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**Report Highlights:**

In 2024, French imports of U.S. food and agricultural products reached approximately \$1.05 billion, reflecting modest growth. Key growth sectors include tree nuts, seafood, specialty beverages, and health-oriented products. Despite economic headwinds, France remains a significant market for U.S. exporters, particularly in premium and niche segments.

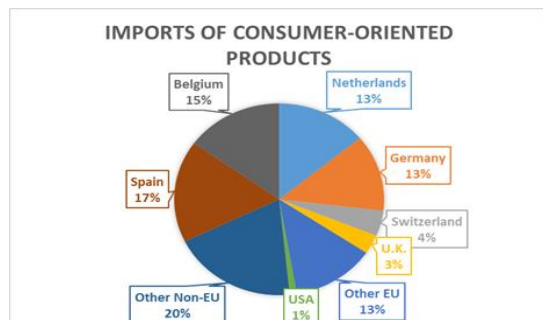
## Market Fact Sheet: France

### Executive Summary

In 2024, gross domestic product (GDP) was estimated at \$3.162 trillion. France is the world's seventh largest economy and the second largest in the EU, endowed with substantial agricultural resources.

### Imports of Consumer-Oriented Products

Primary imports from outside the EU include oilseeds, fruit, and distilled spirits. Imports from the EU are primarily meat, dairy, and vegetables. France has a positive trade balance in agricultural and food products, reaching \$16.6 billion in 2024. French imports from the United States reached \$1.05 billion in 2024, led by seafood, tree nuts, soybean and alcoholic beverages.



### Food Processing Industry

France's food processing sector encompasses approximately 19,000 companies with total annual sales exceeding \$176.7 billion. Small- and medium-sized enterprises (SMEs) account for almost 98 percent of the industry. It is the leading sector of the French economy with a strong reputation for quality and innovation.

### Food Retail Industry

In 2024, approximately 65 percent of all retail food sales in France were in the hyper-supermarket and discount store format. E-commerce food sales increased by more than 15 percent compared to 2021 and now represent around 14 percent of total retail food sales.

### Food Service Industry

France's HRI sector recorded \$126 billion in sales revenue in 2024. Hotels and restaurants account for approximately 58 percent of sales while institutional food service represents 20 percent.

### Quick Facts CY 2024

**Imports of Consumer-Oriented Products** (*USD billion*): 53. This figure does not include U.S. products exported to France transshipped through other EU countries.

### List of Top 10 Growth Products in Host Country

Seafood, almonds, peanuts, pistachios, grapefruit, sauces, pet food, food preparations, beer, wine, and whiskey.

### Food Industry by Channels (USD billion)

Food Industry Output	176.7
Food and Ag. Exports	88.9
Food and Ag. Imports	72.3
Retail	394
Food Service	126

### Top 10 Host Country Retailers

1. Carrefour	6. Systeme U
2. Auchan	7. Lidl
3. E. Leclerc	8. Cora
4. ITM Entreprises	9. Aldi
5. Casino	10. Schiever

### GDP/Population

Population (*millions*): 68.1

GDP (*trillions USD*): 3.2

GDP per capita (*USD*): 47,359

Sources: TDM, ANIA

Strengths	Weaknesses
France is one of the largest consumer markets in Europe.	U.S. exporters face competition from EU FTA partners who benefit from tariff-free market access.
Opportunities	Challenges
A large food-processing industry seeking a wide range of ingredients.	Non-tariff barriers can complicate the process for exporting to France.

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# 1. MARKET SUMMARY

France's economy expanded modestly in 2024, with GDP growth estimated at 0.8 percent. Economic activity has been constrained by sluggish domestic demand, persistent inflation, and geopolitical uncertainty. Nonetheless, key indicators suggest gradual improvement. Inflation has eased to an average of 2.4 percent, and unemployment remains relatively stable at 7.4 percent. The French government, under President Emmanuel Macron, continues to prioritize fiscal responsibility. After implementing significant pension reforms in 2023, efforts in 2024 have focused on controlling public spending and reducing the national debt. The public deficit is projected to decline to 4.2 percent of GDP in 2025, down from 4.8 percent in 2023. Analysts remain cautiously optimistic as business confidence stabilizes, and investment begins to rebound across key sectors such as manufacturing, energy, and food production.

Table 1: France Key Trade and Demographic Information for 2024	
Ag. Imports from all Countries	\$74.1 billion
U.S. Market Share	1.4 percent with \$1.05 billion
Consumer Food Imports from All Countries	\$54 billion
U.S. Market Share	1.3 percent
Total Population/Annual Growth Rate	68.1 million – 0.2 percent annual growth
Urban Population	55.8 million (2023)
Number of Metropolitan Areas	4: Paris, Marseille, Lyon, and Lille
Inflation	2.4 percent, projected 2025 at 1.9 percent
Size of the Middle-Class	48 percent of total population
Per Capita Gross Domestic Product	\$47,150 (2024 estimation)
Unemployment Rate	7.4 percent
Percent of Population Employed	68.4 percent

Statistics from the Trade Data Monitor, INSEE, Eurostat, French Customs.

## Bilateral Trends

The commercial and economic relationship between the United States and France remains among the most enduring and strategically important globally. Despite evolving political dynamics and occasional policy divergences—particularly on defense, digital regulation, and trade enforcement—the two nations maintain a strong foundation of cooperation rooted in shared democratic values and mutual interests. France continues to be one of the leading European destinations for U.S. foreign investment, and the United States remains the top non-EU investor in France. Ongoing diplomatic engagement, coupled with high levels of academic, cultural, and technological exchange, reinforces this partnership. France’s advanced infrastructure, world-class research institutions, and innovation-driven economy continue to attract American businesses. However, recent domestic political shifts and social unrest in France have underscored a volatile climate, which U.S. stakeholders are monitoring closely for implications on labor stability, regulatory enforcement, and market access.

Trade and investment ties between the United States and France remain robust. Bilateral trade exceeds \$1 billion daily, underscoring deep commercial integration. U.S. exports to France include industrial goods such as aircraft, engines, chemicals, electronics, medical devices, and advanced software systems.

According to the U.S. Bureau of Economic Analysis, French foreign direct investment (FDI) in the United States totaled approximately \$378 billion in 2023, while U.S. FDI in France stood at over \$90 billion. More than 4,600 U.S. companies operate in France, employing close to 500,000 workers. In 2024, U.S. exports of goods and services to France reached approximately \$50.4 billion, a slight recovery from 2023. U.S. agricultural exports held steady at \$1.05 billion. Meanwhile, French exports to the United States increased by about 4.2 percent, maintaining France's position as one of the top EU exporters to the American market. The bilateral trade surplus for the United States with France stood at \$6.8 billion in 2024. ([BEA, French Customs](#))

U.S. companies that are based in France continue to view France favorably despite a very challenging economic environment. Many of France's historical challenges for foreign investors, such as overall labor costs and labor protections, social legislation, and the complexity of administrative procedures persist, but France's capacity for innovation and research, recent pro-business regulations, and the government's ecological transition efforts are significant draws. France is among the least restrictive countries for foreign investment. There are no statutory limits on foreign ownership of companies, excluding those in certain specified sectors. Any acquisition of a domiciled company or subsidiary operating in sectors deemed critical to France's national interests relating to public order, public security, and national defense, or conducting R&D on critical or dual-use technology for application in those sectors, are subject to prior notification, review, and approval by the Minister of the Economy, Finance, and Industrial and Digital Sovereignty.

## **French Consumption Trends**

The purchasing power of the average French consumer continued to face pressure in 2024, following declines of 0.3 percent in 2022 and 0.4 percent in 2023. A recent report by Secours Catholique described food insecurity levels as the highest since World War II ([Secours-Catholique Report 2023](#)). For low-income households, food expenditures can account for 30 percent or more of the family budget. As a result, French consumers are highly price-sensitive and increasingly focused on value. While environmental sustainability remains a concern, economic pressures have led many consumers to prioritize affordability over ecological considerations. Whenever possible, consumers generally prefer locally produced products that are more directly linked with producers they know and recognize. (See [Gain Retail Foods](#)).

France's hotel, restaurant, and institutional catering (HRI) sector is estimated at \$70 billion in sales revenue. Hotels and restaurants account for approximately 60 percent of sales, while institutional food service represents 60 percent. (See [Gain Food Service](#) ).

## **General Consumption Trends**

Over the last three decades, France has witnessed significant socio-economic and demographic changes which are fundamentally transforming food consumption trends. Traditionally, French consumers have enjoyed a very close cultural and historical relationship with food that often harkens to a romanticized bygone era belonging to grandparents and great-grandparents. Within this context however, individual regional experiences can vary widely from north to south, east, and west. More recently, urbanization and especially immigration have ushered numerous changes that challenge traditions, especially as the tastes and preferences of younger generations are more defined by convenience, value, and novelty /

innovation. Taste and perceived health benefits remain important drivers of food consumption. Ethnic foods from Asia, the Middle East and Africa are very popular – especially Turkish, Japanese, Chinese, Indian and Moroccan cuisine. Halal and kosher certified foods are also in high demand, particularly in neighborhoods that are predominantly Muslim or Jewish. In recent years, there has been a growing interest in American food products, especially BBQ, Cajun, and American style gourmet burgers. French consumers are generally very aware of food safety and sanitation issues. Food safety scares are widely publicized, and public perceptions tend to linger long after problems appear to have been resolved. Food safety concerns over pesticide residues, GE's and trans fats are driving consumer demand for natural and organic food products, natural fruit juices, and organic produce. In addition, consumers are increasingly demanding Omega 3 rich foods like fish and seafood, vegan food, gluten free products, and food supplements. As the French food service industry is under pressure to move away from frozen foods, there is a lot of interest in developing simple menus around fresh consumer-ready/easy to prepare products.

The French food market is highly developed, sophisticated, and well supplied with quality products from all over the world. France's transportation infrastructure is built on advanced technologies and a very high-level of government investment. The food industry is a major beneficiary of these investments, and today, the French food sector represents almost 20 percent of France's total industry value. To operate or sell in France, U.S. companies must navigate a complicated labyrinth of national and European regulations and standards. Retail distribution chains and networks are also very concentrated, frequently dominated by French suppliers that can exercise control over stringent selection processes. To successfully enter the French market, foreign suppliers should be prepared to have a creative marketing approach and the flexibility to absorb high retail price mark-ups.

**Table 2: Advantages and Challenges in the Market Facing Exporters**

Advantages	Challenges
More than 75 percent of the French population lives in urban areas, where there is a strong demand for international cuisine.	Some French consumers have irrational food fears and choose food products based on perceived rather than real food safety.
French per capita income is roughly comparable to that of the United States.	French consumers are very exacting when it comes to quality and innovation.
A flourishing tourism industry increases demand for hotel and restaurant products.	Price competition is fierce.
U.S. fast food chains, theme restaurants, and innovative food processing can create demand for American food ingredients.	Certain food ingredients are banned or restricted in the French market.
Domestic distribution systems are very efficient.	Marketing costs to increase consumer awareness are very high.
American food and food products can be appealing.	Mandatory customs duties, sanitary and phytosanitary regulations, and labelling requirements can be very onerous.
US-EU organics equivalency agreement in place since 2012 increased the market for U.S. organics.	The EU labelling requirement of the 0.9 percent biotechnology threshold excludes many U.S. processed products.

## **II. EXPORTER BUSINESS TIPS**

### **Multilateral Agreements & Business Customs**

As an EU member state, France benefits from custom union agreements with Turkey and Andorra. The European Union also has preferential trade agreements with Norway, Iceland, Switzerland, Liechtenstein, Israel, the Palestinian Authority, Tunisia, Morocco, Jordan, Egypt, Lebanon, Syria, Algeria, Mexico, and South Africa. African, Caribbean, and Pacific (ACP) developing countries have non-reciprocal preferential access to the European market under the Cotonou Agreement. Other developing countries enjoy preferential access under the Generalized System of Preferences (GSP). The EU trade agreement with Canada (CETA) provisionally entered into force in September 2017. However, in March 2024, the French Senate rejected its ratification citing unfair competition. While the CETA is expected to be approved eventually, the action by the French Senate is a reminder of the very complicated trade politics, especially in agriculture. The EU-Japan Economic Partnership Agreement, which came into effect in 2019, is seen as relatively benign for French agriculture and has generated little controversy. In the wake of Brexit, the EU and the United Kingdom (UK) finalized a Trade and Cooperation Agreement, which has been provisionally applied since January 1, 2021, and formally entered into force on May 1, 2021. The EU remains the UK's largest and most important trading partner. Meanwhile, the EU-Mercosur free trade agreement represents a significant strategic partnership, but its implementation continues to face obstacles. Key concerns among EU member states, particularly regarding the potential impact on the agricultural sector, have delayed full ratification. For countries like the United States that do not have a preferential trade agreement with the EU, exports tend to be relatively less price competitive.

### **Market Strategy**

To successfully export to France, companies are strongly encouraged to carefully verify compliance with French and EU food law, customs requirements, market restrictions, as well as specific market characteristics, including seasonal demand. High quality and geographically distinct products like Florida grapefruit, California wine, Alaska and New England seafood, Tex-Mex or Cajun style foods are widely recognized and appreciated. Product image, including innovative packaging, is very important. Companies are encouraged to participate in trade shows and eventually organize targeted marketing events such as in-store promotions to introduce new products.

Many processed food products are subject to additional import charges due to sugar, milk, fat, milk protein, and starch content. French regulations limit market access to numerous U.S. agricultural products including, but not limited to, products derived from biotechnology, enriched flour, bovine genetics, exotic meat (alligator), bird meat (ratite), live crayfish, hormone treated beef and bison meat, certain fruits and vegetables, and pet food.

After release from customs, foods are subject to ad valorem duties that are levied under the Common External Tariff. Customs duties differ according to product. In addition, foods that are imported into France are also subject to a Value-Added Tax (VAT). Currently, the VAT is generally charged at one of the following rates:

- A standard rate of 20 percent applies to alcoholic beverages, some chocolates, and candies.

- A reduced rate of 5.5 percent applies to most other agricultural and food products.

For additional information on restrictions, standards, and regulations, please refer to the EU and FAS/Paris Food and Agricultural Import Regulations and Standards Reports (FAIRS).

U.S. suppliers may also contact the following organizations for additional support:

- **State Regional Trade Groups (SRTG)** are non-profit trade development organizations that help U.S. food producers and processors connect to markets overseas. These groups are formally linked to U.S. State Departments of Agriculture, and they receive public and private funding to carry out research and promotional activities internationally. For more information, please contact your local state regional trade group representative office:

<https://www.fas.usda.gov/state-regional-trade-groups>

- **The U.S. Agricultural Export Development Council (USADEC)** is the umbrella organization representing U.S. trade associations, including the SRTGs. The mission of USAEDC is to help coordinate and develop synergies across different sectors. For an overview and additional information on various USDA cooperator groups, please refer to the [www.usaedc.org](http://www.usaedc.org) website. Commodity Cooperator Groups regularly organize trade missions (and reverse trade missions), bringing U.S. exporters to the market, as well as foreign buyers to the U.S. Many initiatives are organized around trade shows or other events.

### III. IMPORT FOOD STANDARDS AND REGULATIONS/IMPORT PROCEDURES

Once all financial and customs arrangements are complete, goods must be imported within six months. For certain goods originating outside the European Union, a specific import or export license may be required depending on the product.

Additionally, **all shipping documents must be submitted in French**. This includes the commercial invoice, the bill of lading or air waybill, the certificate of origin, the sanitary and/or the veterinary or plant health certificate for specific products. Bilingual documentation or documentation accompanied by an official translation is acceptable. Exporters must ensure that their products fully comply with French regulations verifying customs clearance procedures **BEFORE** shipping the products to France.

Exporters are strongly encouraged to work closely with their French importer or distributor to ensure a seamless customs clearance process. For additional information, please consult the [Country Commercial Guide](#) prepared by the U.S. Department of Commerce.

#### Labeling/Packaging Requirements

All product labels must be clearly written in French and should include the following information: product definition; shelf life; warning, precautionary information, or usage instructions; a list of contents (ingredients, weights, volumes, etc... in metric units). All additives, preservatives and color agents must be clearly noted on the label per EU regulations with specific group name or 'E' number, the product's country of origin, the name of importer or vendor within the EU, and the manufacturer's lot or batch number.



## **Mandatory Labeling of Genetically Engineered (GE) Products**

Regulations [\(EC\) 1829/2003](#) and [\(EC\) 1830/2003](#) set European policy standards on biotech traceability and labelling. Each EU Member State can put in place specific national requirements for biotech-free labelling. In April 2004, France implemented EC 1829/2003 and 1830/2003 Regulations. The Fraud Control Office of the Ministry of Economy, Finance, and Industry (DGCCRF) is the designated authority ensuring compliance with the regulation.

## **Voluntary “GE free” Labelling Systems**

In France, the government has implemented a national voluntary “GMO free” labelling system. This system only applies to food produced in France (i.e., it does not apply to imports):

- Plant products can be labelled as “GMO free” if they contain less than 0.1 percent GE plants.
- For animal products, two thresholds are set which are indicated on the label: 1) under 0.1 percent is labelled as “fed without GMO plants (0.1 percent),” and 2) under 0.9 percent as “fed without GMO plants (0.9 percent).”
- For processed animal products, milk and eggs included, labels can note “sourced from animals fed without GMO plants (0.1 or 0.9 percent).”
- For apiculture products, there can be no biotech cultivation within three kilometres of an apiary.

“GE free” labels are most frequently found on animal products (meat, dairy products, and eggs), canned sweet corn and soybean products. It is forbidden to claim that GE free products have a better nutritional, health, or environmental value.

## **Transport of goods to and from France**

French transportation infrastructure is among the most advanced in the world, benefitting from advanced technology and a high-level of government investment. For air freight, the three main entry points are Orly and Charles de Gaulle airports (close to Paris) and Saint-Exupéry airport in Lyon. France has twelve major seaports capable of handling container ships. The largest seaports - Le Havre, Rouen, Paris (often referred to as HAROPA), Dunkirk and Marseille – account for over 60 percent of all traffic. France also has an extensive highway and river-transport network. The Société nationale des chemins de fer français (SNCF) offers one of the fastest and most technologically advanced rail systems in Europe. French telecommunication infrastructure is similarly advanced. Many U.S. products entering France are transshipped through other EU markets, especially the Netherlands, Belgium, Germany, and the UK. For transshipments through the UK, exporters are strongly encouraged to verify regulatory requirements that may have changed due to Brexit.

## **IV. MARKET SECTOR STRUCTURE AND TRENDS**

French business practices are very similar to those commonly used in the United States. Transactions tend to be direct and straightforward. The United States and France produce many similar goods and services which often compete in both markets. Marketing products and services in France is generally similar to marketing in the United States. French business representatives are sophisticated, cultured and very knowledgeable. Successful partnerships take time and effort to develop as each side adapts to



different cultural factors and legal norms. For more information on French distribution and retail market entry strategies, please refer to the FAS Paris [Food Retail Sector Report](#).

The French HRI sector relies on the services of food importers, wholesalers, and distributors. Working with a well-established distribution channel is often the key to successful market development. For more information, please refer to the FAS Paris [HRI](#) report.

Companies wishing to export to France are highly encouraged to research and develop a detailed marketing plan **prior** to entering the market. Mistakes tend to be very expensive. Companies should work with an experienced importer, local agent, or distributor. Local companies not only know the market and can help formulate a successful marketing strategy, but they will also know how to best navigate the distribution channel and assist with customs and labeling requirements. New exporters should also consider investment in promotional activities, including trade shows, point of sale promotions and advertising campaigns, to gain exposure and develop market contacts.

**V. AGRICULTURAL AND FOOD IMPORTS**

For U.S. exporters, the French market offers attractive opportunities for regionally distinct high-quality products. With growing recognition and consumer demand for U.S. seafood, particularly salmon, cod, scallops and lobsters, products from Alaska and New England are gaining popularity. U.S. craft beer and distilled spirits are also in high demand, especially when quality is combined with a distinct story and identity. Other products that have good market potential include fruit juices, soft drinks, flavored spring waters, dried fruit and nuts, fresh fruits and vegetables (particularly tropical), frozen foods (both ready-to-eat meals and specialty products), snack foods, tree nuts, ethnic or regional products, innovative dietetic and health products, organic products, soups, breakfast cereals, and pet food. There are also niche markets for non-hormone treated U.S. beef, wild rice, candies, and kosher and halal foods. Demand for traditional bulk commodities, including oilseeds, protein meals, feeds and grains, is also strong, but these are primarily price driven markets that depend on prevailing market conditions.

**Table 3: France's Consumer Oriented Best Prospects**

Product Category	2024 Total Imports (in million dollars)	Average Percentage Market Share Change (2024-2023)	Key Constraints over Market Development	Market Attractiveness for USA
HS 03. Fish and Seafood	\$189	Plus 25%	Competition from other suppliers	The United States ranks 7 <sup>th</sup> , far behind the U.K. and Norway; however, health benefits and quality of U.S. products offer opportunities for U.S. suppliers primarily for frozen Alaska Pollock fillets, fresh and frozen scallops, frozen surimi base, live lobster, and frozen salmon.
HS 08. Fruits and nuts	\$183	Plus 10.05%	Competition from key established suppliers	U.S. products are considered as quality and safety products. France is the leading European market for U.S. grapefruits; however, sales are impacted by high prices. The most popular nuts sold in France are almonds and pistachios. Most sales from the U.S. are bulk and for the processing industry.

<b>Distilled Spirits</b>	\$136	Plus 5.63%	Competition from local production and imports from European countries. High Tariffs on hard alcohol.	U.S. whisky and bourbon are considered quality products; opportunities exist, but high tariffs have a negative impact on sales.
<b>Wine</b>	\$96.7	Minus 1%	Competition from domestic production and imports from European countries	The market remains a niche for U.S. suppliers, but opportunities exist to compete with other countries present in the market for quality wine.

Source: Trade Data Monitor, LLC

## **VI. TRADE ASSISTANCE FOR EXPORTERS**

For any questions or comments regarding this report, U.S. companies are welcome to contact the U.S. Agricultural Affairs Office in Paris:

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### **Attachments:**

No Attachments