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France

Exporter Guide

Annual

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

Author Defined:
Executive Summary:

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Note : Average exchange rates used in this report are:

Calendar Year 2013: US Dollar 1 = 0.76 Euros
Calendar Year 2014: US Dollar 1 = 0.74 Euros
Calendar Year 2015: US Dollar 1 = 0.90 Euros
January-June 2016: US Dollar 1 = 0.89 Euros
(Source: The Federal Reserve Bank of New York and/or the International Monetary Fund)

SECTION I. MARKET OVERVIEW

1. Macroeconomic Situation

The U.S.-French commercial and economic alliance is one of the United States' oldest and closest bilateral relationships. Relations between the United States and France have remained active and friendly. The two countries share common values and have parallel policies on most political, economic, and security issues. Trade and investment between the United States and France are strong. The United States is the top destination for French foreign investment and the United States is the largest foreign investor in France. The United States and France have a bilateral convention on investment and a bilateral tax treaty addressing, among other things, double taxation and tax evasion.

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 level of productivity is high, but productivity growth has been weak for several decades. In hopes of addressing this, the Government passed a controversial labor reform law aimed at liberalizing the highly-rigid labor market. The law makes it easier to lengthen working hours, reduce severance pay and weaken the power of labor unions. Meanwhile, the result of the Brexit referendum is expected to have a limited impact on French confidence indicators and financial markets in the short term, though a decline in exports and investment could weigh on growth in the medium term. The problem of terrorism, however, continues to pose downside risks to the economy and may have a significant impact in the tourism industry and reduce tourism investment.

With a gross domestic product (GDP) of approximately $2.8 trillion in 2015, France is the world's sixth largest industrialized economy and the European Union's third largest economy after Germany and the United Kingdom. It has substantial agricultural resources but its manufacturing base has declined significantly. France is a member of the G-8 and an initiator of the G-20, the European Union, the World Trade Organization, and the Organization of Economic Cooperation and Development, confirming its status as a leading economic player in the world.

As a result of the slow GDP growth (1.2% in 2015 after 0.2% in 2014) the unemployment rate (Metropolitan France) is now in double digits, down from 10.4% in 2014 to 10.1% at the end of 2015, and increased by 0.3% since the beginning of 2016. It is over 25% for youth under the age of 25.

GDP is expected to continue its slow rebound with a growth rate of 1.3% in 2016 followed by an increase of 1.6% in 2017 thanks to lower energy prices, tax cuts on labor and businesses and persistently low interest rates. GDP per capita in France was $42,725 in 2015.

According to Department of Commerce Census data, in 2015, U.S. exports to France were $30 billion in goods and $19 billion in services. In the other direction, French exports to the United States were $48 billion in goods and $17 billion in services. The net is a U.S. trade deficit with France of $16 billion. Almost 25 percent of the bilateral trade between the United States and France is related to the aerospace industry.

2. French Agricultural Production and Consumption

In 2015, the overall value of the agricultural production decreased by 0.2 percent. There was a slight value increase in 2015 for grains, oilseeds, fruits and vegetables, including potatoes, while the value of the animal production decrease for milk and other small animal products. In the meantime, farmers and ranchers benefitted from the energy price reduction, and increased financial support due to drought, the ongoing livestock sector crisis, and the growth of the tax credits for competition and employment. However, the external trade surplus for agricultural and food products was about 9 billion in 2015, a decrease of 18 percent over 2014.

French household purchasing power increased by about 1.6 percent in 2015, the fastest pace since 2011. According to the French National Institute for Statistics and Economic Studies (INSEE), this is due to the slowdown of price increases not only for food but also for manufactured products, along with a net decrease in oil prices resulting in a lower bill for heating and gasoline. However, the majority of French food consumers will continue to prefer hyper/supermarkets private label products, while others may continue to buy branded products but in smaller quantities to better balance their food budgets. This trend is expected to continue in 2016.

As in previous years, in 2015 French consumers continued to be price conscious, taking advantage of promotions and tending to diversify their shopping locations. Food expenses represented less than 20 percent of French household budget compared to 34 percent in the 60’s. French food expenses in hyper, supermarkets and hard discounters have decreased in volume about 1.4 percent per year since 2010, but increased 1.9 percent in value. “Drive-thru” concept created seven years ago shows signs of fatigue with less new clients, and with 65% of sales resulting from regular clients.

During the past three years, new taxes on certain sugared foods, as well as the increase in 2014 of the value-added tax, negatively impacted food consumption. However, in 2015, a slight increase in French household income improved French purchasing power and total food sales increased by 1.6 percent. 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

In January 2016, the French population was estimated to 66.6 million people, including overseas territories, an increase of 0.4 percent compared to 2014. The natural balance between births and deaths was the lowest since 1976, but still remain the major demographic dynamic, well over the immigration balance.

Estimate of Population and Statistics (In thousands)

Year	Population	Birth	Death	Natural Increase	Net Immigration
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	+39
2011	64,933	823.4	545.1	+278.3	+30
2012	65,241	821.0	569.9	+251.2	+72
2013	65,565	811.5	569.2	+242.3	+47 (p)
2014 (without Mayotte)	65,854 (p)	811.1	558.7	+252.7	+47 (p)
2014 (incl. Mayotte)	66,074 (p)	818.6	559.3	+259.3	+47 (p)
2015 (incl. Mayotte)	66,381 (p)	800.0	600.0	+200.0	+47 (p)
2016 (incl. Mayotte)	66,228 (p)	N/A	N/A	N/A	N/A

(p) = Projections
N/A = Not Available
Source: INSEE

4. Changing Food Trends

Socio-economic and demographic changes have significantly altered food trends. Trends show that French consumers desire food products that offered 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

· The rapid population shift from rural to urban regions is boosting demand for international foods. • French per capita income is near that of the United States. • The tourism industry increases demand for hotel, restaurant, and institutional products. • U.S. fast food chains, theme restaurants, and the food processing industry occasionally demand American food ingredients. • Efficient domestic distribution systems. • American food and food products remain quite popular. • US-EU organics equivalency agreement in place in 2012 will supposedly increase the organic trade.	· Food scares and other food safety issues cause concern among French consumers. • French consumers are exacting when it comes to quality and innovation. • Price competition is fierce. • Certain food ingredients are banned or restricted in the French market. • Marketing costs to increase consumer awareness are high. • Appreciation of the U.S. dollar vis-a-vis the Euro. • Mandatory customs duties, sanitary inspections and labeling requirements can be onerous. • The EU biotech labelling requirement of 0.9 percent excludes many U.S. processed products.

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-eu.org/trade-with-the-eu/eu-import-rules/fairs-reports/
http://www.fas.usda.gov/data/france-fairs-country-report

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. Canada's trade deal with Europe was approved by the EU in November 2016. 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, the French desire innovative foods. Consumers like ethnic and exotic foods with distinctive themes and flavors. 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 favor 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, frozen desserts. Kosher and halal foods have also increased in popularity. There is a strong and unmet demand for these products.

With some five to seven million potential consumers of halal food products, France ranks as the leading market in Europe for halal foods with a market estimated at six 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 appears to be increasing at a rate of around 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 the "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 pesticides and according to special criteria. The organic market in France increased at a yearly rate of ten percent during past years and jumped by 14.7 percent in 2015 to reach total sales of approximately 5.5 billion dollars. Roughly 80 percent of sales were made via retail organic and specialty stores, and 20 percent directly from producers to consumers, as well as artisanal traders. About 76 percent of organic food products consumed in France originate from domestic production. Half of imports of organic foods consist of grocery products. Fresh fruit and vegetables represent about 20% of the total French imports of organic food products and consist mainly of exotic and specialty items not produced in France. Major organic food products imported from the United States are cereals, tree nuts, dried fruits, fruit and vegetable juices, fruits, and rice.
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.

3. Marketing Strategies for the French Market

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, Alaska, and 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.

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 $14,000 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, prepared by the U.S. Department of Commerce, at the following address:

http://2016.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 myst 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

Mandatory Labelling of Genetically Engineered (GE) Products and Exemptions

Under the Regulations (EC) No 1829/2003 and (EC) No 1830/2003on biotech traceability and labelling, the EU sets standards for positive (sourced from biotech), but not for negative labelling (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

Voluntary "GMO-free" Labeling Systems

In France, the government has implemented a national voluntary "GMO-free" labeling system. It only applies to food produced in France. Imported products are not concerned. It states that:

- Plant products can be labelled as “GE free” if they contain less than 0.1 percent GE plants.
- For animal products, two thresholds are set and must be indicated on the label: 1) under 0.1 percent is labeled as “fed without GE plants (0.1 percent),” and 2) under 0.9 percent as “fed without GE plants (0.9 percent).”
- Processed animal products, milk and eggs can be labelled as “sourced from animals fed without GE plants (0.1 or 0.9 percent).”
- For apiculture products, biotech plants should be no closer than three kilometers to an apiary.

Besides, some food manufacturers and retailers voluntarily label their products as “GMO-free.” Such labels are mainly found on animal products (meat, dairy products, and eggs), canned sweet corn and soybean products.

National Ban on the only GE Corn Trait Commercially Grown in the EU:
The only GE plant approved for cultivation in the EU is MON810 Bt corn, an insect-resistant corn. In France, the cultivation of this corn is banned under Directive (EU) 2015/412.

Customs Process:

- A person or company can facilitate customs clearance for imports as long as they can present to the French Customs Authorities at the port entry with 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 following rates:

- Standard rate of 20 percent applies to alcoholic beverages, some chocolates and candies
- Reduced rate of 5.5 percent applies mostly to agricultural and food products.

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 2015, the 16,218 companies (98 percent being small- to medium-sized companies) of the sector generated total sales of $189 billion and employed 440,926 persons in 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 $10.4 billion surplus in 2015 thanks to wine and spirits and fresh products.

Up until now the French food industry has weathered the economic slowdown, but since two years ago, employment in the sector has declined, as a result of new taxes, price rises in raw materials and socio-structural measures and difficulties. During January-August 2016, total French agricultural and food products exports decreased by three percent compared to the same period in 2015, while total imports increased slightly (+1.7 percent). During that period exports of wines and spirits decreased to the European Union, while they increased to third countries (mainly spirits) to Asia and North America. Exports of grains are declining to third countries. Within the EU, grain exports decreased, as a result of lower world prices, as did exports of vegetables, wine, and sugar. Imports of agricultural and food products continued to increase during the first half of 2016, mainly for fruits, vegetables, and beverages from Spain. Globally, the trade surplus for agricultural and food products during January-August 2016, reached $4.8 billion, a significant decrease compared to the same period in 2015.
Food industry reports highlight the weakness of this French sector compared to its European partners. Even though France remains the fourth largest 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 their commercial buying/selling platform), increased by seven percent, and Germany by eight percent (mostly due to the booming of their meat and dairy sectors) during the same period of time. The report also pointed out the threat that emerging agricultural countries like Brazil, China, Argentina and India represent. The lower 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. This does not take into account the craft companies that represent 85 percent of the companies in the French food industry. In line with these difficulties, the food industry should adapt to the French consumer behavior changes and the declining portion of the food budget in the household expenses.

Exports in billion dollars		**Imports in billion dollars**	
2012	55.2	2012	45.2
2013	58.1	2013	48.6
2014	59.8	2014	51.0
2015	66.7	2015	56.3

Source: Agreste/French Customs

Production of Major French Food Processing Sectors – Percentage growth
Calendar Year 2014/2015

Food Processing Sectors	Production in Billion dollars 2014 (value)	2015 (volume)	Percentage Growth 2015/2014 Value	Volume	Price Growth
Meat Industry	44.1	36.3	-1.4	0.1	-1.6
Seafood Industry	3.9	3.3	1.0	1.4	-0.5
Fruits & Vegetable Industry (incl. Fruit juices)	9.1	7.2	-5.8	-4.6	-1.2
Fats and Oils Industry	6.8	5.7	0.7	2.4	-1.7
Milk Industry	37.9	31.0	-3.1	-0.3	-2.8
Grain Industry	8.0	6.8	-0.2	3.1	-3.2
Bakery/Pastry industry	32.8	27.8	2.2	3.0	-0.8
Animal Feed Industry	15.6	12.7	-3.3	-0.6	-2.7
Beverage Industry	25.6	21.4	3.5	1.6	1.9
Tobacco Industry	1.0	0.4	-30.5	-30.2	-0.5
Other food industries	30.1	25.4	2.2	2.9	-0.7
Total Food Industries	**214.8**	**178.2**	**-0.3**	**0.9**	**-1.2**

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. Mobile phone service is price competitive and has a number of major players. There is also easy access to the Internet via French and foreign service providers. High-speed Internet access has rapidly expanded. 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, the strong 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, including food supplements, as well as kosher and halal foods. Over the past few years, there has been a renewal of interest for American food products. Many restaurants offering a U.S. theme have opened in recent years. This trend is also confirmed by the French importers of American food products where import sales have increased. Also, 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

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 found at:

http://www.fas.usda.gov/data/france-food-service-hotel-restaurant-institutional

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)

	2013	2014	2015
A. Total Market Size	5,902	8,991	6,924
B. Local Production	3,896	3,951	3,294
C. Total Exports	1,482	1,872	1,419
D. Total Imports	5,051	6,912	5,049
E. Total Imports from U.S.	241	296	240

N/A = Not Available
Source: GTI – French Customs

Comments: France is the fourth seafood producer in the European Union, after Spain, the United Kingdom and Denmark. France is a net importer of seafood products as its seafood domestic production represents only twenty percent of total French consumer demand. During past years, the seafood per capita consumption increased, currently representing about 36 kilograms per year, including 68 percent fin fish and 32 percent shellfish and crustaceans.

In 2015, the United States was France's fifth largest supplier of seafood products in volume, 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.

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

HS Code: 22

(USD Million)
(January-December)

	2013	2014	2015
A. Total Market Size	9,825	11,729	7,578
B. Local Production	24,028	25,600	21,693
C. Total Exports	18,391	18,040	18,195
D. Total Imports	4,188	4,169	4,080
E. Total Imports from the U.S.	212	207	206

N/A = Not Available
Source: GTI - French Customs

Comments: In 2015, volume imports of U.S. wine and spirits represented approximately seven percent of total French imports. U.S. wine and spirits imports in France in volume, ranks seventh after EU countries, including Spain, Portugal, and Italy, ahead of Chile, Australia, and South Africa. 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 quality of the products and the promotional efforts made by American themed restaurants in France.

France is world leader for whiskey consumption. Per French Customs, French imports of U.S. whiskey amounted to $97 million in 2015, a 24 percent decrease compared to 2013, mainly due to the dollar fluctuation. Nevertheless, the penetration of new bourbon brands like Jim Beam, Maker's Mark, Stepson, in addition to Jack Daniel's, and Wild Turkey. The United States remain France's second supplier after the United Kingdom.

In 2015, U.S. beer exports to France were valued at $2.5 million, representing a fifty percent increase volume over 2014. France's leading beer suppliers are Belgium, Germany and the Netherlands.

Opportunities exist for ethnic, new, and innovative U.S. beverages, particularly those linked with Tex-Mex foods. Sales of innovative beverages are on the rise.

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

(USD Million)
(January-December)

	2013	2014	2015
A. Total Market Size	11,945	14,606	11,494
B. Local Production	8,657	9,139	7,168
C. Total Exports	2,072	1,632	1,344
D. Total Imports	5,360	7,099	5,670
E. Total Imports from the U.S.	218	353	295

N/A = Not Available
Source: GTI – French Customs

Comments: Under this category, dried nuts are the majority of U.S. exports, and the United States accounted for five percent of total French imports. The value was $241 million in 2015 and has been increasing at about an annual rate of 17 percent over the past three years. Other major competitors in the French market are Spain, Italy and Turkey. In the dried fruits and nuts category, almonds are the leading U.S. product exported to France, valued at $169 million in 2015 and accounting for six percent of total French imports. Shelled and in-shell pistachios are the second-ranked product exported to France, and France also imports significant quantities of U.S. Macadamia nuts and walnuts. France is a producer of walnuts and U.S. exports to France is primarily determined by the size of the domestic crop from year to year.

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.

Prime opportunities for U.S. fresh fruit and vegetable 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. grapefruits, and number three in the world after Japan and Canada with 76,000 tons imported in calendar year 2015, valued at $80 million, a slight decrease volume of three percent over 2014. The U.S. market share for citrus fruits represents 20 percent of total French imports in volume and 22 percent in value. The United States is France's leading supplier for grapefruits, ahead of South Africa, Israel and Spain.

During short crop years, France may import apples and pears from the United States. There is also a niche market for berries, medjool dates, dried prunes, frozen fruits and nuts, fresh cherries, cashew nuts, apples and other fresh citrus. Imports of fresh and dried cranberries from the United States have been very successful during the last fifteen years valued at $295,000 in 2015.

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

(USD Million)
(January-December)

	2013	2014	2015
A. Total Market Size	N/A	N/A	9,237
B. Local Production	N/A	N/A	8,100
C. Total Exports	2,772	2,359	2,310
D. Total Imports	3,481	3,396	3,447
E. Total Imports from the U.S.	40	48	46

N/A = Not Available
Source: GTI – French Customs

Comments: France is one of the top worldwide markets for U.S. Great Northern Beans. Significant opportunities exist for U.S. suppliers of dried beans, peas and lentils.
In France, in 2015, dry legumes reached a total import value of $179 million. The United States is one of the top sources for the French market, followed by Canada and China. Statistics show a growth of U.S. exports to France for fresh and chilled roots since 2011. FAS Paris initiated contact with French

buyers and the American Sweet Potatoes Commission to actively promote this product among the food service industry.

Very few opportunities exist for U.S. fresh vegetables. Trends and increased consumption indicate a growing demand for dried and 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)

	2013	2014	2015
A. Total Market Size	45,614	46,568	37,710
B. Local Production	44,156	44,117	36,327
C. Total Exports	4,536	5,639	3,838
D. Total Imports	5,994	8,090	5,321
E. Total Imports from the U.S.	7	13	12

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 48.200 tons hormone-free high quality beef was voted by the European Parliament in 2012 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 2013, the organic market in France increased by over $500 million to reach about $5.5 billion dollars in 2015. In 2015, 83 percent of sales were made via 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), only 25 percent of organic products consumed in France are imported from a foreign country. These products are mainly exotic produce, fruits and vegetables, soy, and a variety of grocery products, as well as fruit juices and seafood. In 2015, there were approximately 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
Homepage: http://www.usda-france.fr

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

APPENDIX A: FOOD AND AGRICULTURAL TRADE SHOWS IN FRANCE In Calendar Year 2017

MAISON ET OBJET January 20-24, 2017 September 8-12, 2017 Paris Nord Villepinte Organizer : Philippe Bazin pbazin@promosalonsusa.com Internet: http://www.maison-objet.com/ (Bi-annual Show)	International Home Fashion Manufacturers
SALON INTERNATIONAL DE LA RESTAURATION, DE L'HOTELLERIE ET DE L'ALIMENTATION (SIRHA 2017) January 21-25, 2017 Eurexpo – Lyon Organizer: GL Events Exhibitions Tel: (33 4) 78 176 176	International Event for Hospitality, Restaurant, Catering and Food Service Industries

Fax: (33 4) 78 176 177
Contact :
Email :
Internet: http://www.gl-events.com/

(Biennal Show)

EUROPAIN / INTERSUC — International Chocolate, Sugar Confectionery & Bakery Trade Show
Parc des Expositions – Paris-Nord Villepinte
February 3-6, 2018
Organizer: Philippe Bazin
Tel: +1 (212) 564 0404
Email: pbazin@promosalonsusa.com
Internet: http://www.europain.com

(biennal Show)

TEXWORLD — International Textile Manufacturers
February 6-9, 2017
September, 2017
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
Internet: http://www.texworld.messefrankfurt.com/

(Bi-annual Show)

PREMIERE VISION — International Textile and Clothing
February 7-9, 2017
September 19-21, 2017
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
Internet : http://www.premierevision.fr/

(Bi-annual Show)

LE CUIR A PARIS — International Leather Products
February 7-9, 2017
September 19-21, 2017

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
Internet : http://www.cuiraparis.com

(Bi-annual Show)

SALON DU VEGETAL — Horticultural Trade Show
June 20-22, 2017
Angers
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
Internet : http://www.salonduvegetal.com/

(Annual Show)

SALON INTERNATIONAL DE L'AGRICULTURE
Paris- Porte de Versailles — International Agricultural Show
February 25 – March 5, 2017
Organizer: Comexposium
Tel: (33 1) 76 77 11 11
Email: contact.exposantsSIA@compexposium.com
Internet: http://www.salon-agriculture.com/

(Annual Show)

CFIA — Retail Food Trade Show
Carrefour des Fournisseurs de l'Industrie
Agroalimentaire
March 7-9, 2017
Parc des Expositions – Rennes Aeroport
Organizer : Agor/GL Events
Tel: (33 5) 53 36 78 78
Fax: (33 5) 53 36 78 79
Contact: Sebastien Gillet
Email: sebastien.gillet@gl-events.com
Internet: http://www.cfiaexpo.com/

(Annual Show)

EUROPEAN SANDWICH & SNACK SHOW
March 15-16, 2017
Paris – Porte de Versailles
Organizer : Reed Exposition
Contact : Sandrine Barat
Email: sandrine.barat@reedexpo.fr
Internet: http://www.sandwichshows.com

(Annual Show)

SALON DES MARQUES DE DISTRIBUTEURS ALIMENTAIRES – MDD RENCONTRES
International Private Label Show for Foods
March 28-29, 2017
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: Veronique Fantin
Email : veronique.fantin@gl-events.com
Inernet : http://www.mdd-expo.com/

(Annual Show)

CARREFOUR INTERNATIONAL DU BOIS
International Timber Show
May 30 – June 1, 2018
Parc de la Beaujoire – Nantes
Organizer : Carrefour International du Bois
Tel : (33 2) 40 73 60 64
Email : sam@timbershow.com
Internet : http://www.timber.show.com

(Biennal Show)

SALON INTERNATIONAL DE L'ELEVAGE (SPACE 2017)
International Trade Fair for Livestock
September 12-15, 2017
Rennes – Carrefour Europeen
Organizer : Space
Tel : (33 2) 23 48 28 80
Fax: (33 2) 23 48 28 81
Contact: Valerie Lancelot

Email : v.lancelot@space.fr
Internet : http://www.space.fr/

(Annual Show)

SALON INTERNATIONAL DE L'ALIMENTATION (SIAL 2018) – USDA ENDORSED October 21-25, 2018 Organizer: IMEX Management, Inc. Tel: (704) 365 0041 Fax: (704) 365 8426 Email: kellyw@imexmgt.com Internet: http://www.imexmgt.com/ (Biennal Show)	International Food and Beverage Trade Show – including In-Food and Organic Sections

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
Web: http://www.foodexportusa.org
Contacts: Tim Hamilton, Executive Director
Laurent Swartz, Deputy Director
Suzanne Milshaw, International Marketing 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
Web: http://www.foodexport.org
Contacts: Tim Hamilton, Executive Director
Michelle Rogowski, Deputy Director

Teresa Miller, International Marketing 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
Web: http://www.susta.org
Contacts: Bernadette Wiltz, Executive Director
Kristin Core, Marketing Coordinator

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
Web: http://www.wusata.org
Contacts: Andy Anderson, Executive Director
Janet Kenefsky, Deputy Director & International Marketing 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) 33 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
Internet : http://www.douane-minefi.gouv.fr

STATISTICS

TABLE A. FRANCE KEY TRADE AND DEMOGRAPHIC INFORMATION FOR 2015

Ag. Imports from All Countries (1)	$59 billion
U.S. Market Share (1)	2.0 percent with $1.2 billion
Consumer Food Imports from All Countries (1)	$36 billion
U.S. Market Share (1)	1.5 percent with $525 million
Edible Fishery Imports from All Countries (1)	$6 billion
U.S. Market Share (1)	3.8 percent
Total Population/Annual Growth Rate (2)	66.6 million - Growth rate annual: 0.4%
Urban Population/Annual Growth Rate	53 million – Annual Growth Rate: N/A
Number of Metropolitan Areas (3)	4
Size of the Middle Class (4)	50 percent of total population
Per Capita Gross Domestic Product	Between $37,653 and $42,802 (6)
Unemployment Rate, incl. Overseas territories	10.2 percent (*)
Percent of Female Population Employed (5)	67 percent
Exchange Rate: US$1 = EURO 0.90	

Footnotes:

1. Statistics from the Global Trade Atlas from the Global Trade Information Services
2. Preliminary figures as of January 1, 2016, including overseas and department territories, 64.5 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 is about under 50 percent of the population
5. Percent against total number of women (15 years old or above)
6. This amount varies according to source and exchange rate utilized by the different sources

(*) Unemployment rate for France and overseas territories as of first quarter of 2016

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

	France Import Statistics from the World				France Import Statistics from the U.S.				U.S. Market Share			
Commodity	**2012**	**2013**	**2014**	**2015**	**2012**	**2013**	**2014**	**2015**	**2012**	**2013**	**2014**	**2015**
Consumer Oriented Agric. Total	36,968	40,181	40,567	35,572	415	470	533	525	1.1	1.2	1.3	1.5
Fish & Seafood Products	5,924	6,471	6,506	5,681	263	248	219	215	4.4	3.8	3.4	3.8
Agricultural Total	52,138	56,277	56,858	49,285	724	910	1,064	907	1.4	1.6	1.9	1.8
Agricultural, Fish & Forestry	62,837	67,454	68,312	59,054	1,032	1,197	1,324	1,169	1.6	1.8	1.9	2.0

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	2012	2013	2014	2015	% Share 2012	% Share 2013	% Share 2014	% Share 2015	% Change 2015/2012
World	36,730,563,474	39,896,687,476	40,662,662,833	35.571,986,003	100.00	100.00	100.0	100.0	-3.16
Spain	6,028,237,259	6,585,604,038	6,529,222,004	5,821,614,485	16.42	16.51	16.06	16.36	-3.42
Germany	5,164,600,317	5,448,013,865	5,475,897,915	4,617,563,507	14.06	13.65	13.46	12.98	-10.59
Belgium	5,137,731,132	5,599,827,411	5,830,487,273	4,928,961,760	13.99	14.04	14.34	13.86	-4.07
Netherlands	4,663,773,495	4,966,882,113	4,985,794,551	4,196,833,033	12.70	12.45	12.26	11.80	-10.03
Italy	3,729,810,849	3,922,280,241	4,003,533,455	3,392,520,300	10.15	9.83	9.84	9.53	-9.06
Switzerland	1,340,759,299	1,820,746,520	1,858,501,368	1,662,893,417	3.65	4.56	4.57	4.68	24.01
United Kingdom	1,285,839,976	1,402,431,464	1,468,494,052	1,288,357,866	3.50	3.51	3.61	3.62	0.15
Morocco	744,285,004	803,533,877	927,879,298	849,755,301	2.03	2.01	2.28	2.39	14.25
Ireland	743,982,536	788,264,100	777,861,060	708,684,888	2.03	1.97	1.91	1.99	-4.70
Poland	684,233,233	770,737,599	827,767,370	815,933,604	1.86	1.93	2.03	2.29	19.30
France	640,777,519	669,998,505	696,859,618	491,135,198	1.74	1.68	1.71	1.38	-23.40
Portugal	429,944,568	455,711,976	449,179,577	401,924,526	1.17	1.14	1.10	1.13	-6.51
United States	415,080,656	470,161,709	532,944,209	525,236,416	1.13	1.18	1.31	1.47	26.50
Turkey	395,380,530	394,422,860	442,040,017	479,194,775	1.08	0.99	1.09	1.35	21.26
Denmark	394,416,802	408,090,279	410,818,624	302,828,392	1.07	1.02	1.01	0.85	-23.10

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	2012	2013	2014	2015	% Share 2012	% Share 2013	% Share 2014	% Share 2015	% Change 2015/2012
World	4,683,890,241	5,050,690,675	6,506,119,065	5,680,778,551	100.00	100.00	100.0	100.0	21.28
Norway	707,234,094	861,569,478	798,985,687	675,553,562	15.10	17.06	12.28	11.90	-4.38
United Kingdom	497,919,020	593,001,056	615,498,498	557,786,553	10.63	11.74	9.45	9.82	12.05
Spain	275,760,418	265,355,780	441,437,383	410,979,453	5.89	5.25	6.78	7.23	48.91
United States	257,080,560	241,081,350	218,882,460	214,691,220	5.49	4.77	3.37	3.78	-16.34
Netherlands	227,570,863	228,838,062	278,886,996	244,578,011	4.86	4.53	4.29	4.31	7.46
China	219,253,867	186,773,355	197,376,887	191,033,807	4.68	3.70	3.03	3.36	-12.79
Ecuador	176,865,399	231,476,277	343,152,371	294,103,690	3.78	4.58	5.27	5.17	66.10
Ireland	165,129,595	151,000,826	162,650,532	147,601,233	3.53	2.99	2.51	2.60	-10.30
Denmark	159,210,236	170,522,824	213,037,199	172,548,179	3.40	3.38	3.27	3.05	8.80
Poland	149,484,903	180,179,431	164,746,426	143,369,709	3.19	3.57	2.54	2.52	-4.03
India	128,291,854	137,117,576	191,556,037	156,970,977	2.74	2.71	2.95	2.76	22.66
Iceland	115,280,419	133,217,390	176,247,636	180,810,408	2.46	2.64	2.71	3.19	57.39
Vietnam	112,091,359	102,296,765	179,081,159	155,048,958	2.39	2.02	2.75	2.73	38.39
Madagascar	111,278,694	103,264,743	124,506,762	80,880,901	2.38	2.04	1.92	1.43	-27.02
Germany	79,096,387	72,190,879	188,785,713	184,734,758	1.69	1.43	2.91	3.26	134.18

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