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France

RETAIL FOOD SECTOR

Annual Report 2009

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Report Highlights:
In 2008, French consumers spent approximately 12.4 percent of their budgets on food and beverage (including alcohol) purchases: 5 percent was spent outside the home (hotels, cafes and restaurants), and approximately 7.4 percent in retail food outlets. France imported about $714 million of consumer-oriented food and beverage products from the U.S. in 2008, a seven percent increase over 2007.

Frozen food sales continue to show good potential. Strong prospects also exist for fish and seafood, non-alcoholic beverages and dairy products

Post:
Paris

Commodities:
Oats

Author Defined:

Average exchange rate used in this report, unless otherwise specified:

Calendar Year 2006: US Dollar 1 = 0.796 Euros

Calendar Year 2007: US Dollar 1 = 0.7312 Euros

Calendar Year 2008: US Dollar 1 = 0.6803 Euros

(Source: Central Intelligence Agency Fact Book)

EXECUTIVE SUMMARY

SECTION I. MARKET SUMMARY

In 2008, food sales in France, excluding alcoholic beverages and tobacco, increased 0.1 percent, compared to growth of 1.5 percent in 2007. Food prices increased 4.9 percent, compared to 1.3 percent in 2007. Food products and beverages, including alcohol, represented 12.4 percent share of the total household budget in 2008.

In 2008, the slowdown of total food in volume is explained by the decrease consumption of meat (minus 2.3 percent). A rise in prices for raw materials, which affected dairy products, eggs, oils, bread and breakfast cereals, had a limited impact on the consumption of these products.

The following sectors demonstrated strong growth trends from 2006-2008: milk, cheese and eggs, fruits and vegetables, non-alcoholic drinks (mainly fruit juices, mineral water, and sodas), fish and seafood, meat, bread and cereals.

French imports of agricultural and food products (including tobacco) continued an upward trend from $38.6 billion in 2004 to $58.2 billion in 2008. In 2008, France's top suppliers of food and agricultural products included the Netherlands, Spain, Belgium/Luxembourg, Germany, Italy, and the United Kingdom. Brazil is the largest exporter of bulk products, including soy and soy protein, orange juice and orange juice concentrates to France outside of the EU-27, and is a significant supplier of meat and poultry.

France imported $714 million in consumer-oriented food and beverage products from the U.S. in 2008, an increase of 7 percent from 2007. (source: UBI France/French Customs). The table below details 2008 imports of U.S. food and beverage products by major category:

Over U.S.$ 15 million	Between U.S.$ 3 to 15 million
Stone fruit, tropical fruit and citrus Canned fruits Nuts (almonds, peanuts, etc.) Oilseeds, misc. grains, seeds, including soybeans	Animal feeds Strawberries Dried fruits (other than tree nuts) Canned vegetables

Fish and seafood Cereals, including rice and corn Meat and offals Spirits, including wines Beverages, including fruit juices Dried vegetables	Canned fish Sauces Biscuits Tobacco and tobacco products

Source: UbiFrance/French Customs

Major French Imports of Selected Agricultural and Food Products, Total and U.S., for Calendar Years 2004-2008 (in million U.S.$)

	2004		2005		2006		2007		2008	
In U.S. $ million	**Total**	**USA**	**Total**	**USA**	**Total**	**USA**	**Total**	**USA**	**Total**	**USA**
Animal (incl. marine) products										
Meat and offal	3,631	**29.3**	3,903	**44.5**	4,239	**48.4**	4,783	**31.2**	4,510	**33.5**
Fish and seafood	3,274	**160.9**	3,577	**186.1**	4,036	**231.0**	11,342	**218.1**	11,495	**235.0**
Milk products, including eggs	2,577	**8.4**	2,431	**2.5**	2,680	**2.6**	1,785	**13.5**	1,943	**16.9**
Vegetables products										
Vegetables	2,252	**17.6**	2,347	**19.5**	2,523	**19.2**	5,731	**27.1**	6,099	**28.4**
Fruit	3,516	**160.4**	3,411	**207.7**	3,613	**209.0**	8,237	**185.7**	8,138	**184.9**
Coffee, tea, spices	831	**1.2**	972	**0.7**	1,146	**0.5**	4,620	**1.2**	5,369	**2.0**
Rice	311	**15**	272	**12.6**	284	**11.3**	435	**2.1**	598	**4.2**
Corn	203	**45.4**	148	**32.6**	146	**18.0**	335	**19.9**	427	**25.9**
Animal and vegetable fats	1,357	**5.6**	1,539	**5.9**	1,855	8.4	754	**9.8**	765	**17.1**
Food industry products/Canned and dry grocery products										
Canned and prepared meat and fish	1,296	**3.5**	1,300	**4.7**	1,494	**4.4**	3,722	**7.0**	3,983	**8.3**
Sugar and sweet foods	1,098	**0.3**	1,066	**0.4**	901	**1.5**	920	**0.4**	1,213	**0.2**
Cocoa based foods	1,271	**0.1**	1,135	**0.1**	2,004	**1.2**	1,403	**0.6**	1,952	**0.5**
Cereal based foods	278	**3.5**	2,259	**8.6**	2,360	**3.4**	826	**2.9**	1,204	**3.9**
Canned fruits, jams and pureed fruits	706	**35.8**	723	**35.8**	813	**37.7**	1,746	**28.4**	2,006	**29.9**
Canned vegetables	695	**1.2**	713	**0.1**	799	**1.9**	1,135	**2.0**	1,203	**1.1**
Fruit juices	738	**25.5**	734	**22.3**	1,256	**20.5**	1,900	**24.5**	2,079	**20.0**
Other prepared foods	600	**14.5**	1,544	**10.3**	1,633	**20.1**	1,387	**14.0**	1,424	**17.5**
Mustards & sauces	298	**4.2**	322	**4.3**	337	**4.9**	703	**5.4**	753	**5.8**
Beverages, including alcohols	2,559	**61**	2,610	**64.7**	2,360	**23.1**	17,359	**99.2**	17,505	**113.8**
Wines & Spirits	1,475	**57.7**	1,418	**63.3**	1,534	**80.3**	10,023	**96.4**	9,982	**110.5**
Animal feeds	1,951	**16.5**	1,926	**12.1**	1,897	**21.1**	1,089	**15.4**	1,361	**52.6**

Sources: UbiFrance / Customs

SECTION II. FRENCH FOOD RETAIL DISTRIBUTION PROFILE

France's retail distribution network is diverse and sophisticated. The food retail sector is generally comprised of six types of establishments: hypermarkets; supermarkets; hard discounters; convenience; gourmet centers in department stores; and traditional outlets. (See definitions, page 11 of this report). In 2008, sales within the first five categories represented 75 percent of the country's retail food market, and the sixth, which includes neighborhood and specialized food stores, represented 25 percent of the market.

Major French Food Retailers, Number of Stores by Type:

Year	**2007**	**2008**
Hypermarkets	1,526	1,036
Supermarkets	5,501	3,913
Hard discounters	4,223	4,332

Source: Lineaires

France's major retailers, by 2008 sales within France, were: Carrefour; Leclerc; ITM Entreprises (Intermarché); Auchan; Casino; Systeme U; and Cora (Louis Delhaize). In 2008, sales of the top 15 French food retailers, without tax, totaled 186.1 billion euros ($273.55), a 4.6 percent increase compared to 2007. Hyper and supermarkets were the leading retailers with 66 percent total food sales. Higher food prices and consumer concerns about a decrease in purchasing power saw hard discounters gaining ground against hyper/supermarkets compared to previous years; in 2008, hard discounters' market share grew to 14.3 percent, compared to 13.6 percent in 2007. E-commerce food and beverage sales represented $350 million in 2008.

Hyper/Supermarket Trends: In 2008, hyper/supermarkets continued to make inroads in the restaurant and fast-food sectors by selling ready-to-eat products to consumers, such as roasted meats (e.g., cooked chicken), fresh-baked bread and pastries. Increased competition from hard discounters forced hyper/supermarkets to develop lines of discounted products. Large retailers increased their development of private branded products to capture more value in-house. Private label sales grew to about 31 percent of all food product retail sales in 2008. In 2006, French legislation limiting the number of new hypermarket/supermarket openings prompted large stores to expand existing surface area. Complaints that this new measure benefitted existing hyper/supermarkets resulted in a modification in July 2008, included in the "Loi de modernisation de l'economie" (LME), which allowed the opening of new stores under 1,000 square meters.

Mergers and alliances among major hyper/supermarkets have aligned the country's 5 largest retailers with seven central buying offices. (Please see page 11 for more information on central buying offices.) France is currently considering a measure to allow retail establishments, like food stores, to open on Sunday, which may impact future revenues.

To increase household purchasing power, reduce retailer margins and sales prices, two laws were enacted in 2008:

- The "Chatel" Law: for the development of competition for the benefit of consumers continues the reform of the relationship between suppliers and retailers;
- The economic (LME) law: Permitting suppliers and retailers to negotiate purchasing prices. The French Government believes this law is not being properly applied by retailers as consumer prices have not decreased. The Senate may amend the law if the situation does not improve.

Major French Hyper/Supermarkets and Hard Discounters by Number of Stores in Calendar Year 2008

Hypermarkets / Supermarkets / Hard discounters

Outlet name	N° shops	Outlet name	N° shops	Outlet name	N° shops
LECLERC	445	INTERMARCHE	1,467	LIDI	1,420
CARREFOUR	239	SUPER U	697	ED	916
AUCHAN	123	CHAMPION	657	ALDI	860
GEANT CASINO GEANT DISCOUT	114	CASINO	391	LEADER PRICE	540
CORA	61	CARREFOUR MARKET	385	NETTO	402
HYPER U	54	MONOPRIX	338	LE MUTANT	194
		SIMPLY MARKET	316	NORMA	130
		ATAC	97		
		LECLERC	68		

Source: Lineaires/Panorama Trade Dimensions 2009

Major French Hyper/Supermarkets/Hard Discounters by Sales Amount in Calendar Year 2008

In billion dollars

Outlet Names/Groups	***Amount of Sales in CY 2008***
CARREFOUR	55.9
LECLERC	47.5
INTERMARCHE (Mousquetaires)	46.0
AUCHAN	28.9
CASINO	27.3
SUPER U	26.3
CORA	11.8
FRANCAP	8.9

LIDL	6.5
MONOPRIX	5.4
ALDI	3.7

Sources: Lineaires – 2009

Small Supermarkets

Convenience stores

Convenience stores fall under the category of small supermarkets (superettes) and are generally located in small cities and frequently open every day (including Sunday). In 2008, there were approximately 15,000 outlets and the number continues to grow. Convenience stores are often affiliated with large retailers. The main operators in this segment are:

- Francap (Coccinelle, Coccimarket, G20, Colruyt, Viveco, Diagonal, Sitis, Panier Sympa, Atoo Alimentation, Votre Marché)
- Carrefour (Shopi, 8 à Huit, Marché Plus, Proxi, Sherpa, ED, Carrefour Express)
- Casino (Casino Supermarché, Monoprix, Marché Franprix, Spar). The Casino group also owns Naturalia, a health food store.
- Systeme U (Marché U, U Express)

Gas Station-Marts

Gasoline companies, having lost about 60 percent of their gas sales to stations found at hypermarkets, have equipped their gas stations with small, self-service food stores. (There are approximately 430 throughout France.) These outlets are frequently used for stop-gap purchases and accounted for about one percent of French food sales in 2008.

Traditional Outlets (neighborhood, specialized food stores and open air markets)

Smaller, neighborhood grocery store purchases represented 20 percent of French food sales in 2008, with approximately 50,000 outlets in France. Some are subsidiaries of large retailers such as Carrefour, while others are aligned with independent groups, such as Aldis, Francap, Sugro, Magex, Patisfance, and Prodirest.

Traditional grocers include gourmet stores, such as Fauchon, Hediard, and Benois-Guyard, which carry a wide range of imported products, are located in large and medium-sized cities and attract high-income consumers. The approximately 200 outlets in France offer U.S. exporters easier market entry for products; their drawback is a tendency to purchase smaller quantities.

Internet Sales of Food Products and Beverages

Internet sales of food and non-food products are progressing at a rate of 30% yearly. Worldwide total e-commerce sales in 2008 reached approximately $8.8 billion, (versus $6.8 billion in 2006) of which food and beverage sales accounted for $350 million and 4 percent of e-commerce sales.

SECTION III. BEST PRODUCT PROSPECTS

Large U.S. and other multinational food companies are well established here and their products are adapted to the French market. U.S. exporters will find existing and new market opportunities for high value products in France.

A. Products Identified as Opportunities for U.S. Suppliers

Home food consumption

2008 - Sales in billion dollars

Products	Total sales in France	Comments
Tropical fruits and nuts	2.4	French consumers are open to different flavors. Nuts are primarily consumed in France as snacks.
Fish and seafood	5.3	Health benefits appreciated
Quality wines	6.2	Change in habits: drop in consumption of lower quality wines to the advantage of higher quality wines
Grape and fruit brandies	2.9	
Fruit juices	2.8	Health benefits highlighted
Canned fruits, jams, marmalades and chocolate & confectionery	9.4	Niche opportunities exist for sugar-free, low carb and functional value-added products for chocolate and confectionery products
Biscuits, pastries	5.9	
Tea and coffee	4.3	Change in breakfast habits to tea and herb tea
Frozen foods	6.9	Working consumers: strong growth potential

(1) Excludes cooked, processed meat and sausages

Source: INSEE – Household Consumption

Other opportunities

Products	Comments
Baby foods	Increase in birth rate
Dietary products, including	Health concerns

nutraceuticals	
Soups	Return to tradition
Seafood and fish	Increase in consumption
Pet foods	Increase in pets: French are dog-lovers
Kosher foods	Religious and health concerns
Halal foods	Large Muslim population in France

Health concerns and tax increases on alcoholic beverages have reduced French demand while consumption of non-alcoholic beverages, such as mineral water and fruit juices, is growing. Sales are also on the increase for exotic and tropical fruits (including citrus), fish and seafood (domestic availability cannot meet demand), frozen foods (both ready-to-eat meals and specialty products such as pizza and ice cream), soft drinks, canned fruits, biscuits/cookies and chocolate, tea, coffee and sauces.

Among the increasingly health-conscious French consumer, demand is also rising for organic, health and diet foods, including nutraceuticals. In addition, niche markets exist in France for kosher and halal foods, for which demand continues an upward trend. The growing number of pets has stimulated demand for conventional and organic pet foods.

B. Products Not Commonly Found on the French Market Offering Opportunities to U.S. Suppliers

Products	**Comments**
Specialty seafood, lobsters, scallops	High demand for quality products
Tropical fruits	Receptiveness to new tastes and textures
Certain varieties of nuts	Receptiveness to healthy products
Prepared ethnic foods and meals	Opportunities for ethnic pre-prepared foods such as Cajun or California-style cuisine

C. Products Facing Significant Import Barriers

French regulations prohibit imported products made with vitamin-enriched flour, some U.S. meat and poultry products, and alligator meat. For more information on product trade restrictions within the European Union, please refer to US/EU Mission Food and Agricultural Import Regulation and Standards Report (FAIRS) available at:
http://www.fas.usda.gov/gainfiles/200808/146295548.pdf
For France restrictions and regulations, please visit Post latest FAIRS report at:
http://www.fas.usda.gov/gainfiles/200708/146291922.pdf

A special environmental food labeling requirement is expected to enter into force by January 2011, and at the international level, a new ISO norm (ISO 14067) is being prepared.

SECTION IV. FROZEN FOOD PRODUCTS

In 2008, French frozen food sales increased 2 percent to $11.8 billion compared to 2007. The rise in frozen food sales, despite the economic downturn, reflects the strong potential of this sector. The best-selling frozen food products in 2008 were prepared meals, vegetable and potato products (accounting for 60 percent total sales), meat and poultry, fish and seafood, entrees/hors d'oeuvres (pizzas, quiches, tarts, etc.), desserts, and soups, sauces and herbs. In 2008, home consumption of frozen foods was valued at $6.9 billion, an increase of 8 percent compared to 2007, and represented 58 percent of total frozen food consumption. Private label frozen food products sold in hyper/supermarkets and hard discounters gained ground on branded products.

Quantity of Frozen Foods Sold in Hyper/Supermarkets/Hard-Discounters in 2008

Products	Quantity
Vegetables	119,355 tons
Potatoes	137,713 tons
Fish and seafood	80,870 tons
Prepared Meals	87,236 tons
Pizzas and quiches	40,743 tons
Pastries	4,844 tons
Ice cream	150 million liters

Source: TNS Worldpanel, 2009

- Private labels gained ground in 2008 against branded products.
-
- Vegetables: Private label sales in 2008 represented 80 percent market share by volume and 61 percent market share by value of total vegetable sales. Major branded products were Bonduelle and Findus.

- Fish and Seafood: Private label sales in 2008 represented 51 percent market share in volume and 33 percent market share by value of total fish and seafood sales. Major branded products were Findus and Iglo.

- Prepared, ready-to-eat meals: Private label sales in 2008 represented 59 percent market share by volume and 37 percent market share by value of total prepared, ready-to-eat-meals sales. Major branded products were Nestle and Marie.

- Pizza and quiches: Private label sales in 2008 represented 55 percent market share by volume and 42 percent market share by value of total pizza and quiches sales. The leading branded products are Buitoni, Marie and McCain.

- Potatoes: Private label sales in 2008 represented 54 percent market share in volume and 46 percent in value of total potato sales. Branded products include McCain, Findus, and Aviko.

- Ice cream & desserts: Private label sales in 2008 represented 61 percent market share in volume of total ice cream and desserts sales. Major branded products are Miko, and Nestle.

While frozen foods can be purchased in hyper/supermarkets, France also has unique retail outlets which sell only frozen food products, from entree/hors d'oeuvre to desserts. Despite strong competition from larger full-service food retailers, frozen food stores continue to increase in popularity and market share.

Picard Surgeles is the leading frozen food retailer in France for home consumption , with a 14 percent market share, 766 outlets throughout France and sales in 2008 estimated at 1.7 billion dollars. Picard sells high-end frozen products and offers opportunities for U.S. suppliers of fish and seafood, frozen fruits and vegetables, fruit juices, and prepared specialty meals for private label.

Toupargel is the second largest frozen food retailer in France, after Picard, and the leader for frozen food home deliveries, before Thiriet, Maximo and Argel. In 2008, Toupargel sales were over $560 million. Toupargel offers opportunities primarily for U.S. suppliers of fish and seafood. In 2009, Toupargel opened an internet website "Place du Marché" for consumers to place orders.

Percentage of Frozen Food Sales, per Retail Outlet, in 2007 and 2008
(excluding ice cream)

Type of Outlet	Percentage of Sales in 2007	Percentage of Sales in 2008	Evolution 2008/2007(Percent)
Hyper and Supermarkets	46.2	46.5	+0.6
Home delivery services	21.6	20.4	-5.5
Frozen food stores	18.2	18.5	+1.6
Hard discounters	12.1	12.9	+6.6

Sources: SFSG (French Federation of Frozen Food Industries), and TNS World Panel 2008

<u>Institutional Consumption</u>: Consumption by the restaurant/institution and food service sectors was estimated at $4.9 billion in 2008, an increase of 11 percent compared to 2007, and represented 42 percent of the total French frozen food consumption.

The major distributors of frozen food for the food service sector are:

- Promona

- Brake
- Davigel
- Mikogel
- Aviko
-
- The top products imported in this category are vegetables, fish and seafood products.
-

Definitions
(a) Hypermarket: Stores with more than 2,500 sq.m. (25,000 sq.ft) selling a wide variety of food and non-food items.
(b) Supermarket: Stores with between 400 m2 and 2,500 m2 (4,000 to 25,000 sq ft) selling a wide variety of foods and non-food household goods
(c) Superette: Stores with less than 400 m2 (4,000 sq ft) selling food and basic non-food household goods.
(d) City-center stores: Stores located within cities selling a wide variety of food, specialty foods and non-food items
(e) Hard discounters: Small supermarkets with a limited range of low cost products, often private label.
(f) Gas Marts
(g) Frozen Food Centers: A unique concept of retail store selling only frozen foods from entrees/hord d'oeuvres to desserts.

COMPETITION

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

ROAD MAP FOR MARKET ENTRY INTO FRANCE

Entry Strategy

U.S. suppliers generally benefit from a relationship with a local French agent or representative. Local representatives can provide up-to-date information on business practices, trade laws, sales leads, and marketing and distribution strategies. In many instances, these in-country contacts also serve as importers and distributors. New-to-market and niche products usually enter through importers/distributors. The Office of Agricultural Affairs in Paris maintains an extensive list of potential importers and distributors and can supply information about ongoing activities that provide opportunities to meet the French trade. A directory of European importers "American Foods in Europe – Your Guide to European Importers of U.S. Food and Beverage Products" is available online at http://www.american-foods.org/

Buying Groups: In France, while a few major food retailers buy direct, most major food retailers buy products from central buying offices. These offices usually source products, handle import (customs) formalities, logistics, supply, maintenance, delivery and sometimes pricing and labeling for their retail customers. They insure that foreign-sourced products meet all import requirements, including food, labeling, packaging, and other market specifications. The goal for a U.S. exporter is that its product meets all the import requirements and that the central buying office includes it in its product catalogue. Food retail buyers use this catalogue to make purchases for their stores.

In France, the central buying offices are:

- Groupe Carrefour
- Leclerc
- EMC Distribution,
- ITM Entreprises
- Groupe Auchan
- Systeme U
- Provera France

(contact information on Atttachment I of this report)

French Central Buying Offices in 2008
By Market Share

Groups	***Outlet Names***	***In value***
GROUPE CARREFOUR	*Carrefour, Champion, others*	*27%*
LECLERC	*Leclerc*	*17%*
EMC DISTRIBUTION	*Groupe Casino, Monoprix*	*14%*
ITM ENTREPRISES	*Intermarche*	*14%*
GROUPE AUCHAN	*Auchan, Atac*	*14%*
SYSTEME U	*Systeme U*	*10%*
PROVERA France	*Cora - S. Match, Others*	*4 %*

Source: ACNielsen 2008/ Lineaires 2008

In order to present a product to a central buying office, a U.S. supplier should:

Submit product descriptions and price quotations

Submit products for laboratory testing
Determine sanitary/health certification and other import documents requirements

Building a Relationship with a Hyper/Supermarket's
Central Buying Office or Purchasing Department

Stages / Goal	Action	Follow up
Stage 1 – Create interest in your product. The goal is to be listed or referenced in a buyer's catalogue.	- Send a product promotion kit to the appropriate buyer who transmits it to the marketing department who may ask for samples shows interest or not: if interested, meeting with supplier requested	- with additional information on company and factories . sanitary certificates, ISO, HACCP certificates -- Prices are not necessary at this stage

<u>Specialized importer/distributor:</u>
An importer can offer several advantages to a U.S. supplier: market insight; information about competitors; and established retail business connections.

Stages / Goal	Action / Means
Stage 1 - Establish a contact	- Send a product promotion kit with samples; indicate prices

Stage 2 – Check the supplier's reliability	- The importer verifies that the manufacturing plants meet standards and regulations as well as the financial reliability of the supplier
Stage 3 - Commercial offer	- Price negotiations and discounts for large quantity purchases. Define logistical requirements. An exclusive contract is usually for three years.
Note: - The price needs to be included with the file when building a relationship with an importer, while it is not necessary in building a relationship with a hyper/supermarket.	

SECTION V. UPCOMING TRADE SHOWS

French Trade Shows for Consumer-Oriented Products

France offers a wide variety of trade show venues for food and beverage products. The following table provides details on major consumer-oriented and related trade shows for food, beverages, and taking place in France.

• **VAEExpo (International**	• September 23-24, 2009	Show Organizer: Comexposium/VAE expo

Snack and Food Show) -yearly		Andréa Donkers Godard Tel: (33 1) 76 77 12 74 andrea.donkers@comexposium.com http://www.vaeexpo.com
• **Natexpo (Organic, Health/Dietetic, Cosmectic and Econologic Trade Show)** Paris, France (Interval: 2 years) • Target Market: Europe/International health and dietetic foods, cosmetic and ecologic products	• October 17-19, 2009	Show Organizer: Comexposium Catherine Benhammou Tel: (33 1) 76 77 1151 Andrea Donkers Godard Tel: (33 1) 76 77 1274 andrea.donkers@comexposium.com www.natexpo.com
• **European Sandwich and Snack Show** -yearly- • Target Market: France/Central, Eastern and Western Europe Good venue for exhibiting sandwich, snacks and related food and beverages for the carry out sector	• February 10-11, 2010	Show Organizer: Reed Expositions France Jean-Baptiste Honoré Tel: (33 1) 47 56 2185 Fax: (33 1) 47 56 2404 jean-baptiste.honore@reedexpo.fr http://www.sandwichshow.com
• **Salon International de la Boulangerie, Patisserie, Glacerie, Traiteur et Intersuc (Bakery Pastry, Ice Cream, Chocolate & Confectionery Exhibition)** -yearly- • Target Market :	• March 6-10, 2010	Show Organizer: Europain Developpement Tel : (33 1) 40 16 4448 infos@europain.com www.europain.com

European Food products and ingredients for this sector of the food industry.		
• **CFIA (Carrefour des Fournisseurs de l'Industrie Agroalimentaire)** Rennes Aeroport, France -yearly- • Target market : Europe/International European largest show for retail food and beverage sector	• March 9-11, 2010	Show Organizer: Gilles Ferrod Tel: (33 5) 53 36 7878 Fax: (33 5) 53 36 7879 gferrod@gl-events.com www.cfiaexpo.com
• **Salon des Marques de Distributeurs Alimentaires – MDD Rencontres (Private Label Show)** Paris, France (Interval : yearly) • Target Market : Europe/International	• March 30-31, 2010	Show Organizer: GL Events Gilles Ferrod Tel: (33 5) 53 36 7878 Fax: (33 5) 53 36 7879 gferrod@gl-events.com http://www.mdd-expo.com/
• **SIAL (International Food and Beverage Show)** -every 2 years- • Target Market: Europe/International Traditionally there is a large U.S. Pavilion featuring 150 U.S. companies and associations. USDA-endorsed show.	• October 17-21, 2010	U.S.Pavilion Organizer: http://www.imexmgt.com/shows/sialparis2010

• **SIRHA (International Hotel Catering and Food Trade Exhibition)** - every 2 years - • Target Market: Europe/International European largest show for HRI/Food Service Sector • USDA-endorsed show	• January 22-26, 2011	US Pavilion Organizer: B-For International Bjorn Bieneck Tel: 540 373 9935 Fax: 540 372 1414 bbieneck@exhibitpro.com www.b-for.com

More information about these and other French exhibitions and trade shows can be found under the following Internet address: http://www.salons-online.com/

SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

Internet Home Pages

Internet home pages of potential interest to U.S. food and beverage exporters are listed below:

U.S. Mission to the European Union http://useu.usmission.gov/agri/usda.html
FAS/Washington http://www.fas.usda.gov
European Importer Directory http://www.american-foods.org
FAS/Paris http://www.usda-france.fr
Web site for Professional Trade Shows and Events http://www.salons-online.com

If you have any questions or comments regarding this report, or need assistance exporting to France, please contact the U.S. Agricultural Affairs Office in Paris at:

Foreign Agricultural Service
U.S. Department of Agriculture
Embassy of the United States of America
2, avenue Gabriel
75382 Paris, Cedex 08, France
Phone: (33-1).43.12.2264
Fax: (33-1) 43.12.26 62
Email: agparis@fas.usda.gov <mailto:agparis@usda.gov>
Home page: <http://www.usda-france.fr

Please view our Home Page for more information on exporting U.S. food and beverage products to France, including market and product "briefs" available on specific topics of interest to U.S. exporters.

Importer listings are available from the Agricultural Affairs Office for use by U.S. exporters of US. Food and beverage products. Reports of interests to U.S. exporters interested in the French market include:

Report Number	Name	Hot link
FR5016	Kosher Foods in France	http://www.fas.usda.gov/gainfiles/200505/146119632.pdf
FR5090	Organic Food	http://www.fas.usda.gov/gainfiles/200607/146208245.pdf
FR6023	Dried Fruit Annual	http://www.fas.usda.gov/gainfiles/200604/146187422.pdf
FR6054	Fishery Products Annual	http://www.fas.usda.gov/gainfiles/200610/146249202.pdf
FR6058	Product Brief: French Market for Confectionary, Chocolate & Cocoa Products	http://www.fas.usda.gov/gainfiles/200702/146280097.pdf
FR6064	Retail Food Sector Annual	http://www.fas.usda.gov/gainfiles/200702/146280102.pdf
FR7006	Wine Annual	http://www.fas.usda.gov/gainfiles/200702/146280108.pdf
FR7012	HRI Food Service Sector Annual	http://www.fas.usda.gov/gainfiles/200703/146280654.pdf
FR7023	Food & Agricultural Import Regulations and Standards Annual	http://www.fas.usda.gov/gainfiles/200708/146291922.pdf
FR7041	Ready to eat and Snack Market	http://www.fas.usda.gov/gainfiles/200712/146293360.pdf
FR7042	Halal Food Market	http://www.fas.usda.gov/gainfiles/200801/146293395.pdf
FR8029	Product Brief: Non-Alcoholic Beverages	http://www.fas.usda.gov/gainfiles/200812/146306963.pdf
FR8030	Product Brief: Sauces, Condiments & Dressings	http://www.fas.usda.gov/gainfiles/200812/146306965.pdf

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service Home Page at: http://www.fas.usda.gov

ATTACHMENT I

KEY FRENCH CONTACTS FOR THE FOOD RETAIL TRADE

- ***For the names of buyers, please contact:***
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- ***Office of Agricultural Affairs at the American Embassy in Paris***
- ***Fax: (33-1) 43 12 2662***
- ***agparis@fas.usda.gov***

- **ALDI**
-
- **Head office**
- Parc d’activité de la Goële
- 13 rue Clément Ader
- 77230 DAMMARTIN EN GOELE
- Tel. 33.1.60.03.68.01 - Fax 33.1.60.03.77.84
-
- **Central buying**
- same address
- Tel. 33.1.60.03.68.21 - Fax 33.1.60.03.78.23
- Internet: <http://www.aldi.fr>
-
- **AUCHAN**

- **Purchases, logistics France:**
- 200 rue de la Recherche
- 59650 VILLENEUVE D’ASCQ
- Tel. 33.3.28.37.67.00 - Fax 33.3.28.37.64.00
- Internet: <http://www.auchan.com>
-
- **BAUD FRANPRIX** (CASINO Group)
- 2 route du Plessis
- 94430 CHENNEVIERES SUR MARNE
- Tel. 33.1.45.93.70.00 - Fax 33.1.45.93.70.69

- **DISTRIBUTION LEADER PRICE**
- 2 route de Presles - Zone Industrielle
- 77220 Gretz ARMAINVILLIERS
- Tel. 33.1.64.42.51.52 - Fax 33.1.64.42.51.59
-
- **CARREFOUR**
- **Food Purchasing Office:**
- 26 quai Michelet
- 92595 Levallois Perret cedex
- Tel: 33.1.58.63.30.00 – Fax 33.1.58.63.67.50

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-
-
- Domaine de Beaubourg
- Croissy Beaubourg - BP 81
- 77435 MARNE LA VALLEE CEDEX 2
- Tel. 33.1.64.62.65.00 - Fax 33.1.64.80.40.51
-
-
- **ITM ENTREPRISES** (Group of independents)
- Parc de Tréville
- 1 allée des Mousquetaires
- 91078 BONDOUFLE CEDEX
- Tel. 33.1.69.64.10.72 - Fax 33.1.69.64.26.19
- Internet: <http://www.groupedesmousquetaires.com>
-
- **LIDL** (German Group LIDL UND SCHWARTZ)
-
- 35 rue Charles Péguy
- 67200 STRASBOURG
- Tel. 33.3.88.30.94.00 - Fax 33.3.88.29.00.29

- **ACD Lec**
- Same address as LECLERC
- and Central Buying for Leclerc
- 26, quai Marcel Boyer
- 94859 Ivry sur Seine
- 33.1.49.87.51.26
-
- **METRO FRANCE**
- **Head office**:
- ZA du Petit Nanterre
- 5 rue des Grands Prés
- 92000 NANTERRE
- Tel. 33.1.47.86.63.00 - Fax 33.1.47.86.63.56
-
-
- **MONOPRIX / PRISUNIC**
-
- Tour Vendôme
- 204 rond point du Pont de Sèvres
- 92516 BOULOGNE BILLANCOURT CEDEX

- Tel. 33.1.55.20.70.00 - Fax 33.1.55.20.70.01
-
-
- **SYSTEME U**
-
- 1, rue Thomas Edison
- 94046 CRETEIL CEDEX
- Tel. 33.1.45.17.92.00 - Fax 33.1.45.17.92.20
    -
-
- 15, rue du Louvre
- 75001 PARIS
- Tel. 01.45.08.85.60 - Fax: 33.1.42.21.01.61
- Franprix and Leaderprice
-
- **EMC DISTRIBUTION**
- 28, rue des Vieilles Vignes
- 77316 CROISSY BEAUBOURG
- Tel. 01.61.44.70.00 - Fax 01.61.44.70.01

-
- 1, rue du Chenil
- Domaine de Beaubourg
- 77183 CROISSY BEAUBOURG
- Tel. 01.64.62.79.00 - Fax 01.64.62.79.01

- Cash and carry
- METRO

BP 205 - *92002 NANTERRE CEDEX*

- Tel: 01.47.86.60.00

- PROMOCASH

14 avenue Sommer - *92160 ANTHONY*

- Tel: 01.46.74.55.00
-
- PROCOMARCHE

3 rue Benjamin Delessert - *77550 MOISSY CRAMAYEL*

- Tel: 01.64.88.31.30

- **Wholesalers in dry grocery products:**
- PRODIREST

10-12, Boulevard Arago - *91320 WISSOUS*

- Tel: 01.60.13.82.00
-
- ALDIS

1/11 rue du Puits Dixme - Senia 524

- 94577 ORLY CEDEX
- Tel: 01.41.80.49.27
-
- **Wholesalers in spirits, wines and beverages**
- PRODIREST

10-12, Boulevard Arago - *91320 WISSOUS*

- Tel: 01.60.13.82.00

- ALDIS

1/11 rue du Puits Dixme - Senia 524

- 94577 ORLY CEDEX
- Tel: 01.41.80.49.27
-
- FRANCE BOISSONS :

19 rue des Deux Gares

- 92565 RUEIL MALMAISON CEDEX
- Tel: 01.47.14.37.50

- **Wholesalers in frozen products**

- BRAKE FRANCE

4 allée des Séquoias - 69760 LIMONEST

- Tel: 04.78.66.38.00

- DAVIGEL

BP 41- 76201 DIEPPE CEDEX

- Tel: 02.35.04.76.00

-

- PROMOCASH

14 avenue Sommer - 92160 ANTHONY

- Tel: 01.46.74.55.00
- POMONA

Route Wissous - 91380 CHILLY MAZARIN

- Tel: 01.64.54.20.20

- : M. Raphaël WEISS

- AVIKO

9 bis rue Clément Ader - 60200 COMPIEGNE

- Tel: 03.44.23.30.12
- Tel: 00 31 575 458 200 (The Netherlands)
-
- BRAKE FRANCE SERVICE

Route Nationale de Mons

80200 ESTREES MONS

Tel: 03.22.85.77.77

Fax: 03.22.85.77.55