



Webinar “Exportboost Frankrijk”

12.09.2023



STRUCTURELE PARTNER

Fevia
Vlaanderen

Welkom!

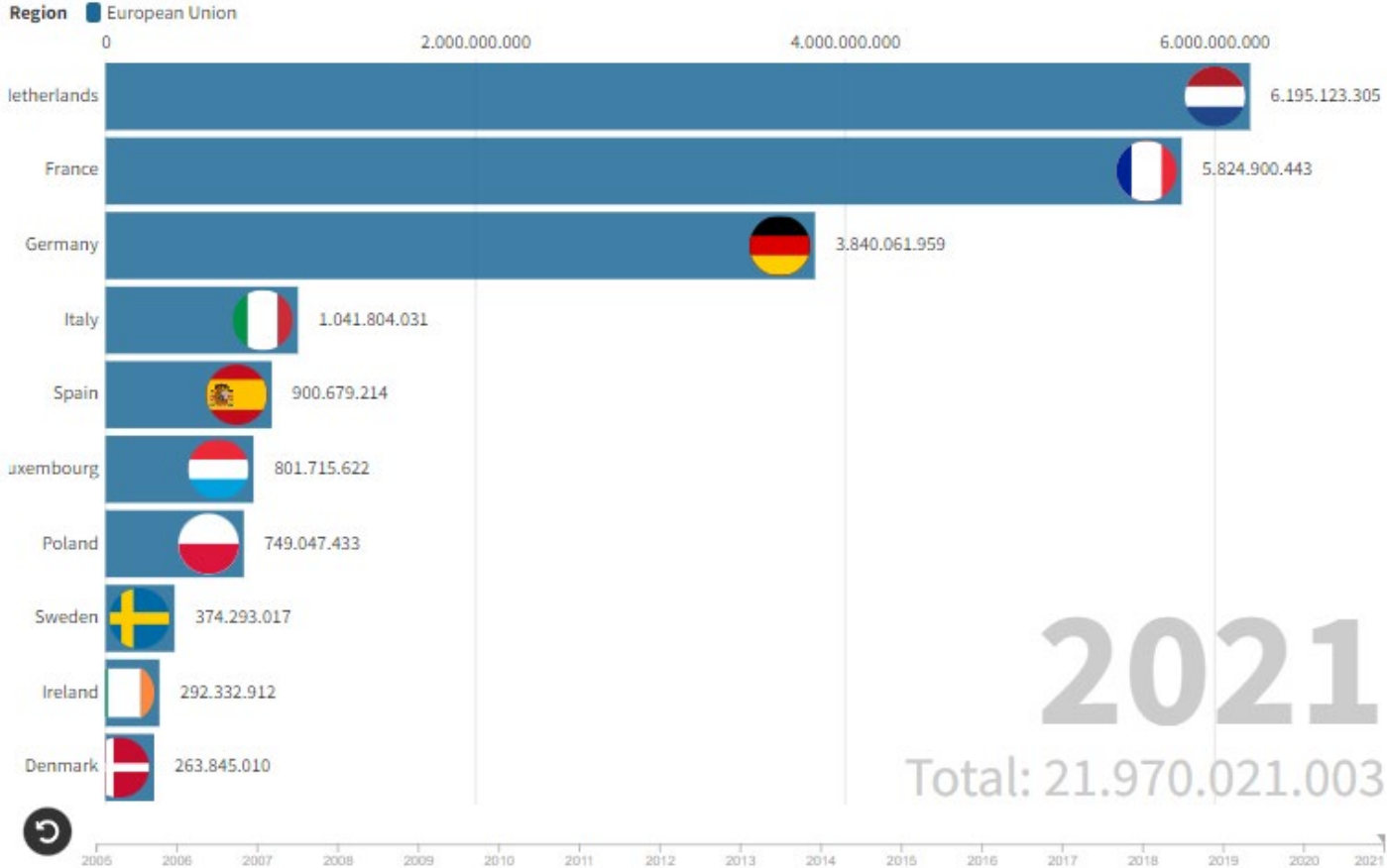
- Schakel je microfoon uit maar laat gerust je camera aan
- Wij nemen dit webinar op
- Wij sturen je achteraf de opname en de slides
- Vragen kan je stellen tijdens de Q&A of in de chat gedurende het hele webinar
- Verder nog vragen?
Neem gerust contact op met de sprekers (contactgegevens op laatste slide)

Programma

- Vlaams-Franse handel in voeding & dranken
Tine Vandervelden, Fevia Vlaanderen
- Marktintroductie en verplichtingen rond verpakkingen
Ans Baggerman, Flanders' Investment & Trade
- Introductie in de Franse retail & foodservice markt, trends en consumentenvoorkeuren
Sophie Delcroix & Cécile Marette , Green Seed Frankrijk
Philip Horemans, Green Seed Belgium
- Toelichting van het programma van de Exportboost studiereis naar Frankrijk
Tine Vandervelden & Philip Horemans

Vlaams-Franse handel in voeding & dranken

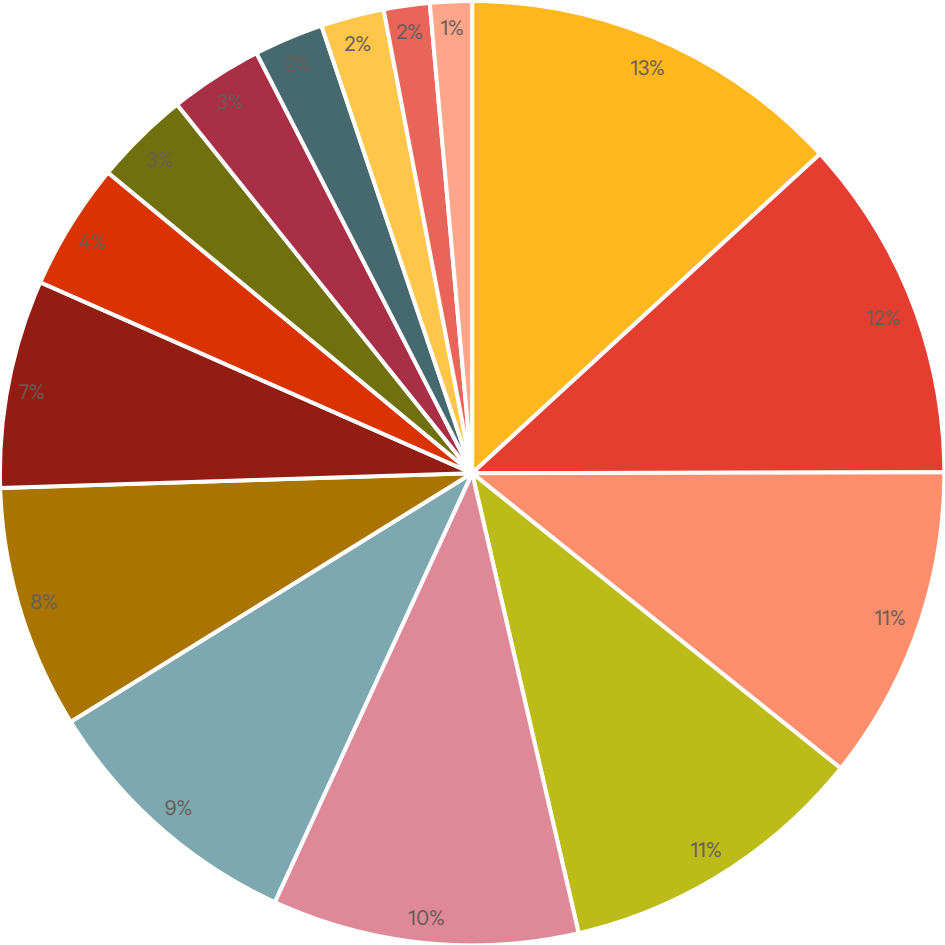
Evolutie BE uitvoer EU top 10 (2022)



Evolutie import-export VL-FR

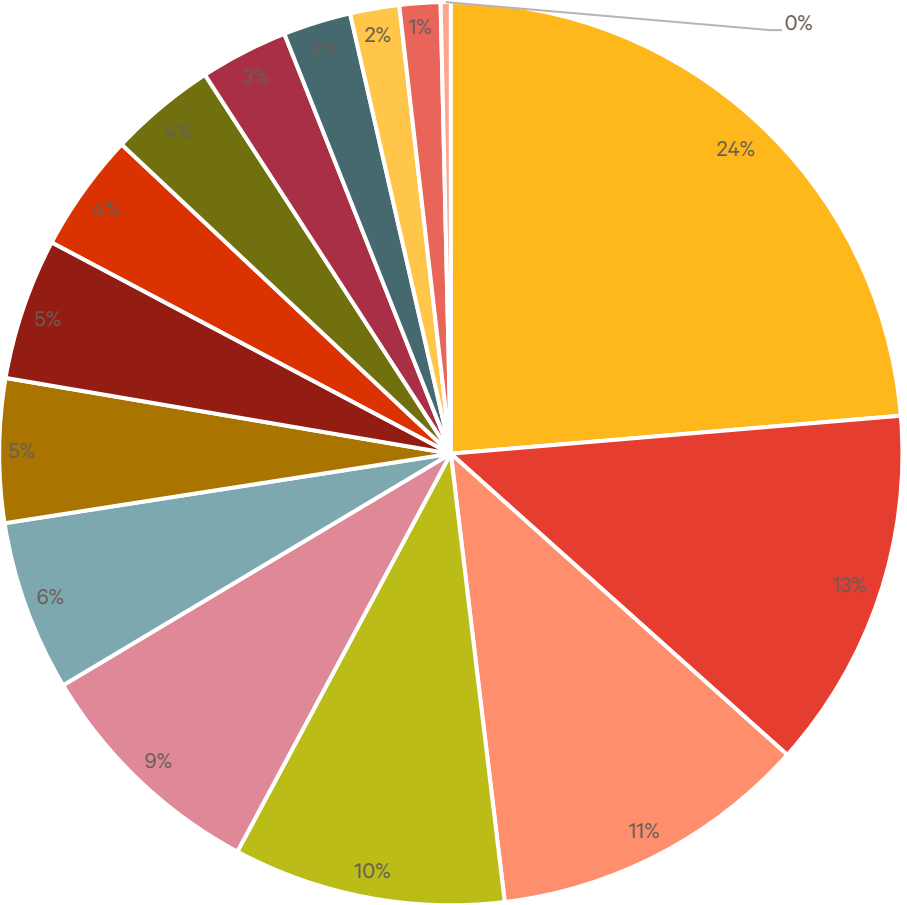


Export 2022 per productgroep



- Meat
- Dairy products
- Preparations of cereals
- Beverages
- Preparations of vegetables or fruit
- Fats & oils
- Vegetables
- Cocoa and cocoa preparations
- Miscellaneous
- Sugars and sugar confectionery
- Preparations of meat or fish
- Coffee & tea
- Mill & malt
- Cereals
- Fish

Import 2022 per productgroep



- Cereals
- Fats & oils
- Beverages
- Dairy products
- Vegetables
- Preparations of cereals
- Sugars and sugar confectionery
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- Fish
- Coffee & tea

Marktintroductie en verplichtingen rond verpakkingen



- 1. Missie van Flanders Investment & Trade**
- 2. Waar zijn we actief**
- 3. Trade : Dienstverlening van FIT**
- 4. Handelsbalans –exportcijfers**
- 5. Sector voeding in Frankrijk**
- 6. Regelgeving Verpakkingen**
- 7. “Verover de wereld”**



1 - Missie van FIT

Het agentschap heeft als missie om door zijn binnen- en buitenlandse netwerk bij te dragen tot:

- de **bevordering van de export** en **internationalisering van ondernemingen** in Vlaanderen,
- de duurzame stimulering van de economische groei van Vlaanderen door **buitenlandse investeringen aan te trekken en te verankeren.**



GROEI



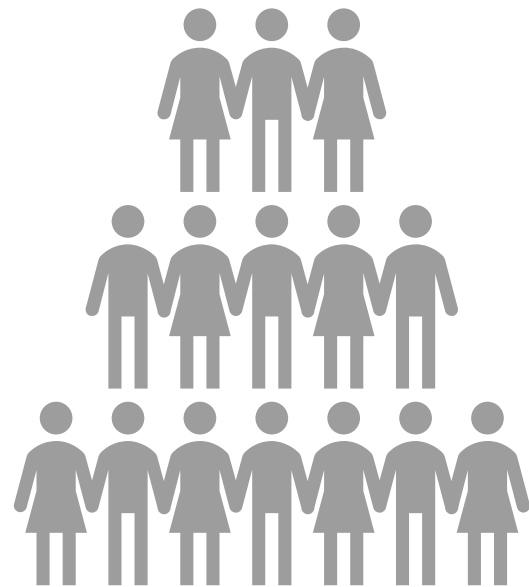
JOBS



WELVAART



2 - Waar zijn we actief



148 in Vlaanderen



177 in buitenlandse posten

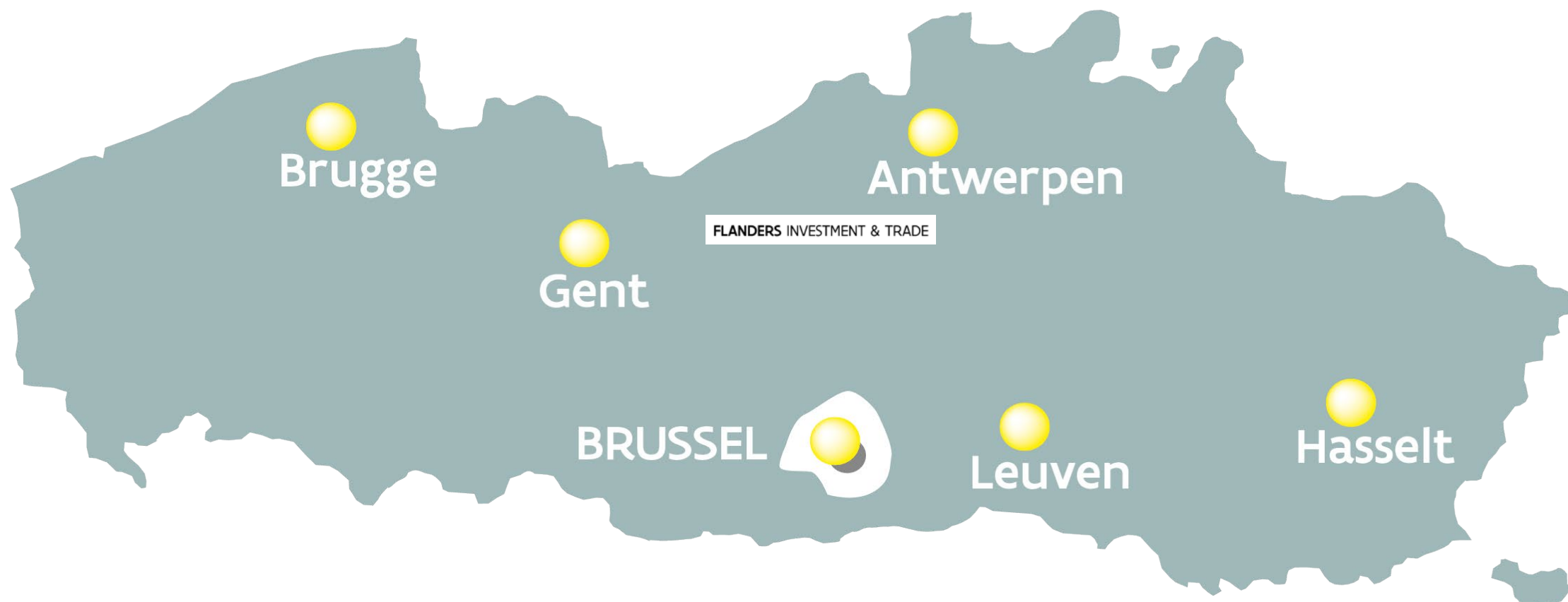


325 in totaal







BINNENLANDS NETWERK

Flanders Investment & Trade

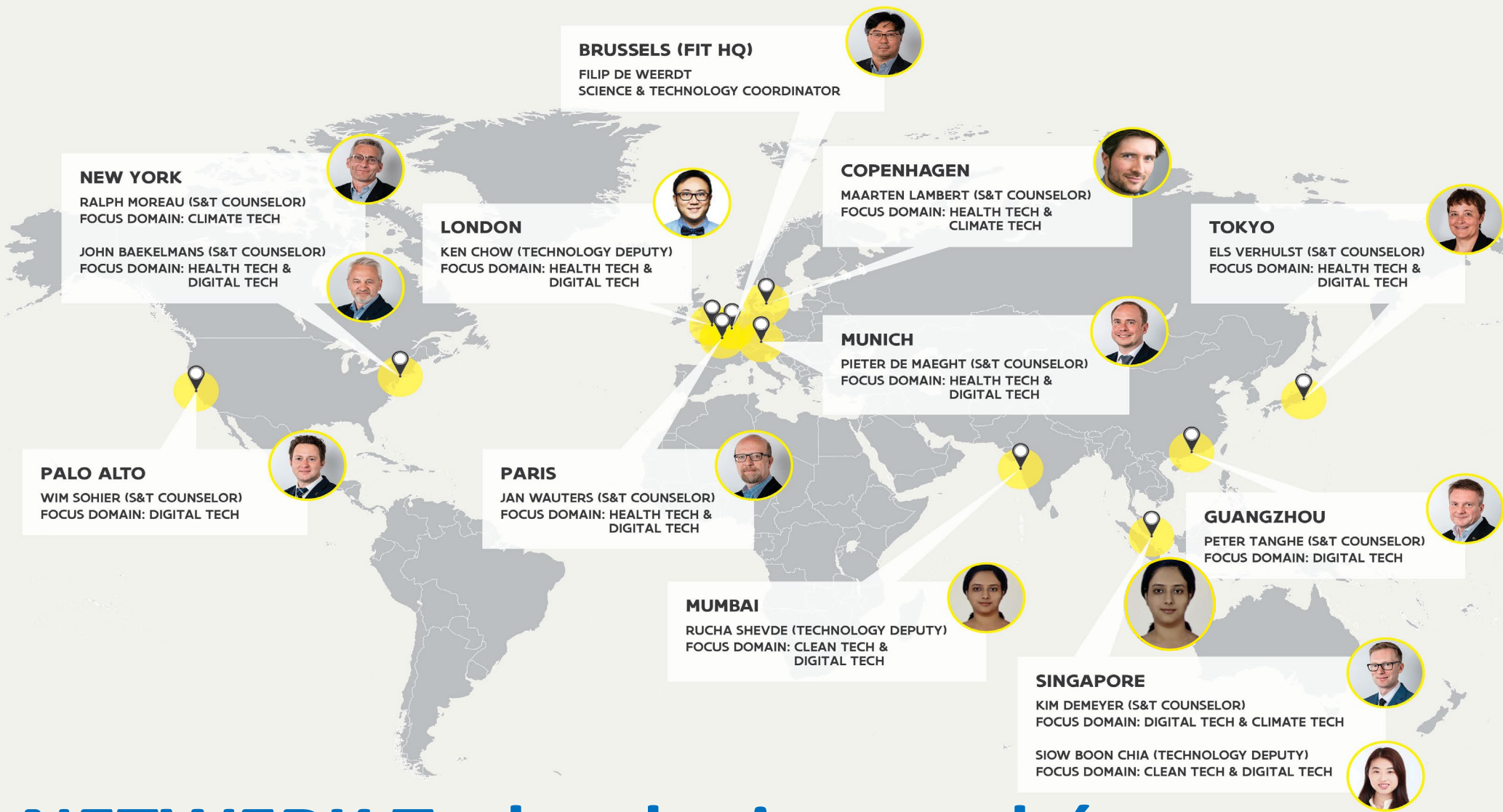




-  Vlaamse economische vertegenwoordiging
-  Antenne
-  Science & Technology-kantoor
-  Tech deputy bij de economische vertegenwoordiging



WERELDWIJD BUITENLANDS NETWERK



NETWERK Technologie attachés



STRUCTURELE PARTNERS

.AGORIA Vlaanderen

 **BELGIAN-CHINESE
CHAMBER OF COMMERCE**
比中经贸委员会

 **BVA**

 **bicc&i**
Belgo-Indian
Chamber of Commerce & Industry

 **BLUE
CLUSTER**

 **dsp
valley**

 **essenscia**
vlaanderen

 **Fedustria**

 **Fevia**
Vlaanderen

 **flanders.bio**

 **FLEGA**
FLEMISH GAMES ASSOCIATION

 **flux50**
ENERGISING THE FUTURE

 **MEDVIA**
The innovation cluster for better health

 **SIM**
innovating together

 **THE BEACON**

 **unizo**

 **法蘭德斯
中國商會** **FCCC
VCKK**
FLANDERS-CHINA CHAMBER OF COMMERCE
VLAAMS-CHINESE KAMER VAN KOOPHANDEL

 **EMPOWERING
LOGISTICS**

 **vkwlimburg**

 **Vlaams
netwerk van
ondernemingen**

Flanders Investment & Trade Frankrijk

Paris, Lille et Lyon



**Luc
Strybol**



**Jan
Wauters**



**Martine
De Paepe**



**Cécile
Concile**



**Ans
Baggerman**



**Aline
Germeau**



**Céline
Martel**



**Willem-Frederik
Vander Poorten**



**Greet
Isebaert**



**Hiba
Almisallati**



**Anne
Fargetton**



**Bernadette
Vleminckx**

FLANDERS INVESTMENT & TRADE



FLANDERS INVESTMENT & TRADE

3 - TRADE: Dienstverlening aan KMO'S

1 - Ondersteuning/advies

Faciliteiten verstrekken, exportmeter.

2 - Promotie en evenementen

Flanders International Business Award

“destination tomorrow” - 20 sept 2023,

Beurzen, evenementen, sociale media, Seminars,...

3 - marktkennis

Antwoorden op vragen, marktstudies B2B, IBD, prospectie,...

4 - Subsidies



3.2 - Highlights Trade acties Frankrijk

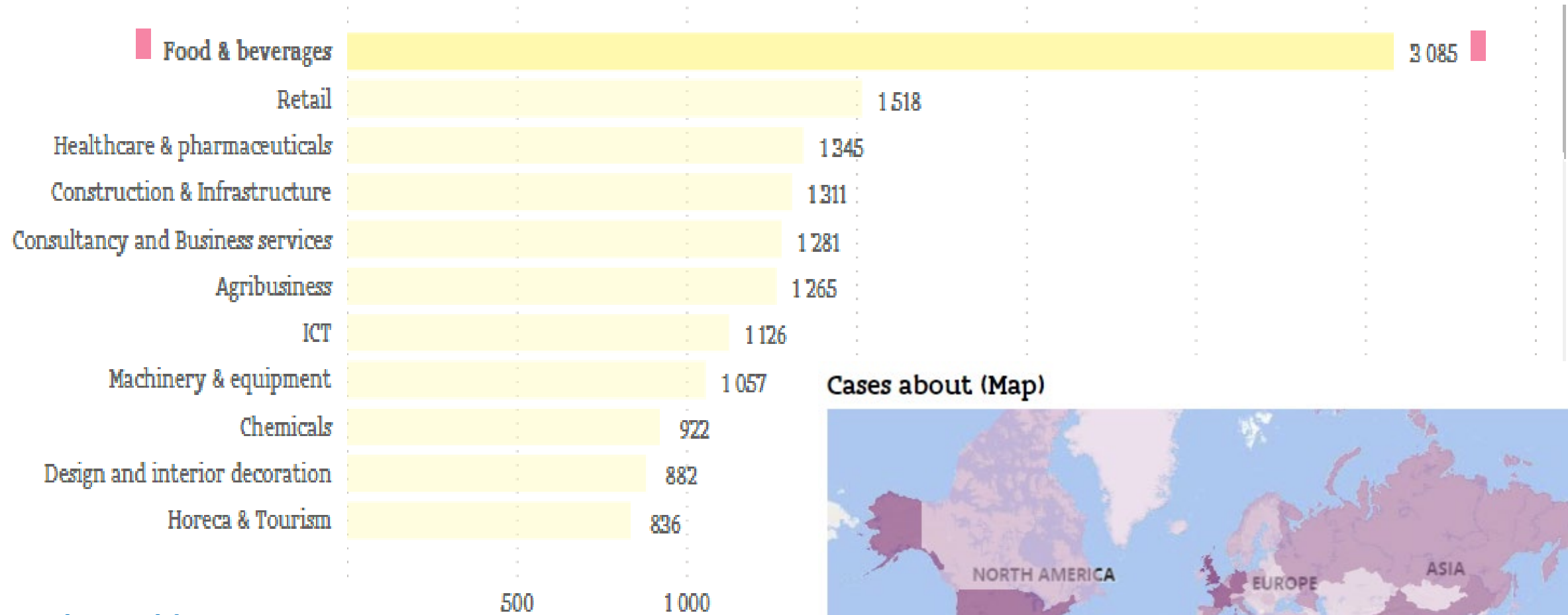
2022

- Beurs Toptransport samen met de havens - Marseille
- Beurs Sial – 15/19 oktober - Parijs
- B2B aankoopcentrale Gamme Vert – Lille
- Mission Agoria 23 et 24 november Olympische spelen
- B2B met aankoper Bricoman – Lyon/Brussel

2023

- Salon Vivatech (focus sport technologie) - Paris
- Salon Sirha – Lyon 19 januari (voeding)
- France4explorers – Lille (afsprakenprogramma)
- Paris Air Show - Bourget Paris
- Salon Pollutec – Lyon (water- en bodemsanering)
- Journée des Agents commerciaux - FNAC – Paris
- Coupe du Monde Rugby France

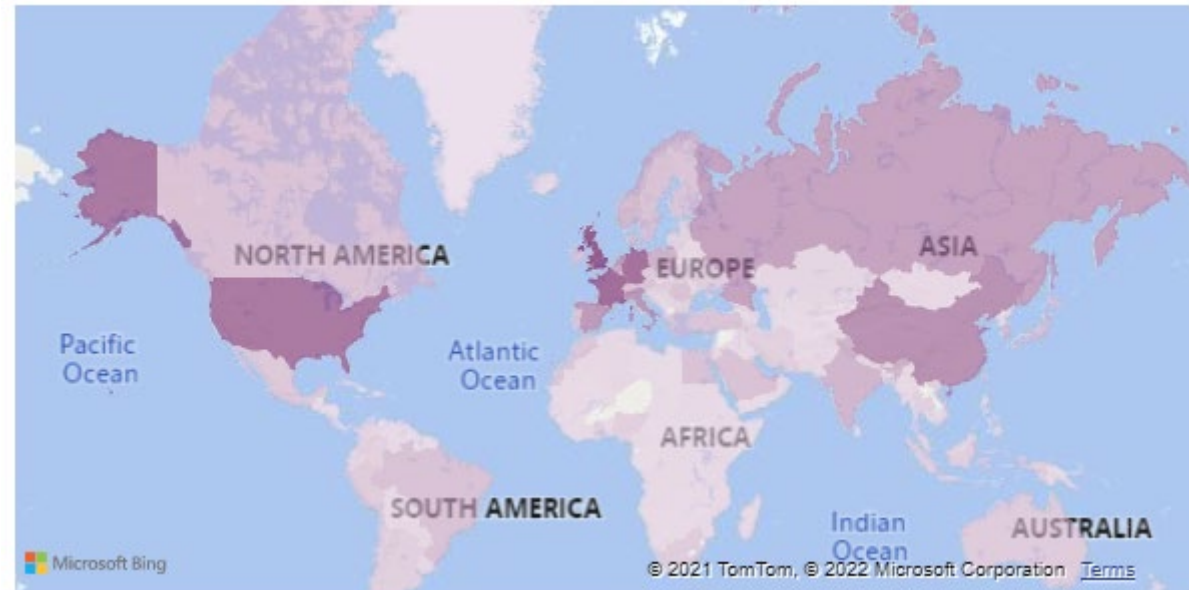
3.3 - cases per sector in 2022 (wereld)



Totaal wereld : 10 320
Food & beverages : 29,89%

Totaal Frankrijk : 647
Food & Beverages : 28,9%

Cases about (Map)





3.4 - Subsidies

Algemeen

- Deelname aan of organisatie van buitenlandse beurzen en niche-evenementen (of organisatie) - ook onder virtuele vorm
- Prospectiereizen buiten de Europese Economische Ruimte (EER)
- Digitale internationale commerciële bedrijfscommunicatie
- Oprichting prospectie- en saleskantoor buiten de EER (ook grotere bedrijven)
- Internationaal maatwerkproject (bij voorkeur in groei landen)

Steunpakketten

- Starterspakketten Internationalisering (startende exporteurs)
- Bijzondere Exportsteun Brexit



4 - Handelsbalans – exportcijfers



export
uit Vlaanderen
in 2022

EUR 479,7 MILJARD



EUR 494,8 MILJARD

import
naar Vlaanderen
in 2022



Top 10 export destinations of Flanders in 2022



69%
of the total export of
Flanders

exportmarkten

2022

(x miljard EUR)

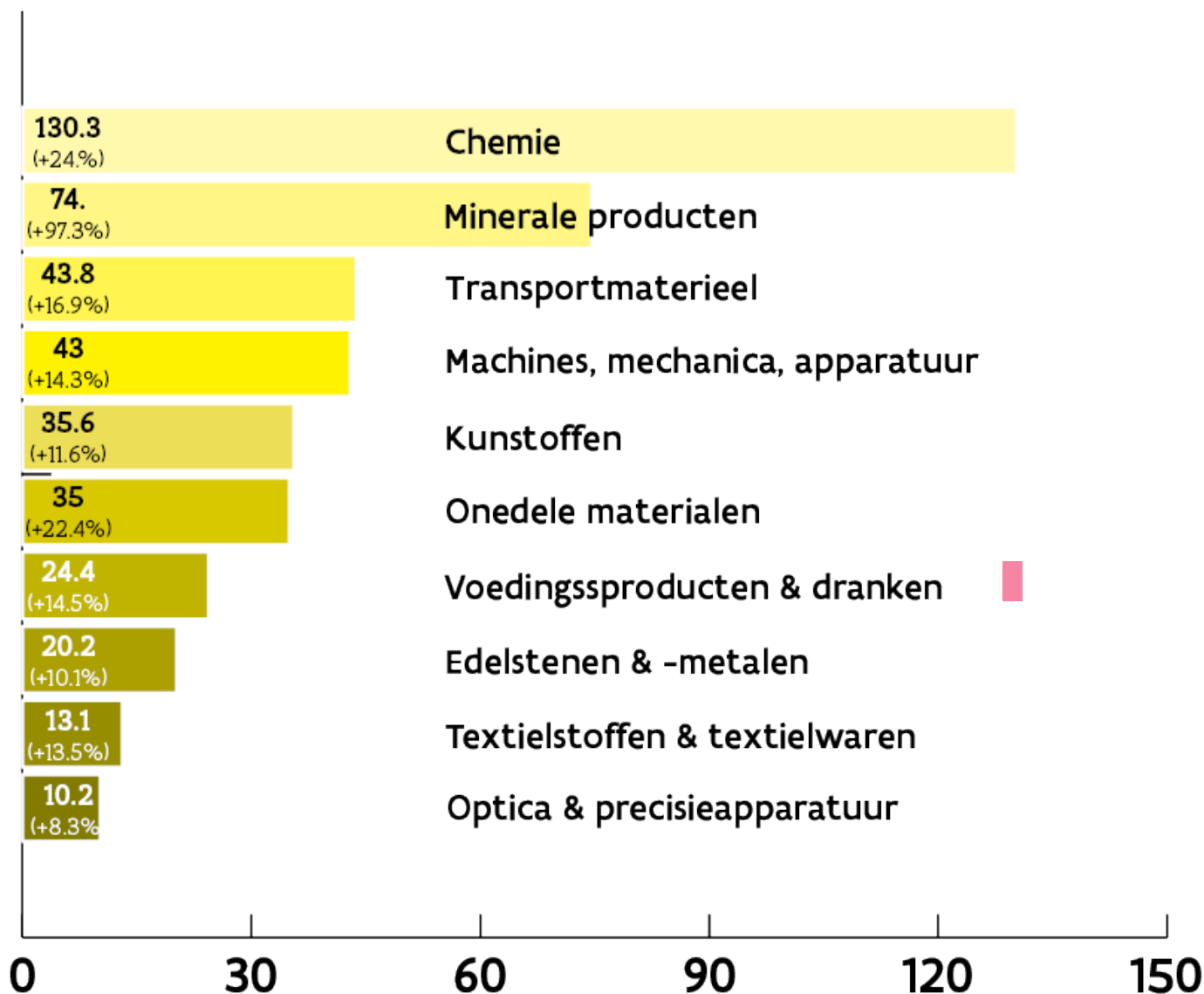
* Vanaf 1 februari 2020 is het VK niet langer opgenomen in de EU-totalen (look voor historische data).

Continent	2020	2021	2022	"Aandeel 2022 in %"	2020 - 2021	2021 - 2022
WERELD	297,97	380,64	479,70	100%	+27,74%	+26,02%
Europese Unie	189,57	246,00	307,94	64,20%	+29,77%	+25,18%
Europa overige	39,31	42,01	48,94	10,20%	+6,85%	+16,50%
Europa	228,88	288,01	356,89	74,40%	+25,83%	+23,92%
Azië overige	22,74	32,18	38,21	7,96%	+41,47%	+18,74%
Nabije en Midden-Oosten	7,51	10,27	11,90	2,48%	+36,74%	+15,86%
Azië	30,25	42,44	50,10	10,44%	+40,30%	+18,04%
Noord-Amerika	19,76	23,03	31,28	6,52%	+16,52%	+35,84%
Zuid-Amerika	3,97	5,18	7,65	1,60%	+30,52%	+47,85%
Centraal-Amerika	1,58	2,06	3,56	0,74%	+30,36%	+72,28%
Amerika	25,31	30,27	42,49	8,86%	+19,58%	+40,38%
Afrika overige	6,65	10,21	18,02	3,76%	+53,60%	+76,49%
Noord-Afrika	3,31	4,75	5,47	1,14%	+43,47%	+15,22%
Afrika	9,96	14,96	23,49	4,90%	+50,23%	+57,04%
Australië en Nieuw-Zeeland	1,80	2,67	2,32	0,48%	+48,69%	-13,09%
Oceanië overige	0,04	0,05	0,06	0,01%	+12,22%	+22,59%
Oceanië	1,84	2,72	2,38	0,50%	+47,80%	-12,43%
Bijzondere trafiek	1,72	2,24	4,35	0,91%	+30,01%	+93,86%



Vlaamse sectorale uitvoer 2022

in miljard euro
(evolutie in uitvoerwaarde
t.o.v. 2021)



90% VAN DE VLAAMSE EXPORT

Bron: Eurostat



VLAANDEREN VERSNELT!

Samenwerken aan de internationalisering
van de Vlaamse economie !

- Food ■
- Smart Logistics
- Life Sciences & Health
- Solution driven engineering & technology
- Sustainable resources, materials & chemistry



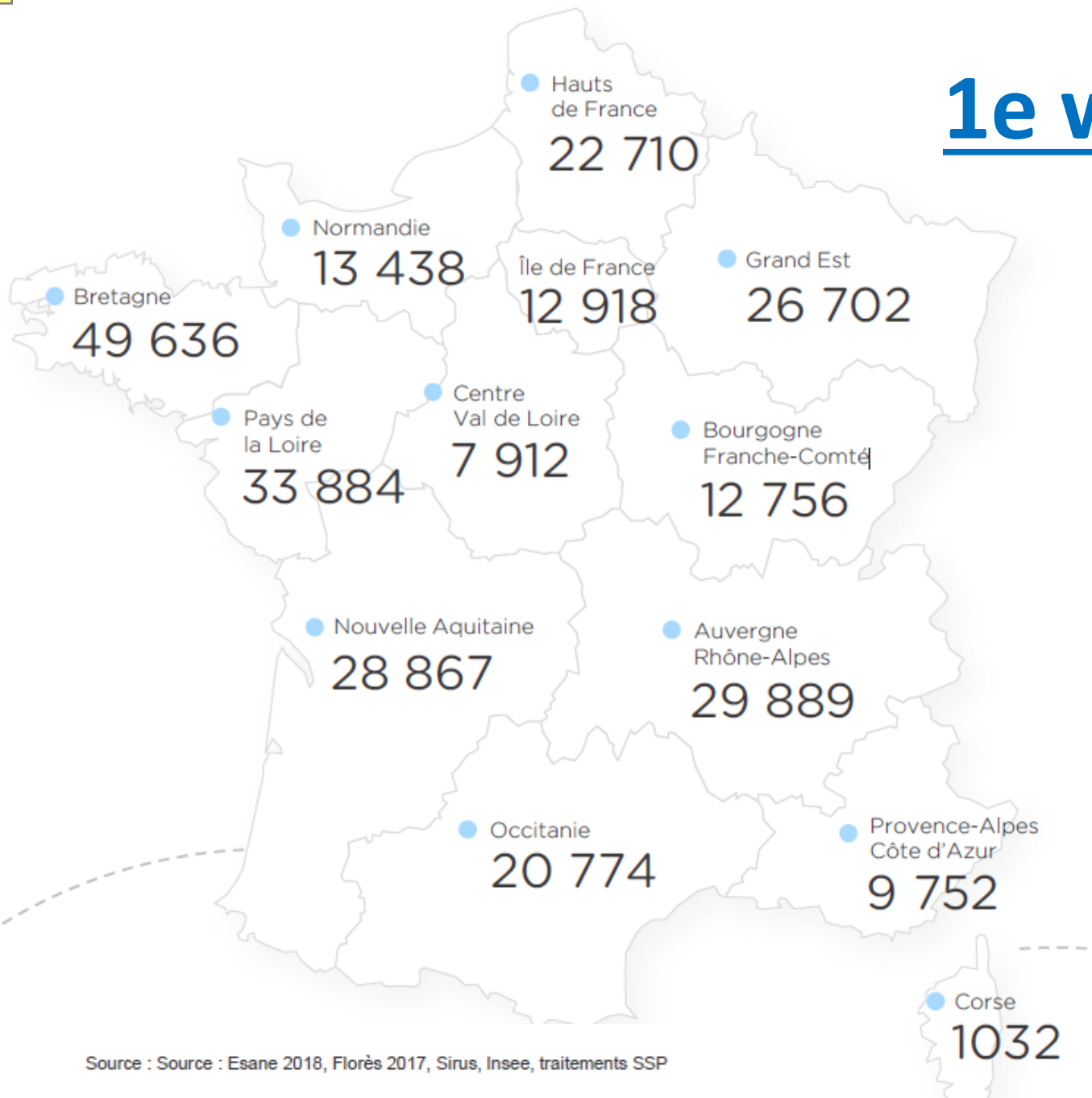
5 – Sector voeding in Frankrijk (korte belichting)

5 - Franse voedingsindustrie : export

- 24 % van de omzet in voedingsindustrie voor de export
- 4^e wereld exporteur
- 3^e sector die bijdraagt aan de Franse handelsbalans (na de aeronautica en chemie sector)
- Drie belangrijkste producten voor de export :
- dranken, zuivelproducten, graanproducten
- Frankrijk is de grootste vlees- en zuivelproducent van de Europese Unie. Voor deze producten is er dus beperkte nood aan import.

- 46 Mds€ voedingsproducten export, maar verlies van concurrentieel internationale positie : 2 plaatsen lager dan 10 jaar
- Lagere marges : min 7 % in 2022 (900 miljoen in een jaar).

1e werkgever in Frankrijk



- 15 4709 bedrijven
- 98 % zijn KMO's
- 433 579 jobs

- 70% van de landbouw wordt verwerkt in voedingsindustrie

- + 80% van de Franse consumptie wordt geproduceerd in Frankrijk

TOP Grootdistributie in Frankrijk (2021)

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

Top 2 hotel- en resortketens in Frankrijk en Europa met restaurant en catering



Hotelketen	hotels	aankoopbeleid
Accor	Etap Hotel, Formule1, Ibis, Mercure, Novotel, Sofitel, Il Seasons, Pullman, Thalassa Sea & Spa, Adagio, The Sebel, Mgallery	importeurs, groothandelaren, direct of cash & carry
Groupe Louvre Hotels	Première Class, Campanile, Kyriad, Tulip In, Golden Tulip, Royal Tulip	importeurs, groothandelaren, direct of cash & carry

Tendenzen consumentengedrag food



“Nationale merken verliezen de strijd om marktaandeel in Frankrijk, terwijl distributiemerken zeer sterk groeien” : Thierry Cotillard, CEO Intermarché.

- In 2 jaar meer dan **21% inflatie**
- **MDD** (huismerken en witte producten vertegenwoordigen nu 35,4% van de merkomzet. 2,2 punten meer dan in dezelfde periode vorig jaar.
- een sterke groei op het gebied van onderhoud, hygiëne en **diepvriesproducten**.
- Meer volume, maar minder marges

6.1 - Regelgeving verpakkingen Frankrijk



In Frankrijk is een **anti-afvalwet voor een circulaire economie (Loi Agec)** van kracht die onder andere producenten in bepaalde productcategorieën onderwerpt aan een **REP (Responsabilité Elargie du Producteur)** of een producentenverantwoordelijkheid voor afvalbeheer.

Triman-Logo

Men is hierbij verplicht:

- een unieke identificatiecode aan te vragen;
- zich aan te sluiten bij één of meerdere eco-organismen;
- de verpakkingen naar **B2C** eindconsumenten aan te passen.

6.2 - Regelgeving verpakkingen Frankrijk - Informatiebronnen



1 - Sessies tijdens de International Business Days

- 25 september 2023 om 09u30 in Brugge
- 27 september 2023 om 09u30 in Hasselt

Een directe link naar deze seminars om in te schrijven.

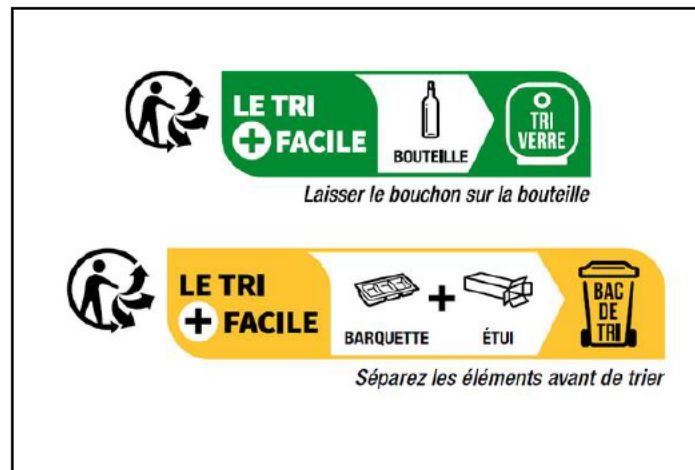
[Seminaries over Zuid-Europa tijdens de Flanders International Business Weeks | International Business Awards](https://www.flandersinvestmentandtrade.com/export/marktstudie/regelgeving-verpakkingen-frankrijk)
([flandersinternationalbusinessawards.be](https://www.flandersinternationalbusinessawards.be))

2 - Studie verpakkingen is te downloaden website FIT

<https://www.flandersinvestmentandtrade.com/export/marktstudie/regelgeving-verpakkingen-frankrijk>

3 - Webinar: Franse regelgeving en gevolgen omtrent verpakkingen voor exporterende bedrijven

[Webinar: Franse regelgeving en gevolgen omtrent verpakkingen voor exporterende bedrijven – YouTube](#)



Welkom

Internationaal ondernemen? Ontdek de events waarmee u scoort in het buitenland!

177
events online

U vindt hier alle events van en voor internationaal ondernemend

Vlaanderen: zakenreizen, opleidingen, b2b matchmaking events, internationale delegaties, ontmoetingen met buitenlandse beslissingsnemers en nog veel meer.

[Bekijk de volledige agenda](#)

Land

Alle

Sector

Alle

Type

Alle

[Check agenda](#)



Merci pour votre attention
Dank voor uw aandacht

Ans Baggerman
Commercial deputy
ans.baggerman@fitagency.com

Introductie in de Franse retail & foodservice markt, trends en consumentenvoorkeuren

Green Seed Group



With 25 years of experience, the Green Seed Group is a unique international network of 10 offices in Europe and North America, specializing in the food & beverage sector.

OUR MISSION

To advise food and beverage companies or marketing boards on how to develop a sustainable and profitable position abroad.

Green Seed France can help you to develop your business in France using our in-depth knowledge of the local food and beverage market and our established contacts within the trade.

**Dreams are the seeds of change.
Nothing ever grows without a seed, and nothing
ever changes without a dream.**



Green Seed Group



A unique international network of 10 agencies in Europe and North America, specializing in the food & beverage sector



1. MARKET BACKGROUND & CONSUMER TRENDS
2. KEY QUESTIONS TO START
3. THE FRENCH RETAIL SECTOR
4. KEY RETAILERS' PROFILES
5. TRADE SHOWS
6. RECOMMENDATIONS

France is...



Food is an important part of French lifestyle

85% of French consumers believe that "health is on the plate"

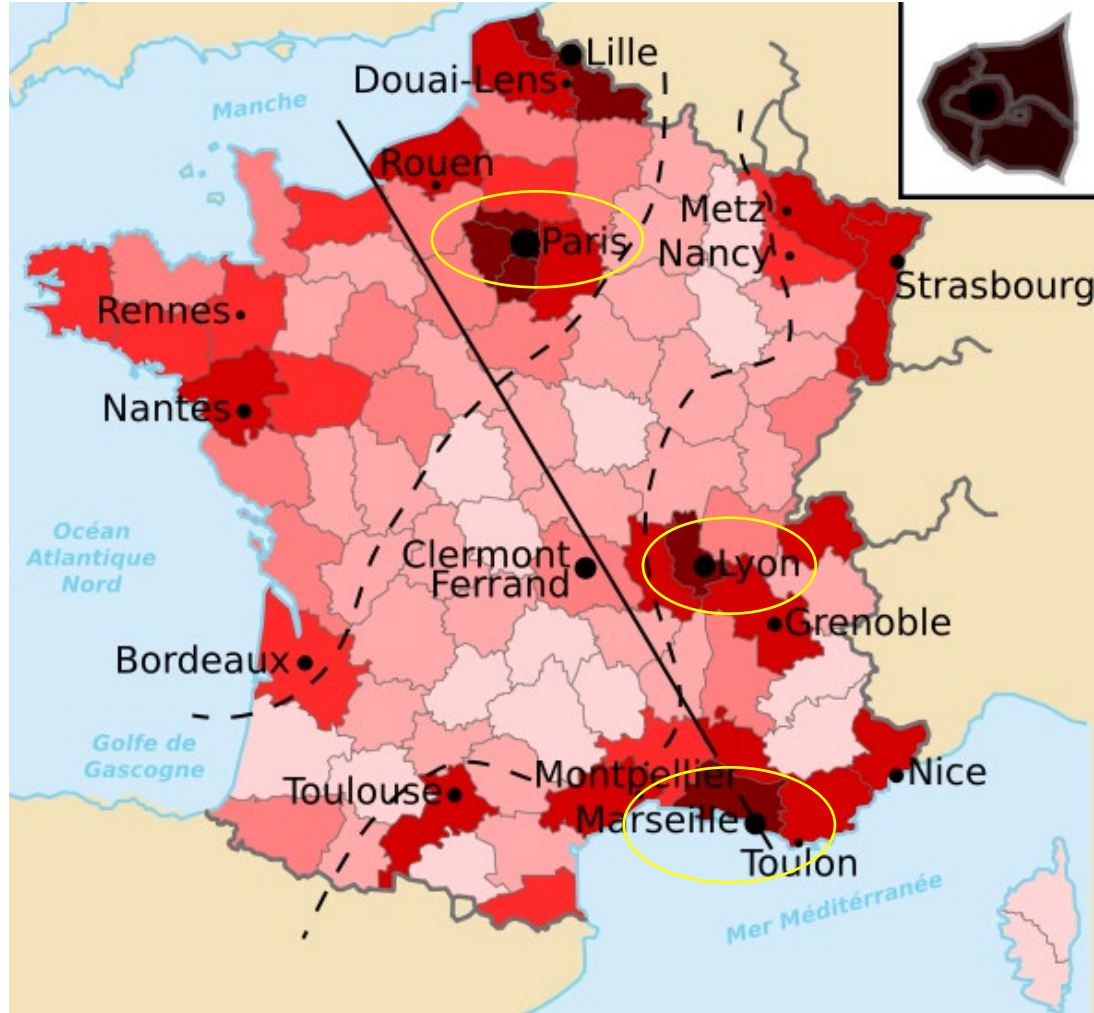
Strong culinary tradition

French Cuisine inscribed on UNESCO's List since 2010

+15 500 French manufacturers

More money is spent on food than any other EU country

Market background



- France is n°3 in the EU Market for Grocery Retail market – behind Germany
- 67 million inhabitants
- A concentrated population in Ile de France (Paris and suburbs) : 19% of economic activity (population +12M)
- Various VAT rates for food, depending on products
 - Standard food rate is 5.5 %
 - Food to go : 10%
 - Petfood : 10%
 - Alcohol : 20%
 - Confectionery, vegetable fats, caviar, chocolate or cocoa : 20%

Food trends



Health & Sustainability

- Consumers have never been more concerned about their health
- Ethics and responsibility apply now from the field to the plate



CLEAN LABEL

No sugar, no preservatives or additives, natural colorings, gluten free, lactose free, no nitrites...
48% read the nutritional values on packaging



SOCIAL CONSCIENCE

67% Consumers often stop buying product they like, without effective CSR policies, because they want to be more “Responsible”



FLEXITARISM

Strong decrease of meat consumption. 89% of French say they like meat but 68% think they eat too much of it. Only 2% vegan



AUTHENTIC

Bulk products in paper bags. 91% consumers willing to buy products with less packaging.



NUTRI SCORE

60% French people say they choose a product according to it



ECO SCORE

New signage assesses the environmental impact of food products, might soon be mandatory (2024)



ORGANIC

It is still a niche market (about 5% of total food) and has been slowing down since high inflation



LOCAL

Strong development of PGI and quality labels, French origin being an asset... Hypermarkets MS decreasing in favour of SM & Convenience stores

Satisfaction & Digitalization

- Enjoyment drives food choices for 71% of people in the world
- Digital technology: essential tool in everyday life, it helps us to eat healthier, safer, and more sustainably



PLEASURE & REASSURANCE

Food is a refuge in these uncertain times. It is also an opportunity to share with family and friends.



PERSONAL COMMITMENT

The satisfaction of making a useful choice through a societal commitment, in relationship with nature, animals...



CURIOSITY

Consumers want to explore new tastes and new textures. They want to travel without leaving their kitchen by discovering new flavours.



HOME COOKING

With lockdowns, consumers rediscovered the pleasures of cooking. It has benefits on budgets and health. Innovation provided solutions with cooking aids, recipe kits and ready-made preparations.



CLICK & COLLECT

Sanitary crisis changed Consumers 'habits :+45% for the Click & Collect



QUICK COMMERCE

This new segment in the food e-commerce has faced a strong growth in the number of operators +25 but declining recently



DIGITAL

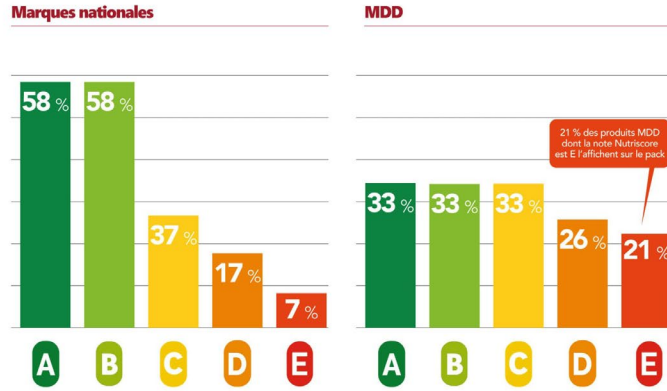
Culinary advice, anti-waste tips and tricks or nutritional coaching, digital applications offer a personalised service.

TRENDS Some examples



> PGC FLS : Part des références portant le logo Nutri-score on-pack selon la note

[Etude sur 182 catégories d'aliments, janvier-juillet 2023, HM/SM/proxi/e-commerce]



L'EFFET DE L'AFFICHAGE DE LA NOTE SUR LES VENTES

> Nutri-score présent on-pack : écart de croissance de la demande vs sans logo on-pack

[25 catégories pour lesquelles les shoppers ont le choix entre différentes notes, janvier-juillet 2023 vs N-1, HM/SM/proxi/e-commerce]

Les références portant la note A on-pack ont une croissance 6,3 pts supérieure aux refs n'affichant pas leur note A.



NUTRISCORE impact on Sales in France *

- 58% of brands with an A rating claim it on pack
- skus with an A rating on the pack grow **by 6.3 pts more** than skus which don't claim their A rate



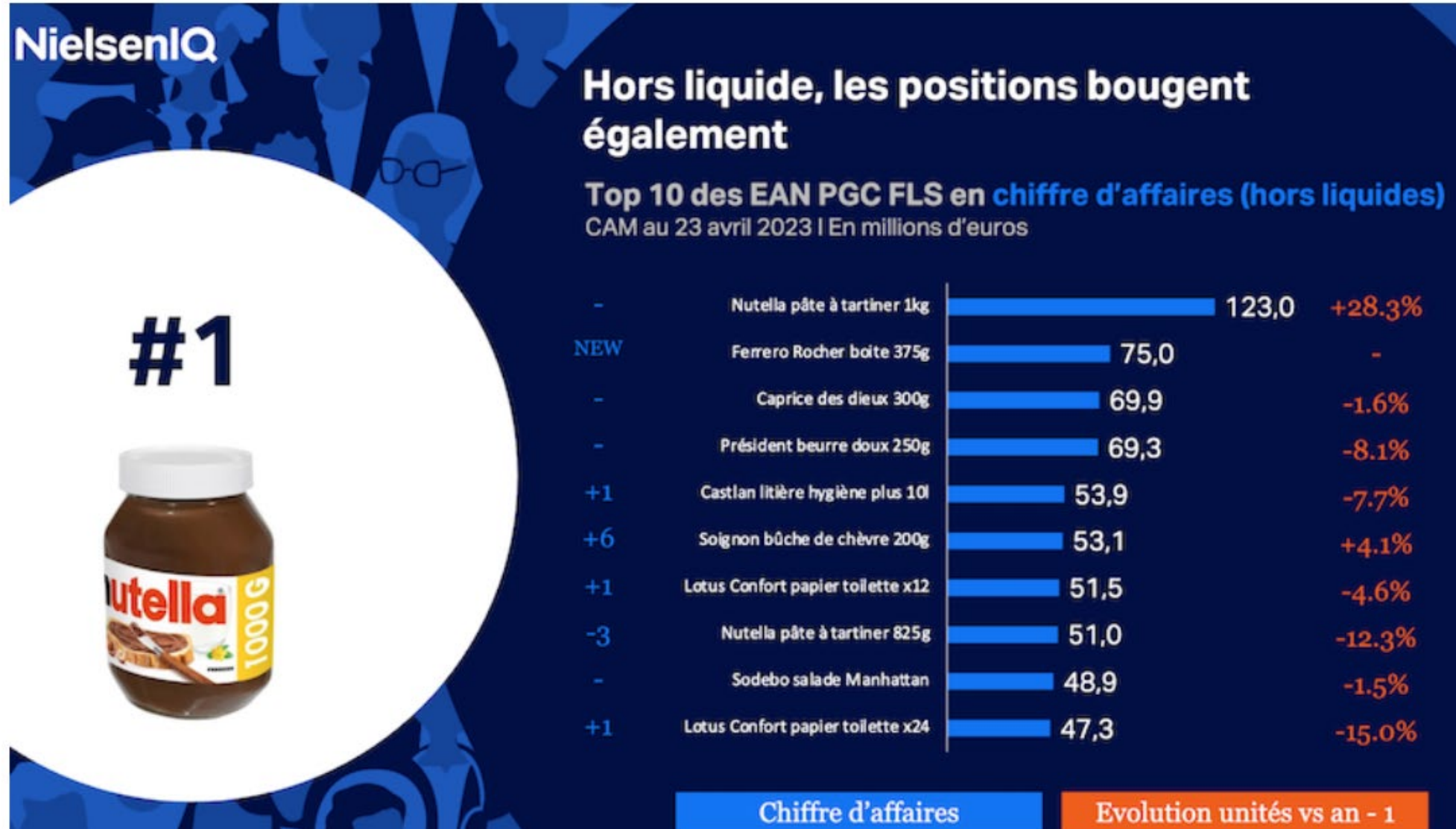
Nescafé Farmers Origin soluble » by Nestlé

- Transparency on origin
- 100% sustainable supply
- Made in France

* Circana 182 categories retail YtD July 23

What we say and what we do

TOP 10 of TO YTD
N°1 : Nutella 1kg (+28% !)
N°2: Ferrero rocher
N°3 : Caprice des Dieux
cheese



But PRICE is KEY



59% of French people consider price to be "very important" when choosing where to shop, making it the main choice criterion

**Impact of the sanitary crisis + war in
Ukraine + climate change**



Polarization of the Consumption:

**EAT BETTER
vs
EACH CHEAPER**

1. MARKET BACKGROUND & CONSUMER TRENDS
2. **KEY QUESTIONS TO START**
3. THE FRENCH RETAIL SECTOR
4. KEY RETAILERS' PROFILES
5. TRADE SHOWS
6. RECOMMENDATIONS



**IS THERE AN
OPPORTUNITY FOR
MY PRODUCTS ?**

YES, IF....



WHAT DOES THAT MEAN?

- Suited to French tastes
- Understood by French Consumers
- Offers a real competitive advantage
- Compliant with French law: quality certificates (IFS, BRC, HACCP ...), claims, Egalim law...

CHOOSING A STRATEGY

Choosing a business model is a key part of your strategy. This depends on the size of your company, the product category, your export maturity and your objectives. Here are the different options available

DIRECT APPROACH	THROUGH AN IMPORTER	THROUGH AN AGENT	JOINT VENTURE	LOCAL SUBSIDIARY
FULL CONTROL	EASY TO MANAGE	IF SPECIALIST IS REQUIRED	STRATEGIC ALLIANCE	FOR LARGE MARKETS
<ul style="list-style-type: none"> - Minimum size of company is required - Start small - Preparation is key 	<ul style="list-style-type: none"> - Experience of the food and drink industry or specifically in your product category. - Almost unavoidable in certain categories: e.g. beverages, snacking - Control your RSP 	<ul style="list-style-type: none"> - Does not take title of the goods - Chose an agent who has experience & established business in your product category. - Can be a complementary option 	<ul style="list-style-type: none"> - Close to your category, but not a competitor. - Immediate access to the market through already established distribution channels 	<p>Various options</p> <ul style="list-style-type: none"> - Liaison office: the least restrictive type of entity - A Branch office: intermediate option - A Subsidiary: the most durable form of establishment

WHICH CHANNELS ARE AVAILABLE ?



FOODSERVICE : a highly fragmented market

- **Travel catering**

- ❖ Planes: Servair / Air France
- ❖ Trains: SNCF, Eurostar, Newrest
- ❖ Ferries: Brittany Ferries

SERVAIR



- **Commercial Catering**

- ❖ Compass
- ❖ Sodexo
- ❖ Elixor

sodexo



elixor

- **Foodhalls**

- ❖ Food halls: Lafayette Gourmet, Grande Epicerie de Paris, Maison Plisson, ...
- ❖ Up market snacking chains : Cojean, Jour, Lina's ...

Lafayette
GOURMET

jour
Healthy by nature

- **Main Distributors**

- ❖ Pomona (+ 8 500SKUs)
- ❖ SYSCO
- ❖ Pro à Pro (+ 20 000 SKUs)
- ❖ Brake France (3 500 SKUs)
- ❖ + regional /specializing distributors (snacking, drinks...)



CAUSSES
SAIN | SAVOUREUX | SIMPLE
www.causse.org

groupe pomona

Sysco
Au cœur de
l'alimentation
et du service

- **Cash & Carry**

- ❖ Promocash (belongs to Carrefour - 139 stores)
- ❖ Metro

Promocash
Engagés pour faciliter votre métier

METRO

RUNGIS INTERNATIONAL MARKET

- ✓ The largest fresh products market in the world, spread over +200 hectares, 7 km from Paris
- ✓ For professionals, stores and restaurants from all over France and even abroad, come to buy their supplies
- ✓ Divided into 5 areas: fruit and vegetables, seafood, meat, dairy products and flowers
 - Turnover of 10 billion euros.
 - 1,200 companies
 - 100,000 skus in fresh food products.
 - A "Gastronomy" offer
 - An "Organic" dedicated pavilion
 - Starting at 3am
- ✓ Many specialist wholesalers have set up their businesses at Rungis
- ✓ Logistics specialists also available on site to meet all logistics needs

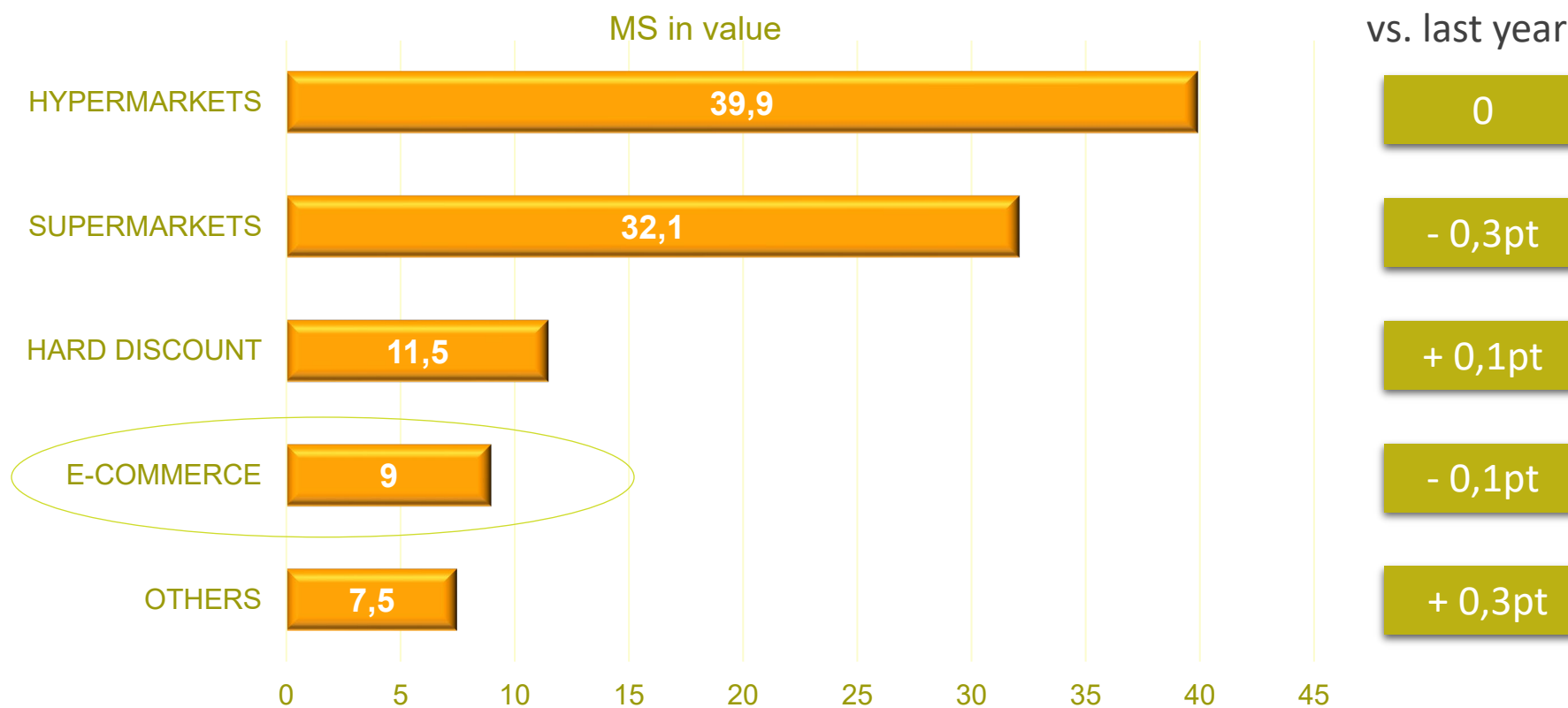


1. MARKET BACKGROUND & CONSUMER TRENDS
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3. **THE FRENCH RETAIL SECTOR**
4. KEY RETAILERS' PROFILES
5. TRADE SHOWS
6. RECOMMENDATIONS



Overview of the French Retail Sector

A fairly stable situation compared to last year, HM & SM still represent +70% of the retail value



2500m² < SM < 400m², HM >2500m²

Kantar Worldpanel FY2022

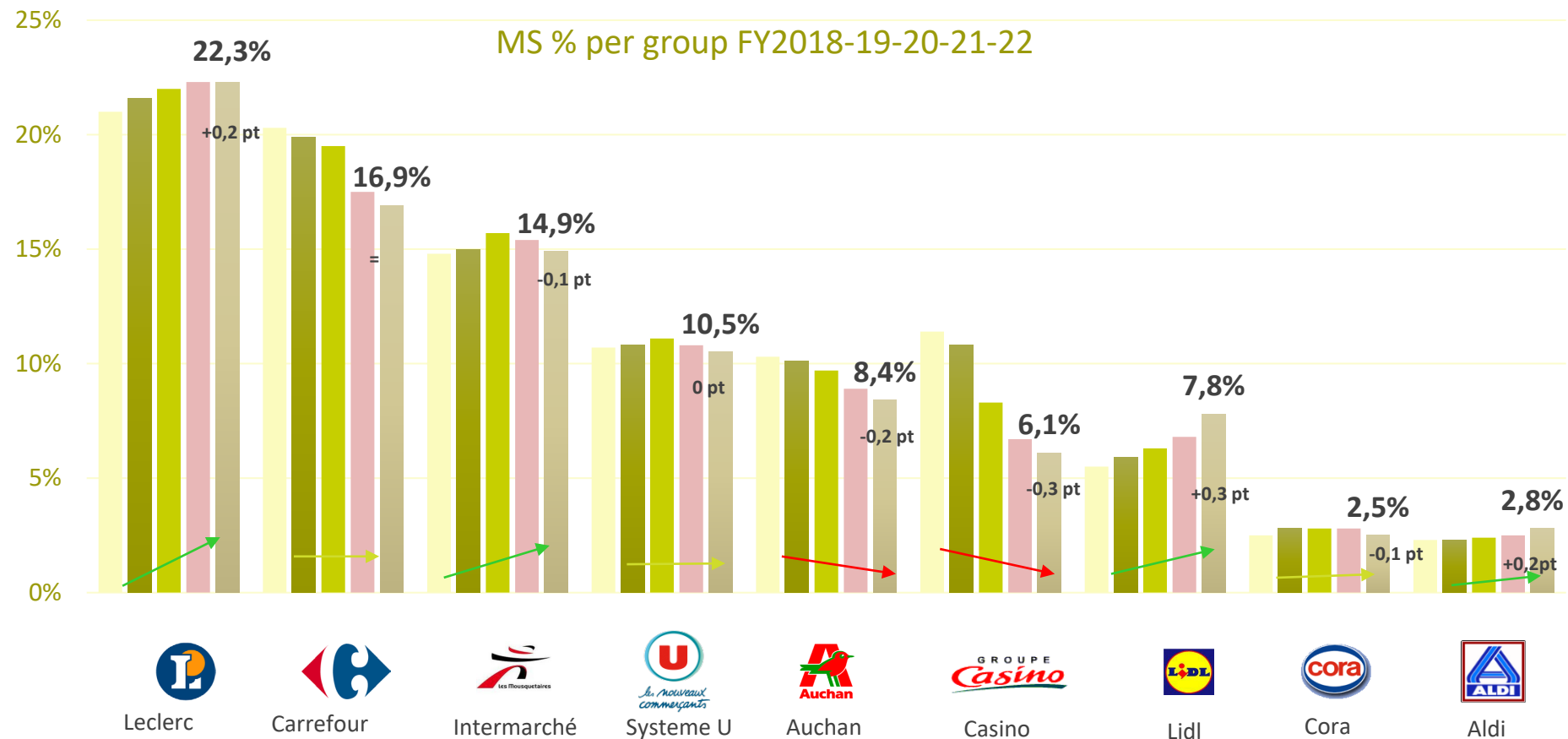
Others = Convenience stores, Cash & carry, Organic stores, frozen distribution, cellarman

Overview of the French Retail Sector

- Unbalanced power: 7 major, large-scale Retailers vs 15 500 French suppliers, of which 98% SMEs = negotiations are difficult, places are hard to win and hard to keep. Building a business in retail is a long-term project
- Strong difference in buying process between franchised (Leclerc, Intermarché...) or very centralized organisation (Carrefour, Auchan, Monoprix...)
- Independent retailers (Leclerc, ITM, SystemeU) and HD are gaining ground in Market shares vs centralized
- Average market shares for Private labels: 35% - progressing
- An exception in the EU: strict legal context with “Egalim law” which regulates the relationships between retailers & Suppliers. Marketing budgets, RSP and margin calculation are highly regulated

Retail Groups Market Shares

Since 2018, Leclerc is n°1 in MS in front of Carrefour
Independent retailers (Leclerc, ITM) and HD are gaining ground



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LECLERC



N° 1 retail group in France

- Leclerc is focused on medium-size HM (average 5 259m²).
- Leclerc Group is managed by a private cooperative grouping of over 500 members. It is a decentralised retailer. Negotiations must be done at the store level, regional level, and national level. Sales force is mandatory.



Leclerc is n°1 retailer, completely decentralized. Delivering to one or two regions with high potential can be interesting to start. But in any case, working with Leclerc means a strong negotiation of prices & an investment in a sales force.

Hypermarkets	643	18 depots used for deliveries
Supermarkets	Leclerc Express : 88	
Click & Collect	Leclerc Drive: 823	
Organic	Le marché bio E. Leclerc: 13	

CARREFOUR GROUP



N° 2 in France

- Carrefour is a major player in worldwide retailing.
- It is a centralised retailer, which can be extremely efficient for some aspects but due to its administrative structure can also be slowed down.
- Negotiations are done at national level for all store formats.

Hypermarkets	234 Carrefour
Supermarkets	993 Carrefour Market
Convenience / Proximity	964 Carrefour City 625 Carrefour Contact
Cash & Carry	+ 150 Promocash
Click & Collect	1757 Carrefour Drive
Organic	80 So Bio 96 BIO C BON

Very centralised, especially in the hypermarket format, Carrefour is a demanding retailer that requires a massive investment from suppliers to meet all their demands: IT, marketing, supply, buying office, admin ...etc. It is a retailer that addresses suppliers already well established in retail and export.

INTERMARCHE



No. 3 retail group in France

- A private cooperative grouping of +3 000 Independent members
- Focus on small hypermarkets (av. 4,420m²) and medium size SM (+1300)
- 100% national coverage but more common in rural areas
- Soft-discount philosophy
- The only retailer involved in food production, 59 production units supplying 40% of their PL
- For brands = sales force is required

Intermarché Hyper	97
Intermarché Super	1 338
Discount : Netto	301
Intermarché Contact	288
Intermarché Express	137
Le drive Intermarché	1 816
Les comptoirs de la bio	104

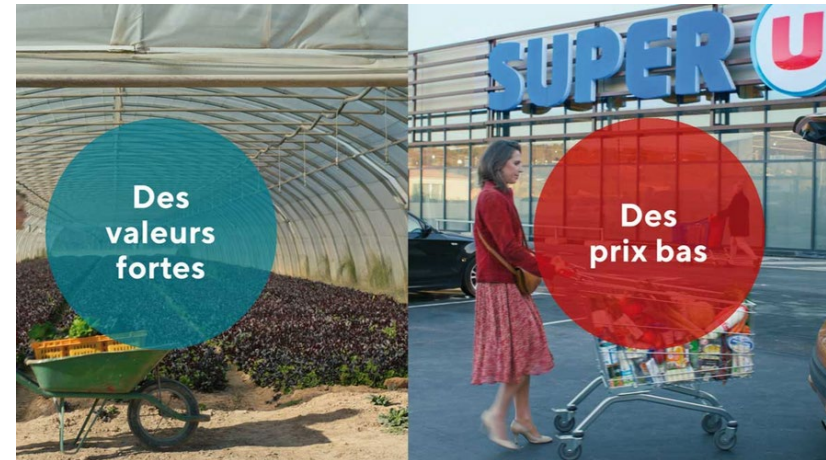
N°3 in the market, Intermarché has a unique way of operating by having its own factories. The operation is in partnership with store owners, making it a retailer that requires time to understand the operation but with a very large potential given the number of supermarkets.

SYSTEME U



No. 4 retail group

- A private cooperative grouping of independent members.
- Historical roots in western France.
- Half of their stores located in towns with less than 5000 inhabitants, focused on medium size supermarkets



Hypermarkets	64 Hyper U
Supermarkets	712 Super U
Convenience	358 U Express
Drive	922 Courses U

N°4 in the market, Système U is a network of independent stores with a strong presence in western France. Système U promotes local consumption, encouraging partnerships with SMEs and local producers. In all cases, the sales force will be needed

AUCHAN



No. 5 retailer

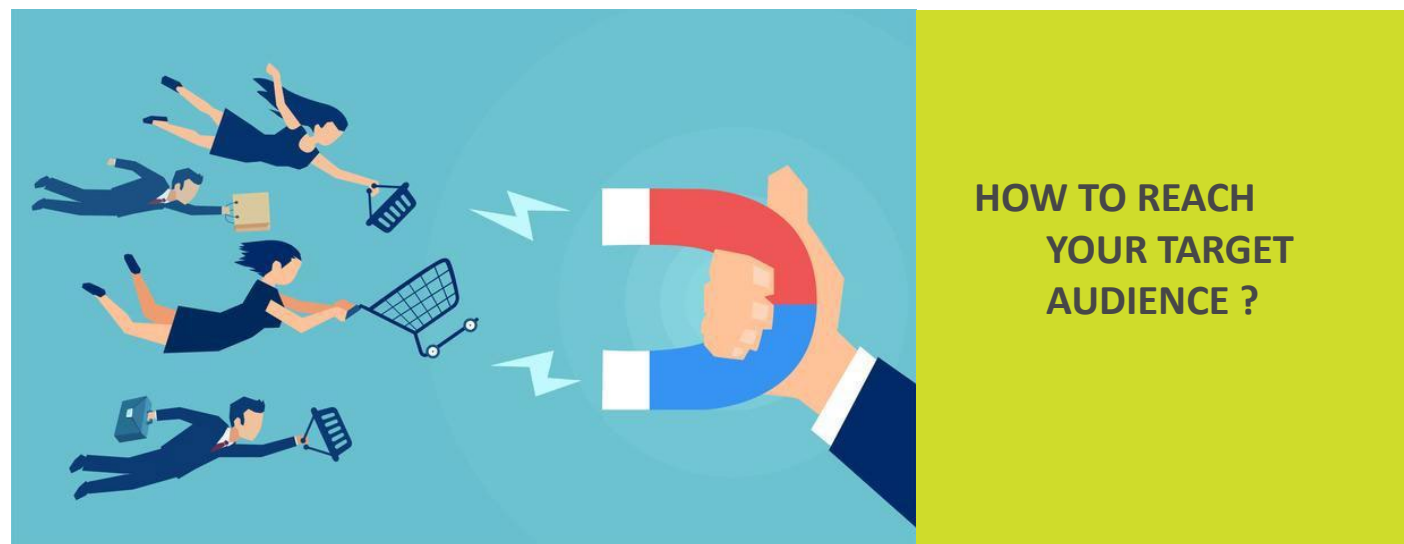
- A family-owned company that caters ...for families
- Very large HM: 10,330 m² vs 5,400 m² average



Hypermarkets	137
Supermarkets	267 Auchan supermarché 71 Bi1, 23 Atac
Organic	2 Cœur de Nature
Click & Collect	361 Auchan Drive 55 Chrono Drive

With a strategy very much focused on very large hypermarkets, Auchan is having difficulty maintaining its market share. But this can be an opportunity because it is a rather centralised retailer, with a very wide range of products

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HOW TO REACH
YOUR TARGET
AUDIENCE ?

Main trade shows in France

- **SIAL** (Paris) - the largest food show in EU alongside ANUGA – biannual
 - Next edition 19-23 October 2024
 - <https://www.sialparis.com/>
- **Sirha** (Lyon) - Food service trade show – biannual
 - Next edition 23-27 January 2025
 - <https://www.sirha-lyon.com/en>
- **Sandwich & Snack Show** (Paris) – snacking & on the go products yearly trade show
 - Next edition 13-24 March 2024
 - <https://www.sandwichshows.com/en-gb.html>
- **Natexpo** (Paris / Lyon) – International trade show for organic products
 - Next edition 22-24 October 2023 in Paris
 - <https://natexpo.com/en/>
- **Gourmet Selection** (Paris) – dedicated to fine food
 - Next edition 10- 11 sept 2023
 - <https://event.salon-gourmet-selection.com/2023/>



SIRHA+ LYON

SANDWICH
& SNACK
SHOW



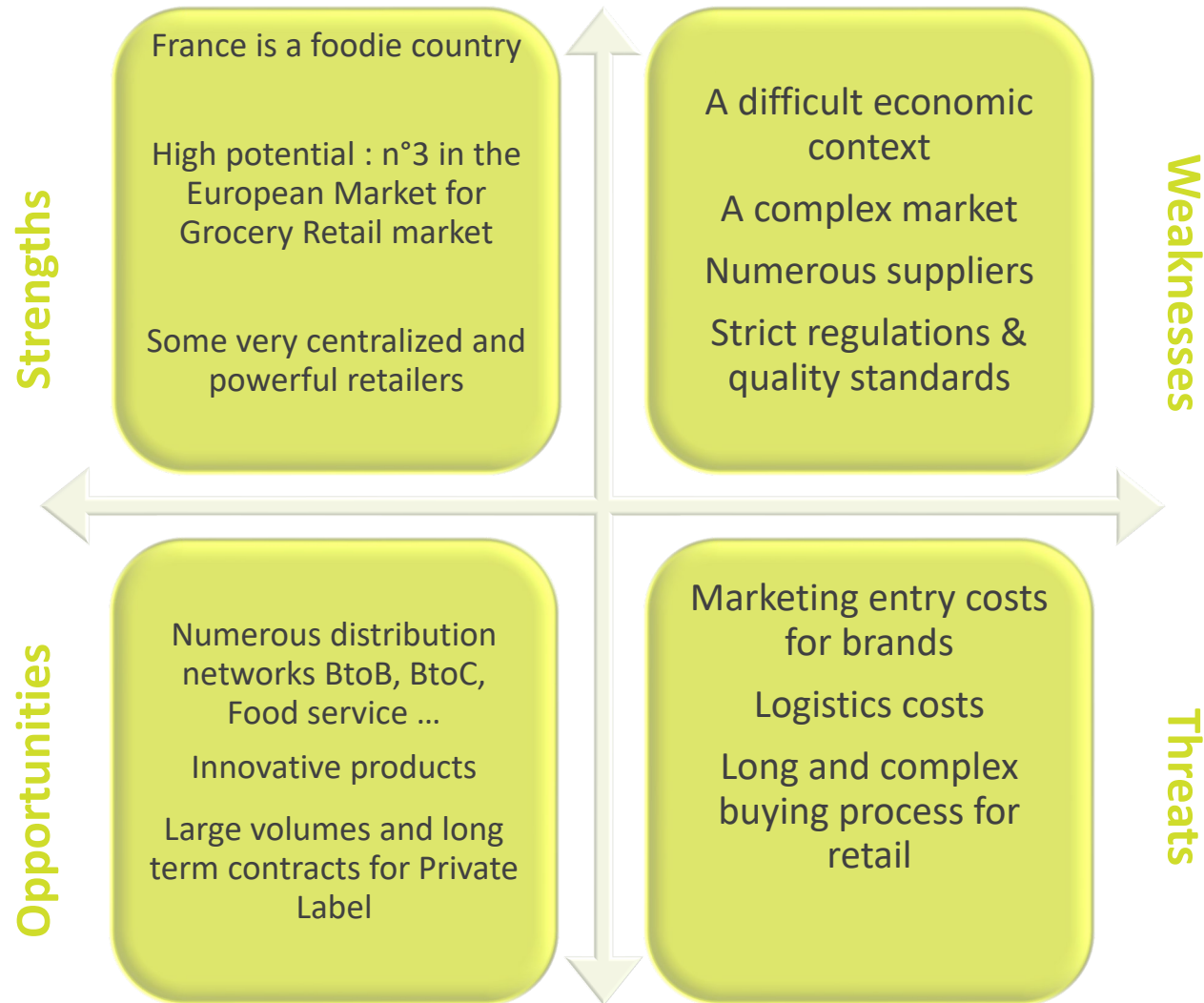
PARIS 2023
natexpo
22-24 OCT.



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6. **RECOMMENDATIONS**



SWOT Analysis



Recommendations

- The French market is highly complex and fragmented = it takes time to build up a large, stable business
- Numerous opportunities but choosing your strategy and best routes to markets are key to succeed.
- Bring something new to the category is essential to open doors → visit retail stores to understand who your competitors are, the level of prices, existing ranges...
- Retailers have very different organisations which are key to understand before starting to do business = start small, with centralized retailers
- EGALIM law highly regulates the business = be prepared before asking for a meeting

PATIENCE & PREPARATION

will be key for success



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Exportboost studiereis

Fevia
Vlaanderen

Exportboost studiereis Frankrijk

13-15 november 2023



Programma

Maandag 13/11

- Heenreis Brussel-Parijs met de trein (Thalys vanuit Brussel naar Parijs van 13:21 - 14:44)
- 15u45: Allen stipt aanwezig in Vlaams Huis Parijs
- 16u-18u: Verwelkoming & diepteseminarie in het Vlaams Huis Parijs
 - Overlopen programma en praktische afspraken door Fevia Vlaanderen
 - Marktintroductie en verplichtingen rond verpakking van door Flanders' Investment & Trade
 - Het belang van herkomst in Frankrijk en de implicaties van Egalim 2&3 door l'Association Nationale des Industries Alimentaires
 - Gedetailleerde briefing van de Franse retail & foodservice markt door Green Seed Frankrijk
- 18u-19u30: Netwerkevent in Vlaams Huis Parijs
- 20u: Diner

Programma

Dinsdag 14/11

- 8u30-10u: gepersonaliseerd marktadvies door Green Seed Frankrijk (groep 1) / storechecks (groep 2)
- 10u30-12u30: Bezoek aan oa Lafayette Gourmet / Printemps du gout foodhalls
- 12u30: Lunch
- 14u30-15u30 : Bezoek aan oa Monoprix en Picard
- 16u-18u: gepersonaliseerd marktadvies door Green Seed Frankrijk (groep 2) / storechecks (groep 1)
- Optioneel: bezoek aan Belgium House Olympische Spelen 2024
- 19u30: Diner

Programma

Woensdag 15/11

- 3u45-8u: Bezoek aan versmarkt Rungis
- 10u-13u: Bezoek aan retailers/foodservice ten zuiden van Parijs
- Terugkeer Parijs-Brussel met de trein

Praktisch

- Open voor zowel leden als niet-leden van Fevia VL, gevestigde en startende exporteurs en producenten in alle productcategorieën in voeding en dranken.
- Maximaal 15 deelnemers. Leden van Fevia VL krijgen voorrang.
- Kost € 800 (excl. btw) voor leden van Fevia VL, € 1.200 (excl. btw) voor niet-leden.
- Inbegrepen: programma, 2 hotelovernachtingen met ontbijt, 2 diners, 1 lunch en collectief vervoer ter plaatse.
- Niet inbegrepen : andere maaltijden of uitgaven dan aangegeven en het transport naar en van Parijs.
- De deelnemer regelt zelf zijn/haar transport naar Parijs en terug. Als je voor de heenreis bij de groep wil aansluiten, raden we je aan een ticket te kopen voor de Thalys vanuit Brussel naar Parijs van 13:21 - 14:44.

Inschrijven: <https://www.fevia.be/nl/evenement/studiereis-exportboost-frankrijk>

Q&A

Volg Fevia op LinkedIn



Volg food.be op LinkedIn



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