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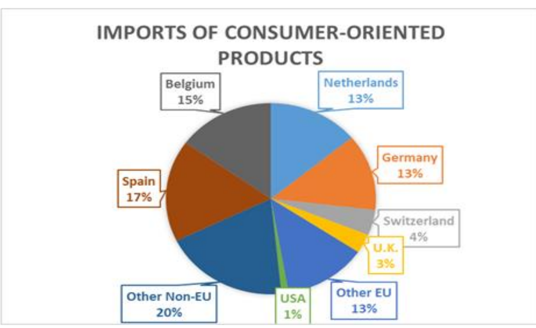
Report Highlights:

The French agri-food industry includes around 17,000–18,000 companies, about 98 percent of which are Small and Medium Enterprises. It generates close to USD 215-225 billion in annual revenue and employs roughly 450,000 people directly, and many more indirectly. The sector remains a key economic and political force in France. While demand for processed food is stable, the industry faces growing challenges related to rising production costs, regulatory pressures, and declining international competitiveness.

Market Fact Sheet: France

Executive Summary
In 2025, France's economy expanded modestly, growing by about 0.9 percent, slightly above expectations but slower than in 2024. France remains one of the largest economies in the world and the second-largest in the EU by GDP, with strong industrial and agricultural sectors.

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. Recent data indicates that France's traditional agri-food trade surplus eroded sharply in 2025, with the sector nearing or possibly recording a deficit for the first time in decades. French imports from the United States reached $1 billion in 2025, led by seafood, tree nuts, soybeans and alcoholic beverages.



Food Processing Industry
France's food processing sector encompasses approximately 17,000 companies with total annual sales exceeding $215 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 2025, approximately 70 percent of all retail food sales in France were in the hyper-supermarket and discount store format. E-commerce food sales represent around 6 percent of total retail food sales.

Food Service Industry
France's HRI sector recorded $126 billion in sales revenue in 2025. Hotels and restaurants account for approximately 58 percent of sales, while institutional food service represents 20 percent.

Quick Facts CY 2025

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

Food Industry by Channels (USD billion)

Food Industry Output	215
Food and Ag. Exports	88.9
Food and Ag. Imports	72.3
Retail	258
Food Service	126

Top 10 Host Country Retailers

1. **Carrefour**	6. **Lidl**
2. **E. Leclerc**	7. **Aldi**
3. **Intermarché**	8. **Hyper U**
4. **Auchan**	9. **Netto**
5. **Casino**	10. **Super U**

GDP/Population
Population *(millions)*: 68.6
GDP *(trillions USD)*: 3.2
GDP per capita *(USD)*: 48,980
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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I. MARKET SUMMARY

Overall Market Summary

The French food industry continued to demonstrate a strong productive capacity, although it is undergoing structural adjustments. The sector comprises approximately 17,000 companies in 2025, of which nearly 98 percent were small- and medium-sized enterprises (SMEs). The sector generated an estimated €200–210 billion ($215–225 billion) in annual revenue in 2025, reflecting nominal growth driven largely by inflation rather than volume expansion. It directly employs approximately 450,000 people, with a broader indirect impact across the agricultural and distribution value chain. The French agri-food industry remains one of the country's most strategically important industrial sectors, with significant political and economic influence.

However, the agri-food sector is undergoing a period of structural transformation and weakened competitiveness following several years of economic pressure. This situation is driven by multiple concurrent factors, including sustained price pressure from large-scale retailers, persistently high agricultural input and energy costs, labor cost increases, and tightening environmental and regulatory requirements.

As a result, the French agri-food industry is experiencing margin compression, declining export competitiveness, and gradual erosion of market share, particularly within the European Union. At the same time, the sector must respond to evolving consumer expectations, including demand for affordability, health, transparency, and sustainability. As a key participant in the agro-ecological transition, the industry is under increasing pressure to deliver environmentally sustainable and nutritionally improved food systems.

Table 1: FRENCH FOOD INPUT AND PRODUCT TRADE
Calendar 2025 and 2024 (In Million Dollars)

Products	Imports		Exports		Trade Balance 2024	Trade Balance 2025
	2024	2025	2024	2025		
European Union						
• Raw Products	690	710	1,266	1,240	576	530
• Processed Products	3,237	3,350	2,615	2,580	-622	-770
TOTAL	3,927	4,060	3,881	3,820	-46	-240
Non-EU Countries						
• Raw Products	802	830	666	700	-136	-130
• Processed Products	1,328	1,380	2,057	2,020	729	640
TOTAL	2,130	2,210	2,720	2,720	593	510
World						
• Raw Products	1,492	1,540	1,932	1,940	440	400
• Processed Products	4,565	4,730	4,672	4,600	107	-130
TOTAL FOOD PRODUCTS	**6,057**	**6,270**	**6,604**	**6,540**	**547**	**-270**

Source: Agreste/French Customs – 2024 actual, 2025 estimates based on trend data

France’s agri-food trade surplus declined significantly to approximately $547 million in 2024 and is estimated to have shrunk in 2025, potentially approaching balance or slight deficit levels. This reflects a structural weakening of export competitiveness and stronger import growth, particularly in processed products.

Exports of cereals, particularly soft wheat, remain a key driver of raw product trade performance, although global price volatility and competition have reduced margins. Exports of wines and spirits—historically a major strength—have slowed due to weaker demand in key markets such as the United States and China.

On the import side, demand for animal feed inputs such as soybean meal, as well as processed food products, continues to grow. Within the European Union, France faces increasing competition from lower-cost producers, contributing to a widening deficit in the processed food trade.

Table 2: FRENCH FOOD PROCESSING INDUSTRIES
Calendar Year 2025

Industries	**Turnover ($ billion)**
Meat and Meat Products	39.5
Fish and Seafood	5.5
Fruits and Vegetables	10.5
Fats and Oils	6.8
Dairy Products	33.0
Grain Industry	9.8
Bakery Industry	17.2
Miscellaneous Food Products	30.5
Animal Feed	16.8
Beverages	40
Total Food Processing Industries	**210**

Sources : Les Industries Agroalimentaires/Agreste/Insee

Growth in turnover reflects price effects rather than strong volume expansion, as consumption remains constrained by inflation and shifting consumer behavior. Demand continues to evolve toward private-label products, value-oriented offerings, and healthier alternatives. French demand for food ingredients continues to evolve in response to technological innovation and changing consumer preferences. Growth remains strongest in convenience foods, plant-based alternatives, organic products, and functional foods.

Consumers remain highly sensitive to food safety, origin, and environmental impact. Regulatory pressure has intensified, particularly regarding nutritional labeling, environmental impact disclosures, and packaging sustainability, including restrictions on single-use plastics and requirements for recyclability. French food companies can generally import food ingredients without too many problems, provided they conform with French and EU sanitary and phytosanitary regulations. When additives are not on the official EU list of approved additives, they are subject to special authorization. For more information on tariffs and other export requirements, please refer to the latest Post FAIRS reports available at the following website.

Key Market Drivers

Key market drivers for the French food processing sector include:

- Lower production costs while maintaining quality standards to remain competitive in global markets.
- Increased interest in health and functional foods with a strong focus on aging consumers.
- Increased emphasis on convenience, ready-to-eat, and value-priced foods.
- Constant development and expansion of French food options.
- Focus on young urban consumers.
- Environmental and food safety concerns that preoccupy consumers and retailers.

U.S. Involvement in the Industry

France remains a major importer of agricultural and food products, with the European Union dominating trade flows. Non-EU suppliers, including the United States, play a complementary but limited role.
In 2025, the United States accounted for approximately 1.3–1.5 percent of total agricultural imports, maintaining its position among the top 15 non-EU suppliers. Growth in U.S. exports was modest but stable, supported by demand for specific products such as soybeans, tree nuts, seafood, and specialty ingredients.

Table 3: MAJOR FOOD EXPORTERS TO FRANCE
France (Customs) Import Statistics
Commodity Agricultural & Related Total
Year to Date: January-December 2025

Partner Country	USD (Millions)		% Share		% Change
	2024	2025	2023	2025	2024/2025
World	95,166	97,500	***100***	***100***	2.5
Belgium	12,833	13,100	13.49	13.4	2.1
Spain	12,017	12,200	12.63	12.5	1.5
Netherlands	9,903	10,000	10.41	10.3	1.0
Germany	9,049	9,200	9.51	9.4	1.7
Italy	7,675	7,900	8.07	8.1	2.9
United Kingdom	5,743	5,900	6.04	6.0	2.7
Poland	3,797	3,950	3.99	4.1	4.0
Ireland	2,269	2,320	2.38	2.4	2.2
Switzerland	2,254	2,320	2.37	2.4	2.9
Brazil	1,950	2,050	2.05	2.1	5.1
Morocco	2,013	2,120	2.12	2.2	5.3
United States	**1,340**	**1,380**	**1.41**	**1.4**	**3.0**

Source: Trade Data Monitor/French Customs (Agricultural Total, Group 2)

Key Advantages and Challenges Facing U.S. Products in France

The French agri-food market in 2026 continues to be shaped by post-inflation consumer behavior, with households prioritizing value and shifting toward lower-cost alternatives. Private-label products continue to gain market share at the expense of premium brands. At the same time, regulatory developments are accelerating the transition toward sustainable production and packaging, creating both opportunities and barriers for imported products.

Advantages	Challenges
Consumer demand for innovative, low fat, healthy, and organic products favor introduction of new products	French and EU food safety, sanitary and phytosanitary regulations often affect the import of fresh produce and certain food ingredients
Demand for quality ingredients is growing as France is a major producer and exporter of finished processed food products	Certain food ingredients (such as enriched flour) are banned or restricted from the French market
Food technology and marketing innovations are driving demand for food ingredients	The U.S. faces strong competition from German, British and French manufacturers.
Growing popularity of specialty and regional theme restaurants, including Cajun and U.S. barbeque is increasing demand for U.S. food ingredients	Government policies tend to discourage imports to favor French domestic food suppliers.

II. ROAD MAP FOR MARKET ENTRY

Entry Strategy

U.S. suppliers are strongly encouraged to work with French partners to develop an effective market entry strategy. Local representatives provide critical insight into regulatory requirements, distribution structures, and business practices.

French food processing companies actively participate in major regional and international trade shows, particularly in the food ingredients sector. The Food Ingredients Europe (Fi Europe) trade show—one of the industry's leading events—is held annually, alternating locations. The next edition scheduled for Paris will be held in December 2027, representing a key opportunity for U.S. exporters to establish contacts and showcase products.

Market Structure

Most French food processors source ingredients through importers, brokers, and specialized wholesalers, although large multinational firms often maintain direct sourcing relationships with foreign suppliers. Food processors supply both the retail sector (approximately 65–70 percent) and the food service/HRI sector (30–35 percent), as food service continues to recover post-pandemic.

A common entry strategy for U.S. SMEs is to work directly with a French importer, distributor, or broker, or partner with a European consolidator or export agent.

Simplified Distribution Flow

United States:
U.S. Supplier → Freight Forwarder → U.S. Customs

France:
Freight Forwarder → French Customs → Sanitary/Health Inspection → Importer/Distributor → Processor → Wholesaler/Retailer → Consumer

Company Profile

As of 2025, France has approximately 17,000–18,000 food processing companies, reflecting slight consolidation in recent years. The sector covers a wide range of product categories, including meat and poultry, fish and seafood, fruits and vegetables, bakery and cereals, dairy products, confectionery, animal feed, ingredients, and beverages. Table 4 below is a list of food processing companies that have investments in France and the United States.

Table 4: FRANCE'S MAJOR FOOD PROCESSING COMPANIES, (2025 estimates)

Company Name and Type of Food Processor	Sales (million $)	Number of Employees	End-Use Channels	Production Location	Procurement Channels
Danone (production, processing and marketing of fresh dairy products, packaged water, baby food and clinical nutrition)	30	90,000	Retail and HRI	France & Europe North America Asia/Middle East & Africa	Importers; Direct
Lactalis (dairy products)	32	85,500	Retail and HRI	France, Europe, North, Central and South America, Asia, Africa	Importers; Direct, Distributors
Pernod Ricard (manufacturing and distribution of wines and spirits)	14	19,000	Retail and HRI	France & Europe USA	Importers; Distributors; Direct
Groupe Avril	11	7,500	Food and non-food	18 countries worldwide	
Agrial (food and agricultural cooperative group)	9	12,000	Retail and HRI	France	Importers: Direct
Moet-Hennessy (luxury industry, wine, spirits)	9	30,000	Retail and HRI	France, Switzerland, USA	Direct
Savencia Fromage & Dairy (formerly Bongrain SA) (milk processor)	8	21,000	Retail and HRI	France, Subsidiaries in Europe, North and South America	Direct; Importers
Tereos (sugar manufacturer, process raw materials in sugar, alcohol, and starch)	8	15,000	Food and non-food industry and retail	France and Europe South America Africa Asia	Importers; Direct
Bigard (meat processor)	7	14,000	Retail, HRI	France	Direct
LDC (poultry producer and	7	24,000	Retail and HRI	France, Poland and Spain	Direct Importers

processor)					
Sodiaal (dairy)	6	17,000	Cooperative	France	Direct
Soufflet Group (InVivo) (grain processor)	6	10,000	Industry and Retail	France, Europe, Asia and South America	Direct; Importers
Nestlé France (products and beverages for human consumption and animal feed)	5	13,000	Retail and HRI	France and all over the world	Importers; Direct

Source: Company Reports (2024-2025)/ RIA

Sector Trends

France remains a major global exporter of processed foods; however, export performance is weakening. In 2024, exports of processed foods were approximately $60–62 billion, while in 2025, exports were flat or slightly declining in real terms. Wine and spirits exports fell because of weaker demand in the United States and China, in part due to the impact of tariffs. In contrast, dairy exports experienced modest growth, supported by steady global demand. Chocolate and premium processed foods continue to perform strongly, though growth has normalized after a surge in 2023. To remain competitive, French food processors are increasingly sourcing ingredients globally, expanding production abroad and investing in cost optimization and supply chain diversification. Major companies such as Danone, Lactalis, and Pernod Ricard maintain extensive global operations, with production and sourcing networks spanning Europe, Asia, and the Americas.

French companies continue to invest heavily in research and development, particularly in organic and natural products, functional and health-oriented foods, and plant-based alternatives. Sustainability remains a central focus, including recyclable packaging, reduced food waste and energy efficiency. However, consumer behavior is increasingly price-sensitive, with many households shifting toward private-label and discount products. A key concern is whether demand for premium products can be sustained under continued economic pressure.

III. COMPETITION

France is a highly competitive market with strong participation from both EU and non-EU suppliers. Key competing countries include Germany, Spain, Italy, Netherlands inside the EU and outside of the EU, Brazil, Morocco, Turkey, United Kingdom, Norway, United States. North African countries, Turkey, and Iran maintain price advantages in nuts and dried fruits, while Norway and the UK dominate seafood exports. Finally, EU suppliers benefit from regulatory alignment and lower trade barriers. Despite higher pricing, U.S. products remain competitive in premium and specialty segments, ingredients for processing, and branded consumer products (snacks, sauces, beverages). For more information on competition, please refer to the Retail Food Report.

IV. BEST PRODUCT PROSPECTS

Tables 5 and 6 provide details of products that have strong sales potential in the market.

Table 5: PRODUCTS IN THE MARKET WITH STRONG SALES POTENTIAL

Product Category	2025 Total Imports (in million dollars)	Average Percentage Market Share Change (2025-2024)	Key Constraints over Market Development	Market Attractiveness for USA
HS 03. Fish and Seafood	$200	Moderate Growth	Competition from other suppliers	The United States ranks 7th,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	$190	Steady Growth	Competition from key established suppliers	U.S. products are considered as quality and safe products. France is the leading European market for U.S. grapefruits; however, sales are impacted by high prices. Most popular nuts sold in France are almonds and pistachios. Most sales from the U.S. are bulk and for the processing industry.
Distilled Spirits	$140	Slow Growth	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.
Wine	$100	Flat/declining	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: TDM – Trade Data Monitor

Table 6: PRODUCTS WITH OPPORTUNITIES FOR SIGNIFICANT GROWTH

Product Category	2025 Total Imports (in Millions Dollars)	Average Percentage Import (2025/2024)	Key Constraints Over Market Development	Market Attractiveness for USA
Mollasses	11	High volatility	Limited market size.	Niche industrial use.
Sugar Confectionery	5	Strong growth	EU Competition.	Innovative products.
Thickener	14	Growing	Regulatory Approvals.	Ingredient supply.
Kosher foods	N/A	Growing	Competition from local wholesalers and key suppliers. Products to be certified Kosher by religious authorities.	Expanding niche demand.
Halal foods	N/A	8-10% annual growth	Competition from multinational groups and key	A large Muslim population in France generates a 10% annual

			suppliers. Products to be certified halal by religious authorities.	increase in halal foods offering opportunities for U.S. suppliers.

Source: TDM – Trade Data Monitor

V. POST CONTACT AND FURTHER INFORMATION

For further information regarding exporting U.S. food products to France, please contact the Office of Agricultural Affairs:

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Attachments:

No Attachments