

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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POLICY

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## France

## Retail Foods

## Annual

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**Report Highlights:**

In 2013, French consumers spent approximately 10 percent of their budgets on food and beverage purchases, including alcohol. Over 70 percent of French household food purchases were made in hyper/supermarkets and hard discounters. However, in recent years the retail sector experienced deep changes with the multiplication of neighborhood distribution channels, development of sales via internet, and drive-thru services. Also, as a result of the economic slowdown in France and the increase in unemployment and taxes, consumers have had to tighten their food budgets. Retailers made additional efforts to attract consumers with lower prices and by increasing the use of private label products.

**Post:**  
Paris

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

**Calendar Year 2011: US Dollar 1 = 0.72 Euros**

**Calendar Year 2012: US Dollar 1 = 0.78 Euros**

**Calendar Year 2013: US Dollar 1 = 0.75 Euros**

**Jan-Aug. 2014: US Dollar 1 = 0.73 Euros**

**Source: The Federal Bank of New York and/or the International Monetary Fund.**

***SECTION I. MARKET SUMMARY***

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 in Section C of this report). In 2013, 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.

In 2013, the overall retail food sales in France were valued at \$320.6 billion, a one percent decrease over 2012 in value, mainly due to the economic situation and a decline in purchasing power. From this amount, hyper/supermarkets and hard discounters represent food sales valued at \$246.1 billion; convenience, gourmet and frozen food stores \$18.4 billion; and traditional outlets \$56.1 billion. Per the National Institute for Economic Statistics (INSEE), retail store food sales dropped by 4.1 percent between January 2010 and August 2013, as a result of the poor economic situation. Food prices increased and the household food consumption slowed down.

Although hyper/supermarkets remain the most popular stores, specialized food stores, frozen food stores, and hard discounts are seeing an increase in sales. French consumers also tend to diversify their purchase across more stores, seeking the best prices for the items they need.

Since 2011, the large retailers have expanded their "drive-thru" service that increased 40 percent in 2013 and is expected to continue expanding and reach \$4 million by 2016. This service allows shoppers to make purchases online, and then simply drive to a designated point at a store or warehouse to pick up their purchase. The service is free of charge and at the same prices as in the store. Also, due to decreased sales in 2013 and early 2014, large retailers were encouraged to expand their lower-priced, private label offering, as well as invest further in smaller format stores.

Despite a slight decrease in frozen food sales, due to a horsemeat scandal in 2013, this segment should continue to show good potential in the long term, mainly for potato based products, ready-to-eat/ethnic meals, and fish/seafood products. Strong prospects also exist for non-alcoholic beverages, including juices, fruits/vegetable and nuts as well as for organic, kosher and halal foods.

**Major French Imports of Selected Agricultural and Food Products  
Calendar Years 2009-2013**

**US\$ Million**

In U.S. \$ Million	2009		2010		2011		2012		2013	
	Total	USA	Total	USA	Total	USA	Total	USA	Total	USA
<b>Animal (including marine products)</b>										
Meat and offals	5,279	6.9	5,204	4.3	5,781	7.4	5,756	6.8	5,994	6.8
Fish and Seafood	4,319	215.9	4,732	238.6	5,186	300.2	4,717	257.1	5,051	241.1
Milk products, including eggs	3,303	5.4	3,541	7.8	4,140	22.9	3,849	8.7	4,394	10.1
<b>Vegetable Products</b>										
Vegetables	2,931	26.2	3,188	28.1	3,142	27.6	3,153	29.0	3,469	39.7
Fruit	4,284	164.4	4,432	166.5	4,537	195.4	4,767	205.6	5,360	217.9
Coffee, tea, spices	1,997	0.5	2,039	0.7	2,739	1.1	2,712	1.2	2,833	1.0
Rice	504	3.4	432	3.4	505	4.0	461	4.7	508	3.6
Corn	329	42.5	254	19.1	288	14.7	276	7.2	340	12.4
<b>Animal and vegetable fats Including oils</b>	2,609	10.5	2,405	11.5	3,275	33.4	2,839	10.8	2,763	12.4
<b>Food industry products/Canned and dry grocery products</b>										
Canned and prepared meat and fish	2,018	7.6	1,874	10.2	2,104	11.9	2,075	8.9	2,344	14.2
<b>Sugar and sweet foods</b>	1,081	7.3	1,015	6.3	1,189	9.3	1,131	4.8	1,197	9.4
<b>Cocoa based foods</b>	2,830	0.1	2,944	0.1	3,309	1.3	2,933	1.9	3,075	1.7
<b>Cereal based foods</b>	3,248	4.0	3,085	6.1	3,533	9.2	3,503	8.8	3,783	10.2
Preparations of fruits, vegetables, nuts and other parts of plants, incl. Jams, fruit purees and fruit juices	3,840	55.0	3,703	54.7	4,237	67.5	4,077	57.2	4,279	53.2
<b>Other prepared foods Including mustards and sauces</b>	2,267	30.4	2,274	30.8	2,596	34.2	2,428	37.9	2,561	50.2
<b>Beverages, including wines, spirits, alcohols and vinegar</b>	3,628	124.3	3,549	156.0	4,212	197.9	3,959	178.9	4,188	212.1
<b>Animal feeds</b>	2,941	10.2	2,865	96.5	3,098	32.8	3,310	8.6	3,596	51.7

Source: Global Trade Atlas/French Customs (Direction Nationale des Statistiques du Commerce Exterieur – DNSCE)

## Definitions

- Hypermarket: Stores with more than 2,500 square meters (25,000 sq.ft) selling a wide variety of food and non-food items.
- Supermarket: Stores with between 400 and 2,500 square meters (4,000 to 25,000 square feet) selling a wide variety of foods and non-food household goods.
- Hard discounter: Small supermarkets with a limited range of low cost products, often private label.
- City Center Store/Superette: Stores with less than 400 square meters (4,000 square feet) selling food and basic non-food household goods.
- Neighborhood Store: Stores located within cities selling a wide variety of food, specialty foods and non-food items.
- Specialized Food Store: A unique concept of retail stores selling a variety of food including frozen entrees/hors d'oeuvres to desserts.
- Gas Marts: Gasoline stations generally equipped with small, self-service food stores.

## **Expected Growth Rate of the Retail Food Market and Sub-sectors**

According to INSEE, the French economy is expected to remain flat during the second quarter of 2014, with a growth limited to 0.7 percent (compared to 0.4 percent in 2012 and 2013 and 2 percent in 2011). The weak growth in France does not hold much hope for improvement in the employment situation, with unemployment expected to reach 10.2 percent, including overseas territories, by the end of 2014. The purchasing power of French households has decreased by 5 percent since 2008. Also, the increase of taxes and social security contributions in 2013 and 2014 reduced household gross disposable income by one percent. Consequently, price will remain the number one concern in French food purchases. 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 budget.

French consumers also appreciate the loyalty programs offered by supermarkets to attract regular customers. Specific promotions are less attractive than consistently lower prices. During the past year, the number of drive-thru service outlets increased by 40 percent to reach 2,721 outlets in early 2014. This service accounted for four percent of hyper/supermarkets and hard discounters total sales in 2013. The drive-thru service is becoming increasingly attractive, especially to senior shoppers. Environmentally responsible behavior is increasing in France and, while only 15 percent of French consumers choose their products based on this criterion, 85 percent are sensitive to it. A common term in France is the “100-kilometer diet” (buying from local producers located within 100 kilometers), favoring regional products, fair trade, recycled packaging, and a lower environmental impact.

The overall number of hyper/supermarkets outlets decreased over the past year, but their surface area has expanded to an average of 232 square meters. At the same time, foreign origin hard discounters, especially Aldi, Lidl and Norma, extended their sales area by about 50 percent, compared to 30 percent for the French hard discounters.

Over time, local factors have influenced the development of traditional outlets. Between 1993 and 2000 the traditional outlets in France lost market share, but since 2000 the number tended to stabilize and even increase for certain types of stores, such as specialty fruit and vegetable, beverage, and dry goods stores. This trend continued in 2014.

## **Trends in Distribution Channels and Number/type of Retail Outlets**

In 2013, the leading French retailers by sales value were: Carrefour; Auchan, Casino, Leclerc, ITM Entreprises (Les Mousquetaires), Systeme U, and Cora. Food sales by these top food retailers were valued at \$236 billion. Hyper and supermarkets are the leading retailers in France with 74 percent of food sales. In line with weak economic situation, the largest retailers will continue to invest in small format outlets in city center stores, with a modern and appealing image, and to adapt their stores to local consumer needs.

Neighborhood/convenience stores are expected to see a decline in sales, while hyper/supermarket sales should continue rising. In turn, hard discounters gained ground against hyper/supermarkets to reach about 14 percent market share in 2013.

### **Major French Food Retailers**

### Number of Stores by Type

Year	2010	2013
Hypermarkets	1698	2013
Supermarkets	5431	5710
Hard Discounters	4613	4562

Source: Lineaires

### Trends in Services Offered by Retailers

For several years, hyper/supermarkets have cut into restaurant/fast-food market share by selling ready-to-eat products, such as roasted meats, fresh-baked bread, and pastries. Increased competition from hard discounters has forced hyper/supermarkets to develop lines of discounted products. As part of this trend, large retailers also increased their development of private label products to capture more value in-house. French legislation in 2006, which limited the number of new hypermarket/supermarkets, prompted large stores to expand existing surface area. Complaints from traditional outlets that this new measure benefitted existing hyper/supermarkets resulted in 2008 in a modification of the legislation included in the “Loi de modernisation de l’économie” (LME), allowing the opening of new stores under 1,000 square meters. In 2008, the LME also enacted a reform to encourage competition that would benefit of consumers, thus permitting suppliers and retailers to negotiate purchase prices. This reform called “Loi Chatel” was aimed at increasing household purchasing power and reducing retailer margins and sales prices. However, to date, due to the weak economic situation, it is difficult to evaluate the impact of this law on food prices.

### Advantages, Opportunities, and Challenges for U.S. Products in France

Advantages/Opportunities	Challenges
A significant portion of French households can afford imported food products which are often more expensive.	Lack of brand and variety awareness of U.S. food products by consumers
The French food retail industry is always looking for new imported food products	Although of interest, introducing new-to-market brands and products is not easy
American food and food product remain quite popular in France	Complying with European and French regulations
Efficient domestic distribution systems	Domestic and intra-EU imports dominate the supply chain
French consumers demand quality, innovative, healthy products	Adapting products to French consumer tastes and expectations
Changing lifestyles, demographic changes and the economic crisis fuel growth in the retail sector	Adapting U.S. products to French consumer needs regarding price practicality, variety, quality and packaging.

## ***SECTION II. ROAD MAP FOR MARKET ENTRY***

## **Entry Strategy**

The most common method of market entry is using an importer to place your product in the French market. Thus, it is important to establish a relationship with an importer and to do so you must provide a product promotion kit, including samples and prices. The importer will verify that your product meets EU import requirements, such as labeling and ingredient regulations and will verify your financial reliability. If interested, the importer will engage in price negotiations and discuss logistical requirements and the length of the contract. FAS Paris maintains a list of importers for your use. A directory of European importers “American Foods in Europe – Your Guide to European Importers of U.S. Food and Beverage Products” is also available online at: <http://www.american-foods.org/>

Importers place your product with retail stores and with central purchasing offices. In France, it is common for large retailers to participate in a central purchasing office to share the costs of purchase and distribution. The central purchasing office buys products direct, as well as from importers and distributors, and provides them to the retail outlets.

## **Central Purchasing Offices/Buying Groups**

In France, 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 labelling, 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. (See “Building a relationship with hyper/supermarket’s central buying office or purchasing department” below).

### **Tips**

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

- Submit product description and price quotations;
- Submit products for laboratory testing;
- Determine sanitary/health certification and other import documents requirements

## **General Import Requirements**

For products exported to France, the following general requirements apply:

Labels should be in French with the following information.

- Product definition
- Shelf life, indicated “used by” and “best before” dates and other storage requirements
- Precautionary information or usage instructions, if applicable
- Statement of contents: Ingredients, weights, volumes, in metric units. All additives, preservatives and color agents must be noted on the label with a specific group name or “E” number
- Country of origin and name of importer or vendor within the EU
- Manufacturer’s lot or batch number

You will find additional labeling rules on food allergens and nutritional products, packaging, container, food additives regulations and trade barriers at: <http://www.usda->

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

### Building a Relationship with a Hyper/Supermarket

Stages / Goal	Action	Follow-Up
<b>Stage 1</b> – Create interest in your product. The goal is to be listed or referenced in a buyer’s catalog.	Send a product promotion kit to appropriate buyer who transmits it to the marketing department who may ask for samples: 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.

### Specialized Importer/Distributor

An importer can offer several advantages to a U.S. supplier, including market insight, information about competitors, and established retail business connections.

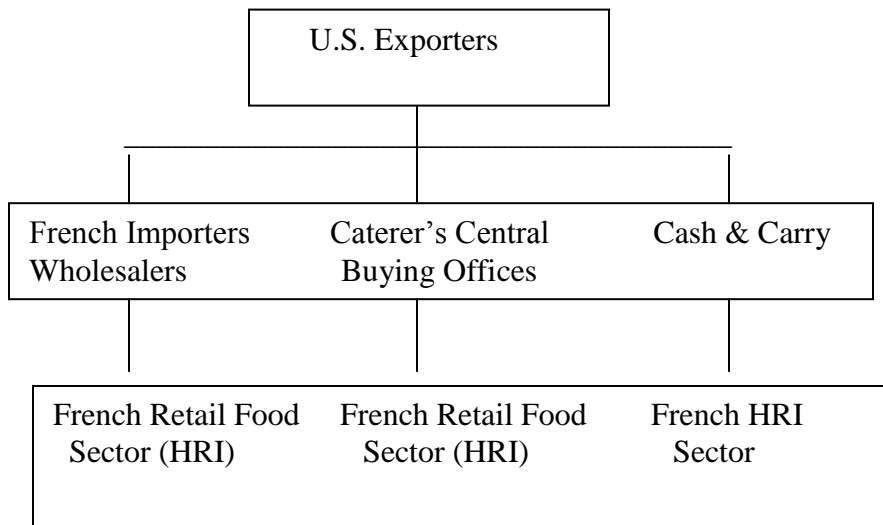
Stages / Goal	Action / Means
<b>Stage 1</b> – Establish a contact	Send a product promotion kit with samples; indicate prices
<b>Stage 2</b> – Check the supplier’s reliability	The importer verifies that the manufacturing plants meet standards and regulations as well as the financial reliability of the supplier
<b>Stage 3</b> – 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.



## Market Structure

### Distribution Chanel Flow Diagram



U.S. exporters can gain market entry to the retail service sectors in several ways: through representation by an importer, through having their products placed in a central purchasing office catalog, and by selling to cash and carry outlets. Food buyers use central buying offices, importers and cash and carry dealers to procure their products.

### *HYPERMARKETS, SUPERMARKETS AND HARD DISCOUNTERS*

#### Company Profiles

#### Major Hyper/Supermarkets/Hard Discounters in France CY 2013, Sales in US\$ Billion

In Billion dollars

Retailer Names/Groups and Outlet Type	Ownership	Sales in CY 2013 (in France and including E-Commerce)	Location	Purchasing Agent Type
Carrefour (Hyper/Supermarkets + convenience stores)	French	47.3 (without tax)	France + foreign countries	Importers
E. Leclerc (Hyper/supermarkets, convenience stores)	French	56 (including tax)	France + Europe	Central Buying office
Intermarche (Les	French	40.2 (including	France +	Central Buying

Mousquetaires) (Supermarkets, hard discounter, and convenience stores)		tax)	foreign countries	Office
Groupe Auchan (hyper/supermarkets, + convenience stores)	French	26.9 (without tax)	France + foreign countries	Direct
Systeme U (Hyper/supermarkets and convenience stores)	French	31.5 (including tax)	France	Direct
Groupe Casino (Hyper/supermarkets, hard discount + convenience stores)	French	26.0 (without tax)	France + foreign countries	Central Buying Office
Cora (Hyper/supermarkets)	French and Belgian (groupe Louis Delaize)	8.1 (including tax)	France and Europe	Importers
Lidl (Hard discounter)	German	9.1 (without tax) – Estimate	France + Europe	Central Buying Office
Aldi (Hard discounter)	German	4.3 (without tax) – Estimate	France + foreign countries	Central Buying Office
Dia (Hard discounter)	Spanish	2.5 (without tax)	France + foreign countries	Central Buying Office
Norma (Hard discounter)	German	0.3 (without tax)	France and Europe	Central Buying Office
Colruyt (Hard discounter)	Belgium	0.5 (without tax)	France and Europe	Central Buying Office
Migros	Swiss	0.2 (without tax)	France and Europe	Central Buying Office
Marks & Spencer (1 M&S food)	British	0.01 (without tax) estimate	France and Europe	Central Buying Office

Source: Lineaires/Panorama Trade Dimensions 2014

### Major Hyper/Supermarkets and Hard Discounters in France by Number of Stores Calendar Year 2013 \*

Hypermarkets		Supermarkets		Hard discounters	
Outlet Name	Number of Stores	Outlet Name	Number of stores	Outlet Name	Number of Stores
E. Leclerc	515	Intermarche Super	1363	Lidl	1533
Carrefour	242	Carrefour Market	969	Aldi	914
Auchan	143	Franprix	882	Dia	865

Geant Casino	117	Super U	773	Leader Price	673
Intermarche Hyper	84	Casino/Hyper Casino	410	Netto	325
Hyper U	71	Simply Market/Atac	386	Le Mutant	98
Cora/Record	59	Monoprix	300	Norma	72

\* Classification was made by outlet name concepts and not surface area.

Source: Lineaires/Panorama Trade Dimensions 2014

### **Number of Drive-Thru Service Locations Calendar Year 2013**

<b>Outlet Name</b>	<b>Number</b>
E. Leclerc	481
Intermarche	449
Groupe Carrefour	361
Systeme U	312
Groupe Casino	247
Groupe Auchan	176
Groupe Cora	65

Source: Lineaires/Panorama Trade Dimensions 2014

## **Major Food Retail Outlet Profiles**

### **Groupe Carrefour**

The French group Carrefour is the world's second largest retailer after Wal-Mart and the largest in Europe. Created in 1959 in southeast France, Carrefour grew rapidly into international markets with stores in 30 countries (Europe, Asia, South America, and North Africa). Carrefour sales in France in 2013 were 35.4 billion euros (\$47.3 billion) and worldwide sales amounted to 74 billion euros (\$99 billion). Carrefour has several store formats, such as supermarkets, convenience and city center stores, all under the name of Carrefour (Carrefour Market, Carrefour Express, Carrefour City, etc. ), depending on whether they are rural or downtown and their sales area. Carrefour is present in Europe, South America and in Asia, as well as in other parts of the world through partnerships with foreign retailers.

Between 2008-2011, after several management changes and new investors, the Group created "Carrefour Planet" in 2010. This is a new hypermarket concept in Europe with organic and frozen food products, as well as fashion, beauty, baby and cultural space including multimedia. In 2013, unrelated to the food market, Carrefour also bought commercial centers (malls) from an investment company. In early 2014, Carrefour acquired the hard discounter DIA that the group had sold in 2011 to a Spanish group. In June 2014, Carrefour announced the acquisition of 53 supermarkets from the Billa chain in Italy.

Although 80 percent of Carrefour private labels are locally sourced, the outlet is looking for new, innovative American oriented food products. Carrefour does not import directly working strictly through importers. FAS Paris can provide a list of French importers/distributors working with Carrefour.

### **E. Leclerc**

E. Leclerc is second largest retailer in France after Carrefour, with increasing sales that reached 42 billion euros in France (\$56 billion) in 2013. Leclerc operates under a franchise system and all of its stores are independently owned. Most of the outlets are hypermarkets representing about 30 percent of the total number of hypermarkets in France. Food products represent 74 percent of the total sales of a typical outlet. Leclerc's focus on low prices and development of specialized sales concepts, such as pharmacies, event ticket outlets, mobile phone outlets, and travel agencies, makes this format attractive to customers. The drive-thru service has also rapidly increased to reach 481 Leclerc Drive outlets in 2013. Leclerc is present in Europe and sources food products thru its central buying office. Clients at Leclerc are diverse, from students to retirees to households with children.

### **Intermarche, Les Mousquetaires**

This chain is focused on low prices, proximity, and smaller scale stores. Intermarche is a group of independents with stores in Europe and foreign countries, including Canada, South Africa, Switzerland, Australia and China. Intermarche is the third largest group in sales behind Carrefour and Leclerc. Total sales in France in 2013 were 30.1 billion euros (\$40.2 billion), of which 75 percent was food products. Most of Intermarche's outlets are supermarkets, a few city center stores and only 84 hypermarkets (4 percent of total French hypermarkets). However, Intermarche has hard discounters (Netto) and cafeteria/restaurants. Half of Intermarche's food products are private label, and 70 percent are either French or European origin. They gave very few foreign suppliers, although they are opened to expanding to international foods. Intermarche imports from their central buying office, but may occasionally buy direct from the supplier.

Clients at Intermarche are diversified and differ from one store to another depending on its geographic location. However, the group recognized that seniors are regular customers looking for good quality foods thru Intermarche's private labels, which commonly cost 25 percent less than branded products.

### **Groupe Auchan**

Group Auchan is privately owned by the Mulliez family and the Schiever Group. Auchan follows a progressive and controlled international growth policy and concentrates its investments on priority development areas, such as Western, Central and Eastern Europe and Asia. Auchan is present in 12 countries but not the United States. Total sales in France in 2013 were 20.1 billion euros (\$26.9 billion). Auchan has hyper and supermarkets, as well as a few convenience and gourmet stores under the names of EasyMarche, Galeries Gourmandes, Partisans du Gout, A 2 pas, and Coeur de nature. Auchan also offers real estate (Immochan) and banking financial products and services (Banque Accord). Private label products represent 25 percent of total food sales. Auchan is always looking to extend its line of private label products, especially in the areas of beverages, coffee, fish, fruit juices, biscuits and snack foods. Auchan group imports direct and is opened to market promotions.

Clients at Auchan are diverse. Although the group carries the same brands all over its stores, they also adapt to the region where the stores are located to offer local/regional or ethnic products to their clients.

## **Systeme U**

Systeme U is the sixth largest retailer in France in terms of sales and the fifth largest retailer in terms of stores. In 2013, Systeme-U total sales in their hyper/supermarkets and convenience store in France amounted to 23.6 billion euros (\$31.5 billion). U brand private label expansion is a priority for the group with the sourcing of new products such as wine, fruit juices, frozen ready-to-eat foods, ethnic foods and seafood. Note that Systeme-U is a good client for Alaska sustainable seafood. Systeme-U imports directly from the seller, especially for private label products.

Systeme-U clients are diverse depending on the store and its geographic location. Systeme-U outlets are considered as proximity stores and the group is looking at expanding its drive-thru service to increase its clientele. Systeme-U has practically no stores outside France.

## **Groupe Casino**

In 2013, Casino total sales in France amounted to 19.5 billion euros (\$26 billion). Casino is present in France and foreign countries with hyper/supermarkets and proximity /convenience stores under the names of Franprix, Petit Casino, Casino Shopping, Casino Shop, Vival, Spar, Chez Jean, Casitalia, Via Italia, and Eco Services. Casino's hard discounter, Leader Price, accounts for 17 percent of the total French hard discounter sales. Groupe Casino sources food products thru their buying office and they are looking for innovative food products not sold by competitors, innovation in terms of packaging, functional foods, as well as food products for their private label line.

## **Cora**

Cora is part of the Belgium group LouisDelhaize and has hypermarket/supermarket stores in France and Europe. Cora, which until 1974 was part of the Carrefour Group, has hypermarkets and supermarkets (Cora, Match, and Record) located in French regional areas. Cora's sales in France in 2013 amounted to 6.1 billion euros (\$8.1 billion). Cora buys products through Provera their Central Buying Office which sources food products from importers.

**Note:** *Generally, for all retail food outlets, clients profiles vary according to the type of outlet (hyper, supermarket or convenience store), its location (large/small cities), and the region in France where the outlet is located.*

## **CONVENIENCE STORES, GAS MARTS**

### **Company Profiles**

#### **Convenience Stores**

Convenience stores fall under the category of small supermarkets (superettes), are generally located in small cities, and frequently opened every day (including Sunday). In 2013, there were approximately 18,000 outlets and their number is expected to rise in coming years with more new concept stores. Convenience stores are often affiliated with large retailers. The main operators in this segment are:

- Francap
- Carrefour
- Casino
- Systeme-U

### Major Convenience Stores by Sales Calendar Year 2013

<b>Retailer Name &amp; Market Type</b>	<b>Ownership</b>	<b>Sales Million Dollars</b>	<b>Number of Outlets</b>	<b>Locations</b>	<b>Purchasing Agent Type</b>
<b>Francap</b> (Small supermarkets/proximity city stores): <ul style="list-style-type: none"> <li>• Coccinelle</li> <li>• Colruyt</li> <li>• CocciMarket</li> <li>• G20</li> <li>• Viveco</li> <li>• Diagonal</li> <li>• Sitis</li> <li>• Panier Sympa</li> <li>• Votre Marche</li> <li>• Rapid' Market</li> <li>• Halles dis</li> </ul>	French	12	150 70 472 130 240 55 69 124 146 87 80	France : Small cities mainly outside Paris and area	Importers
<b>Carrefour</b> (small supermarkets/proximity city stores): <ul style="list-style-type: none"> <li>• Groupe Provenca</li> <li>• Groupe Bernard Hayot</li> <li>• Groupe Dejean</li> </ul>	French	1,217 667	35 9	All over France  Southeast  French Overseas Territory & Dominican	Importers  Buying Office  Buying Office

<ul style="list-style-type: none"> <li>• Groupe Wane (Tahiti)</li> <li>• SDD/SDG <ul style="list-style-type: none"> <li>○ (New Caledonia)</li> </ul> </li> </ul>		307	8	Republic South/Southeast	Buying Office
		400	9		Central Buying office
		160	9	French Overseas Territory	Central Buying Office
				French Overseas Territory	
<p><b>Casino</b></p> <ul style="list-style-type: none"> <li>• (small supermarkets/proximity city stores):</li> <li>• Monoprix</li> <li>• Vindemia</li> <li>• Sherpa</li> <li>• Groupe Caille</li> <li>• Groupe Bernard Hayot</li> <li>• Ho Hio Hen</li> <li>• Cooperateurs de</li> </ul>	French	5,437	503	France	Importers
		1,149	47	French overseas territories	Central buying office
		99	107	French Alps & Pyrenees	Local producers & importers direct
		297	22	French Overseas Department (La Reunion)	Central Buying Office
		200	15	French overseas territory (New Caledonia)	Central buying office
		667	73		Central buying office
		89	26	French overseas	

Champagne				departments Northeast	Central Buying Office
<b>Systeme-U</b> <ul style="list-style-type: none"> <li>(small supermarkets/proximity/city stores):</li> <li>Coop Atlantique</li> <li>Le Mistral</li> <li>Coop de Normandie-Picardie</li> <li>U Proximite Sud</li> </ul>	French	1,260	264	Western France	Central Buying Office
		323	325	South France	Central buying office
		973	264	West, southwest and northeast France	Central Buying office
		40	58	South France	Central Buying Office

Source: Lineaires/Panorama Trade Dimension 2014

### Francap Distribution

Independent small supermarkets, proximity/city stores of the group (Coccinelle, Colruyt, CoccMarket, G20, Viveco, Diagonal, Sitis, Panier Sympa, Votre Marche, Rapid'Market, and Halles Dis) are managed by Francap Distribution. Francap not only operates these outlets but also acts as an advisor as to food purchases (mainly private labels) and negotiations with food suppliers. Francap may be interested by non-GMO's foods in beverages, grocery items and frozen foods. Francap buys only through importers.

### Groups affiliated with Carrefour:

- **Groupe Provencia:** This group operates 35 Carrefour small supermarket outlets: 4 Carrefour, and 31 Carrefour Market mainly located in Southeast France (region Rhone-Alpes). Product sourcing for Provencia is through central buying office, which works with importers.
- **Groupe Bernard Hayot:** This group operates 9 small supermarkets Carrefour located in French overseas territories and departments and Dominican Republic. Product sourcing for Groupe Bernard Hayot is through central buying office which works with importers.
- **Groupe Dejean:** This group operates 8 Carrefour small supermarket outlets: 2 Carrefour, and 6 Carrefour Market mainly located in South/Southeast France. Product sourcing for Groupe Dejean is through central buying office, which works with importers.



- **Groupe Wane:** This group operates 3 Carrefour and 6 Champion located in Tahiti. Product sourcing is through central buying office, which works with importers.
- **Groupe SDD/SDG:** This group operates 1 Carrefour, 1 Carrefour Market, 5 Champion, 1 Promocash and 1 Proxi, in New Caledonia. Product sourcing is through central buying office, which works with importers.

### Groups Affiliated with Casino

- **Monoprix:** This group operates city stores throughout France under the following names: Monoprix; Monop’; Monop’ Daily; Monop’ Station; Monop’ Store; Monop’ Beauty; and Naturalia. Monoprix looking at enhancing its image carries organic, fair trade or sustainable food products. Monoprix offers a range of quality and innovative food products priced generally higher than its competitors. Monoprix is opened to U.S. products and looking for innovative GMO-free products. The group works only with importers.
- **Vindemia:** This group operates stores in French overseas territories under the following names: Jumbo, Score/Jumbo, Spar and Cash. Vindemia sources its products through a central buying office which works with importers.
- **Sherpa:** This group operates mainly in the Alps and Pyrenees regions (southeast and south France) with 107 small supermarkets under the name « Sherpa ». Sherpa sources its products through local producers and importers directly.
- **Groupe Caille:** The group operates stores in French overseas department, mainly La Reunion, with 3 Cash Oi small supermarkets plus 19 Leader Price. The group sources food products through a central buying office.
- **Groupe Bernard Hayot:** In addition to one hypermarket and 7 hard discounters, the group operates 4 small supermarkets Casino and 3 Vival proximity/city center stores in French overseas territories. The group works with a central buying office and importers to source food products.
- **Ho Hio Hen:** In addition to 4 hypermarkets, and 65 hard discounters, the group operates 4 small supermarkets under the names of Casino, and Super H, mainly in French overseas departments.
- **Coopérateurs de Champagne:** The group operated 26 Leader Price mainly in northeast France. The group works with a central buying office and importers to source food products.

### Groups affiliated with Systeme-U

- **Coop Atlantique:** This group operates small supermarkets and city center stores under the names of Super U, U Express, Ecofrais, “1000 Frais” and Coop in western France. Product sourcing through central buying offices working with importers.

- **Le Mistral:** The group operates small supermarkets under the names of U Express and Utile mainly in south France. It sources its products through a central buying office.
- **Coop de Normandie-Picardie:** The group operates small supermarkets under the name of Super U, U Express LM, Point Coop, and C Express in west France (Normandy), southwest, and northeast (Picardie). They source food products through their central buying office and carries 75 percent of food products under their private label.
- **U Proximite Sud:** The group operates 58 small supermarkets under the name of Utile in south France. They source products through their central buying office and importers.

### **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 ('8 a 8' for BP and Carrefour for Total). 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 2013.

### ***TRADITIONAL OUTLETS (NEIGHBORHOOD, SPECIALIZED FOOD STORES, OPEN AIR MARKETS AND INTERNET SALES)***

#### **Neighborhood Stores**

Smaller and independent stores these outlets have slightly increased since 2002. Most of them are specialized food outlets, such as bakeries, butchers, and fish shops, and groceries. They are located both in urban and rural areas. While neighborhood stores in rural areas tend to decrease, these outlets totaled 78,000 stores in 2013, as per the French National Economic Statistics (INSEE). Their sales represent about 20 percent of the French food sales and their products are sourced from wholesalers and wholesale markets. Customers of neighborhood stores are generally medium to upper class.

Traditional grocers include gourmet stores, such as Fauchon, Hediard, La Grande Epicerie, Galerie Gourmande, which carry a wide range of imported products. They 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 and they work directly with importers.

#### **Specialized Food Stores**

- **Grand Frais:** A network of 135 stores of no more than 950 square meters and mainly located in southern France with a few stores in the Paris area. Created in the 1980's to offer consumers the best quality at moderate prices for fruits and vegetables, fish, world food grocery, butcher-delicatessen and dairy products, Grand Frais' total sales in 2013 were \$1.1 billion. Grand Frais

works directly with importers. Lately, Grand Frais introduced U.S. food origin products, such as dried fruits, and is looking to expand its range of manufactured products.

- **Picard Surgeles & other frozen food stores:** Despite strong competition in the frozen food sector from hyper/supermarkets, Picard Surgeles is the leading frozen food retailer in France for home consumption, with a 21 percent market share, 920 outlets throughout France, and sales in 2013 valued at \$1.7 billion. 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. Picard works directly with importers and U.S. suppliers interested should contact FAS/Paris for buyer's name.
- **Toupargel:** 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 2013, Toupargel sales were \$392 million. Toupargel offers opportunities primarily for U.S. suppliers of fish and seafood. Toupargel has an internet website for consumers to place orders.
- **Biocoop:** Biocoop is a network of specialized organic, fair trade, and ecological products, including food and non-food products. Biocoop has 345 stores throughout France and total sales in 2013 amounted to \$773 million. Biocoop sources its products through different buying offices.
- **Open Air Markets:** Originally, open air markets in France were for the sale of locally produced fresh fruits and vegetables, as well as other local products, such as meat, poultry and dairy. They featured lower costs, since there were no packaging, transportation, or middlemen. Nowadays, these local producers still exist in open air markets but large producers and store holders (butchers, poultry and cheese stores) have also established themselves in these markets, especially in large cities. However, the open air markets offer different products depending of their geographic location. It is certain that France's producing areas offer more typical locally produced products than Paris and Paris area. No detailed statistics are available for this small market segment.
- **Internet Sales of Food Products and Beverages:** Globally e-commerce is progressing, especially the drive-thru and home delivery services; however, internet food and beverage sales represent about only one percent of the total food and beverage household purchases, with a value under one billion dollars. The E-commerce for foods is an easy way for women with children, or handicapped people to order heavy products, but customers often contest the lack of innovation in products and services, as well as higher prices.

### ***SECTION III. 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 meat 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.

**Retail Food Sector**  
**Overall Competitive Situation facing U.S. Suppliers**  
**Calendar Year 2013**

<b>Product Category, volume/value of imports from the U.S.</b>	<b>Major Supply Sources &amp; percentage of total French imports in volume</b>	<b>Strengths of Key Supply Countries</b>	<b>Advantages and Disadvantages of Local Suppliers</b>
<p><b>Fruit and nuts, including tropical fruit and citrus</b></p> <p>Net imports: 44,768 tons</p> <p>\$ 217.9 million</p>	<p>A. Spain (38%)</p> <p>B. Italy (7%)</p> <p>C. Ivory Coast (5%)</p> <p>USA – Minor supplier (1.3% share)</p>	<p>A &amp; B: Spain &amp; Italy are EU countries and price competitive as well as geographically close. Italy mainly supplies grapes, while Spain has a wider range of fruits to offer including citrus. South Africa and Israel also supply citrus to France –</p> <p>C: Ivory Coast is a supplier of fruits and bananas and has a lot of French subsidiary companies. However, Morocco, Cameroon, and South Africa are also France’s key suppliers, and have a market share close to Ivory Coast.</p>	<p>Locally, there are very marginal local production for nuts and citrus and none for tropical fruits.</p> <p>France is only a producer of walnuts and mainly for national consumption.</p> <p>Nuts imported from the USA represents over one percent of total nut imports. France is an attractive market for the USA but the competition is tough.</p>
<p><b>Fish and Seafood</b></p> <p>Net imports: 48,946 tons</p> <p>\$ 241.1 million</p>	<p>A. Norway (15%)</p> <p>B. United Kingdom (10%)</p> <p>C. China (6%)</p> <p>USA – Major supplier (6% share)</p>	<p>A &amp; B. Norway dominates the market with 123,193 tons imported, the U.K. is also a strong supplier to France, mainly for the food service market.</p> <p>C. France imports from China pangas fish sold in frozen fillet at Carrefour or Picard. Other fish imports are from Spain, Denmark, and Ireland.</p>	<p>Local resources in fish and seafood do not satisfy increasing demand.</p> <p>USA is a major supplier to France, specially for salmon and tuna.</p>

<p><b>Canned and prepared meat and fish</b></p> <p>Net imports: 469 tons</p> <p>\$ 14.2 million</p>	<p>A. Germany (21%)</p> <p>B. Spain (11%)</p> <p>C. Belgium (7%)</p> <p>USA – Minor supplier (0.1% share)</p>	<p>A, B &amp; C. Germany, Spain and Belgium are price competitive, geographically close and part of the European Union.</p>	<p>Local companies are strong in prepared meat and fish although their number declined over years. They also are affected by rising production costs.</p>
<p><b>Preparations of fruits, vegetables, nuts, including jams, fruit purees and fruit juices.</b></p> <p>Net imports: 14,683 tons</p> <p>\$53.2 million</p>	<p>A. Belgium (17%)</p> <p>B. Spain (13%)</p> <p>C. Germany (12%)</p> <p>USA – Minor supplier (2% share)</p>	<p>A. Belgium dominates the market with preparation of vegetables other than tomatoes (Italy and Spain)</p> <p>B &amp; C. Spain supplies France with prepared fruits, fruit juices, and nuts; and Germany with mushrooms, as well as fruit juices.</p> <p>Fruit juices are also imported from Spain and Brazil, the United States represent a 2% market share.</p> <p>USA market share for nuts imports is close to 2%.</p>	<p>There are approximately 1,100 local companies in the sector of canned fruits and vegetables, including a few major groups and regional canners.</p> <p>France is not a producer of fruit juices except for a few home-made productions.</p> <p>Fruit juices are an attractive market to U.S. suppliers although competition is tough.</p>
<p><b>Prepared foods including sauces, condiments, seasonings, mustards and ice creams</b></p>	<p>A. Germany (20%)</p> <p>B. Belgium (14%)</p> <p>C. Italy (11%)</p> <p>D. Spain (11%)</p> <p>USA – Minor</p>	<p>Spain, Belgium and Germany dominate the market with sauces/condiments/seasonings and mustards.</p> <p>Italy supplies soups, and ice creams.</p> <p>Most of the imports from the U.S. are sauces, condiments and dressings.</p>	<p>Demand for interesting natural or exotic flavors as well as health and wellness products should provide opportunities for U.S. suppliers of sauces/condiments/seasonings, provided they are able to compete with A, B, &amp; D.</p>

Net imports 6,145 tons  \$50.2 million	supplier (1.3% share)		
<b>Snacks (potato and cereal based)</b>  Net import: 92 tons  \$574,930	A. Germany (31%)  B. Spain (15%)  C. United Kingdom (14%)  USA – Minor supplier	A, C: Dominates the market with branded products.  B. Offers exotic flavors.	A few local companies and some multinational firms operate in the market. Demand is for new exotic flavors (olive oil, chili...), healthier content or a combination of both. Popcorn is still on the rise, and the U.S. may offer a variety of new innovative products in the sector.
<b>Beverages, including wines, spirits and alcohols</b>  Net import: 277 MHL  \$212.1 million	A. U.K. (24%) B. Italy (10%) C. Germany (8%)  USA – Medium supplier (5% share)	A, C, dominates the market with branded spirits.  B: supplies wine to France.	France is world's largest wine producer with Italy.  However, a market exists in France for third country wines which have recorded increase during the past years. The U.S. is a net supplier of California wines and its market share increased over years.
<b>Pulses</b>  Net import: 14,907 tons  \$30.2 million	A. China (22%) B. USA (8%) C. Canada (15%)  USA is a major supplier (8% share)	China dominates the market with all varieties of pulses.  USA supplies mainly beans and lentils, so does Canada.	France production of pulses represents 25% of total needs.  The US is a major supplier in the market but has to compete with China in this segment who offers better prices although the quality is lower.
<b>Cereals</b>  Net import:	A. Germany (26%) B. Italy (12%)	A: dominates the market with corn, followed by Ukraine	Very small rice production in south France.

8,222 tons  \$17.5 million	C. Spain (8%)  USA – minor supplier (6% share)	B: dominates the market with rice immediately followed by Thailand and Spain.  USA is 12 French supplier for corn and 14 for rice.	Corn is second vegetable production in France, after wheat, and represents 10% of the total agricultural production area.  US corn supplies are limited in France due to GMOs concerns.
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Source: Global Trade Atlas /French Customs

#### ***SECTION IV. 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 in the sectors listed below, provided they offer good quality, attractive packaging products which remain price competitive.

#### **Products Identified as Opportunities for U.S. Suppliers**

<b>Product Category</b>	<b>Estimated Sales value un 2013 and in billion \$)</b>	<b>Average Annual Growth Rate (in value)</b>	<b>Key constraints over Market Development</b>	<b>Market Attractiveness for USA</b>
Fish and Seafood	9.0	1%	Competition from other suppliers	Health benefits and quality of US products offer opportunities for US suppliers
Citrus fruits and nuts	N/A	N/A	Competition from key established suppliers	US products are considered as quality and safety products
Coffee, tea and spices	3.0	+3%	Lack of awareness for US products	The market remains a niche for US suppliers
Canned fruits and vegetables:	8.7	+12%		

<ul style="list-style-type: none"> <li>• Canned fruits, jams, marmalades</li> </ul>	1.8	+7.2	High tariff on sugar content	Niche market
Other food products:	29.0	+12%		
<ul style="list-style-type: none"> <li>• Sauces, condiments, &amp; seasonings</li> </ul>	2.8	+3%	Competition from key established multinational suppliers. Products to be GMOs free.	U.S. suppliers to provide new exotic and natural flavors and attractive packaging.
<ul style="list-style-type: none"> <li>• Salted and sweet snacks</li> </ul>	1.8	+5%	High tariff and competition from large multinational.	Demand for new flavors and healthy content. Consider U.S. products to be sold for private labels.
<ul style="list-style-type: none"> <li>• Sugar, chocolate, and confectionery</li> </ul>	6.1	+2%	High tariff, adapt to European and French regulations. Also, competition with key established multinationals.	Niche opportunities for sugar-free, low carb and functional value-added products.
Beverages:	24.0	+3.2%		
<ul style="list-style-type: none"> <li>• Quality wines</li> </ul>	12.7	+4%	Competition from third country wine producers, and high tariffs.	Demand for quality wines and exotism should boost U.S. sales with market driven approach to business.
<ul style="list-style-type: none"> <li>• Fruit juices</li> </ul>	3.1	+3%	Competition from Large groups.	U.S. suppliers offer high quality juices and concentrates – Health benefits are appreciated from customers and should benefit US products.
<ul style="list-style-type: none"> <li>• Carbonated</li> </ul>	2.2	+4.3%	High tariffs & fierce	



drinks			competition from multinationals.	US suppliers should offer sugar-free and low-calorie carbonates. Attractive packaging is a plus to these drinks directed to young population.
Bakery & biscuits	5.8	+1%	High tariffs due to sugar content & competition from local artisanal products.	Attractive to U.S. suppliers with high quality products, mainly for sale in gourmet stores.
Frozen foods	12.1	-1.2%	Frozen food market in 2013 was affected by horsemeat found in lasagnes; thus a slight decrease of 2% volume sales was noted on the overall frozen food sales. However this should not affect this sector on the long term. Competition from key established suppliers and multinational groups. Avoid meat products which require EU certification.	Vegetables and potato products offer opportunities as well as prepared meals, desserts and soups.
Canned and prepared meat and fish	47.6	+1%	EU certification required for meat and fish products	US suppliers with required certification for their product and offering innovative products can find a niche.
Pulses	1.8	-1%	Competition from key established suppliers.	U.S. suppliers carry high quality products and should continue valorising the nutritional

				aspect of their pulses.
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N/A = Not Available

Source: INSEE – Food Industries Production

### Products not Present in Significant Quantities but That Have Good Sales Potential

Product Category	Estimated sales value in 2013 in billion \$)	Average Annual Growth Rate	Key constraints over Market Development	Market Attractiveness for USA
Tropical fruits	N/A	N/A	Competition with French overseas department and territories producers (banana and pineapple) High transportation costs	French consumers are open to different flavors. U.S. suppliers may find a niche to offer tropical fruits and sale to specialized gourmet stores.
Specialty seafood, lobsters, scallops	N/A	N/A	Competition from key suppliers.	High demand for quality products. Opportunities for U.S. suppliers able to compete with key suppliers.
Sweet potatoes	N/A	N/A	Not very well-known from French consumers, it is mainly consumed by certain ethnies.	This market is likely to become more dynamic as consumers gain product understanding. Opportunities will exist for development by U.S. sweet potato suppliers and relevant trade associations.
Baby foods	1.3	+1%	Competition from mainly two major groups.	Lack of time for preparation of meals, increase the demand. This market is attractive to U.S. suppliers with high quality/innovative foods and EU certification for meat products.
Dietary products including nutraceuticals	2.7	+12%	Strict EU and French regulations apply to these products.	This is a fast growing and lucrative market attractive for the numerous US suppliers.

Energy drinks	0.2	+7%	Fierce competition from 3 giants of the soft drink market and Red Bull, and strict ingredient regulations apply to these products.	Fast growing market attractive to US suppliers carrying good taste and innovative products provided they are ready to compete with the sector leaders.
Soups	0.6	+3%	Competition from local manufacturers.	Return to tradition, U.S. suppliers with innovative quality and tasty products may find a market.
Pet foods	3	+6.5%	Competition from multinational groups. Pet plants require certification.	Growing number of pets stimulates demand for conventional and organic pet foods.
Organic foods	5.8	+19%	Strict EU regulations on production and countries equivalency apply for imported products from third countries. Note that the US has an equivalence arrangement with the EU.	Increasing health-concern and various food crisis boosted this market segment. Attractiveness for US organic food suppliers with innovative products, as well as ethnic and tropical organic foods that cannot be found in France.
Certain varieties of nuts (cajun, pecan, macadamia)	N/A	N/A	Retail market for certain nut varieties is still a niche. The product is not mainstream and is mainly consumed as snack mix for aperitif and for special occasions (christmas)	This market is likely to become more dynamic as consumers gain product awareness and receptive to new taste and texture.
Prepared ready-to-eat ethnic foods and meals	7	+5%	Competition from key established suppliers. EU plant certification for meals containing meat.	Demand for new flavors and ethnic pre-prepared foods provide opportunities for US suppliers able to compete with key suppliers.
Kosher foods	0.1	+16%	Competition from local wholesalers and key suppliers. Products to be certified Kosher by religious authorities.	Religious and health concerns boost sales of kosher products beyond the community offering opportunities for US suppliers.

Halal foods	8	+10%	Competition from multinational groups and key suppliers. Products to be certified Halal by religious authorities.	A large Muslim population in France generates a 10 % annual increase in Halal foods offering opportunities for US suppliers.
Ice creams	1.5 (home consumption only)	+3%	Competition from large groups. EU regulations and certification	To increase sales, French manufacturers constantly innovate on format packagings, colors, etc. US suppliers having high quality innovative products may find a niche in this market.

N/A = Not Available

Source: INSEE/LSA Magazine

### **Products not Present Because They Face Significant Trade Barriers**

- Vitamin-enriched flour
- Meat and Poultry products
- 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://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Narrative\\_Brussels%20USEU\\_EU-27\\_12-30-2013.pdf](http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Narrative_Brussels%20USEU_EU-27_12-30-2013.pdf)

### ***SECTION V. POST CONTACT 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/>  
FAS/Washington <http://www.fas.usda.gov>  
European Importer Directory <http://www.american-foods.org>  
FAS/Paris <http://www.usda-france.fr>

#### **Questions/Comments and Assistance**

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

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Home page : <http://www.usda-France.fr>

**Please view our Home Page for more information on exporting U.S. food and beverage and find list of French market sector/briefs and other detailed reports.**