

## Market Profile Food & Beverages in France

### 1.0 MARKET OVERVIEW AND STRUCTURE<sup>1</sup>

Household consumption is driving growth in French food and beverage consumption, which increased 2.7% in 2006, the largest gain in six years. With the 2006 average yearly wage estimated at just under Euros 22,200<sup>2</sup>, France ranks first in Europe in terms of food expenditure and third in the world after the USA and Japan. The French spend about 14% of total household expenditure on food and beverages (including alcoholic beverages).

Several economic and cultural factors are driving French consumer trends:

- Eating patterns have changed and a growing number of people aren't conforming to the traditional three meals a day pattern.
- The increased number of women in the work force has reduced the time spent preparing meals and increased the frequency of eating out or buying ready meals.
- Innovation, quality, and diversity are important trends in the French food industry.
- Quality products with selected, eco friendly/natural ingredients, respect of norms and safety standards have become important in the choice of food products.

As a result of these trends, fresh fruit and vegetables are becoming more popular. Seafood consumption is also increasing, while meat and poultry is remaining constant. Sales of frozen products and non-alcoholic beverages, including mineral waters and fruit juices, are rising. Wine consumption is decreasing slightly, accompanied by a trend towards higher quality wines.

Average annual consumption per capita in the main food and beverage sectors:

- bread: 53.7kg
- cheese: 17kg
- beef: 23kg
- poultry: 22kg
- lamb: 4kg
- seafood: 32kg
- wine: 54kg

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<sup>2</sup> National Institute for Statistics and Economic Studies

French consumers are health conscious and are becoming more demanding in terms of quality standards and traceability of products. New Zealand enjoys a “clean and green” image and an excellent reputation in the meat and seafood sectors for product quality and consistency.

<b>New Zealand's Top F&amp;B Exports to France (NZ\$ millions)</b>	<u>April 05- Mar 06</u>	<u>April 06 - Mar 07</u>
Meat	215.9	241.4
Fish & seafood	24.8	30.7
Edible fruit and nuts	8.2	7.4
Animal guts, bladders, stomachs, etc.	6.1	6.0
Vegetables	0.9	2.1
Beverages (wine)	0.2	1.5
Prepared meat, fish	0.2	1.5
Dairy, eggs, honey	0.7	0.3
<b>Total NZ exports to France</b>	<b>345.771</b>	<b>401.609</b>

Source of data: Statistics New Zealand

Best New Zealand food product prospects for the French market:

- frozen fish and seafood (domestic production cannot meet demand)
- frozen lamb, which continues to enjoy high rating with the French consumer
- frozen ready-to-eat, innovative, and well packaged products
- natural, organic, and safe products, well controlled in terms of calories, fat content, etc, for which demand is rising

## 2.0 COMPETITIVE ENVIRONMENT

### 2.1 Major Players in the Market

Food and beverage is the largest industrial sector in France, with over 10,800 companies accounting for 32% of the total economy's GDP.

The French food industry processes nearly 70% of the local agricultural production with sales estimated at almost Euros 140 billion. France's food sector is number one in Europe and second in the world behind the USA. In 2005 food exports were Euros 28.7 billion (up 1.8% on 2004) and food imports Euros 21.8 billion (up 2.8%).

Customs' statistics show that nearly 70% of French imports originate from European Union countries, with major suppliers the Netherlands, Belgium, Germany, Spain, the UK and Italy. Outside the European Union, Brazil is the largest supplier to France, mainly of bulk products including soy and soy protein, orange juice and concentrates.

## 2.2 Distribution Channels

Preference is given to long term partnerships, sustainability and brand building, so the selection of a local partner is the key to a successful market entry. Depending on the product, an exporter can enter the market through a retailer's central buying office or a specialised importer/distributor who is responsible for the delivery of products to distribution centers.

The use of a local distributor is recommended in particular for the Hotel, Restaurant and Institutional (HRI) sector as well as niche products.

For a New Zealand supplier with little knowledge of the French market, building a relationship with a French importer offers advantages. They will provide up-to-date information on business practices, trade laws and regulations, as well as sales, marketing and distribution strategies.

Most large volume buyers, hyper and supermarkets request direct supply and mainly buy straight from source through one of their central buying offices. Central buying offices can register and approve suppliers, apply tariffs, and ensure that products comply with French regulations. Once a product meets all the import requirements they can include it in their product catalogues, offering it to supermarket buyers who can then order the product directly, and will manage delivery of products according to store instructions. Central buying offices often have a warehouse in the Rungis market, from where products are dispatched to the regions.

The Rungis Market, the “largest wholesale market in the world for fresh products”, deals with both fresh and frozen foodstuffs and is a good entry point for New Zealand products ([www.rungisinternational.com](http://www.rungisinternational.com)). With annual sales of Euros 7.1 billion representing 1,500,000 metric tons on incoming food products (2004), it supplies one fifth of the French population. Over 20,000 retailers, restaurant buyers, wholesalers, import-export companies, supermarkets, and hypermarkets buyers get their supplies from the Rungis market.

Payment terms vary between 30 and 90 days. Factoring services through banks, which deduct a small percentage for taking over the risk and paying bills upfront, are available. For example, CIC and its subsidiary Banque Scalbert Dupont offer an excellent factoring service to small companies working with large hypermarket chains.

## 2.3 Retail

Changes at the retail level over the past 30 years reflect an extremely rapid and constant trend towards consolidation in food distribution channels. Today large food retailers take almost 70% of the market share.

Hypermarkets (Hypermarchés): Carrefour, Intermarché, Casino, Leclerc, Auchan, Super U: Covering more than 2,500 m<sup>2</sup> selling space, they dominate food retail and are often located outside the city centre. Hypermarkets sell a vast range of food and non food products.

Supermarkets (Supermarchés): Monoprix, Franprix, Attac, Champion: With between 400 and 2,500 m<sup>2</sup> of selling space, usually located in the city centre or city fringe, they sell food, beverages, some clothing articles and home products.

Superettes: Variety stores always situated in city centres and more expensive than hypermarkets and supermarkets, they have less than 120 m<sup>2</sup> selling space. An increasing number of people are willing to use proximity stores despite the cost in order to save time. Carrefour owns 8 à Huit and Shopi, Casino owns Mini Casino. Superettes sell primarily food and beverage products and basic non food items.

Department Stores: An older generation of up-market department stores (Galeries Lafayette, Le Bon Marché and Printemps) sell gourmet food and high quality, boutique wines.

Hard discount stores: After a period of boom in the 1980s and 1990s, the hypermarkets are now under pressure from discount chains like Ed (Carrefour group) and Lidl. The number of hard-discount stores has more than doubled in the last 10 years.

Freezer centres: A unique concept of national wide retail stores selling only frozen foods, from starters to desserts, such as Picard Surgelés ([www.picard.fr](http://www.picard.fr)) and Thiriet ([www.thiriet.com](http://www.thiriet.com)).

Small traditional specialised food retailers: Bakers, butchers, and open air markets, take approximately 30% of the distribution chain.

## 2.4 Pricing

The market is primarily price driven with a preference for supplies from lower production cost regions such as South America driving prices down. Products from Eastern Europe are also entering the French market.

The high quality end of the market, including premium hotels and upper-end retail, can be less price sensitive, but there is still a “good or close enough” attitude amongst buyers presented with a choice between two or more similar products. A strong price / quality relationship can exist but only products that are sufficiently differentiated on a quality basis can command a higher price if supported by the consumer (or chef).

## 2.5 Marketing Strategies

Exporters to France must be conscious that time is of the essence, budgets are big, and cultural criterions different. The service an exporter can provide is just as significant as the product. Relationships are very important and are based on trust. A French chain buyer will

only get involved in the distribution of a product if s/he is certain that the export partner is effectively present and willing to participate in the product development.

Depending on whether selling “niche” or “base” products, New Zealand exporters can penetrate the market through a specialised importer / distributor or a central buying office. Whichever channel they opt for, they must first meet all import requirements by:

- submitting product descriptions and price quotations
- submitting products for laboratory testing
- establishing sanitary and health certification and other import document requirements.

Once a product meets all the import requirements, the importer/distributor or the retail chain’s central buying office can offer it to supermarket buyers, who then order the product directly.

Building a relationship with a hypermarket or supermarket’s central buying office or purchasing department involves three stages:

- Stage one: Create interest in the product. The goal is to be listed or referenced in a buyer’s catalogue. Send a promotion kit to the appropriate buyer, who may ask for samples. Prices are not always necessary at this stage.
- Stage two: If interested, a meeting with the supplier will be requested, followed by a request for additional information on the company and its factories, sanitary certification, ISO certificates etc. At this first meeting, show the competitive advantage of the product with a well supported presentation and give a simple indication of price level. Follow up with a letter demonstrating knowledge of the competition, products, prices, and target consumers. Focus on the innovative aspect of the product.
- Stage three: Discussion and commercial offer. Define the contractual terms, commercial delivery and logistics. Prepare a price offer taking into account all deductions imposed by French retailers, such as product referencing fees, retailer’s expenses for shelf stacking, and contribution towards promotional budget. Follow up with a precise letter outlining all agreed points. This is a complex phase. French buyers often try to renegotiate points at this stage. First referencing of a product is generally for one year. If the retailer wants to extend the relationship, the whole process of commercial and price discussions will have to be reviewed. Payment terms are never cash, but are set for 30 to 90 days.

Exhibiting at SIAL, the French food industry trade fair, can be a successful way of introducing a product to this market. SIAL is held every second year in Paris and is recognised as one of the focal points for the European food and beverage industry. Many buyers and influencers from around the world attend the event, a trade-only exhibition which saw in 2006 around 5302 exhibitors from 99 countries and over 140,000 visitors from 191 countries. Although New Zealand has not had a national pavilion for many years, some exporters in the meat processing and dairy sectors have exhibited at SIAL.

The next SIAL will take place from 19 to 23 October 2008 ([www.sial.fr](http://www.sial.fr))

## 3.0 SUB-SECTORS

### 3.1 Fruit & Vegetables

New Zealand exported NZ\$7.4m of fruit (mostly apples) and NZ\$2.2m of vegetables (mostly onions) to France in the year ending March 2007.

Globally, France is the third largest producer of fresh vegetables. It's also the largest producer of sterilised vegetables, producing approximately 40% of total European production. The percentage of total production used for processing is very high for several items, in particular for green beans (around 70%) and tomatoes (30%).

In 2005 France produced nearly 19 millions tons of fruit and vegetables. The key products were:

- apples (63% of total fruit production)
- peaches and nectarines (12%)
- pears (6%)
- plums (6%)
  
- potatoes (43% of total vegetable production)
- tomatoes (5%)
- carrots and turnips (4%)
- lettuce (3%)

### 3.2 Beverages

New Zealand exported NZ\$1.6m wine to France in the year ending March 2007, up slightly on the NZ\$1.2m in the previous year.

Decreased consumption of wine in France is the result of health concerns and constant tax increases on alcoholic beverages coupled with a trend towards higher quality wines. New Zealand wines remain expensive compared to other countries (mainly Chile and South Africa) and are rarely seen. The French wine chain Nicolas has run promotions on "Wines of the World", with wines from Australia, South Africa, Chile, Argentina, Italy and Spain, but not New Zealand due to their higher prices.

The demand for non-alcoholic beverages such as mineral water and fruit juices has increased. The French are among the world's highest consumers of bottled water, either natural mineral water, spring water, or table water. The sector is greatly dominated by local production - Perrier, Evian, Vitel, Contrex, etc.

The fruit juice market is dominated by local bottling / packing of imported juices. Main players are Eckes Granini, Pepsico France, Orangina Schweppes, Andros, Cidou, Coca

Cola, Ocean Spray, Teisseire, Yarden, and Sunnyland. The demand for healthy more natural fruit juices has been steadily increasing.

### **3.3 Dairy**

The question of butter quotas is a sensitive subject and is presently “discussed” at political level in Brussels.

The main New Zealand dairy exports to France (NZ\$0.9m) concern either proteins used by the principal cheese and yogurt producers, or are related to nutrition and dietetics such as products designed for children, diabetics, or sportspeople.

### **3.4 Fish and seafood**

Fish and seafood is one of the largest and fastest growing categories of imported food products in the French market because domestic production cannot meet the demand.

New Zealand exported NZ\$30.7m worth of seafood to France in the year ending March 2007, up 24% on the previous year. France is New Zealand’s number one destination for scallops and there is also a high demand for frozen species such as hoki, scampi, oreo dory, orange roughy, mussels and skate wings. Buyers are also interested in new species and there are seasonal opportunities for chilled seafood and live rock lobsters.

Although some New Zealand companies export fresh fish, most seafood is exported frozen. The main players in the French market are the Distributors Own Brands with 47.5% in volume and 32.2% in value of the total market. Findus has 41.1% in volume and 53.6% in value and Iglo has 9.5% in volume and 13.1% in value.

According to Datamonitor, in 2006 annual sales of frozen fish in France were 94,300 tonnes with a turnover of Euro 469.2 million.

### **3.5 Honey**

France’s honey production has been decreasing over the past decade, with about 14,000 tonnes produced in 2004 compared with 17,000 tons in 2000. However, honey imports have been steadily increasing, from 15,000 tons in 2000 to 17,000 tons in 2004. Spain, Germany and Hungary are France’s main suppliers. Argentina started to export honey to France in 2002 and has become a major supplier, as has Turkey to a lesser degree.

The unique antibacterial healing properties of New Zealand Manuka honey combined with New Zealand’s clean image could prove a useful strategy to attract health conscious consumers and market this product in France.

### **3.6 Meat**

New Zealand's meat exports to France were worth NZ\$ 241m in the year ending March 2007, up 12% over the previous year. The meat sector accounts for 60% of all New Zealand exports to France, and consists of frozen lamb (90%), venison (8%) and beef (2%).

While New Zealand beef imports have been overtaken by beef from Argentina (low peso versus high New Zealand dollar), venison meat imports have steadily increased. The French hunting season, which varies from region to region, determines when game products (including New Zealand venison) can be sold at retail.

### **3.7 Organic products**

Demand is rising for organic foods among increasingly health-conscious French consumers. Over the last year, French consumption of organic milk has increased by 29%, while production increased by only 10%. Consumption of organic yogurts has increased by 26% and production by 15%. Consumption of organic butter has increased by 7%. Organic fruit and vegetables are enjoying similar trends.

In view of the ever increasing demand, there could be good prospects for the export of innovative dietetic, health and organic food products to France.

### **3.8 Specialty Foods**

There are ranges of specialty products (condiments, sauces and so forth) available in many stores in France for the diverse ethnic populations. Halal products are sought by France's approximately six million Muslims.

## **4.0 REGULATORY OVERVIEW**

### **4.1 Duties/Taxes**

In France, like the rest of the European Union, processed foods attract higher duties than raw materials. Every item falls under a different tariff category and should be checked individually on: [http://ec.europa.eu/taxation\\_customs/dds/cgi-bin/tarchap?Lang=EN](http://ec.europa.eu/taxation_customs/dds/cgi-bin/tarchap?Lang=EN)

### **4.2 Regulatory Requirements**

Guidelines detailing the European Union's import requirements for animals and animal products are available from the European Commission's Food and Veterinary Office (FVO) as part of an effort to facilitate safe food trade with third countries. The guidelines are based on existing legislative requirements and specific needs identified by FVO inspectors in their contacts with third country partners. The aim is to provide service-oriented explanations on the complex European Union legislation. A particular focus has been put on clearly

explaining the steps that developing countries must take, thereby facilitating access to the European Union market for their products.

### **Basic Labelling/Packaging Requirements:**

Labels should be written in French and include the following information:

- product definition
- shelf life: Indicate “use by” and “best before” dates and other storage requirements
- precautionary information or usage instructions if applicable
- statement of contents: ingredients, weights, volumes, etc in metric units. All additives, preservatives and colour agents must be noted on the label with their specific group name or their “E” number
- product’s country of origin and name of importer or vendor within the European Union
- manufacturer’s lot or batch number

France implemented the EU Novel Food/Novel Feed, and Traceability and Labelling Regulations on 18 April 2004. Under these regulations, biotech products and biotech-derived products need to be identified "from the seed to the fork" at each stage of market release. A unique code will be attributed to each genetic event to facilitate communication among operators. The regulations require the labelling of any food product derived from biotech, whether biotech DNA is detectable in the final product or not. The threshold under which labelling is not compulsory is set at 0.9% for human food.

For more details, see the French Ministry of Agriculture website on biotech:

[http://ogm.agriculture.gouv.fr/savoir\\_plus/fiches/fiche6.htm](http://ogm.agriculture.gouv.fr/savoir_plus/fiches/fiche6.htm)

The French decree implementing EU Regulation can be found at:

<http://www.legifrance.gouv.fr/WAspad/UnTexteDeJorf?numjo=ECOC0400078D>

## **5.0 RECOMMENDED STRATEGIES**

### **5.1 Tactical Recommendations on Market Entry**

France is a very competitive market and the cost of freight makes market penetration more difficult. To compete in France a product must offer a competitive advantage combined with innovation or uniqueness in ingredients, packaging, or internationally recognised branding. Counter seasonality will work for some items such as kiwifruit.

### **5.2 Recommendations on Long Term Strategic Issues for Exporters to Consider**

The chances of a small New Zealand exporter working directly with large French hypermarket/supermarket chain without first going through a key account manager, a commercial agent, or a personal contact are very small, unless s/he has been approached by the French firm in the first place, for the following reasons:

- Hypermarket/supermarket chain buyers are so solicited that they cannot give credibility to all suppliers approaching them. They “close their door” and their switchboard is instructed not to disclose their names and numbers in many cases.
- Even after finding out who the correct person to speak with is, an appointment will seldom be given without a former relationship.
- Products will almost never comply with the very strict specifications set by the chains and will need readjustment.
- There will be language barriers for discussing product compliance, marketing, merchandising, and development.
- Aside from a few large New Zealand companies, New Zealand exporters do not tend to have representatives in France. Buyers often want to have a contact in France who speaks French and who can react immediately to any enquiry.

Large New Zealand exporters are more likely to cope with the various requirements set by these large chains (such as quantities, regularity of deliveries and delays of payments) than small exporting companies, unless terms and conditions are clearly understood and accepted from the beginning.

It is therefore much easier to work with market places such as the Rungis Market in Paris, or with traditional importers, rather than with hypermarkets. Importers / wholesalers have a smaller turnover but their procedures aren't as stringent as hypermarkets. They also often target the HRI sector which commands better prices than hypermarkets. Over the last decade there's been growing dissatisfaction with hypermarkets who have been accused of squeezing their suppliers while making excellent profit margins. This has happened to such an extent that the government had to intervene on several occasions.

### 5.3 Sustainability Issues

**(This section updated May 2008)**

- Labelling

The European Commission is proposing new legislation to simplify and standardise labelling across the EU. The proposals include a minimum text size of 3mm for mandatory information, six ingredients which must be listed on the front of the pack (fat, saturated fat, carbohydrates, sugar, salt and energy), country of origin and allergy labelling.<sup>3</sup>

<sup>3</sup> European Commission Media Releases. Commission proposal to overhaul EU food labelling rules. 30 January 2008

<http://europa.eu/rapid/pressReleasesAction.do?reference=IP/08/112&format=HTML&aged>

Questions and answers on food labelling. 30 January 2008.

<http://europa.eu/rapid/pressReleasesAction.do?reference=MEMO/08/64&format=HTML&aged=0&language=EN&guiLanguage=en>

- Organics

The French Government plans to treble the land area in organic farming by 2012 with organic farmland reaching a target of 20 percent of all farmland by 2020. It also set a 2012 target for 20 percent of produce used in public canteens and catering services to be organic.<sup>4</sup>

The results of a survey by CSA/Agence BIO in October 2005 showed that French consumers mostly purchase fresh organic fruit and vegetables, eggs, cheese and bread. Taste and environmental and health issues were stated as the main reasons for choosing organic products.<sup>5</sup>

The first organic supermarket Natureo Supermarche opened in Chartres in December 2007. The supermarket sells foodstuffs, meat, cosmetics and clothing. In store information panels give details about the products. Natureo stocks over 10,000 items from 250 suppliers which retail for 10-30 percent more the non-organic products.<sup>6</sup>

- Retailing

The French Federation for Trade and Distribution (FECD) signed an agreement with the Ministry of Environment which aims to transform the food retail industry into an eco-sustainable market. The first phase of the project is to reduce the environmental impact of packaging and plastic bags. The next phase aims to double the number of sustainable products in shops and supermarkets, reduce current packaging by 10 percent and recycle 75 percent of glass, paper and cardboard.<sup>7</sup>

The majority of hypermarkets and supermarkets have signed a charter with FECD to promote the sale of environmentally friendly goods. The retailers, with combined sales of €178 billion, will participate in a study to assess the carbon emissions of 300 products purchased by the average consumer. In 2010 the information from this study will be included on the packaging labels for these products.<sup>8</sup>

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<sup>4</sup> *Le Grenelle Environment. Round Table Conclusions. November 2007.*

<http://www.legrenelle-environnement.fr/grenelle-environnement/IMG/pdf/HS-8pGrenelle-Anglais.pdf>

<sup>5</sup> *Notre Europe. Organic Farming in Europe. November 2006.*

[http://www.notre-europe.eu/fileadmin/IMG/pdf/Bonny\\_Agrbio-EN.pdf](http://www.notre-europe.eu/fileadmin/IMG/pdf/Bonny_Agrbio-EN.pdf)

<sup>6</sup> *The Naturéo, largest super bio of France (in French). 15 January 2008.*

[http://www.lsa.fr/article/page\\_article.cfm?idoc=123413&mot\\_cle=natureo](http://www.lsa.fr/article/page_article.cfm?idoc=123413&mot_cle=natureo)

<sup>7</sup> *French Supermarkets ready for sustainability. Organic Market Info. 24 Feb 2008*

[http://www.organic-market.info/bio-markt/en\\_inhalte/inh\\_index.htm?link=Meldungen&catID=15&docID=605](http://www.organic-market.info/bio-markt/en_inhalte/inh_index.htm?link=Meldungen&catID=15&docID=605)

<sup>8</sup> *Patton, Dominique. French retailers back eco-friendly and organic products. Food Navigator. 30 January 2008.*

<http://www.foodnavigator.com/news/nq.asp?n=82899-fecd-organic-food-and-drink-federation>

The large supermarket chain Casino is listed on the stock exchange and is required to publish information about how it takes the environment and society into consideration. As well as an annual report, Casino publishes a separate report on its sustainability activities outlining the company's achievements in social and ethical responsibility as well as current and future plans for reduction in environmental harm in the supply chain.<sup>9</sup>

Casino Group has been collecting data from its 450 direct suppliers to assess the lifecycle of each product. Casino intends to label 3000 products by the end of 2008 with a new eco-label that will give information on the percentage of packaging that can be recycled, greenhouse gases emitted in manufacturing the packaging materials and transportation of the product.<sup>10</sup>

- Consumer trends

General interest in the environment is growing among French consumers. A study conducted by TNS Sofres found that 52 percent of consumers are willing to pay more for environmentally sensitive food production or for food products produced in France, but only 25 percent of consumers were prepared to pay more for organic food and beverages.<sup>11</sup>

## 6.0 MARKET RESOURCES AND CONTACTS

### 6.1 Exhibitions

- SIAL (19-23 October 2008) - held every second year, Paris Nord Villepinte: [www.sial.fr](http://www.sial.fr)
- Salon International Process Alimentaire (IPA) - World Food Process Exhibition (17-20 Novembre 2008), Paris Nord Villepinte [www.ipa-web.com](http://www.ipa-web.com)

### 6.2 Websites of interest

- Association Française du Froid (AFF): [www.aff.asso.fr](http://www.aff.asso.fr) (Cold Chain Industry Association)
- Confederation of the Food and Drinks Industries of the EU (CIAA): [www.ciaa.be](http://www.ciaa.be)
- Conseil National de la Consommation: [www.conso.net](http://www.conso.net) (National Consumer Institute)
- Institut Français pour la Nutrition (IFN): [www.ifn.asso.fr](http://www.ifn.asso.fr) (French Nutrition Institute)

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<sup>9</sup> Casino. Sustainability Report 2006  
<http://www.groupe-casino.fr/anglais/fichiers/2007RDD.pdf>

<sup>10</sup> Europa. ETAP Newsletter - Carbon Labels Inform Consumers on Environmental Costs. January 2008.  
[http://ec.europa.eu/environment/etap/pdfs/jan08\\_carbon\\_label.pdf](http://ec.europa.eu/environment/etap/pdfs/jan08_carbon_label.pdf)

<sup>11</sup> Crosskey, Peter. French Consumers Driven by Price, shun organics. Just-food. October 2006.  
(free registration to view article)  
<http://www.just-food.com/article.aspx?ID=96285>

- European Commission Food and Veterinary Office - [http://ec.europa.eu/food/fvo/index\\_en.htm](http://ec.europa.eu/food/fvo/index_en.htm)

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