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## France

## Exporter Guide

## Annual

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**Report Highlights:**

Socio-economic and demographic changes continued to alter food trends in France. French consumers desire innovative and more convenient foods offering quality image, better taste, and increased health benefits. France offers market opportunities for U.S. suppliers in a number of areas such as fish and seafood, processed fruits and vegetables (including fruit juices), beverages (including wine and spirits), dried fruits and nuts, but also confectionery products, wild rice, organic products, kosher and halal foods.

This report, prepared by the USDA's Foreign Agricultural Service for U.S. exporters of food products,

presents a comprehensive guide to France's economic situation, market structure, exporter tips and best prospects for high-value foods and agricultural products.

**Post:**

Paris

**Executive Summary:**

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**Note : Average exchange rates used in this report are:**

Calendar Year 2009: US Dollar 1 = 0.72 Euros

Calendar Year 2010: US Dollar 1 = 0.75 Euros

Calendar Year 2011: US Dollar 1 = 0.72 Euros

Calendar Year 2012: US Dollar 1 = 0.78 Euros

Jan-Sept 2013: US Dollar 1 = 0.57 Euros

(Source: The Federal Reserve Bank of New York and/or the International Monetary Fund)

## **SECTION I. MARKET OVERVIEW**

### **1. Macroeconomic Situation**

As a member of the G-20, the European Union (EU), the World Trade Organization (WTO), and the Organization for Economic Cooperation and Development (OECD), France is a leading economic player. With a \$2.77 trillion gross domestic product (GDP) in 2012, France is the world's fifth largest industrialized economy. The French population of 65.8 million has a per capita income of \$41,141 in 2012 according to the International Monetary Fund (IMF).

As per the Department of Commerce, France is the ninth largest trading partner of the United States. U.S. trade with France, including exports and imports of goods and services, was \$73 billion in 2012. The United States is the first outlet for French foreign direct investment and is also the first largest foreign investor in France (19 percent of the foreign investments.)

France is transitioning from an economy that has featured extensive government ownership and intervention to one that relies more on market mechanisms, while in the midst of a euro-zone crisis.

The government has partially or fully privatized many large companies, banks, and insurers, and has ceded stakes in such leading firms as Air France, France Telecom, Renault, and Thales. It maintains a strong presence in some sectors, particularly power, public transport, and defense industries. With at least 83 million foreign tourists in 2012, France ranks the leading most visited country in the world and maintains the third largest income in the world from tourism. France's leaders remain committed to capitalism in which they maintain social equity by means of laws, tax policies, and social spending that reduce income disparity and the impact of free markets on public health and welfare.

In 2013, France has dipped into a recession with a decline in first quarter 2013 GDP of 0.8 percent on an annualized basis and is struggling to revitalize its economy while at the same time reducing its annual budget deficit.

The unemployment rate increased from 9.1 percent in 2011 to 10.2 percent in 2012. It increased from the beginning of 2013 to reach 10.5 percent at the end of March 2013 according to INSEE. Lower than expected growth and increased unemployment have cut government revenues and increased borrowing costs, contributing to a deterioration of France's public finances. The Government budget deficit reached 4.8 percent of GDP in 2012, while France's public debt rose from 86 percent of GDP in 2011 to 90.2 percent of GDP in 2012. Paris is implementing austerity measures that eliminate tax credits and freeze most government spending in an effort to bring the budget deficit under the three percent euro-zone ceiling by 2014, and to highlight its commitment to fiscal discipline at a time of intense financial

market scrutiny of euro-zone debt levels.

## 2. French Agricultural Production and Consumption

In 2012, the net result of the agricultural French production increased for the third year in a row. The value of the agricultural production increased by 6.5 percent compared to 2011. Two thousand-twelve was marked by an increase in value for both livestock and vegetable production (+8.4 percent, and +3.5 percent, respectively). This rise is mainly due to price increases, while quantities produced decreased. Most of vegetable production areas suffered bad weather conditions and large price increases, except grains which benefited from an increase in cultivated areas and yields. Animal production and milk prices decreased in volume, while livestock and eggs prices increased slightly. Farmers' charges continue to increase driven by soaring energy and fertilizer prices. On the other hand, the external trade surplus for agricultural and food products reached about 14 billion dollars in 2012.

In 2012, in spite of the financial slowdown, French consumers maintained their food purchases but were more price conscious and took advantage of promotions. French food expenditures in hyper, supermarkets and discounters decreased by 0.8 percent in volume, but increased 1.9 percent in value. New taxes on sweetened beverages such as sodas resulted in an immediate sale decrease of about 4 percent for these products. More taxes on certain food products are expected in 2013 and 2014 to reduce the French social security deficit. A study prepared by the French National Institute Statistics (INSEE) indicated that French consumers doubled their consumption of ready-to-eat foods, including frozen foods, over the past 45 years. The most widely consumed ready-to-eat products are canned vegetables, including potatoes, as well as meat and fish-based products.

## 3. Key Demographic Developments

On January 2013, the French population was estimated to 65.8 million people, from which 63.7 million live in metropolitan areas. In 2012, the French population increased at a slightly slower pace than in previous years, 0.47 percent between January 2012 and January 2013, the lowest increase from the last ten years. The demographic dynamism was the lowest over the last ten years with no change in the number births and a much higher number of deaths than in 2011.

### Estimate of Population and Statistics (In thousands)

Year	Population	Birth	Death	Natural Increase	Net Immigration
2004	62,251	799.4	519.5	+279.9	+105
2005	62,731	806.8	538.1	+268.7	+92
2006	63,186	829.4	526.9	+302.4	+112
2007	63,601	818.7	531.2	+287.5	+74
2008	63,962	828.4	542.6	+285.8	+57
2009	64,305	824.6	548.5	+276.1	+32
2010	64,613	832.8	551.2	+281.6	+54 (p)
2011	64,949 (p)	823.4 (p)	545.1	+278.3	+54 (p)
2012	65,281 (p)	822 (p)	571 (p)	+251 (p)	+54 (p)
2013	65,800 (p)				

(p) = Projections  
Source: INSEE

#### 4. Changing Food Trends

Socio-economic and demographic changes have significantly altered food trends. Trends show that French consumers increasingly desire food products that offer better taste, health benefits, and convenience.

- The “younger” generation, between the ages of 20 and 35 (26 percent), enjoys trying new and innovative products. This generation values products with an appealing image along with good taste.
- Past food safety scares have raised consumer concerns about sanitation and safety issues. In turn, these concerns have led to greater demand for natural and organic food products – fruit juices, fresh and processed dietetic foods, organic produce, fish and seafood products, and food supplements.
- There is strong demand for ethnic meals, halal manufactured products and, to a lesser extent, kosher certified products
- Working consumers and those living alone (about 30 percent of the French population) are spurring demand for easy-to-prepare foods, single and double portion packs, and frozen or microwavable meals.

#### Advantages and Challenges for U.S. Exporters in France

Advantages	Challenges
<ul style="list-style-type: none"><li>• The rapid population shift from rural to urban regions is boosting demand for international food.</li><li>• French per capita income is near that of the United States.</li><li>• The tourism industry increases demand for hotel, restaurant, and institutional products.</li><li>• U.S. fast food chains, theme restaurants, and the food processing industry occasionally demand American food ingredients.</li><li>• Efficient domestic distribution systems.</li><li>• Weakness of the U.S. dollar vis-a-vis the Euro.</li><li>• American food and food products remain quite popular.</li></ul>	<ul style="list-style-type: none"><li>• Food scares and other food safety issues cause concern among French consumers.</li><li>• French consumers are exacting when it comes to quality and innovation.</li><li>• Price competition is fierce.</li><li>• Certain food ingredients are banned or restricted in the French market.</li><li>• Marketing costs to increase consumer awareness are high.</li><li>• Mandatory customs duties, sanitary inspections and labelling requirements can be onerous.</li><li>• The EU biotech labelling requirement of</li></ul>

<ul style="list-style-type: none"> <li>• US-EU organics equivalency agreement in place in 2012 will help increase the organic trade.</li> </ul>	0.9 percent excludes many U.S. processed products.
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## SECTION II. EXPORTER BUSINESS TIPS

### 1. Trade Barriers and Restrictions

- Most processed products are subject to additional import charges based on sugar, milk fat, milk protein, and starch content.
- Efforts to harmonize EU import regulations and to implement commitments under the WTO may abolish inconsistent and conflicting French and EU regulations, quota conversions, variable levies, and restrictive licensing requirements.
- French regulations can limit market access for certain U.S. agricultural products including, but not limited to, the following:
  - Enriched flour
  - Bovine genetics
  - Exotic meat (alligator)
  - Flightless bird meat (ratite)
  - Live crayfish
  - Beef and bison meat
  - Certain fruits and vegetables
  - Pet foods
  - Co-products derived from genetic modification

For more information on product trade restrictions, food standards, and regulations, please refer to the EU and FAS/Paris Food and Agricultural Import Regulations and Standards Report (FAIRS) report:

[http://www.usda-france.fr/media/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Narrative Paris France 4-19-2013.pdf](http://www.usda-france.fr/media/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Narrative%20Paris%20France%204-19-2013.pdf)

France, as an EU member state, benefits from EU customs union agreements with Turkey and Andorra, and free trade agreements under either GATT Article XXIV or GATS Article V. The European Union has preferential trade agreements with Norway, Iceland, Switzerland, Liechtenstein, Israel, the Palestinian Authority, Tunisia, Morocco, Jordan, Egypt, Lebanon, Syria, Algeria, Mexico and South Africa. The European Union provides African, Caribbean and Pacific developing countries (ACP) with non-reciprocal preferential access to its markets under the Cotonou Agreement, and gives other developing countries preferential access under the Generalized System of Preferences (GSP).

### 2. Consumer Tastes, Preferences and Food Safety

Like U.S. consumers, France's consumers desire innovative foods. Consumers like ethnic and exotic foods with distinctive themes and flavours. The number of theme restaurants has increased dramatically. In Paris, one of every two new restaurants is based on a "world food" concept, and all major supermarket chains offer ethnic foods under their private labels. In the ethnic segment, consumers seek new products and look for quality and innovation. The trends favour Thai, Japanese, Northern and Southern African, Indian cuisine, but also Middle Eastern fast food specialties (kebabs). Tex-Mex, Cajun, or California-style cuisine, sports drinks, and vitamin enriched snacks have potential, as do ready-to-eat products, such as frozen foods, seafood (particularly salmon), wild rice, innovative dietetic/health products, organic products, and frozen desserts. Kosher and halal foods are also increasing in popularity. There is a strong and unmet demand for these products. With some seven million potential consumers of halal food products, France ranks as the leading market in Europe for halal foods with a market estimated at 8 billion dollars. However, in the absence of official figures for ethnic foods, it is difficult to precisely estimate this market, but it is clear that it increases at a rate of ten percent yearly. More recently, finger foods are becoming popular, especially in large cities, representing opportunities for ethnic foods.

While many consumers and distributors are receptive to new developments in food products, they request information on product contents and manufacturing processes. France has labelling requirements for both domestically-produced and imported food products containing genetically-modified products or biotech-derived ingredients or additives harmonized at the EU level.

The French Government encouraged the development of quality marks such as "Label Rouge" (Red Label) for meats, poultry, and fruits and vegetables, which guarantees production under established conditions. Product origin labels were also established, which guarantee that certain wines, milk, butter, or cheeses were sourced from a certain region. The government also oversees a certification program which guarantees that product preparation, manufacturing, and packaging processes follow certain specifications. These quality and origin marks have been well received by French consumers. The organic food program certifies that agricultural and food products were manufactured without prohibited fertilizers and according to special criteria. The organic market in France, which increased at a yearly rate of ten percent during past years, slowed to a five percent increase in 2012 to reach sales of \$5.3 billion. Eighty three percent of sales were made via retail organic and specialty stores, 12 percent directly from producers to consumers and 5 percent by artisanal traders. According to 2012 figures released by the French Organic Food Association, imported organic food products represented just less than thirty percent in value, compared to thirty two percent in 2011. Imports include tropical fruits and vegetables, soy, and a variety of grocery products. The main imported products from the United States are dried fruits and exotic fruits, essential oil and aromatic plants. The demand for organic baby food, pre-packaged pastries and cheese, cereals for breakfast, ready-to-eat meal and canned sauces boomed in recent years. The French certification agency, Ecocert, has recently purchased a local U.S. certification agency. This new partnership may facilitate new opportunities for French importers and boost trade of organic food products between France and the United States.

In 2012, a mutual recognition agreement between the United States and the European Union was implemented and organic products certified in Europe or in the United States may be sold as organic in either region. This partnership between the two largest organic producers in the world will establish a



strong foundation from which to promote organic agriculture, benefiting the growing organic industry and supporting jobs and businesses on a global scale.

## **1. Marketing Strategies for the French Market**

a. U.S. food product exporters should consider:

### **Market access restrictions and food laws**

- Check EU and French regulations to ensure products are allowed to enter the French market and carefully verify the list of ingredients and additives.
- Verify customs clearance requirements and any additional import charges based on percentage of sugar, milk, fat, milk protein and starch in the product.

### **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 could 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**

- In-store product demonstrations can help familiarize French consumers with U.S. food products.
- Trade shows are an excellent way to introduce new products to the market.

a. Successful Export Planning for Your Products:

- 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, distribution channels, and market size.
- Conduct basic market research and review export statistics for the past five years.
- Adapt products to local regulations, by giving the customer what they require. Check ingredients and package size requirements, research consumers' preferences, and ensure that the product is price competitive.

- Identify the best distribution channel for the product, i.e., supermarkets, importer, distributor, or a foreign agent. Be prepared to send samples.
- Work an agent, distributor, or importer to determine the best promotional strategy. Be prepared to invest in the market promotion (through trade shows, in-store promotions or advertising campaigns, to gain maximum exposure and make valuable market contacts).

Note: 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 FOOD EXPORT ASSOCIATION OF THE MIDWEST USA. (Addresses, telephone, fax and contact information for these groups are listed in Section V., Appendix B., of this report).

#### **4. General Import and Inspection Procedures**

Import and export transactions exceeding 12,500 Euros (approximately \$19,400 depending on the currency exchange rate) in value must be handled through an approved banking intermediary. Goods must be imported or exported no later than six months after all financial and customs arrangements have been completed.

For products originating in countries other than EU member states or participants in the WTO, and for a limited number of products considered to be sensitive, a specific import/export license may be required by product or by category of products. Otherwise, the following shipping documents in French are required:

- Commercial invoice;
- Bill of landing or air waybill;
- Certificate of origin;
- Sanitary/health certificate (for specific products);
- 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.

For additional information, you may also consult the Country Commercial Guide

<http://export.gov/france/doingbusinessinfrance/index.asp>

#### **Basic Labelling/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

Under Regulations 1829/2003 and 1830/2003 on biotech traceability and labelling, the European policy set standards for positive (sourced from biotech), but not for negative labeling (not sourced from biotech). Each Member State can, however, put in place specific national requirements for biotech-free labelling. France implemented the 1829/2003 and 1830/2003 Regulations in April 2004. The Fraud Control Office of the Ministry of Economy, Finance and Industry (DGCCRF) is the authority enforcing compliance with the regulation and sets general rules for negative labelling. An explanation on biotech labelling regulation by the Fraud Control Office of the Ministry of Economy (DGCCRF) is available at: <http://www.economie.gouv.fr/dgccrf/consommation/Etiquetage-des-produits/OGM>

There have been several voluntary initiatives put in place by the food industry and supermarket chains using “biotech-free” labelling, including Carrefour-branded products, and the Loué free range poultry industry. In both cases, animal products concerned are sourced from animals fed on less than 0.9 percent biotech feed these; however, represent minor market shares in the total French food market. Canned sweet corn has been sold with a specific “biotech-free” logo since 2004, when the European traceability and labelling regulation for biotech products in food was implemented, in order to prevent sales from declining. The supermarket chain Carrefour puts a “fed without GMO” logo on animal products sold under the Carrefour-branded name and using a 0.9 percent threshold.

The Government of France has worked for several years on national rules for non-biotech labelling, so that it would inform rather than disorient consumers, when based on specific rules for all products, as part of the implementation of the national biotech law of 2008. More than two years after the High Council for Biotechnology (HCB) released its recommendation of the definition of “GMO-free” labelling, a decree number 2012-128 relative to voluntary “GMO-free” labelling was published in the Official Journal dated January 31, 2012. This decree describes the requirements for “GMO-free” labelling for products produced in France, but does not apply to imported products from the European Union or from the Economic European Area. Nothing in the decree mentions application to imported products from the rest of the world. In the decree, the threshold of 0.1 percent was used for plant products under which they can be labelled as “GMO-free.”

For animal products, two thresholds are set in the decree: 0.1 percent and 0.9 percent, to be indicated on the label, under which “fed without GMOs” or “Sourced from animals fed without GMOs” can be labelled.

For apicultural products, the decree stipulates that there should not be biotech plants closer to the apiary than three kilometers. “GMO-free” labelling is not permitted.

### **National Ban on the only GE Corn Trait Commercially Grown in the EU:**

According to the Directive EC 2001/18, when a Member State, as a result of new information, has detailed grounds for considering that an approved biotech event constitutes a risk to human health or the environment, the Member State may invoke a safeguard clause on the biotech product; its use would be provisionally restricted or prohibited on its territory.

A safeguard clause was initiated on three biotech events. In 1998, on Bayer rapeseed Topas 19/2 and Bayer rapeseed MS1XRf1 for imports and processing, and in 2008 and again in 2012 on Monsanto corn MON810. France's ban on MON810 has been challenged several times both by scientific (European Food Safety Agency (EFSA)) and legal organizations (European Court of Justice). In November 2011, the French high administrative authority Conseil d'Etat lifted the ban imposed in 2008, based on the conclusions of the European Court of Justice. Nevertheless, the Government of France reinitiated the ban in a decree March 2012, early enough to prevent farmers from planting, and only a few weeks before the presidential elections.

### **Customs Process:**

- A person or company can facilitate customs clearance for imports so long as they can present to the French Customs Authorities at the port of entry or at the airport, with the imported goods and the necessary accompanying documents. To ease the clearance process, the U.S. exporter should 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 the 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 quality 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, some chocolates and candies
  - Reduced rate of 5.5 percent applies mostly to agricultural and food products.

Note that as of January 1, 2014, the standard rate will be raised to 20 percent.

## **SECTION III. MARKET SECTOR STRUCTURE AND TRENDS**

## 1. The French Food Industry

In France the food industry is the leading industrial sector both for sales and employment. In 2012, the 13,500 companies of the sector generated total sales of \$206.3 billion and employed 495,000 persons throughout France. The food industry has a key role in France in the regional dynamism and development as it processes 70 percent of the French agricultural production. The food industry sector also contributes to the commercial balance of the country and generated a \$11.8 billion surplus in 2012 thanks to wine and spirits and fresh products.

Up to now the French food industry pretty well resisted to the economic slowdown, but since the beginning of 2013, the sector faces employment reduction as a result of recent rise in raw materials and socio structural measures difficulties. However, exports of agricultural and food products during the first half of 2013 were on the rise (+1.6 percent), thanks to beverages exports to the European Union, mostly wine, as well as to dairy product exports to Asia and America. Wheat exports to the EU and North Africa registered a strong increase, as did corn, barley and potatoes. Imports of agricultural and food products continued to increase during the first half of 2013, mainly for fruits, vegetables, and beverages from Spain. Globally the trade surplus for agricultural and food products during the period Jan-June 2013, reached \$7.9 billion, practically the same as during the last six months of 2012.

Recently, the French Ministry of Agriculture published a report highlighting the weakness of the French food industry compared to its European partners. Even though France remains the fourth world exporter of food products, French food product exports increased an average of five percent yearly during the period 2006-2012, while The Netherlands (thanks to its commercial buying/selling platform), increased exports by seven percent, and Germany by eight percent (mostly due to the boom in their meat and dairy sectors) during the same period of time. The report also pointed out the threat posed by emerging agricultural countries like Brazil, China, Argentina and India. The loss of the French food industry competitiveness is mainly due to higher labor costs, more restrictive sanitary regulations, but also mainly to the small size of the French agricultural companies (under 20 employees – not taking into account the craft companies -) which represent 85 percent of the total French food industries, hence the need to improve competitiveness by consolidating farmers and processing industries. In line with these difficulties, the food industry should adapt to the French consumers behaviour changes and declining food budgets as a percentage of household expenses.

Exports in billion dollars		Imports in billion dollars	
2010	48.1	2010	40.5
2011	53.1	2011	44.9
2012	55.9	2012	46.3

Source: INSEE – National Account

### Production of Major French Food Processing Sectors – Percentage growth Calendar Year 2012/2011

Production in Billion dollars	Percentage Growth 2012/2011
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<b>Food Processing Sectors</b>	<b>2011 (value)</b>	<b>2012 (volume)</b>	<b>Value</b>	<b>Volume</b>	<b>Price Growth</b>
Meat Industry	44.8	40.9	2.1	-2.8	5.1
<b>Seafood Industry</b>	4.1	3.7	-1.7	-3.0	1.3
Fruits & Vegetable Industry (incl. Fruit juices)	9.5	8.6	2.2	-1.4	3.6
Fats and Oils Industry	4.7	5.3	26.0	23.3	2.2
Milk Industry	35.7	32.9	0.3	0.0	0.3
Grain Industry	9.6	9.1	2.3	2.3	0.0
Bakery/Pastry industry	28.0	26.2	2.8	1.5	1.2
Animal Feed Industry	16.0	14.8	5.0	0.5	4.6
Beverage Industry	25.8	24.6	7.1	3.3	3.7
Tobacco Industry	1.9	1.9	13.5	6.7	6.4
Other food industries	33.9	30.6	2.0	-2.0	4.2
<b>Total Food Industries</b>	<b>214.1</b>	<b>198.2</b>	<b>3.3</b>	<b>0.3</b>	<b>3.0</b>

Source: INSEE National Account

## 2. Infrastructure Situation

France's transportation infrastructure is among the most sophisticated in the world, benefiting from advanced technology and a high level of investment by the government. The three main entry points for air-freight are Orly and Charles de Gaulle airports and Saint-Exupery airport in Lyon. France has twelve major seaports, many of which are equipped for container ships. There is an extensive highway and river-transport system, 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. High-speed Internet access is expanding rapidly. The government promotes better use of information technologies.

## 3. Market Trends

The French market for food products is mature, sophisticated, and well served by suppliers from around the world. Additionally, an increasing interest in American culture, younger consumers, and changing lifestyles contribute to France's import demand for American food products. Generally, high quality food products with a regional American image could find a niche in the French market, particularly if they gain distribution through 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, organic and health food products, as well as kosher and halal foods. Since the last few years we can note a renewal of interest for American food products. Many restaurants offering a US theme have opened these last years. This trend is also confirmed by the French importers of American food products where import sales have increased.

The French food service industry is moving towards fresh consumer-ready products at the expense of frozen foods.

#### 4. Marketing U.S. Products & Distribution Systems

The United States and France produce many of the same goods and services and export them to each other. Therefore, marketing products and services in France can bear some resemblance to marketing in the United States. French business representatives are sophisticated and knowledgeable about their respective markets. At the same time, American firms must consider certain business practices, cultural factors, and legal requirements in order to do business effectively in France. 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:

[http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Retail%20Foods\\_Paris\\_France\\_9-13-2012.pdf](http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Retail%20Foods_Paris_France_9-13-2012.pdf)

The Hotel/Restaurant/Institutional (HRI) sector in France uses the services of wholesalers or processed food buyers, and the well developed 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 can be viewed at:

[http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20Service%20-%20Hotel%20Restaurant%20Institutional\\_Paris\\_France\\_1-6-2012.pdf](http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20Service%20-%20Hotel%20Restaurant%20Institutional_Paris_France_1-6-2012.pdf)

#### SECTION IV. BEST HIGH-VALUE PRODUCTS PROSPECTS

There are significant market opportunities for consumer food/edible fishery products 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 and surimi), innovative dietetic and health products, organic products, soups, breakfast cereals, and pet foods. In addition, niche markets exist for candies, chocolate bars, wild rice, kosher and halal foods. Market opportunities for U.S. exporters also exist for oilseeds, protein meals and other feeds, as well as for wood products and grains.

Listed below are six consumer-oriented food products considered by the Office of Agricultural Affairs as representing the “best prospects” for U.S. business.

##### **Top 6 Market Opportunities for Consumer-Oriented Food Products (USD Million)**

###### 1. Name of Best Prospects: **FISH AND CRUSTACEANS**

HS Code: 03

(USD Million)

(January-December)

	2010	2011	2012
A. Total Market Size	N/A	N/A	N/A
B. Local Production	N/A	N/A	N/A

C. Total Exports	1,303	1,407	1,406
D. Total Imports	4,745	5,222	4,684
E. Total Imports from U.S.	239	301	257

N/A = Not Available

Source: GTI – French Customs

**Comments:** France is a major consumer of seafood products and a net importer of many, because domestic production is significantly lower than demand. Seafood per capita consumption is approximately 36 kg per year, including 68 percent fin fish and 32 percent shellfish and crustaceans. In 2012, the United States was France’s fifth largest supplier of seafood products after Norway, the United Kingdom, Spain and China. U.S. seafood products exported to France mainly consisted of frozen Alaska Pollock fillets, fresh and frozen scallops, frozen surimi base, live lobster, and frozen salmon.

1. Name of Best Prospects: **BEVERAGES, INCLUDING MINERAL WATER, BEER, WINE AND SPIRITS**

HS Code: 22

(USD Million)

(January-December)

	2010	2011	2012
A. Total Market Size	N/A	12,323	10,576
B. Local Production	N/A	25,794	25,501
C. Total Exports	15,123	17,698	18,880
D. Total Imports	3,558	4,227	3,955
E. Total Imports from the U.S.	156	198	179

N/A = Not Available

Source: GTI - French Customs

**Comments:** In 2012, French retail sales of U.S. wine amounted to \$35 million, representing four percent of total French imports. U.S. wine imports in France ranks fourth after Spain, Portugal and Italy, ahead of Chile, South Africa or Australia. In France, California wines face strong competition from new world producers, such as Australia, South Africa and Chile. However, market opportunities do exist for U.S. wines thanks in part to the “exoticism”, the quality of the products, and the promotional efforts made by American themed restaurants in France.

As per French Customs, French imports of U.S. whiskey amounted to \$101 million in 2012, this is 96 percent increase over 2011, thanks to the penetration of bourbon brands like Jim Beam, Maker’s Mark, Stepson, in addition to Jack Daniel’s, and Wild Turkey. The United States is France’s second supplier after the United Kingdom.

In 2012, U.S. beer exports to France amounted to \$560,000, a 3.5 percent increase in value compared to 2011, but a volume decrease of 6.5 percent. France’s major beer suppliers are Belgium, The Netherlands and Germany.

Opportunities exist for ethnic, new, and innovative U.S. beverages, particularly those linked with Tex-



Mex foods. Sales of innovative beverage, such as beer with whiskey malt are on the rise, as are sales of non-alcoholic beers and “panaches” (mixture of beer and lemonade).

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

(USD Million)  
(January-December)

	2010	2011	2012
A. Total Market Size	N/A	11,993	11,336
B. Local Production	N/A	9,500	8,647
C. Total Exports	1,955	2,059	2,041
D. Total Imports	4,436	4,552	4,730
E. Total Imports from the U.S.	166	196	201

N/A = Not Available

Source: GTI – French Customs

**Comments:** Prime opportunities for U.S. suppliers are in off-season and extended-season sales, as well as during years of short French fruit crops. France is the leading European market for U.S. grapefruit, and number three in the world after Japan and Canada with 14,606 tons imported in calendar year 2012, valued at \$17 million. The U.S. market share for citrus fruits represents 19 percent of total French imports in volume and 21.3 percent in value. France imports apples and pears from the United States in short-crop years. There is also a niche market for berries, cherries, and tangerines. Imports of fresh and dried cranberry from the United States have been successful during the last ten years.

The snack and nut product niche market is important for U.S. exporters, who profit by promoting their products as healthy and high-quality choices. Dried fruits and nuts, generally salted, are mainly consumed as snacks with aperitifs. Among the most popular snacks are almonds, cashews, pecans, hazelnuts, and pistachios, all of which sell best when merchandised in bulk packages. Consumption of these products has doubled over the past ten years. Being a significant grower of walnuts, French import demand is primarily determined by the size of the domestic crop. The United States is France’s third supplier of in-shell and shelled walnuts after Ukraine and Moldova.

(For detailed market information, please see Post brief reports on dried fruits and nuts, which can be found on the following websites:

<http://www.fas.usda.gov/gainfiles/200812/146306964.pdf>  
<http://www.fas.usda.gov/gainfiles/200812/146306812.pdf>

1. Name of Best Prospect: **FRESH AND DRIED VEGETABLES**  
HS Code: 07

(USD Million)  
(January-December)

	2010	2011	2012
A. Total Market Size	N/A	N/A	N/A

B. Local Production	N/A	N/A	N/A
C. Total Exports	2431	2607	2400
D. Total Imports	3194	3153	3146
E. Total Imports from the U.S.	28	28	29

N/A = Not Available

Source: GTI – French Customs

**Comments:** U.S. dried vegetables exports to France increased by 15 percent in value in 2012, compared to the previous years, to reach \$14,316 million. France is one of the top worldwide markets for Great Northern Beans. Significant opportunities exist for U.S. suppliers of dried beans, peas and lentils. Imports of U.S. rice grew 17.5 percent in value from 2011 to 2012 to reach \$4.7 million, and 28 percent in volume.

Very few opportunities exist for U.S. fresh vegetables, except for green asparagus, and perhaps superior quality and off-season fresh vegetables, such as eggplant, zucchini, sweet peppers, and iceberg lettuce. Trends and increased consumption indicate a growing demand for fresh prepared vegetables (washed and cut) and many supermarkets have a special section for these types of products. There may also be demand for organic vegetables, as the new US/EU organic agreement should open doors for U.S. suppliers.

5. Name of Best Prospect: **MEAT AND OFFALS**

HS Code: 02

(USD Million)

(January-December)

	2010	2011	2012
A. Total Market Size	N/A	45,777	41,473
B. Local Production	N/A	44,853	40,245
C. Total Exports	4,156	4,905	4,499
D. Total Imports	5,226	5,829	5,727
E. Total Imports from the U.S.	4	7	7

N/A = Not Available

Source: GTI – French Customs

**Comments:** Opportunities in this market are limited given the import quota on hormone- free meat and stringent EU veterinary regulations. However, as a result of the enlargement compensation agreement between the United States and the European Union a new quota of 45,000 tons hormone-free high quality beef was voted by the European Parliament in 2011 for import from the US to the EU with zero import duties. Additionally, bison meat is growing in popularity.

1. Name of Best Prospect: **ORGANICS**

Since 2007, the organic market in France doubled to reach 5.3 billion dollars in 2012. In 2012, 83 percent of sales were made via the retail organic and specialty stores, 12 percent directly from producers to consumers and 5 percent by artisan traders. As per the latest report from the French Organic

Association (Agence Bio), fewer than 30 percent of organic products consumed in France are imported. These products are mainly exotic produce, fruits and vegetables, soy, and a variety of grocery products. In 2012, there were 18 buyers of organic products in France who imported from the United States. The main imported products were dried and exotic fruits, essential oils, and aromatic plants. The demand for baby food, pre-packaged pastries and cheese, breakfast cereals, ready to eat meals, and canned sauces rose during the past years. Also, the fact that the French certification agency, Ecocert, recently purchased a local U.S. certification agency, as well as the new equivalence agreement between the United States and the European Union may open new opportunities for U.S. suppliers and boost trade between France and the United States.

## **SECTION V. KEY CONTACTS, AND OTHER RELEVANT REPORTS**

For further information contact:  
**Office of Agricultural Affairs**  
American Embassy  
2, avenue Gabriel – 75382 Paris Cedex 08  
Tel: (33-1) 43 12 2245  
Fax: (33-1) 43 12 2662  
Email: [JournolJ@usda.gov](mailto:JournolJ@usda.gov)  
Homepage: <http://www.usda-france.fr>

For more information on exporting U.S. food products to France, visit our homepage.

Reports identified below are relevant and complementary information to this report and can be found at the following hot link: <http://www.usda-france.fr/market-information-and-opportunities-en.htm>

## **APPENDIX A : FOOD AND AGRICULTURAL TRADE SHOWS IN FRANCE In Calendar Year 2014**

(Bi-annual Show)

MAISON & OBJET  
January 24-28, 2014  
Paris Nord Villepinte  
Organizer: M. Philippe Bazin  
[pbazin@promosalonsusa.com](mailto:pbazin@promosalonsusa.com)  
Internet: <http://www.maison-objet.com/>

International Home Fashion  
Manufacturers

(Bi-annual Show)

TEXWORLD

International Textile Manufacturers

February 17-20, 2014  
Paris - Le Bourget  
Organizer: Messe Frankfurt France SAS  
Tel: (33 1) 55 26 89 89  
Fax: (33 1) 40 35 09 00  
Email: [texworld@france.messefrankfurt.com](mailto:texworld@france.messefrankfurt.com)  
Internet: <http://www.texworld.messefrankfurt.com/>

(Bi-annual Show)

PREMIERE VISION  
February 18-20, 2014  
Parc des Expositions Paris-Nord Villepinte  
Organizer: Premiere Vision Salon  
Tel: (33 4) 72 60 65 00  
Fax: (33 4) 72 60 65 49  
Email: [info@premierevision.fr](mailto:info@premierevision.fr)  
Internet: <http://www.premierevision.fr/>

International Textile and Clothing  
Show

(Bi-annual Show)

LE CUIR A PARIS  
20, 2014  
Parc des Expositions - Paris Nord Villepinte  
Organizer: SIC SA  
Tel: (33 1) 43 59 05 69  
Fax: (33 1) 43 59 30 02  
Email: [lpasquier@sicgroup.com](mailto:lpasquier@sicgroup.com)  
Internet: <http://www.cuiraparis.com/en/>

International Leather Products February February 8-  
Show

(Annual Show)

EUROPEAN SANDWICH & SNACK SHOW  
Paris – Palais des Congres  
February 5-6, 2014  
Porte de versailles – Paris  
Organizer: Reed Exposition  
Contact: Jean-Baptiste Honore  
Email: [jean.baptiste-honore@reedexpo.fr](mailto:jean.baptiste-honore@reedexpo.fr)  
Internet: <http://www.sandwichshows.com>

(Annual Show)

SALON DU VEGETAL  
February 18-20, 2014  
Angers

Horticultural Trade Show

Organizer: BHR - Bureau Horticole  
Regional des Pays de Loire  
Tel: (33 2) 41 79 14 17  
Fax: (33 2) 41 45 29 05  
Email: [salon@bhr-vegetal.com](mailto:salon@bhr-vegetal.com)  
Internet: <http://www.salonduvegetal.com/>

(Annual Show)

SALON INTERNATIONAL DE L'AGRICULTURE Paris - Porte de Versailles February 22 – March 2, 2014 Organizer: Comexposium Tel: (33-1) 76 77 11 11 Contact: Emilie Rodriguez Email: <a href="mailto:Emilie.rodriguez@comexposium.com">Emilie.rodriguez@comexposium.com</a> Internet: <a href="http://www.salon-agriculture.com/">http://www.salon-agriculture.com/</a>	International Agricultural Show
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(biennial Show)

SALON MONDIAL DE LA BOULANGERIE, PATISSERIE, GLACERIE, CHOCOLATERIE ET CONFISERIE Parc des Expositions - Paris-Nord Villepinte March 8-12, 2014 Organizer: Europain Developpement/Comexposium Philippe BAZIN Tel: + 1 (212) 564-0404 Email: <a href="mailto:pbazin@promosalonsusa.com">pbazin@promosalonsusa.com</a> Internet: <a href="http://www.europain.com">http://www.europain.com</a>	International Chocolate, Sugar, Confectionery & Bakery Trade Show
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(Every two years for Europain and when not Europain:  
The Annual Salon National de la Boulangerie/Patisserie/  
Chocolate/Intersuc takes place)

(Annual Show)

CFIA Carrefour des Fournisseurs de l'Industrie agroalimentaire Parc des Expositions - Rennes Aeroport February 11-13, 2014 Organizer: Agor/GL Events Tel: (33 5) 53 36 78 78 Fax: (33 5) 53 36 78 79 Contact: Sebastien Gillet Email: <a href="mailto:sebastien.gillet@gl-events.com">sebastien.gillet@gl-events.com</a>	Retail Food Trade Show
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Internet: <http://www.cfiaexpo.com/>

(Annual Show)

**SALON DES MARQUES DE DISTRIBUTEURS  
ALIMENTAIRES - MDD RENCONTRES**

April 8-9, 2014

Paris - Parc des Expositions/ Porte de Versailles

Organizer: Agor – GL-Events

Tel: (33-5) 53 36 78 78

Fax: (33-5) 53 36 78 79

Contact: Gilles Ferrod

Email: [gilles.ferrod@gl-events.com](mailto:gilles.ferrod@gl-events.com)

Internet: <http://www.mdd-expo.com/>

International Private Label  
Show for Foods

(Annual Fair)

**CARREFOUR INTERNATIONAL DU BOIS**

Parc de la Beaujoire - Nantes

June 4-6, 2014

Organizer: Carrefour International du Bois

Tel: (33 2) 40 73 60 64

Email: [sam@timbershow.com](mailto:sam@timbershow.com)

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

International Timber Show

(Bi-annual Show)

**MAISON & OBJET**

September 5-9, 2014

Paris Nord Villepinte

Organizer: M. Philippe Bazin

[pbazin@promosalonsusa.com](mailto:pbazin@promosalonsusa.com)

Internet: <http://www.maison-objet.com/>

International Home Fashion  
Manufacturers

(Bi-annual Show)

**TEXWORLD**

September 15-18, 2014

Paris - Le Bourget

Organizer: Messe Frankfurt France S.A.S.

Tel: (33-1) 55 26 89 89

Fax: (33-1) 40 35 09 00

Email: [texworld@france.messefrankfurt.com](mailto:texworld@france.messefrankfurt.com)

International Textile Manufacturers

Internet: <http://www.texworld.messefrankfurt.com/>

(Annual)

**SALON INTERNATIONAL DE L'ELEVAGE  
(SPACE 2014)**

Rennes - Carrefour Europeen

September 16-19, 2014

Organizer: SPACE

Tel: (33-2) 23 48 28 80

Fax: (33-2) 23 48 28 81

Contact: Valerie Lancelot

Email: [v.lancelot@space.fr](mailto:v.lancelot@space.fr)

Internet: <http://www.space.fr/>

International Trade Fair for  
Livestock

(Bi-annual Show)

**PREMIERE VISION**

September 20-22, 2014

Parc des Expositions Paris-Nord Villepinte

Organizer: Premiere Vision le Salon

Tel: (33-4) 72 60 65 00

Fax: (33-4) 72 60 65 49

Email: [info@premierevision.fr](mailto:info@premierevision.fr)

Internet: <http://www.premierevision.fr/>

International Textile & Clothing  
Show

((Bi-annual Show))

**LE CUIR A PARIS**

Paris - Porte de Versailles

September 16-18, 2014

Organizer: Sic SA

Tel: (33-1) 43 59 05 69

Fax: (33-1) 43 59 30 02

Email: [contactsic@sicgroup.com](mailto:contactsic@sicgroup.com)

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

International Leather Products

(Biennial Show)

**SALON INTERNATIONAL DE L'ALIMENTATION**

Trade Show - including In-Food and  
Organic Sections

International Food and Beverage

## **APPENDIX B: U.S.-BASED STATE REGIONAL TRADE GROUPS**

### **FOOD EXPORT USA - NORTHEAST**

One Penn Center  
1617 JFK Boulevard, Suite 420  
Philadelphia, PA 19103  
Tel: (215) 829 9111/Fax: (215) 829 9777  
E-Mail: [info@foodexportusa.org](mailto:info@foodexportusa.org)  
Web: <http://www.foodexportusa.org>  
Contacts: Tim Hamilton, Executive Director  
Antoniya Gospodinova, Branded Program Manager  
Joy Canono, Generic Program Manager

### **FOOD EXPORT ASSOCIATION OF THE MIDWEST USA**

309 W Washington Street, Suite 600  
Chicago, Illinois 60606-3217  
Tel: (312) 334 9200/Fax: (312) 334 9230  
E-Mail: [info@foodexport.org](mailto:info@foodexport.org)  
Web: <http://www.foodexport.org>  
Contacts: Tim Hamilton, Executive Director  
Michelle Rogowski, Deputy Director and Branded Program Manager  
Teresa Miller, Generic Program Manager

### **SOUTHERN U.S. TRADE ASSOCIATION (SUSTA)**

World Trade Center  
2 Canal Street, Suite 2515  
New Orleans, LA 70130  
Tel: (504) 568-5986/Fax: (504) 568-6010  
E-Mail: [Susta@Susta.Org](mailto:Susta@Susta.Org)  
Web: <http://www.susta.org>  
Contacts: Jerry Hingle, Executive Director  
Penney Lawrence, Branded Program Manager  
Deneen Wiltz, Branded Program Director  
Bernadette Wiltz, Deputy Director & International Marketing Director, Generic Program

### **WESTERN U.S. AGRICULTURAL TRADE ASSOCIATION (WUSATA)**

4601 NE 77th Avenue, Suite 200  
Vancouver, WA 98662  
Tel: (360) 693 3373/Fax: (360) 693 3464  
E-Mail: [export@wusata.org](mailto:export@wusata.org)



Web: <http://www.wusata.org>

Contacts: Andy Anderson, Executive Director

Ann Buczkowski, Branded Program Manager

Janet Kenefsky, Generic Program Manager

## **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: <http://www.finance.gouv.fr>

*Agency responsible for promotion and control of food quality:*

Direction Générale de l'Alimentation (DGAL)

Ministère 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: <http://www.agriculture.gouv.fr>

*For information on duties, taxes, and documentation:*

Centre de Renseignements Douaniers

84, rue d'Hauteville

75010 Paris

Tel: (33-1) 825 30 82 63/Fax: (33-1) 53 24 6830

Email: [crd-ile-de-france@douane.finances.gouv.fr](mailto:crd-ile-de-france@douane.finances.gouv.fr)

Internet: <http://www.douane-minefi.gouv.fr>

## **STATISTICS**

**TABLE A. KEY TRADE AND DEMOGRAPHIC INFORMATION FOR 2012**

Ag. Imports from All Countries (1)	\$63 billion
U.S. Market Share (1)	1.6 percent with \$1.0 billion
Consumer Food Imports from All Countries (1)	\$37 billion
U.S. Market Share (1)	1.1 percent with \$415 million
Edible Fishery Imports from All Countries (1)	\$5.9 billion
U.S. Market Share (1)	4.4 percent
Total Population/Annual Growth Rate (2)	65.8 million - Growth rate annual: 0.47%
Urban Population/Annual Growth Rate	56.6 million – Annual Growth Rate: N/A
Number of Metropolitan Areas (3)	4
Size of the Middle Class (4)	80 percent of total population
Per Capita Gross Domestic Product	\$41,141
Unemployment Rate, incl. Overseas territories	10.9 percent (*)
Percent of Female Population Employed (5)	52 percent
Exchange Rate: US\$1 = EURO 0.78	

## Footnotes:

1. Statistics from the Global Trade Atlas from the Global Trade Information Services
2. Preliminary figures as of January 1, 2013, including overseas and department territories, 63.7 million for metropolitan France only
3. Population in excess of 1,000,000
4. Defining the middle class by excluding the poorest and the wealthiest, the middle class represents 80 percent of the population
5. Percent against total number of women (15 years old or above)

(\*) Unemployment rate for France only: 10.5%, as of May 2013

**TABLE B. CONSUMER FOOD & SEAFOOD PRODUCTS IMPORTS**  
**(In millions of United States Dollars, rounded to the nearest million)**

**France Import      France Import**  
**Statistics from the   Statistics from   U.S. Market**  
**World                    the U.S.                Share**

<b>Commodity</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
Consumer Oriented									
Agric. Total	33,913	37,522	36,730	350	438	415	1.0	1.2	1.1
Fish & Seafood Products	5,878	6,524	5,924	249	313	263	4.2	4.8	4.4
Agricultural Total	47,904	54,689	52,138	759	883	724	1.6	1.6	1.4
Agricultural, Fish & Forestry	58,824	66,558	62,837	1,057	1,248	1,032	1.8	1.9	1.6

Source: Bico Report / Global Trade Atlas

# TABLE C. TOP 15 SUPPLIERS OF CONSUMER FOODS & SEAFOOD PRODUCTS

## FRANCE IMPORT STATISTICS (In United States Dollars)

France (Customs) Import Statistics  
Commodity: Consumer Oriented Agric. Total, Group 32 (2012)  
Year to Date: January-December

Partner Country	2010	2011	2012	% Share 2010	% Share 2011	% Share 2012	% Change 2012/2010
World	33,913,109,719	37,522,327,440	36,730,563,474	100.00	100.00	100.00	-2.11
Spain	5,546,849,839	5,721,563,995	6,028,237,259	16.36	15.25	16.41	5.36
Germany	4,598,906,012	5,335,128,799	5,164,600,317	13.56	14.22	14.06	-3.20
Belgium	4,932,104,636	5,362,033,035	5,137,731,132	14.54	14.29	13.99	-4.18
Netherlands	4,640,517,617	4,952,040,165	4,663,773,495	13.68	13.20	12.70	-5.82
Italy	3,429,028,009	3,800,806,892	3,729,810,849	10.11	10.13	10.15	-1.87
Switzerland	925,870,637	1,194,091,067	1,340,759,299	2.73	3.18	3.65	12.28
United Kingdom	1,199,999,313	1,414,874,126	1,285,839,976	3.54	3.77	3.50	-9.12
Morocco	796,007,889	844,248,889	744,285,004	2.35	2.25	2.03	-11.84
Ireland	677,241,204	789,133,030	743,982,536	2.00	2.10	2.03	-5.72
Poland	519,337,723	621,242,965	684,233,233	1.53	1.66	1.86	10.14
France	568,310,827	651,376,218	640,777,519	1.68	1.74	1.74	-1.63
Portugal	386,109,696	456,915,050	429,944,568	1.14	1.22	1.17	-5.90
United States	350,382,226	438,249,864	415,080,656	1.03	1.17	1.13	-5.29
Turkey	400,478,743	418,265,455	395,380,530	1.18	1.11	1.08	-5.47
Denmark	328,879,734	397,698,644	394,416,802	0.97	1.06	1.07	-0.83

Source : Global Trade Atlas from the Global Trade Information Services.

France (Customs) Import Statistics  
Commodity: 03, Fish and Crustaceans, Molluscs And Other Aquatic Invertebrates  
Year to Date: January-December

Partner Country	2010	2011	2012	% Share 2010	% Share 2011	% Share 2012	% Change 2012/2010
World	4,745,377,815	5,222,151,627	4,683,890,241	100.00	100.00	100.00	-10.31
Norway	786,618,219	768,113,232	707,234,094	16.58	14.71	15.10	-7.93
United Kingdom	528,512,157	580,881,322	497,919,020	11.14	11.12	10.63	-14.28
Spain	262,104,979	279,794,440	275,760,418	5.52	5.36	5.89	-1.44
United States	238,655,793	301,054,810	257,080,560	5.03	5.76	5.49	-14.61

Netherlands	202,857,050	224,526,896	227,570,863	4.27	4.30	4.86	1.36
China	205,712,593	273,616,155	219,253,867	4.34	5.24	4.68	-19.87
Ecuador	151,344,655	179,026,869	176,865,399	3.19	3.43	3.78	-1.21
Ireland	140,621,400	163,328,653	165,129,595	2.96	3.13	3.53	1.10
Denmark	166,180,639	211,019,750	159,210,236	3.50	4.04	3.40	-24.55
Poland	140,925,994	156,371,047	149,484,903	2.97	2.99	3.19	-4.40
India	102,181,110	136,797,900	128,291,854	2.15	2.62	2.74	-6.22
Iceland	99,714,388	125,072,105	115,280,419	2.10	2.40	2.46	-7.83
Vietnam	117,019,565	132,862,739	112,091,359	2.47	2.54	2.39	-15.63
Madagascar	103,085,762	114,767,127	111,278,694	2.17	2.20	2.38	-3.04
Germany	84,122,963	79,099,236	79,096,387	1.77	1.51	1.69	-0.00

Source: Global Trade Atlas from the Global Trade Information Services.