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France

Exporter Guide

U.S. Exporter Guide 2000

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Report Highlights:

With a real growth domestic product (GDP) increase of 2.9 percent in 1999, 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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Note: Average exchange rate used in this report for calendar year 1999 is US Dollar 1 = FF 6.13 (Source: IFM), unless otherwsie specified.

SECTION I. MARKET OVERVIEW

1. Macroeconomic Situation

According to the French Institute for Statistics (INSEE), in 1999 French real gross domestic product (GDP) grew by 2.9 percent in real terms. This compares with 3.3 percent in 1998, the best performance in 10 years, and a marked improvement since the slow growth of the mid-1990s. Inflation remained low and under control. Strong growth helped bring the unemployment rate to 10.6 percent by the end of 1999. The unemployment rate continued to fall in 2000, down to 9.9 percent in April and 9.8 percent in May, falling below 10 percent for the first time since December 1991.

The outlook for 2000 and 2001 is for continued growth. The government projects growth of up to 3.5 percent in 2000, and in the range of 2.5-3 percent in 2001, 2002 and 2003. A 3 percent growth rate would incorporate effects of investment in new technologies and continued efforts toward structural reforms.

Despite good short-term prospects, most observers believe 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 and 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. Furthermore, the economic impact of the transition to the 35-hour workweek, as of January 1, 2000, is perceptible, but not yet clear. The Government claims 180,000 jobs created or preserved. According to the Labor Ministry, the number of jobs created or preserved should be higher due to the impact of agreements already signed at the sector level (”accords de branche”). Many large companies say that the cost of the 35-hour workweek has been 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.

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

Overall household food and beverage consumption increased slightly by 0.5 percent during 1999. 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 rose over last year. Bread, meat, poultry, butter, margarine and oils, coffee and tea, sugar and alcoholic beverages consumption 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
2000 (P)	59.2	15.1	34.7	9.4

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
1999	24.3

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 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 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 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 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 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 need compulsary labeling.

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.

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 first French industrial sector, accounting for19 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 4,250 food industry companies.

- According to the French Food Industry Association (ANIA), in 1999 the food processing sector's turnover was FF 816 billion ($133 billion), an increase of 1.7 percent from the 1998 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 1999, 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 1999: FF 172 billion ($28 billion), 0.6 percent decrease over 1998. The French food industry is the world's largest exporter of processed products with about 10 percent of the global market.

- Total Imports in 1999: FF 117 billion ($19 billion), 2.5 percent decrease over 1998.

Production of Major French Food Processing Sectors and Growth Rates

	Volume % Growth 1999/98	Price % Growth 1999/98	1999 Value (In billion $)
Grains and animal feed	-5.4	+2.4	10.7
Oilseeds and seeds	+7.0	-4.6	5.1
Fruits and vegetables	+8.9	-16.7	9.0
Wines and Spirits	+7.1	-1.5	10.1
Livestock	+0.8	-3.4	11.8
Poultry products	-1.5	-7.7	4.1
Other animal products	-0.7	-2.2	8.8

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 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: **FISH AND SEAFOOD, FRESH AND FROZEN**
   Commodity Code Number: HS Code: 03

	1997	1998 (Jan-Dec)	1999
A. Total Market Size	3,568	4,088	N/A
B. Local Production	1,647	1,671	N/A
C. Total Exports	1,087	1,133	1,052
D. Total Imports	3,008	3,550	3,204
E. Total Imports from U.S	106	117	124
F. Exchange Rate: USD 1.00 =	FF 5.83	FF 5.75	FF6.15

Source: French Customs/SCEES - French Ministry of Agriculture

Note: Please note that local production and market size figures are not yet available from the trade for calendar year 1999.
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. During calendar year 1999, total French household purchases of seafood products increased 4 percent compared to 1998 to reach 552,966 MT. 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 800,000 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

	1997	1998 (Jan-Dec)	1999
A. Total Market Size	5,979	6,276	7,146
B. Local Production	5,278	5,499	6,293
C. Total Exports	952	982	958
D. Total Imports	1,653	1,759	1,811
E. Total Imports from U.S.	68	81	113
F. Exchange Rate: USD 1.00 =	FF 5.83	FF 5.75	FF6.15

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 17 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 1999, French imports totaled about FF 3.7 billion ($604 million). Imports from the United States mostly consist of fresh and frozen orange and grapefruit juices and amounted to FF 574 million ($93 million) in 1999, an increase of 42 percent 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

	1997	1998 (Jan-Dec)	1999
A. Total Market Size	9,172	8,928	9,114
B. Local Production	16,026	16,156	16,553
C. Total Exports	8,473	9,000	9,198
D. Total Imports	1,619	1,772	1,759
E. Total Imports from U.S.	37	43	71
F. Exchange Rate: USD 1.00 =	FF 5.83	FF 5.75	FF6.15

Source: French Customs/SCEES - French Ministry of Agriculture

Comments: French imports of U.S. wine totaled FF 66 million ($11 million) in 1999, 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 imports in France increased 14 percent in 1999, over 1998, with total French imports estimated at FF 197 million ($32 million).

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. 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).

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

	1997	1998 (Jan-Dec)	1999
A. Total Market Size	3,286	3,870	3,474
B. Local Production	2,309	2,757	2,439
C. Total Exports	1,496	1,424	1,308
D. Total Imports	2,473	2,537	2,343
E. Total Imports from U.S.	128	138	92
F. Exchange Rate: USD 1.00 =	FF 5.83	FF 5.75	FF6.15

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 155 million ($25 million) in 1999, as well as apples and pears (in short crops). There is also a niche market for berries, cherries and tangerines. In 1999, U.S. fresh fruit exports to France were valued at FF 208 million ($34 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 Moldova and China 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.

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

	1997	1998 (Jan-Dec)	1999
A. Total Market Size	4,060	3,375	5,542
B. Local Production	3,801	3,216	5,415
C. Total Exports	1,147	1,340	1,353
D. Total Imports	1,406	1,499	1,480
E. Total Imports from U.S.	27	29	26
F. Exchange Rate: USD 1.00 =	FF 5.83	FF 5.75	FF6.15

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

	1997	1998 (Jan-Dec)	1999
A. Total Market Size	4,795	5,534	6,699
B. Local Production	5,523	6,030	7,070
C. Total Exports	3,710	3,368	3,144
D. Total Imports	2,982	2,872	2,773
E. Total Imports from U.S.	34	29	22
F. Exchange Rate: USD 1.00 =	FF 5.83	FF 5.75	FF6.15

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 2000/2001

SIAL 2000
Paris-Nord Villepinte
October 22-26, 2000
(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

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

PARIS HORSE SHOW
Paris-Porte de Versailles
December 2-10, 2000
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

SIRHA INTERNATIONAL
FOOD TRADE EXHIBITION
Lyon - Eurexpo
January 20-24, 2001
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

SALON INTERNATIONAL DU VEGETAL — "The most plant-like of shows" International Professional Show
Parc des Expositions Angers
February 21-23, 2001
Organizer: BHR Centre Regional Horticole
Tel: (33-2) 41 79 2929
Fax: (33-2) 41 79 2900
E-mail: bhr@wanadoo.fr
Annual Show

SALON INTERNATIONAL DE L'AGRICULTURE — International Agricultural Show
Paris Porte de Versailles
February 18-25, 2001
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

PREMIERE VISION — International Cotton & Textile Show
Paris-Nord Villepinte
March 3-5, 2001
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

FOIRE INTERNATIONALE DE LYON — International Food, Beverages & and Tourism Fair
Lyon - Eurexpo
March 16-26, 2001
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
Paris Porte de Versailles
April 27 - May 8, 2001
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

International Food, Beverages & Tourism Fair

EUROKOSHER
Paris - Porte de Versailles
May 14-15, 2001
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

International Kosher Food Exhibition

FOIRE INTERNATIONALE DE BORDEAUX
Bordeaux Lac
May 19-27, 2001
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

International Food & Beverages Fair

VINEXP0
Bordeaux-Lac
June 17-21, 2001
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

ETHNIC FOOD SHOW
Porte de Versailles, Paris
June 13-14, 2001
Organizer: Algodoal
Tel: (33-1) 44 74 5010
Fax: (33-1) 44 74 5067
E-mail:ABonnel@aol.com
Annual Show

International Ethnic & Specialty Foods

FOIRE INTERNATIONALE DE STRASBOURG
Strasbourg Parc des Expositions
September 7-17-2001
Organizer: SOFEX
Tel: (33-3) 88 37 2121
Fax: (33-3) 88 37 3795
Internet: www.foireeurop.com
Annual Fair

International Food & Beverages Fair

SALON DE LA PRODUCTION ANIMALE
Carrefour Europeen - Rennes
September 11-14, 2001
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 14-24,2001
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

PREMIERE VISION
Paris-Nord Villepinte
October 5-8, 2001
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

International Cotton & Textile Show

Held every six-months

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

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

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)
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 1999

AgImports from All Countries (1)	$29,292 million
U.S. Market Share (1)	3.0 percent
Consumer Food Imports from All Countries (1)	$16,957 million
U.S. Market Share (1)	2.0 percent
Edible Fishery Imports from All Countries (1)	$3,218 million
U.S. Market Share (1)	4.0 percent
Total Population/Annual Growth Rate (5)	58.9 million 0.4 percent (Nov. 1999)
Urban Population /Annual Growth Rate	44.9 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	$23,843
Unemployment Rate	11.2 percent
Percent of Female Population Employed (4)	48.1 percent (March 2000)
Exchange Rate: US$1 = EURO 0.9386= FF 6.16	

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

	Imports from the World			Imports from the U.S.			U.S Market Share		
(In Millions of Dollars)	1997	1998	1999	1997	1998	1999	1997	1998	1999
CONSUMER-ORIENTED AGRICULTURAL TOTAL	16783	17545	16957	347	362	349	2	2	2
Snack Foods (Excl. Nuts)	1501	1542	1457	4	5	3	0	0	0
Breakfast Cereals & Pancake Mix	200	180	198	3	6	1	1	3	0
Red Meats, Fresh/Chilled/Frozen	2430	2331	2264	34	28	22	1	1	1
Red Meats, Prepared/Preserved	471	467	414	1	1	1	0	0	0
Poultry Meat	285	280	262	1	1	1	0	0	0
Dairy Products (Excl. Cheese)	1374	1564	1448	3	1	1	0	0	0
Cheese	636	682	681	2	1	1	0	0	0
Eggs & Products	99	85	79	1	1	4	1	2	5
Fresh Fruit	2000	2038	1924	42	35	32	2	2	2
Fresh Vegetables	1020	1111	1102	4	2	2	0	0	0
Processed Fruit & Vegetables	1636	1757	1757	21	22	31	1	1	2
Fruit & Vegetable Juices	511	543	603	57	69	93	11	13	15
Tree Nuts	307	300	243	81	79	56	26	26	23
Wine & Beer	811	906	862	8	9	11	1	1	1
Nursery Products & Cut Flowers	816	888	891	2	2	2	0	0	0
Pet Foods (Dog & Cat Food)	169	151	146	11	10	11	6	6	7
Other Consumer-Oriented Products	2519	2690	2624	75	91	80	3	3	3
FISH & SEAFOOD PRODUCTS	3030	3434	3218	106	114	123	3	3	4
Salmon	357	374	422	28	14	19	8	4	4
Surimi	37	50	51	11	16	18	29	32	36
Crustaceans	785	912	896	19	24	31	2	3	3
Groundfish & Flatfish	673	804	781	24	31	29	4	4	4
Molluscs	264	302	279	6	7	7	2	2	3
Other Fishery Products	914	992	789	18	22	18	2	2	2
AGRICULTURAL PRODUCTS TOTAL	24051	24987	23694	797	832	684	3	3	3
AGRICULTURAL, FISH & FORESTRY TOTAL	29853	30737	29292	995	1048	897	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

FRANCE - TOP 15 SUPPLIER

CONSUMER-ORIENTED AGRICULTURAL TOTAL - 400

Reporting: France - Top 15 Ranking	Import 1997 Value 1,000$	Import 1998 Value 1,000$	Import 1999 Value 1,000$
Netherlands	2,328,891	2,508,618	2,562,251
Belgium	0	0	2,445,634
Spain	2,271,872	2,417,367	2,310,323
Germany	2,060,008	2,167,771	2,132,416
Italy	1,558,993	1,622,656	1,632,910
United Kingdom	1,181,983	1,162,505	1,003,508
Ireland	482,470	541,272	524,365
Morocco	345,538	379,286	401,177
United States	**347,211**	**362,221**	**348,613**
Denmark	513,598	397,485	343,785
Switzerland	209,733	219,762	250,174
Portugal	204,687	205,031	205,197
Israel	175,525	213,204	198,203
Cote d'Ivoire	202,847	185,259	182,406
New Zealand	154,199	162,240	164,538
Other	4,750,215	4,969,985	2,250,996
World	**16,787,780**	**17,514,657**	**16,956,543**

FISH & SEAFOOD PRODUCTS - 700

Reporting: France - Top 15 Ranking	Import 1997 Value 1,000$	Import 1998 Value 1,000$	Import 1999 Value 1,000$
United Kingdom	392,133	410,092	422,057
Norway	306,967	320,177	354,882
Spain	155,546	184,072	198,138
Denmark	178,799	182,180	166,250
Netherlands	163,765	168,309	164,744
United States	**105,587**	**114,209**	**123,387**
Belgium	0	0	108,976
Cote d'Ivoire	188,799	216,587	108,220
Iceland	98,951	125,526	98,768
Germany	99,591	117,446	98,414
Ireland	77,742	88,865	93,191
Ecuador	102,563	102,936	89,500
Madagascar	60,993	96,345	76,998
Thailand	102,396	116,180	70,371
Senegal	92,289	104,431	68,809
Other	903,559	1,087,070	975,084
World	**3,029,674**	**3,434,418**	**3,217,816**

Source: United Nations Statistics Division