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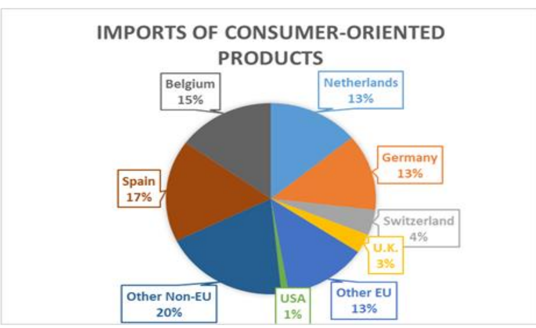
Report Highlights:

In 2025, French imports of U.S. food and agricultural products reached approximately $1 billion. 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 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 $290 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 $116 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)*: 56.5. 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	290
Food and Ag. Exports	96.5
Food and Ag. Imports	90
Retail	330
Food Service	116

Top 10 Host Country Retailers

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

GDP/Population
Population *(millions)*: 68
GDP *(trillions USD)*: 3.3
GDP per capita *(USD)*: 48,930
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

France's economy grew by approximately 0.9 percent in 2025, slightly exceeding earlier expectations despite political uncertainty, fiscal tightening, and weaker global trade. Economic activity was supported by exports, business investment, and easing inflation, while household consumption remained subdued. Inflation continued to moderate toward the European Central Bank's target, helping to improve purchasing power. The labor market remained relatively resilient, although unemployment edged up to around 7.5–7.6 percent. Fiscal consolidation remained a government priority. Official data show the public deficit improved to 5.1 percent of GDP in 2025 from 5.8 percent in 2024, while public debt increased to 115.6 percent of GDP. Business confidence strengthened gradually during the year, supported by lower interest rates and recovering investment in industry, technology, and defense-related sectors

Table 1: France Key Trade and Demographic Information for 2025	
Ag. Imports from all Countries	$90 billion
U.S. Market Share	$1 billion
Consumer Food Imports from All Countries	$56.5 billion
U.S. Market Share	$427 million
Total Population/Annual Growth Rate	68 million – 0.2 percent annual growth
Urban Population	56 million
Number of Metropolitan Areas	4: Paris, Marseille, Lyon, and Lille
Inflation	2 percent
Size of the Middle-Class	48 percent of total population
Per Capita Gross Domestic Product	$48,930
Unemployment Rate	7.5 percent
Percent of Population Employed	68.4 percent

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

Bilateral Trends

France and the United States continue to maintain one of the world's most significant economic and commercial partnerships. Despite periodic policy differences in areas such as defense, digital regulation, industrial policy, taxation, and trade enforcement, the relationship remains grounded in strong political, economic, and cultural ties. France remains a leading destination for U.S. investment in Europe, while the United States continues to be one of the most important sources of foreign investment in France. Extensive cooperation in research, innovation, higher education, aerospace, energy, life sciences, and advanced manufacturing reinforces this relationship. France's highly developed infrastructure, skilled workforce, and world-class research institutions continue to attract American companies seeking access to both the French and broader European markets. At the same time, businesses continue to monitor political developments, fiscal reforms, labor-market conditions, and regulatory changes that may affect investment decisions.

Trade and investment ties remain robust. Bilateral trade in goods and services continues to support hundreds of thousands of jobs on both sides of the Atlantic and reflects a high degree of economic integration. Key U.S. exports to France include aerospace products, machinery, chemicals, pharmaceuticals, medical technologies, information technology services, and business services. France is also a major supplier of aircraft, pharmaceuticals, luxury goods, industrial products, and agricultural products to the U.S. market. French agricultural exports to the United States exceeded $5.8 billion in 2025, down 9.6 percent from 2024, while imports from the United States exceeded $1 billion, up 3.42 percent from 2024. The United States remains one of France's most important export markets outside the European Union.

Investment links continue to deepen. According to the U.S. Bureau of Economic Analysis, the stock of foreign direct investment (FDI) in the United States reached $5.71 trillion in 2024, with European investors accounting for a substantial share of that total. U.S. direct investment abroad increased to $6.83 trillion in 2024, reflecting the continued importance of transatlantic investment relationships. While final country-level 2025 FDI stock data is not yet available, France remains among the largest foreign investors in the United States, and the United States remains one of the largest foreign investors in France. Thousands of U.S.-owned firms operate in France across manufacturing, technology, financial services, healthcare, transportation, and consumer sectors.

U.S. companies generally continue to view France as an attractive long-term investment destination despite persistent challenges related to labor costs, regulatory complexity, taxation, and administrative procedures. France remains one of the more open economies for foreign investment among advanced industrial countries, with no general statutory restrictions on foreign ownership outside a limited number of strategic sectors. Investments involving activities deemed critical to national security, public order, defense, or sensitive technologies remain subject to prior review and approval by the French Ministry of the Economy. At the same time, government support for innovation, clean technologies, digital transformation, artificial intelligence, and advanced manufacturing continues to enhance France's attractiveness as a location for foreign investment.

French Consumption Trends

French consumers remain highly value-conscious despite improving economic conditions. Inflation moderated significantly during 2024 and 2025, helping to stabilize household purchasing power. Nevertheless, many consumers continue to feel the effects of several years of elevated food, housing, energy, and transportation costs. As a result, purchasing decisions are increasingly influenced by price, promotions, and perceived value. Sustainability and environmental considerations remain important, but affordability has become a primary factor for many households. French consumers also continue to demonstrate a strong preference for locally produced food products and brands that offer transparency, traceability, and support for domestic producers. Food insecurity remains a concern among lower-income households, students, and vulnerable populations, contributing to continued demand for affordable food options. For additional information, please check the Food Processing Ingredients, Retail Foods, and Food Service reports.

General Consumption Trends

France remains one of the world's most sophisticated and diverse food markets. Over the past three decades, demographic change, urbanization, globalization, and evolving lifestyles have significantly influenced consumer food preferences. While food continues to occupy an important place in French culture and identity, younger consumers increasingly prioritize convenience, value, health, and product innovation alongside traditional considerations of taste and quality.

Regional food traditions remain strong, but immigration and international travel have broadened consumer tastes and contributed to growing demand for international cuisines. Asian, Middle Eastern, African, and Latin American foods have become increasingly popular, particularly among younger urban consumers. Japanese, Chinese, Indian, Korean, Thai, Turkish, Lebanese, and Moroccan cuisines are now well established within the French foodservice and retail sectors. Demand for halal-certified products continues to expand, while kosher products maintain a stable niche market. Interest in American-style foods, including barbecue products, gourmet burgers, Tex-Mex offerings, specialty sauces, and snack foods, also remains strong. French consumers place significant importance on food quality, safety, traceability, and origin. Product labeling, ingredient transparency, animal welfare, and environmental sustainability continue to influence purchasing decisions. At the same time, following several years of elevated inflation, affordability and value have become increasingly important considerations. Consumers are actively seeking products that balance quality, health benefits, convenience, and competitive pricing. Private-label products continue to gain market share across many categories.

Health and wellness trends remain important drivers of food consumption. Demand continues to grow for products perceived as natural, minimally processed, high in protein, rich in Omega-3 fatty acids, plant-based, gluten-free, or supportive of specific dietary and lifestyle preferences. Functional foods, nutritional supplements, and products promoting digestive health, immunity, and overall wellness continue to attract consumer interest. While organic products remain an important market segment, growth has moderated as some consumers have shifted toward lower-priced alternatives. France's foodservice sector continues to emphasize fresh ingredients, local sourcing, and simplified menus featuring consumer-ready and easy-to-prepare products. Hotels, restaurants, institutional catering operators, and quick-service restaurants increasingly seek products that offer convenience, labor efficiency, and consistent quality while meeting consumer expectations for freshness and sustainability.

The French food market is highly developed, competitive, and supplied by domestic, European, and international producers. France's modern transportation and logistics infrastructure supports efficient nationwide distribution. The food and beverage industry remains the country's largest manufacturing sector by turnover and employment. However, market entry requires compliance with extensive French and European Union regulations covering food safety, labeling, environmental standards, packaging, and sanitary and phytosanitary requirements. Retail distribution remains highly concentrated, making strong local partnerships, targeted marketing strategies, and product differentiation important factors for success.

Table 2: Advantages and Challenges in the Market Facing Exporters

Advantages	Challenges
More than 80% of France's population lives in urban areas, creating strong demand for diverse and international food products.	Competition from domestic, EU, and international suppliers is intense.
France remains one of Europe's largest consumer markets with high purchasing power.	Consumers have high expectations regarding quality, sustainability, and traceability.
A strong tourism sector supports demand from hotels, restaurants, and foodservice operators.	Regulatory compliance costs can be significant.

Advantages	Challenges
Growing interest in international cuisines creates opportunities for imported products and ingredients.	Retail distribution is concentrated among a small number of large chains.
Efficient logistics and distribution systems facilitate nationwide market access.	Marketing and brand-building investments are often necessary to achieve visibility.
Continued demand for health-focused, convenience, premium, and innovative food products.	EU food safety, labeling, packaging, sustainability, and SPS requirements can be complex.
The U.S.–EU organic equivalence arrangement continues to facilitate access for many certified organic products.	EU biotechnology labeling requirements and restrictions may limit opportunities for certain products.

II. EXPORTER BUSINESS TIPS

As a member of the European Union (EU), France participates in the EU Customs Union and benefits from the EU's extensive network of free trade agreements and preferential trade arrangements. The EU maintains customs union arrangements with Turkey and Andorra and has trade agreements or association agreements with numerous countries and regions, including the United Kingdom, Mercosur, Canada, Japan, South Korea, Switzerland, Norway, Iceland, Liechtenstein, Mexico, Chile, Singapore, Vietnam, New Zealand, and many Mediterranean partner countries.

The EU-Canada Comprehensive Economic and Trade Agreement (CETA), which has been provisionally applied since 2017, continues to facilitate bilateral trade and investment. While political debate remains active in France regarding certain agricultural provisions, the agreement remains in force pending completion of ratification procedures by all EU member states. The EU-Japan Economic Partnership Agreement remains one of the world's largest free trade agreements and continues to support trade flows in agricultural, industrial, and services sectors. Similarly, the EU's agreements with South Korea, Vietnam, Singapore, New Zealand, and other partners have expanded market access opportunities for European businesses and consumers.

Following the United Kingdom's withdrawal from the European Union, the EU-UK Trade and Cooperation Agreement entered into force in 2021 and continues to govern trade and economic relations between the two parties. The European Union remains the United Kingdom's largest trading partner, while the United Kingdom remains one of the EU's most important export markets. The European Union and the Mercosur countries (Argentina, Brazil, Paraguay, and Uruguay) reached a political agreement on the partnership in December 2024. In 2025, the European Commission proposed splitting the package into two legal instruments—a Partnership Agreement covering political cooperation and an Interim Trade Agreement covering the EU-exclusive trade provisions—to facilitate approval. The agreements were formally signed in Asunción on January 17, 2026, and the Interim Trade Agreement entered into provisional application on May 1, 2026, while the broader Partnership Agreement continues through the remaining ratification process.

The European Union also maintains preferential trade arrangements with developing countries through the Generalized Scheme of Preferences (GSP) and other partnership frameworks. In 2023, the Samoa Agreement replaced the Cotonou Agreement as the principal framework governing relations between the

European Union and members of the Organization of African, Caribbean and Pacific States (OACPS). Because the United States does not currently have a comprehensive free trade agreement with the European Union, U.S. exporters generally do not benefit from the tariff preferences available to many of the EU's free trade agreement partners. Consequently, U.S. products may face a competitive disadvantage in certain sectors where preferential tariff treatment is available to competing suppliers.

Market Strategy

France remains one of the largest and most sophisticated food markets in Europe. To successfully export to France, U.S. companies should carefully verify compliance with all applicable European Union and French regulations, including food safety requirements, sanitary and phytosanitary measures, labeling rules, packaging regulations, sustainability requirements, customs procedures, and product-specific import restrictions.

French buyers generally place a high value on quality, authenticity, traceability, and product origin. Products with strong regional identities and distinctive characteristics continue to perform well in the market. Premium seafood, specialty fruits and nuts, wines and spirits, sauces, seasonings, snack foods, health-oriented products, and innovative food ingredients can find opportunities among French consumers and foodservice operators. Product presentation, branding, sustainability credentials, and packaging innovation remain important factors influencing purchasing decisions.

Participation in major trade exhibitions, industry events, and targeted promotional activities remains one of the most effective methods for entering the French market. In-store promotions, product demonstrations, digital marketing campaigns, and partnerships with local distributors can help introduce new products and build consumer awareness. Exporters should be aware that a number of U.S. agricultural products continue to face regulatory restrictions or additional compliance requirements under European Union legislation. Market access challenges may affect products derived from agricultural biotechnology, hormone-treated beef, certain animal products, some feed ingredients, selected fruits and vegetables, and products that do not meet EU sanitary, phytosanitary, traceability, or labeling requirements. Requirements should be verified prior to export, because regulations continue to evolve.

After customs clearance, imported products are generally subject to the European Union's Common External Tariff. Duty rates vary by product classification and origin. In addition, imported food products are subject to the French Value Added Tax (VAT).

As of 2025, the principal VAT rates applicable to food products are:
- Standard VAT rate (20 percent): applies to alcoholic beverages and certain non-essential consumer products.
- Reduced VAT rate (5.5 percent): applies to most food and agricultural products intended for human consumption.

Companies should also be aware of new European Union requirements relating to sustainability, packaging waste reduction, environmental claims, supply-chain due diligence, and deforestation-free sourcing, which may affect market access and compliance obligations for certain products.

For detailed information regarding import requirements, exporters should consult the latest European Union regulations and the USDA Foreign Agricultural Service Food and Agricultural Import Regulations and Standards (FAIRS) reports.

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 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 United States 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 FAIRS report and 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-Exupery airport in Lyon. France has twelve major seaports capable of handling container ships. The largest seaports - Le Havre, Rouen, Paris (collectively 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 remain broadly similar to those commonly encountered in the United States, although cultural differences and regulatory requirements can influence commercial relationships and market-entry strategies. French companies generally value professionalism, technical expertise, product quality, reliability, and long-term business relationships. While business negotiations are typically direct and structured, decision-making processes can be more formal and centralized than in the United States, particularly within larger organizations. France is one of Europe's most competitive consumer markets. U.S. products often compete directly with both French and other European suppliers, requiring exporters to clearly demonstrate value, quality, innovation, sustainability, or unique product attributes. Successful market entry frequently depends on a combination of strong branding, product differentiation, regulatory compliance, and effective local partnerships.

The French retail, foodservice, and hospitality sectors are highly sophisticated and increasingly omnichannel. Traditional retail distribution remains concentrated among a small number of major retailers, while e-commerce, online grocery platforms, and digital marketing channels continue to grow in importance. Companies seeking to enter the French market should develop a comprehensive strategy that incorporates both traditional distribution networks and digital sales and marketing channels. France's hotel, restaurant, and institutional foodservice sector remains one of the largest in Europe, supported by strong domestic demand and a robust tourism industry. Foodservice operators typically rely on specialized importers, wholesalers, distributors, and purchasing groups to source products. Establishing relationships with experienced local distributors remains one of the most effective methods for developing market presence and accessing foodservice channels.

Companies wishing to export to France are strongly encouraged to conduct detailed market research and develop a comprehensive market-entry plan before launching products. Regulatory compliance, labeling requirements, sustainability obligations, pricing structures, logistics, and distribution costs should be evaluated carefully, as market-entry mistakes can be costly and time-consuming to correct. For most exporters, working with an experienced importer, agent, distributor, or market representative remains highly advisable. Local partners can provide valuable assistance in navigating French and European Union regulations, customs procedures, labeling requirements, retailer expectations, and consumer preferences. They can also help identify appropriate distribution channels and support negotiations with buyers.

Participation in major European and French trade exhibitions, industry conferences, buyer meetings, and promotional campaigns continues to be an effective strategy for building market awareness and establishing commercial relationships. In addition to traditional trade shows and point-of-sale promotions, companies should consider investing in digital marketing, social media engagement, influencer partnerships, and e-commerce initiatives to strengthen brand visibility and consumer engagement in the French market.

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. 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	2025 Total Imports (in million dollars)	Average Percentage Market Share Change (2025-2024)	Key Constraints over Market Development	Market Attractiveness for USA
HS 08. Fruits and nuts	$236	Plus 29.2%	Competition from key established suppliers	U.S. products are considered as high quality and safe 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.
HS 03. Fish and Seafood	$191	Plus 1%	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.
Distilled Spirits	$104.5	Minus 22%	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.
Wine	$75.7	Minus 22%	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