

# **USAID/GEO**

## **Guyana Economic Opportunities**

### **EXPORT MARKET OPPORTUNITIES**

### **MARKET PROFILE: THE FRENCH ORGANIC SECTOR**

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# EXPORT MARKET OPPORTUNITIES

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## ACRONYMS

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EC	European Commission
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
ITC	International Trade Centre
ONAB	Observatoire National de l'Agriculture Biologique
PMO	Primary Market Operators
SNM	Service des Nouvelles des Marchés
USDA	United States Department of Agriculture

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## **Introduction**

This market bulletin is the second in a series that looks at the potential for Guyanese products in organic export markets. At present, Guyana produces very little certified organic products. An important objective of Guyana's trade and agricultural policies is the diversification of production and exports. One possible area for diversification is in the market for organic and natural foods. Several producers and exporters and the Ministry of Fisheries, Crops and Livestock are interested in the potential for increasing organic farming and exports. At present, however, there is little hard information on the demand for fresh or processed organic products that could be exported from Guyana. This survey of the market for organic products in France is intended to help fill this void and to provide information to farmers, exporters, and policy makers about the potential for organic farming and exports from a market perspective. It seeks to answer the following questions: Which products are in demand? What is the potential for growth in demand? Which countries are currently the major suppliers (i.e. potential competitors) to the French market? What is the potential for fresh vs. processed agricultural produce? And perhaps most importantly, the bulletin provides a very extensive list of importers, wholesalers, distributors and retailers who deal with organic products.

Part I of the bulletin provides a brief overview of the French market, current imports, distribution channels and discusses possible opportunities and constraints. Part I is based primarily on desk and internet research. Part II of the bulletin focuses mainly on opportunities for organic exports to France, particularly for processed or semi-processed produce. Part II is primarily the result of direct interviews with French processors, importers and distributors.



## **PART I**

### **Overview of the French Market For Organic Produce**

**Prepared by**

**Amelia Hube**



# The Market for Organic Fruit and Vegetables in France

## A. French Organic Market Overview

The organic worldwide market as a whole is growing. Likewise, sales in France have grown since 2000. According to the USDA 2001 GAIN Report, organic food sales in France were estimated at 7.5 billion FF (\$1 billion) in 2000. This figure was expected to rise to at least 15 billion (\$2.4 billion) by 2003. A more conservative estimate, according to an overview of world markets for organic food and beverages compiled by the International Trade Centre (ITC) in December of 2002, puts retail sales in France in 2003 totaling approximately \$1.3 billion. The organic market in France has been growing at a rate of 20-25 percent per year and this trend is expected to continue over the next few years. Due to French concerns about health and food safety issues, the demand for organic food products remains high. As a result, French imports of organic food products have risen steadily since current domestic production cannot meet the demand. Nevertheless, domestic production of organic products is likely to remain a firm competitor in French markets due to investments by the French Ministry of Agriculture. In collaboration with the EU and the French government, a program to stimulate organic agricultural production seeks to make France the leading European supplier of organic food and products by the year 2010 (USDA, 2001).

Vegetables, exotic fruits and nuts in particular, are products that French processors find in short supply. Both fresh and processed domestic organic fruit and vegetables stay in strong demand within the French market (USDA, 2001).

There have been no official data gathered on quantities of organic fruit and vegetables produced, exported and imported, so it is difficult to provide any estimation of the total volume of processed organic fruit and vegetables sold on the French market. AgenceBio, now housing the former Observatoire National de l'Agriculture Biologique (ONAB) is planning a study on this topic, though this will provide data mainly on fresh fruit and vegetables.

Approximately 50 percent of domestic organic production is marketed by primary market operators (PMOs), operators who buy from French producers or foreign suppliers and sell to wholesalers or retailers (ITC/FAO/CTA, 2001). Around 70, mostly long-standing, PMOs were involved in the organic sector in 2000 (ITC/FAO/CTA, 2001). A few are mainstream conventional fruit and vegetable operators who have expanded into the organic field. The remaining half is marketed directly by farmers.

An estimated one-third of French domestic production of organic fruit and vegetables is exported to other EU countries, including the United Kingdom, Germany, Switzerland and Scandinavia, though this share is decreasing as domestic consumption rises. Re-export trade is a common pattern among EU countries, and French imports are still dominated by organic foods from other EU countries. Most commonly re-exported organics include citrus and vegetables from Spain, Italy and Morocco, and tropical fruits from Cameroon, Guinea and Madagascar.

## B. French Organic Imports

According to USDA, total imports of organic food into France in 1998 were valued at FF300 million and equalled 30,000 tonnes (ITC/FAO/CTA, 2001). Total imports account for about 10 percent of the organic food market in value. Some 40 percent of imports in volume come from the so-called "third countries" (i.e. non-EC countries) (ITC/FAO/CTA, 2001).

Official figures of total imports of organic fruit and vegetables are not available, as customs offices in the past have not distinguished organic and conventional products. The European Commission approved a regulation which requires Member States to record the quantities of organic products entering the countries. This system was slated to begin implementation in 2002. Based on importer requests for import certificates from third countries, the Ministry of Agriculture (Direction de la Production et des Echanges Internationaux) estimates that approximately one third of the organic fruit and vegetables sold in France are imported (ITC/FAO/CTA, 2001). World Organic News speculated that this number would increase to 50 percent in 2001 based on a survey that same year (ITC/FAO/CTA, 2001).

Due to the common practice of re-exporting among EU countries, there is insufficient data to determine total volume of imports, since both EU suppliers and some of the six third countries on the Article 11 list<sup>1</sup> are important suppliers of organic fruit and vegetables. Even tropical fruits, which are primarily produced outside the EU, are sometimes re-exported into France from Belgium or the Netherlands. Telephone interviews with major French importers revealed that fresh organic fruits and vegetables are also largely re-exported into France from Spain or Italy. Furthermore dried organic ginger is not imported into France, but rather re-exported from Holland or Germany. Many of the largest importers of organics in Europe are located in Germany.

FAO conducted a survey in 2000 of 15 French importers of organic fruit and vegetables, using questionnaires (ITC/FAO/CTA, 2001). The survey had two main goals: to evaluate current imports of organic fruit and vegetables, and to assess the prospects for market growth in the next three years. Although the rate of reply to the questionnaire was relatively low, phone and direct interviews generated the information sought from all importers but two. Importers were asked about the origins and volumes for each product category. The detailed figures for products exportable from Guyana are presented in Exhibit 1.

<b>Exhibit 1: Imports of organic fruit and vegetables (exportable from Guyana) into France by origin in 1999 (tonnes)</b>				
<b>Origin</b>	<b>EC</b>	<b>Third Countries</b>		<b>Total</b>
		Art.11 countries (*)	Other third countries	
<b>Fruit</b>				
Coconut			3	3
Guava			2	2
Mango	42	1	113	156
Papaya			6	6
Pineapple			386	386
<b>Vegetable</b>				
Fresh ginger			5	5
Sweet potato	21	1		22

(\*):Australia, Argentina, Hungary, Israel and Switzerland.

Source: FAO survey of importers (World Markets)

<sup>1</sup> Australia, Argentina, Hungary, Israel, and Switzerland

Allowing for small quantities that were not mentioned by importers and a few importers who did not reply to the survey, a total of 24,000 to 25,000 tonnes can be considered a reasonable estimate of French gross imports of organic fruit and vegetables in 1999. These imports would account for about one third of the organic fruit and vegetables sold in France. However, the existence of significant re-exports means that the actual share of imported produce is lower (ITC/FAO/CTA, 2001). This figure of 25 000 tonnes is very low when compared to gross imports of fruit and vegetables which stood at over 3.6 million tonnes in the same year (ITC/FAO/CTA, 2001).

Imports of organic fruit are greater than those of organic vegetables. Citrus accounts for more than half of organic fruit imports. Tropical fruit (pineapple, banana, mango, avocado, passion fruit, papaya and litchi) account for an additional 15 percent of imports. Mango was among the products pointed out by importers to exhibit the fastest growth in sales and anticipated continued demand.

The most imported temperate fruits are apples, followed by grapes, peaches and nectarines. The most imported vegetables are tomato, broccoli, carrot, courgette and pepper (ITC/FAO/CTA, 2001).

Proliferation of French organic imports at the beginning of this century (up to 30 percent from the 20 percent annual growth rate that was seen throughout the mid 1990s) indicates that the French market is beginning to exhibit the trend apparent in other European countries.

### **C. Sources**

According to importers, EU countries supply about two-thirds of French imports of organic fruit and vegetables. Spain and Italy are France's two largest suppliers, accounting for 87 percent of French imports from the EU, and mainly supply fruit (mainly citrus, some stone fruit and apples). Spain supplies some vegetables (courgettes, peppers, tomatoes), though none that compete with possible exports from Guyana. A smaller supplier of mainly vegetables is France's third EU supplier, the Netherlands. A breakdown of the origin of imported organic fruit and vegetables in 1999 is shown in Exhibit 2.

<b>Exhibit 2: Origin of organic fruit and vegetables imported into France in 1999 (tonnes)</b>						
<b>Origin</b>			<b>Fruit</b>	<b>Vegetables</b>	<b>F &amp; V (undif.)</b>	<b>Grand Total</b>
EC		EC (undif.)	1,400	200		1,600
		Italy	3,000	800		3,800
		Italy, Portugal, Spain (undif.)		200		200
		Italy, Spain (undif.)	1,000	200		1,200
		Netherlands	100	200		300
		Spain	3,700	3,700		7,400
		Spain, Italy, Greece (undif.)	100	100		200
<b>EC Total</b>			<b>9,300</b>	<b>5,400</b>		<b>14,700</b>
Third Country	Article 11	Argentina	320	340		660
		Australia	50			50
		Israel	640	800	30	1,470
	<b>Total</b>	<b>art. 11</b>	<b>1,010</b>	<b>1,140</b>	<b>30</b>	<b>2,180</b>
	Other third countries	Cameroon	470	10		480
		Dominican Rep	430			430
		Egypt		20		20
		Guinea	40			40
		Côte d'Ivoire	100			100
		Morocco	710	3,120 (*)		3,830
		New Zealand	30			30
		South Africa	70	10		80
		Tunisia	10	20		30
		USA	40			40
	Other	30			30	
<b>Total other third countries</b>		<b>1,930</b>	<b>3,180</b>		<b>5,110</b>	
<b>Third Country</b>	<b>Total</b>	<b>2,940</b>	<b>4,320</b>	<b>30</b>	<b>7,290</b>	
	Countries			1000	1,000	
<b>Grand total (rounded)</b>			<b>12,200</b>	<b>9,700</b>	<b>1000</b>	<b>23,000</b>

(\*) The Moroccan export control authority declared about 2000 tonnes for 1999/2000.

Source: FAO survey of importers (2000)

According to the FAO 2000 survey, one-third of French imports are from non-EC countries. Main suppliers from non-EU countries include: Australia, Argentina, Ivory Coast, Cameroon, Dominican Republic, Guinea, Israel, Morocco, New Zealand, South Africa, Tunisia, Turkey, and the United States (small quantity).

Morocco accounts for more than half of exports of this group, and it supplies vegetables which would not compete with potential exports from Guyana, though Morocco does supply citrus fruit from October to April. A more direct competitor is Cameroon, which is a supplier of pineapple, mangoes, and papayas. Imports from many third countries are underestimated, as some fruit and vegetables are first imported into the Netherlands or Germany and then re-exported to France (ITC/FAO/CTA, 2001).

Among the other suppliers, which export much lower volumes, Guinea and Madagascar both export tropical fruit and are the most likely competitors to Guyanese producers.

Major sources of organic ginger (dried and sliced) are Indonesia, India, Madagascar and Tanzania. Indian exports of organic ginger prove to be significant competition due to lower prices. Tropical organic fruits are largely imported from Africa, though Argentina, Chile, Ecuador, Mexico, Peru, Dominican Republic and Brazil also compete in the tropical organic fruit market in France. Even with this growth in imports from Latin America, figures are only truly representative of fresh organic products. Based on phone interviews with importers, processed organic fruit and vegetables are apparently mostly re-exported to France from other EU countries. Large importers of organic processed fruit and vegetables are found in Germany and Holland.

### **Entering the French Organic Market**

#### **A. Distribution Channels**

There are approximately 1600 distributors of organics in France. A complete list of distributors can be found on the AgenceBio website. The processing sector in France consists mostly of small and medium-sized companies, though French conventional processing companies often create their own organic arm as is common in other European countries (OTA, 2000).

The ITC reported an estimated 1500 specialized natural food stores in 2000 (ITC/FAO/CTA, 2001). National and regional retail chains account for one-third of these stores. Retail chains with national coverage include Biocoop, La Vie Claire and Rayons Verts; chains with regional coverage include Satoriz, Naturalia, Croq'nature, Dame Nature, La Vie Saine and Eau Vive (ITC/FAO/CTA, 2001).

A major shift in organic foods distribution began in the early 1990s when supermarkets began to become increasingly involved in an arena previously occupied primarily by specialized stores. Prominent retail chains, Monoprix, Carrefour, Auchan, Cora and Leclerc, all now carry organic foods. Supermarkets have now become the main outlet for organic food sales, accounting for half of total organic food sales.

Supermarket chains largely determine the future of the organic fruit and vegetable market in France, with the capital and influence necessary to stimulate new markets. So far, their stances on selling organics vary. Relatively few supermarket chains have developed a wide range of organic products, though many enjoy the positive image that results from selling organics. The positive image is due to ideas of food safety, quality of life and respect for the environment that accompany organic products. Even so, organic fruit and vegetables account for only 0.5 percent of organic food sales in supermarkets (ITC/FAO/CTA, 2001). Many supermarkets may be deterred by the irregular deliveries, small-size suppliers, and the perishable nature of organic produce. Packaging for organic produce, which acts to avoid confusion with conventional fruits and vegetables, is a further deterrent because it raises costs and impedes organic producers who are not equipped with packing facilities.

Large scale retailers have not led the rapid growth of organics sales in France as they have in other European countries (including the United Kingdom). It is important to note that Monoprix is an exception to this laissez-faire norm in France; for over ten years, Monoprix has developed a range of organic products. Carrefour, Europe's largest retailer, has recently entered the French market and is expected to boost sales of organic products (ITC/FAO/CTA, 2001).

Natural food stores have increased the average size of their outlets, creating "organic supermarkets", some of which are over 200 square meters, in response to increased competition in the organic sector from retail chains. France has become the leader in Europe with an estimated 170 organic supermarkets in 2000 (ITC/FAO/CTA, 2001). Biocoop is a leading example in the growth of specialized natural food stores, with 190 shops in 2000, 100 of which are larger than 200 square meters. BioCoop asserts that 91 percent of its food products are certified organic. Specialized stores (organic or health food shops) still account for 32 percent of total organic food sales (ITC/FAO/CTA, 2001). An estimated 1,800 health food shops, plus 140 cooperative stores and over 25 farmers markets sell organic foods (OTA, 2000).

Domestically-produced organic fruit and vegetables are mainly produced by small-scale farmers. Their production is marketed either directly to consumers or through organizations like cooperatives. About half of the domestic production is sold directly by organic farmers, though the share of direct sales and open air market sales is decreasing due to the increased involvement of supermarket chains.

As the organic market in France expands, the marketing chain is expected to shorten: consolidation of the French organic fruit and vegetables sector, supplier mergers and vertical integration, economies of scale and closer links between supermarket chains and suppliers are all expected.

Detailed information on the distribution avenues of processed tropical fruits in particular will be available in August of 2003 in a publication on trade channels of processed organic tropical fruits in the EU which is to be produced by the Sustainable Markets Intelligence Center (CIMS).

## **B. French Importers of Organic Fruit and Vegetables**

As of 2001, the ITC reported some 15 importers of organic fruit and vegetables in France (ITC/FAO/CTA, 2001). French importers often also buy domestic products, sometimes only irregularly importing small quantities. Perpignan in southeast France is an important hub for the import of fruits and vegetables, including organics. Many fresh produce importers are based in the Southeast, including the two largest importers, Bioprime and Pronatura (ITC/FAO/CTA, 2001).

The largest French importer of organic products is Pronatura. They sell to retailers and wholesalers, as well as re-export to other countries in the EU. Phone interviews revealed that 60 percent of their fresh organic fruits and vegetables are imported, equally divided between African and Latin American country producers. Most of their tropical fruits come from Africa. Major suppliers of mango in Latin America are Argentina, Chile, Ecuador, Peru, Dominican Republic, Brazil and Mexico. In 2002, Pronatura imported 5 tonnes of fresh mangos and that number is expected to increase by 25-35 percent in 2003. Of their imports from Latin America, 80 percent is sourced directly from producers. Pronatura asserts that conventional markets want organic products due to the better quality that the organic label implies. There is a market for organic juice and dried fruits in France, but the size of the market is not yet large enough for importers like Pronatura to get involved. They anticipate growth in the market for juices and dried fruits in 2004 and 2005. In 2002, Pronatura only bought 4000 bottles of juices, 70% from Italy and 30% from France. Imports from Holland and Germany only represent 3% and 5% of their total buy respectively, which is only fresh organic fruit and vegetables. Major French producers of juices are Eurofood (Italy), Francou (South of France), and Moulin de Valdonne (France). ViaBio is the arm of Pronatura that sells to supermarkets.

A majority of the other importers in France import fruits and vegetables almost entirely from other European countries, mainly Spain and Italy.

Many importers also act as wholesalers or distributors, re-exporting to other EU countries (i.e. BioDynamis, BioPrim, Pronatura). Other importers produce organic products themselves and found importing advantageous to maintain year-round supply to their clients (i.e. AgroBioDrom, FRDP). Some producers have formed cross border linkages, such as Uni-vert (French and Spanish producers) and Imago (Spanish and Moroccan producers), and do not import internationally. On the other hand, some importers have acquired organic farms to ensure regular supplies (i.e. Pronatura in Brittany and Morocco and Exodom in Cameroon) (ITC/FAO/CTA, 2001).

## **C. Prices**

Organic products in France sell at an average of 20-35 percent higher than for conventional products. The greatest price difference can be found at specialized organic food stores, which tend to price their items higher than supermarkets. The price differentiation between organic and conventional foods is even more marked for fruit and vegetables. Perhaps due to their perishable nature, organic fruits and vegetables can be sold for as much as 100 percent more than conventional produce (ITC/FAO/CTA, 2001). Average price premiums for organic fruit and vegetables fluctuate significantly.

Phone interviews provided sporadic insights into specific product prices. Organic ginger chips, for example, sell for 2 Euros and 8 cents a kilo to Tagtraum in Hamburg, which sometimes supplies Arcadie, a French importer of Cardamon from Guatemala and ginger from Madagascar. Tagtraum also supplies Yogi Tea which is probably the largest buyer of dried ginger in Europe. Forestrade does buy dried and sliced organic ginger for re-sale to specialized organic shops in France, but information on prices was unattainable. Another important note to producers who would like to export ginger is that importers often have a minimum quantity requirement, often requiring the sale of organic ginger to accompany other organic products as well, which can then be shipped in one container.

There is no consolidated information on prices of processed organic fruit and vegetables. The Service des Nouvelles des Marchés (SNM) provides information on prices in France, including weekly market analyses showing price during the previous week (<http://www.snm.agriculture.gouv.fr>). Full access to SNM services requires a paid subscription. Exhibit 3 shows French market prices in May 2003 for imports of products, which Guyana could produce.

## **D. French Organic Product Import Regulations**

Organic products imported by France must satisfy the same quality, labeling, sanitary and phytosanitary requirements as conventional products. Importers must also demonstrate that the products have been produced and handled in accordance with recognized European Commission standards.

The EC 2092/91 Regulation governs organic production, labeling, certification and imports in France. Importers and distributors that are registered with an organic certification body of an EU member state can label their certified products with the Agriculture Biologique (AB) logo issued by the Ministry of Agriculture. The AB logo's familiarity with French consumers assures the integrity of the organic label.

An import certificate is needed for organic products sourced from countries outside the EU and not of the six countries on the EC Article 11 list<sup>2</sup>. Importers from third countries like Guyana must provide detailed evidence of the equivalence of production rules and effectiveness of control in the country of origin to the Ministry or one of the French certifiers. French certifiers then make a recommendation to the Ministry for decision.

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<sup>2</sup> Australia, Argentina, Hungary, Israel, and Switzerland

**Exhibit 3: French Market Prices for imports in May 2003 (mid-April to mid-June)**

Product	Market	Average Price (Euro)	Lowest Price (Euro)	Highest Price (Euro)
Dried Pineapple - Thaïlande cube vrac le kg	Rungis FLG secs	2.50	2.30	2.60
Pineapple - Afrique B(1100-1500g) avion le kg	BIO-Rungis-FLG	3.32	2.20	4.74
Pineapple - Cameroun B(1100-1500g) avion colis de 6 le kg	Toulouse FLG de gros	2.35	2.30	2.40
Pineapple - Côte d'Ivoire B(1100-1500g) avion carton le kg	Toulouse FLG de gros	2.30	2.20	2.50
Pineapple - Côte d'Ivoire B(1100-1500g) bateau conteneur carton le kg	Toulouse FLG de gros	1.12	1.00	1.25
Pineapple - Victoria Ile Maurice 700-800g avion colis de 8	Rungis FLG Exotiques	3.50	3.40	3.60
Carambole - Malaisie avion carton	Lille FLG de gros	12.50	10.00	15.00
Carambole - Malaisie carton (le colis)	Rungis FLG Exotiques	15.00	14.00	16.00
Carambole - Malaisie carton	Avignon	7.00	6.34	7.20
Ginger - Thaïlande	Rungis FLG Exotiques	1.60	1.40	1.80
Ginger - Brésil carton	Avignon	2.75	2.44	2.90
Guava - Brésil carton	Rungis FLG Exotiques	4.20	3.80	4.50
Mango - Kent Côte d'Ivoire bateau colis 4kg	Toulouse FLG de gros	2.00	1.80	2.20
Mango - Import biologique le kg	BIO-Rungis-FLG	3.69	1.95	4.80
Mango - Import biologique carton le kg	BIO-Nantes-fruit et légume	3.60	3.40	4.00
Mango - Kent Burkina Faso avion carton	Rungis FLG Exotiques	2.50	2.30	2.60
Mango - Kent Mali avion colis de 8-9	Rungis FLG Exotiques	2.50	2.30	2.60
Mango - Kent Côte d'Ivoire avion carton	Rungis FLG Exotiques	4.58	3.70	5.80
Mango - Côte d'Ivoire avion colis de 10	Lille FLG de gros	5.00	4.50	5.50
Mango - Brésil bateau carton	Lille FLG de gros	1.60	1.50	1.70
Mango - Brésil colis 4kg	Avignon	2.00	1.90	2.10
Cashew Nut - Import W3	Rungis FLG secs	5.95	5.80	6.10
Dried Papaya - Thaïlande cube le kg	Rungis FLG secs	2.59	2.44	2.74

(\*) kg used unless otherwise indicated

Source : Service des Nouvelles des marchés (SNM) website

# Opportunities and Constraints for Entering the French Organic Market

## A. Opportunities and Constraints Overview

The growth rate of the French organic market rose from about 12 percent annually during most of the 1990s to some 20 percent annually from 1998-2001. Influencing factors include recent food safety scares and uncertainty regarding genetically modified foods. In 2001, Organic Monitor forecasted an increase in the growth rate of the French organic vegetables market to 30 percent annually (ITC/FAO/CTA, 2001). Based on interviews with Bio Convergence, the FAO forecasted a doubling of the market for organic fruit and vegetables between 1996 and 2002, exceeding FF1.2 billion by 2002 (ITC/FAO/CTA, 2001).

The increasing involvement of supermarket chains, like Monoprix and Carrefour, will further stimulate the French organic market. Another positive influence is an increase in promotional activities in the past three years with the support of the Ministry of Agriculture. A flourish of support for the organic industry is led by *le printemps bio* with a national annual promotion week in May with the involvement of the Ministry, producers and distributors.

With consolidation of the French organic fruit and vegetables sector, supplier mergers and vertical integration, economies of scale and closer links between supermarket chains and suppliers expected, more efficient distribution and lower retail prices should follow.

On the other hand, several constraints to entering the French organic market must be considered. High prices of organic products remain a significant deterrent for consumers. The price difference between organics and conventional fruit and vegetables is frequently greater than the maximum different of 30-35 percent most consumers have been found to accept. Second, consumers are discouraged by the lack of availability of organic products in mainstream outlets. Due to small quantities supplied by market operators, supermarket chains have had difficulty building strong relationships with suppliers. This disconnect has lessened the large-scale retail sector's involvement with organic fruit and vegetables (ITC/FAO/CTA, 2001).

## B. Specific Importing Opportunities

The growth rate of organic fruit and vegetables sales is increasing, and the market for processed foods is the fastest growing segment of the French organic foods market (ITC/FAO/CTA, 2001). Best prospects for entering niche markets in France according to the USDA include dried fruit and nuts, organic foods, and tropical fruits.

Biocoop, a specialized organic supermarket, is currently looking for canned organic fruits. Among exotic fruits, pineapples and mangos could be of greatest interest. However, they are not yet able to import directly. French importers and conventional supermarkets echoed a demand for processed exotic fruits, and Pronatura is anticipating a significant growth in the processed fruits and vegetables market in the near future (anytime from 3 months to 2 years). For processed fruits and vegetables, other major European importers who re-export into France may provide greater immediate market access. Major competitors of Pronatura include Eosta (Holland) and Schramm (Germany).

Organic Insights published an export study through the Organic Trade Association in 2000 (OTA). Those pertinent to export from Guyana include:

- Dry legumes

- Dried fruits
- Demand is rising for a more balanced, high quality supply of traditional and tropical fruits. The same is true for fresh produce.
- There is a demand for frozen foods, like fruit purées and frozen fruit.
- Market research shows fruit juices, which already account for 6% of the total retail sales in France, will be one of the highest selling organic goods in France. Sales are expected to reach 22 million liters in 2003, almost tripling within 5 years.

For information on French producers of organic juices, try Eurofood (Italy), Francou (South of France), and Moulin de Valdonne (France).

### **C. Obstacles and Competition**

Developing countries that wish to export to France will find that demand for organic fruit and vegetables is greater than domestic supply. Even with demand growing rapidly, developing countries are still faced with strong competition from EC countries in the French organic market, particularly with citrus and temperate fruit and vegetables during the European production season. Duty-free access to France and EC-wide regulations on organic farming are advantages to EC countries and obstacles to developing countries wishing to enter the French organic market. With support from national governments, production in EU countries continues to increase (ITC/FAO/CTA, 2001).

French consumers often prefer locally-grown foods to imported. As a result, leading organic operators buy domestically first and foremost. There are exceptions to this rule. The two largest French importers of organic products import from all over the world, though they still focus on Article 11 countries<sup>3</sup>. This trend is exacerbated by doubts about the integrity of foreign certification systems.

Administrative obstacles also inhibit importing to France. A special certificate for each transaction from French authorities is required for operators to import from non-Article 11 countries. Furthermore, exporters must be able to provide regular and high quality product. This supply regularity is a critical point with supermarket chains.

### **D. Conclusion and Recommendations**

Sales of organic fruits and vegetables are growing at an average rate of 20 percent annually. Sales growth is expected to continue and possibly increase with the increased involvement of large scale retailers (supermarkets like Carrefour) which drive the rapid growth in sales of organics in northern European countries. While traders indicate that demand is higher than domestic supply, imports can easily meet the gap. Imports of organic fruit and vegetables are low but growing. Main sources for products exportable from Guyana are: Cameroon (pineapple, guava, mango); India, Indonesia, Tanzania and Madagascar (ginger);

Developing countries in sub-Saharan Africa supply small quantities (from a few dozen tonnes to a few hundred tonnes annually, depending on the country) of tropical fruits, such as mangoes, papayas, pineapples. These imported products are substantially re-exported towards northern Europe.

The French market offers opportunities to Guyana with higher demand than supply for good-quality organic tropical fruits. In the FAO's importer survey, several importers indicated a lack of quality organic tropical fruit.

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<sup>3</sup> Australia, Argentina, Hungary, Israel, and Switzerland

Organic off-season citrus offers potential for import, but Spain and Italy dominate the French market during the European production season. Likewise, during low European production, organic vegetables and temperate fruits have a likely market potential. Therefore, they offer promising opportunities, primarily to countries in the Southern Hemisphere.

Along with existing export opportunities lie several constraints to be considered. French organic operators tend to follow consumer interest in regionally grown products by buying domestically or from other EU countries. Consumer interest in more locally grown foods is perpetuated by doubts regarding the reliability of organic certification systems in countries less well-known by the consumer. Importers also face more red tape with third countries since they are required to have a special certificate from French authorities for each transaction. This process has been simplified, but may still take up to two months, inhibiting the import of seasonal and perishable foods. Increased trust in third country certification should ease obstacles such as these.

There is still much uncertainty regarding the continuation of price premiums for organic products. While prices for organic produce remained stable over the past couple of years, most traders speculate that prices will decline somewhat as supply increases. Industry players also expect to see increased efficiency within the organic distribution chain through vertical integration and mergers. A rise in efficiency should reduce production costs, also leading to a price decrease for organic products. In any case, depending on the rate of growth of demand it is likely that the current level of price premium for organic products will eventually decrease. Relative low labor costs in developing countries may serve as an advantage in the long run to developing country organic product exporters. Developing country producers should consider reassessing their potential investment with the idea that reduced profit margins will most likely prevail in the longer run.

Importers specializing in organic products should be targeted for their familiarity with the technical and administrative requirements for importing organic products. Other outlets for exporting should be carefully pursued as networks to sell directly to supermarkets or wholesalers may not understand the constraints faced by developing country producers.

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**Market Profile: The French Organic Market**

**Part II**

**The Market for Processed Tropical Products**

**Prepared by**

**Bettina Balmer**



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# 1. GENERAL APPROACH OF THE EUROPEAN MARKETS

## 1.1. KEY CHARACTERISTICS

- Organics in Europe remains a niche market. In the main countries (Germany, France, etc.), a big development was awaited but never came. Organic represents globally between 2 and 3% of the food sales in Germany, France and United Kingdom. The share of organic foods entering through varies from country to country.

**SALES OF ORGANIC PRODUCTS IN 2002**  
**billion EUR, estimation**

Country	Sales billion EUR	% in conventional supermarkets
Germany	2.8	35%
United Kingdom	1.3	80%
France	1.2	50%
The Netherlands	0.4	50%
United States	7.8	

- There are no accessible reliable figures in terms of volumes, prices and end-use of fruits (especially exotic fruits).
- The dynamic for organics in Europe is now being pulled by (demand driven) processors and distributors, and no longer pushed from the production side. Therefore, European countries like France, the United Kingdom, and Germany are currently having problems in supplying their internal markets with local products and they are thus forced to import from Europe and other countries.
- The market is highly fragmented: a lot of operators at all levels - producers of organic agricultural products, further processors, retailers (shops, on-line, etc).
- Distribution channels are difficult to understand because they are strongly interwoven, sometimes with the conventional sectors. Different types of actors are active in this market:
  - **Pure importers/traders** (like TRADIN in the Netherlands; see address list for description): specialize in imports of high volumes (per container). Located mostly in Northern Europe (The Netherlands, Germany, same in the UK). The main entry into Europe for organic products (ingredients, raw material, end products) remains the Netherlands.
  - **Brokers** specialized in organic like F.PROJECTS or P.F.S. in France. This type of company works mainly on an exclusivity base and represents foreign companies in Europe.
  - **Wholesalers / distributors**: they act at the national level and are able to import in case of high demand (per container). These distributors sometimes produce specific products.
  - **Regional distributors** for specialized retail shops.
  - **Processors specialized in organic**: usually small or medium-sized companies compared to their counterparts in the conventional sector. Generally, they are not able to import directly and instead buy from importers or wholesalers.

- Some conventional big players (NESTLÉ, MILUPA, TEISSEIRE) tried to enter this market three years ago but now appear to be pulling out. The main reasons for their pullout are:
  - **size of the market:** the market is too small to develop large scale production (compared to their conventional products) ;
  - **sourcing :** it's hard for them to have regular year round supplies (in volumes and sometimes in quality), especially with specific imported products ;
  - **traceability and supply chain:** the conditions to enter this field are too complicated in terms of supplying raw material, logistics, production, regulation, etc.

## **1.2. FURTHER PROCESSED PRODUCTS WITH EXOTIC FRUITS**

The list of products covered by this survey includes the following:

- pineapple
- plantain
- mango
- papaya
- guava
- bread fruit
- carambola (starfruit)
- coconut
- Surinam cherry
- cassava
- sweet potato
- cashew nuts.

On the European side, some products are not used as organic and do not present any interest at this stage; some are rarely used but could find some market opportunities; others are commonly used (even if “common” does not mean in large volumes). The exotic fruits listed above have never been used in such volumes as temperate fruits, citrus and banana.

Following our investigations and discussions with processors and importers, the products by category are listed below:

1. “commonly used”: **pineapple, mango, guava, coconut, cashew**
2. “rarely used or those with some potential” : **papaya, carambola, Surinam cherry**
3. “never/rarely used in the range of organic further processed products” : **plantain, bread fruit, cassava, sweet potato**

Concerning this last category, we do not believe that there is a market at this stage, unless growers have the means necessary to promote and to prospect for those products. In the following pages the focus will be on the first two categories.

## USE OF EXOTIC FRUITS IN ORGANIC PRODUCTS

Fruit	Main uses	Raw material
<b>Pineapple</b>	Juice (pure, blends) Jam, fruit spreads, crystallized fruits Stewed fruits ("compote") Yogurt Baby foods: jars and juices Ice cream Dried rings and diced for: retail (retail packs for fruit mixes), muesli, cereal bars, biscuits and other products from the bakery sector Canned pineapple (for retail)	Concentrate, clarified concentrate, low pulp or high pulp concentrate, single strength juice, pulp, puree Dried Canned
<b>Mango</b>	Nectar and juice, tropical mixes Ice cream Dry chips, diced... for : retail (retail packs for fruit mixes), muesli, and bakery sector Jam, fruit spreads	Puree and pulp concentrate; clarified concentrate Dried
<b>Guava</b>	Juice and nectar, tropical mixes Jam, fruit spreads	Pink and white yellow pulp and puree, clarified concentrate
<b>Coconut</b>	Canned milk for direct consumption (retail cans) Grated in retail packs or bulk for the bakery sector Included in jam, fruit spread, desserts, cookies...	Milk Dried and grated
<b>Cashew nut</b>	In retail packs, mixed nuts	Dried
<b>Papaya</b>	Juice Diced for: retail (retail packs for fruit mixes), muesli, and bakery sector	Red and yellow puree and pulp concentrate Dried
<b>Carambola (starfruit)</b>	Pieces for direct consumption,	Dried
<b>Surinam cherry</b>	Juice (blends, nectar...)	Juice

Some remarks about the further processing of exotic fruits in Europe:

- Organic banana (which is not on the list) remains the most consumed exotic fruit in Europe (mainly fresh, less as further processed).
- From the list, pineapple is the most further processed exotic fruit, used in a wide range of products, including baby food (which is not the case for the other fruits).
- After pineapple, mango is also widely used in further processed products.
- Cashew nuts are consumed only dry and directly (or included in some mixes like muesli, bakery products, etc).
- Coconut is mainly sold grated and as canned milk but can be included as an ingredient in some desserts, jams, fruit spread, cookies, etc.
- Surinam cherry is more used as a dietetic complement (which brings C vitamin). At the present time in Europe, acerola is in fashion and often added to fruit juices.
- Carambola is rarely used in further processed products.
- Some specific national or regional products were not included here. For example in the United Kingdom chutney is very popular and can include exotic fruits. But this ethnic product (organic or otherwise) is not consumed in France.

### 1.3. RECOMMENDATIONS

#### *Fruits*

#### MARKET OPPORTUNITIES FOR ORGANIC EXOTIC FRUITS

<b>Pineapple</b>	+++
<b>Mango</b>	++
<b>Coconut</b>	++
<b>Cashew</b>	++
<b>Guava</b>	+
<b>Papaya</b>	+
<b>Surinam cherry</b>	+
<b>Starfruit</b>	+/-
<b>Plantain</b>	-
<b>Manioc</b>	-
<b>Bread fruit</b>	-
<b>Sweet potato</b>	-

As can be seen in the table above, in term of volumes demanded for processing, organic **pineapple** has the greatest potential. The second is **mango**. **Coconut** and **cashew** also offer potential and were demanded by several operators during the inquiry. Market potential for the other products is smaller.

### ***About the sectors***

- **Juices & nectars:** The sector appears to be the most important for exotic fruits in terms of volume. If temperate fruit (apple, pear) and citrus (orange) are the most common juices, the main operators of this sector have exotic fruits in their range of products, including pineapple, mango nectar, exotic blends.
- **Muesli, cookies, bakery products:** use of dry fruits and nuts. A lot of small operators who buy from regional and/or national wholesalers.
- **Yogurt:** very small market with mainly organic temperate fruits; exotic fruits are seldom found.
- **Jams, jellies:** a lot of small operators (craft industry); exotic fruits are seldom used. Big players of conventional products have done some trials. Others have a few products, but not a lot.
- **Baby food:** very strict in terms of legislation; conditions to enter this field are stringent (high level of quality is demanded of suppliers).
- **Ice cream:** very small segment.

### ***About the distribution channels***

There are several operators between potential Guyanese exporters and European processors. Usually organic processors are too small to import all their ingredients, though it can occur for main ingredients. Exotic fruits will never be used more than temperate fruits for the same product (juices, jams, etc). Exotics remain a “small” ingredient with the exception of perhaps pineapple, mango and to a lesser extent coconut and cashew).

At this stage organic exotic fruits (dry, pulp, concentrate, etc.) are usually imported by traders (by container or less, according to the product availability) who have the know how to import and to handle the products. Depending on volumes, some products go directly to processors. Others are sold to national or regional distributors. In between the trader and the processors some companies may handle the product in order to further prepare it for retail or for further processors, to pack it in smaller units, to clean it, etc.

The main specialized organic importers are located in the Netherlands and in Germany (TRADIN, EDWIN LORENTZ, ETC). There are no big importers in France or in the United Kingdom.

At times some importers of conventional ingredients do handle organic products to client requests. In this case, organic is a complement to their range of products in order to satisfy customers, but not as an important part of their products range. Although all big players in fruit ingredients have handled organics at one time or another, some have stopped because they had not the know how to treat niche products.

Some countries appear to specialize. For example, Germany is known for its organic juices and the main brands found in specialized French shops come from Germany (brands: Voelkel and Beutelsbacher). Furthermore, JACOBY is an important German supplier of organic juices under its own label for supermarkets and hypermarkets.

The more the product is sold in Europe in small volumes, the more the trader is essential because small processors are not organized or capable of importing. So, for niche markets,

exporters will need to identify a good importer who will be able to enter the product in Europe, to store it, to further process it if necessary and to find the right customers.

The main operators in the organic market are detailed below.

## 2. THE ORGANIC MARKET IN FRANCE

### 2.1. Facts and figures

- France has between 4500 and 5500 processors of organic foods. 60% of them are small operators in the grain sector, such as bankers.
- France counts approximately 125 wholesalers specialized in organic products. The main ones are: DISTRIBORG (the leader), BIOPRIM, RCS DISTRIBUTION, BIO CER, BRETAGNE VIANDE BIO (meat), BIO GAM (dairies, eggs, oils), CABSO SARL (fruits & vegetables), VANDENDRIESSCHE, BIO DISTRIFRAIS, CHANDOBET, GUADISUCRE, J.L. BOYÈRE, SARL NATURAL... The big player in this sector is DISTRIBORG GROUP (part of WESSANEN), which distributes in conventional retail chains. The group purchases from 30-40 suppliers and distributes under its own brands.
- The specialized retail sector is very fragmented: a lot of small operators. Main retail chains: BIOCOOP (42 outlets), CROQ'NATURE (5), RAYONS VERTS (9), COOP IND (6), NATURALI (6), SATORIZ (6), ELAN NATURE (2), CÔTÉ VERT (2), BIOMONDE (3), DAME NATURE (3), LA VIE CLAIRE (9), EAU VIVE (4), LA VIE SAINE (3).
- Almost all large conventional retail chains also sell organic foods. Turn over of the sector in organic: 500 million EUR (50% of the organic distribution turn over as against 26% in 1994). Main chains involved in this sector: MONOPRIX, CARREFOUR, CORA, CASINO, AUCHAN, LECLERC, INTERMARCHÉ. In 2002, CARREFOUR carried 151 organic products: 89 dry products, 21 in drinks and 41 in fresh products.

#### *The big players and interesting operators:*

DISTRIBORG GROUP is one of the leaders in the distribution of labeled organic products to supermarkets and specialized retail shops. The group is composed of several specialized companies (BONNETERRE, BRUGIER SILLON, etc). and is part of Dutch multinational, WESSANEN.

- F.PROJECTS and P.F.S. (PROCESED FRUIT SUPPLIERS): two of the few brokers in this market.
- JACOBY, French office for an important German fruit juice producer.
- LE GOUT DE LA VIE: a leader in production and distribution of organic products to supermarkets.
- J.L.BOYERE: one the main French players in the distribution of dry fruits.
- LEA VITAL GROUP: involved through different companies in further processing.
- The German RAPUNZEL and Dutch TRADIN (European leaders in importation and distribution of organic) have a sales office in France but only for sales.
- TRIBALLAT: one of the few “big” dairy companies, which carries a range of organic yogurts.
- VITAGERMINE: interesting in the field of baby food.
- VITAMONT: one of the few French organic fruit juices company.

Some conventional players have tried organic products with some success. They may be considered as potential operators, even if at the present time they are not involved in organic foods. These include:

- For fruit concentrates and purees: BOIRON, KERRY, CAP'FRUIT, DÖHLER FRANCE, COLINDIS (which is a agent more than a producer) ;
- For fruit juices, besides the French leaders: FRUITE, FRUIVAL (ANDROS group) GIVRAT FRUIT / MOULIN DE VALDONNE (TEISSEIRE group);
- For jams, etc: MATERNE BOIN, ANDROS.

## **2.2. Fairs**

### **NatExpo**

Paris, 18<sup>th</sup> to 20<sup>th</sup> of October 2003 (every two years)

<http://www.natexpo.com>

Small organic compared to Biofach in Germany, but it is the main French fair targeting professionals. Approximately 400 suppliers in the organic field and nutritional complements 8000 visitors in 2003.



## **PART III**

### **IMPORTERS, DISTRIBUTORS AND PROCESSORS IN THE FRENCH ORGANIC MARKET**

### 3. FRENCH DISTRIBUTORS AND PROCESSORS

*Main sources used to constitute this list:*

- *Store checks*
- *SETRABIO members (association for French organic processors)*
- *Participants at SIAL 2002, world fair for food products in Paris*
- *Participants at BIOFACH 2003, world organic fair in Germany*
- *Participants at NATEXPO 2003, French fair for organic and dietetic products*
- *Participants at ANUGA 2003, first world food fair, in Germany*
- *Internet research*

#### **ABCD DE L'EXOTIQUE**

80 rue d'Angers

94584 RUNGIS Cedex

Phone: + 33 1 46 87 21 32

Fax: + 33 1 46 87 53 17

Contact: Alain DOVAL, buyer

*Import-export of tropical fresh fruits & vegetables.*

*Company specializes in conventional tropical fruits (mainly bananas from the French Caribbean). ABCD began 6 months ago with fresh organic banana and hopes to develop other fresh fruits (depending on demand). Note: direct import of bananas but for other fruits in small volumes, buying is done through an importer.*

#### **AGREXCO FRANCE SARL**

16 rue du Séminaire

PO Box 312

94153 RUNGIS Cedex

Tel : 33 1 41 80 82 82

Fax : 33 1 46 86 99 59

*(Importer, organic products from Israel)*

*Contact: Gerard Dicard*

#### **AGROBIODROM**

Quartier Saint Martin

26270 Lorient

Tel: +33 4 75 63 86 00

Fax: +33 4 75 63 86 01

agrobiodrom@wanadoo.fr

#### **ALTERBIO FRANCE SARL**

5 rue Levasseur

ZI Saint Charles

66000 PERPIGNAN

Tel : +33 4 68 68 38 38

Fax : +33 4 68 68 38 29

Accueil : info@alterbio.com

Service commercial : altervente@alterbio.com

Service communication : altercomm@alterbio.com

<http://www.alterbio.com>

(Producer, importer)

**ALMATA**

19 rue Diderot  
92130 ISSY LES MOULINEAUX  
Tel: + 33 1 40 95 07 34  
Fax: + 33 1 40 95 07 35

*Production and distribution of pure organic fruit juices.*

**ANDRE GUEPRATTE SARL**

Zone Artisanale de Virey  
50600 SAINT HILAIRE DU HARCOUËT  
Tel.: + 33 2 33 49 21 95  
Fax: + 33 2 33 49 59 10

*Producer of red berries. Packaging. Frozen fruits, sauces, jams, liquors, puree.*

**ANDRESY CONFITURES**

24 rue Maurice Berteaux  
78780 MAURECOURT  
Tel.: + 33 1 39 74 68 94  
Fax: + 33 1 39 74 40 00  
[www.andresy-confitures.com](http://www.andresy-confitures.com)  
[info@andresy-confitures.com](mailto:info@andresy-confitures.com)

*Specializes in production of quality jams and jellies. Traditional process of production.*

**ARCADA**

Domaine du Blazy  
47130 PORT SAINTE MARIE  
Tel: +33 5 53 87 20 24  
Fax: +33 5 53 87 26 18  
[arcada@ins.France.com](mailto:arcada@ins.France.com)

*(Importer-distributor, packer)*

*Contact: Mr Roland Charade*

**AUX RAYONS VERTS (CHAIN WITH 60 SHOPS)**

41 rue Léon Blum  
ZA La Neuville  
51100 REIMS  
Fax : +33 3 26 04 88 79

**AUCHAN**

200 rue de la Recherche  
59656 VILLENEUVE-D'ASCQ  
Cedex  
Tel: +33 3 20 67 55 78  
Fax: +33 3 28 37 61 39  
E-mail: [pfrisch@auchan.com](mailto:pfrisch@auchan.com)

*23rd. Benoit Dubus from Bureau des achats des fruits et legumes – 33 3 20 08 55 14, [bdubus@auchan.fr](mailto:bdubus@auchan.fr) – organics. Mr. Frisch will be back on 7/17. Spoke with the assistant buyer, Celine ([cchiebaide@partner.auchan.fr](mailto:cchiebaide@partner.auchan.fr)) and emailed her a list of products for which she could provide conventional prices.*

**BEAUBOURG**

Tel: +33 1 64 62 65 00

Fax: +33 1 64 80 40 51

Contact: Mr. Remoiville

**BIGALLET**

Rue de la Gare

38730 VIRIEU-SUR-BOURBRE

Tel.: + 33 4 74 88 25 13

Fax: + 33 4 74 97 90 23

[www.bigallet.com](http://www.bigallet.com)

[bigallet@wanadoo.fr](mailto:bigallet@wanadoo.fr)

*Production of organic fruit syrups and aperitifs.*

**BIOCASH DISTRIBUTION**

281 avenue du Marché de la Gare

MIN Espace n.13

34047 Montpellier

Tel: 33 4 67 58 68 58

Fax: 33 4 67 58 59 70

*(Import, wholesale)*

**BIOCOOP (180 SHOPS IN FRANCE IN 2001)**

22 cours Gambetta

65000 TARBES

Tel: +33 5 62 34 10 37

Fax : +33 5 62 44 15 96

<http://www.globenet.org/adorne/0biococp.html>

Service de produits

02 41 79 70 00

Mr. Vincent Rousselet

[produit@biocoop.fr](mailto:produit@biocoop.fr)

*His reply to my email:*

*“We are looking for canned organic fruits. Among exotic fruits, pineapples and mangos could be of best interest. However, we are not able to import yet. We have to go through an importer.”*

**BIOCOOP**

Consulting Firm

17 rue Théophile Gautier

65000 TARBES

Tel: +33 1 44 07 72 99

Fax: + 33 1 44 08 17 00

**BIOPRIM SA**

530 avenue de Milan – Zone du Grand Saint-Charles

66000 PERPIGNAN

Phone: + 33 4 68 54 79 79

Fax: + 33 4 68 54 57 68

[www.bioprim.com](http://www.bioprim.com)

[contact@bioprim.com](mailto:contact@bioprim.com)

*Import-export of organic fruits & vegetables, included exotic fruits. Brands: ECOFARM, BIOSÉLECTA, BIOSPAN, TERRA VIVA.*

### **BIO TROPIC GMBH**

Van Rietlaan 19, NL-3461 HW Linschoten

Tel: +31 (0) 348 43 50 70

Fax: +31 (0) 348 43 10 77

[info@biotropic.com](mailto:info@biotropic.com)

*Contact: Dick Troost*

### **BIOCONVERGENCE**

16, rue Claude Bernard

75321 PARIS Cedex 05

Tel : 33 1 53 44 79 65

[mcm.bioconvergence@wanadoo.fr](mailto:mcm.bioconvergence@wanadoo.fr)

*Contact: Madame Mouen*

[setrab@setrabio.com](mailto:setrab@setrabio.com)

*Umbrella organization for processors and traders*

### **BOIRON FRERES**

1 rue de la Glacière

94538 RUNGIS Cedex

Tel.: + 33 1 45 60 73 00

Fax: + 33 1 46 87 85 92

[www.boironfreres.com](http://www.boironfreres.com)

[aansart@boironfreres.com](mailto:aansart@boironfreres.com)

*Frozen fruits, puree, frozen preparation for fruit mousses. In organic: strawberry and raspberry puree.*

### **BONNETERRE**

1 place des Planteurs

94538 RUNGIS Cedex

Phone: + 33 1 49 78 25 00

Fax: + 33 1 46 87 91 68

*Part of DISTRIBORG. Sells a range of organic dairy products, meat, fresh produce, juices, frozen food, etc. in the specialized retail sector.*

### **BRIMBIO SUARL – SAFCO / AGRISOL**

20 avenue Robert Schuman

13002 MARSEILLE

Phone: + 33 4 91 99 41 60

Fax: + 33 4 91 91 80 71

[www.agrisol.com](http://www.agrisol.com)

[marseille@agrisol.com](mailto:marseille@agrisol.com)

*Part of SAFCO (Société Africaine de Conserverie, Ivory Coast). Tropical fruits (Smooth Cayenne pineapple, Victoria pineapple, Fifi banana, pink banana, sour sop, mango, lime, papaw, passion fruit) and further processed fruits : juice, frozen, canned, chunks. One of the plantations (named Brimbo) has 600 ha under organic production in Ivory Coast, certified by Ecocert end of 2000. It will be the most important farm in Africa in organic, by size and type of products.*

*Not contacted because it is a direct competitor with Guyana.*

**BRISSON SCEA**

5 rue des Platanes  
33220 PINEUILH  
Tel.: + 33 5 57 46 03 48  
Fax: + 33 5 57 46 42 88  
[brisson@aquinet.rtm.fr](mailto:brisson@aquinet.rtm.fr)

*Organic prunes and dried fruits, juices, concentrate and organic puree.*

**BROCHENIN SA**

Route de Nyons – Le Grand Deves – BP 21  
26790 TULETTE  
Phone: + 33 1 43 42 17 50  
Fax: + 33 1 53 02 00 83  
Contact: Diego GARCIA, General Manager  
Address in Paris : 11 rue de la Chine 75020 PARIS  
[www.brochenin.com](http://www.brochenin.com)  
[diego@brochenin.com](mailto:diego@brochenin.com)

*Specialization in organic oils and fats (palm oil, margarine, etc). Importation of tropical products: organic fresh and dried bananas, mango, pineapple, papaw, grain, etc. from South America, Africa. Specialization in organic fresh banana from South America (Ecuador mainly - 3000 tons/year: fifi, plantain, red...) and organic fresh pineapple, papaw, mango (from Africa, Central America, South America). Other products : organic coconut, dry banana. First company which has introduced organic palm oil. Strong links with Colombia (for palm oil, banana). They do not want to expand their range on other suppliers.*

**BRUGIER SILLON**

ZI en Tourré  
11400 CASTELNAUDARY  
Phone: + 33 4 68 94 52 10  
Fax: + 33 4 68 94 02 80

*Part of DISTRIBORG. Distribution of organic dried fruits. BRUGIER SILLON does only distribution; does not import. Imports are centralized at DISTRIBORG head office (contact Jean-Philippe THEVENET, buyer for dried and further processed fruits). BRUGIER SILLON distributes mainly to specialty shops, small amount to retails chains and to processors (producers of muesli, biscuits...). Big interest in dried exotic fruits (pineapple, mango, passion fruit, papaw...) and cashew nuts.*

**CAP'FRUIT SA**

ZA Rapon  
26140 ANNEYRON  
Tel.: + 33 4 75 31 40 22  
Fax: + 33 4 75 31 59 72  
Contact: Mr. FORCHERON, raw material buyer  
[www.capfruit.com](http://www.capfruit.com)  
[info@capfruit.com](mailto:info@capfruit.com)

*Production of frozen and aseptic fruit purees. Handles a few organic, mainly regional fruits + passion fruit. Organic products are only sold frozen.*

**CARREFOUR**

PO Box 75  
Zae de Saint Guénault  
1 rue Jean Mermoz  
91002 EVRY Cedex  
Tel: +33 1 58 63 30 00  
Fax: +33 1 60 79 44 98

*Philippe – les produits bio, said to call back 7/15. No answer, sent him an email.  
Philippe\_bernard@carrefour.com*

**CELNAT**

ZI de Blazovy  
43700 SAINT-GERMAIN-LAPRADE  
Tel.: + 33 4 71 03 04 14  
Fax: + 33 4 71 03 54 31  
[celnat@celnat.fr](mailto:celnat@celnat.fr)  
[www.celnat.fr](http://www.celnat.fr)

*French specialist of organic cereal and grain products. Collector of organic grain, milling plant, processor of organic muesli and cereal flakes, packer of dry food, cereals, etc.. Distributor of organic dried fruits & vegetables, flour and semolina, seeds, seeds to germinate. Brand : Celnat. 42 persons, turn over of 7.1 million EUR. Dried fruit is a very small part of the business.*

**CENTRE LECLERC**

149 rue Saint Honoré  
75001 PARIS  
Tel: +33 1 46 62 52 00  
Fax: +33 1 46 62 96 00

**CÉRÉCO**

ZA La Fontenelle  
35113 DOMAGNE  
Phone: + 33 2 99 00 02 66  
Fax: + 33 2 99 00 09 35  
[grillon-or@wanadoo.fr](mailto:grillon-or@wanadoo.fr)  
[www.cereco-bio.fr](http://www.cereco-bio.fr)

*Producer, packer of organic breakfast cereals, muesli and flakes, dry fruits.*

**CHARLES FARAUD S.A.**

avenue de Gladenbach - ZA La Tapy  
84170 MONTEUX  
Phone: + 33 4 90 66 95 00  
Fax: + 33 4 90 66 95 09  
Contact: Nathalie  
<http://www.charlesfaraud.com>

*Baby food and stewed fruits.*

*The company does only a few organic products (baby food and stewed fruits). Is not targeting the organic sector, concentrating instead on a range of conventional products as ready to eat dishes; salads, canned goods. Could be interested in conventional puree of passion fruit, guava, mango.*

**COLINDIS**

Bâtiment "Le Tropic"

2 Allée de Londres

91969 Courtaboeuf Cedex

Tel.: + 33 1 69 07 83 46

Fax: + 33 1 69 82 98 66

Contact: Ms. POLLET

[www.colindis.com](http://www.colindis.com)

E-mail: [contact@colindis.com](mailto:contact@colindis.com)

*Trader in further processed fruits for industry. One of the leaders in France. French sister company and exclusive dealer for BAYERNWALD (important German producer of half processed fruits: juices, puree, concentrate, special products of 40 different fruits, including some exotic fruits but mainly temperate fruits). Important part of the activity is done with organic fruits. COLINDIS supplies food industry (NESTLE, ANDROS, IFF...), retail chains (CARREFOUR) and restaurants.*

*COLINDIS works only in France and a little bit in the organic field (250 customers in total, of which 25 to 30 are for organic ingredients). The company doesn't do any marketing or advertising for organic products and only supplies upon request. For any demand in exotic organic fruits, it buys from the German GRÜNER PUNKT which is a sister company of BAYERNWALD (the owner of GRÜNER PUNKT, Armin Philipp, (see German list) is the brother of the owner of BAYERWALD). COLINDIS is not able to import directly as the volumes demanded in organic are too small.*

**COLLINES SARL**

La Jarrige

23320 SAINT VAURY

Tel.: + 33 5 55 80 25 84

Fax: + 33 5 55 80 22 51

[www.collines.fr](http://www.collines.fr)

[all.arle@wanadoo.fr](mailto:all.arle@wanadoo.fr)

*Small company. Use domestic products; transformation by artesianal methods using mainly regional fruits: jams, sauces, organic jams and fruits deserts.*

**CONFIT DE PROVENCE**

La Petite Calade – RN 7

13540 PUYRICARD

Phone: + 33 4 42 96 64 88

Fax: + 33 4 42 96 60 18

Contact: Cécile SAGOT

[www.confitdeprovence.com](http://www.confitdeprovence.com)

[contact@confitdeprovence.com](mailto:contact@confitdeprovence.com)

*Produces jams and deserts. Does not use exotic fruits and does not want to.*

**CONSERVIERIES DE HAUTE PROVENCE**

11 espace Saint-Pierre

04310 PEYRUIS EN PROVENCE

Tel.: + 33 4 92 33 23 00

Fax: + 33 4 92 33 23 08

[www.conserveries-hauteprovence.fr](http://www.conserveries-hauteprovence.fr)

*Production of organic jams, use temperate fruits + oranges.*

**CORA/LOCEDA HYPERSELECTION**

PO Box 81  
Domaine de Beauboug  
77183 CROISSY-SUR-  
BEAUBOURG  
Tel: +33 1 64 62 65 00  
Fax: +33 1 64 80 40 51

*Need to speak to Mr. Remoiville, back the 21st. Loceda is the hyperselection chain*

**CRUZILLE NOEL AUBERT**

226 avenue Jean Mermoz  
BP 5 Saint Jean  
63014 CLERMOND-FERRAND  
Tel.: + 33 4 73 91 24 46  
Fax: + 33 4 73 90 29 57  
[www.cruzilles.fr](http://www.cruzilles.fr)  
[contact@cruzilles.fr](mailto:contact@cruzilles.fr)

*Production of organic jams, for syrups, deserts, fruit jellies. .*

**ETRAB**

40 av. Des Terroirs de France,  
75 611 PARIS cedex 12.  
Tel:33 1 44 74 53 56  
Fax :33 1 44 74 52 76

*Syndicat Europeen des transformateurs et distributeurs de l'agriculture biologiques  
European professional union of processors and distributors of organic food  
<http://www.setrabio.com/setrab/default.htm>*

**DANIVAL SA**

Moulin d'Andiran  
47170 ANDIRAN  
Phone: + 33 5 53 97 00 23  
Fax: + 33 5 53 97 00 10

Contact: Thomas BREUZET, buying and site manager  
[tbreuzet@danival.fr](mailto:tbreuzet@danival.fr)

*Further processor in canned products: jams, stewed fruits, ready dishes, etc. Leader for canned products in specialized retail stores. Produces a little own labels for supermarkets.*

*At present the company uses only pineapple in pieces to put in some preparations (like stewed apples + pineapple pieces) or banana puree. Pineapple is bought in cans of 5/1. DANIVAL foresees no near term developments with exotics fruits, but could be interested to have a supplier for the future.*

**DISTRIBORG GROUP**

217, Chemin du Grand Revoyet  
69561 SAINT GENIS LAVAL CEDEX ( FRANCE)  
Phone: + 33 4 72 67 10 20  
Fax: + 33 4 72 67 10 57

<http://www.distriborg.com>

<http://www.distriborg.com/francais/Bjorg/index.htm>: web site for Bjorg branded organic products (full range of products)

<http://www.distriborg.com/francais/bonneterre/bonneterre.html>: web site for Bonneterre branded organic products (full range of products)

<http://www.distriborg.com/francais/sillon/index.htm>: web site for Le Sillon branded organic products (dry fruits: raisin, apricots, almonds, figs, dates and bakery ingredients)

<http://www.distriborg.com/francais/evernat/index.htm>: site for Evernat branded organic products (full range of products)

E-mail: [info@distriborg.com](mailto:info@distriborg.com)

*A leading distributor of specialty food products in Europe, DISTRIBORG GROUP is the mother company of about fifteen distribution companies which in France, Belgium, The Netherlands, Spain, Italy, UK. The group is in different markets: diet, organic, ethnic foods, food complements. DISTRIBORG was bought by WESSANEN, Dutch multinational food company which produces, organic and natural foods.*

*6 leader brands: Evernat, Bjorg, Bonneterre.*

*In terms of organic, the group also owns BREWHURST HEALTH FOOD SUPPLIES, wholesaler leader in distribution of organic, diet, natural food. Other French subsidiaries of the group include:*

- *BRUGIER-SILLON: distributor of dried fruits and fresh organic food (and natural cosmetics)*
- *R.BONNETERRE SA: distributor of specialized retail organic food under the Bonneterre brand.*
- *BIO DISTRIFRAIS: cash & carry in four French towns.*
- *CHANTENAT: distributor in West of France of fresh, natural or organic products*

➤ ***DISTRIBORG GROUP produces nothing directly and would not supply the names of its suppliers (we can suppose that WESSANEN produces a part of the products with other European suppliers).***

### **DÖHLER FRANCE SARL**

254 rue du Faubourg Saint Martin

75010 PARIS

Tel.: + 33 1 40 36 33 90

Fax: + 33 1 40 36 34 02

[france@doehler.com](mailto:france@doehler.com)

*French office of the German group (see German list). Leading manufacturer of fruit juice concentrates and blends, fruit preparations, flavorings and ingredients for the beverage and dairy industries. No interest at the present time after a trial in organics.*

### **DYNAMIS FRANCE**

54 avenue de la Villette

94637 RUNGIS Cedex

Tel: +33 1 45 60 43 44

Fax: +33 1 46 87 44 05

[dynamis@wanadoo.fr](mailto:dynamis@wanadoo.fr)

Contact: Mr Markus Zeiher

(Import, Export)

### **LES DOUCEURS DE JACQUEMART**

BP 300

Zone Industrielle

24 rue Marie Curie

26107 ROMANS Cedex

Tel.: + 33 4 75 72 20 13

Fax: + 33 4 75 70 25 60

[www.douceurs-de-jacquemart.com](http://www.douceurs-de-jacquemart.com)

[bienvenue@douceurs-de-jacquemart.com](mailto:bienvenue@douceurs-de-jacquemart.com)

*Organic shortbread biscuits filled with apricot, strawberry or blueberry.*

### **ETIKÉBIO**

Z.A. de Rostervel

56240 PLOUAY

Phone: + 33 2 97 33 06 83

*Small producer of organic yogurts with fruits, fresh cheese, “crème fraîche”, etc. At the present time, it does not use exotic fruit.*

### **EURO-NAT SA**

ZA La Boissonnette

07340 PEAUGRES

Phone: + 33 4 75 67 30 15

Fax: + 33 4 75 67 30 24

Contacts:

- Didier PERREOL, President General Manager

- Mr. VEDRENNE (buying end products); Miss BELLONI (ingredients for biscuits)

[www.euro-nat.com](http://www.euro-nat.com)

[euro-nat@euro-nat.com](mailto:euro-nat@euro-nat.com)

*Group composed of 6 companies:*

- *EURO-NAT SA: packaging of cereals, production of muesli, distribution of organic products (dry fruits, fruit juices);*
- *BIOLAND SARL: distribution of organic products in Paris and suburbs;*
- *TERRITOIRE SARL: producing organic biscuits;*
- *NICOLAS SAS: producing of organic pastas;*
- *JATARIY SRL (Bolivia): raw material collecting, further processing of quinoa, production of puffed quinoa;*
- *SCL EUROPRIM.*

*Brands: Primeal, Les Produits de l'Abbé Bisson, Douce Nature.*

### **EXODOM**

28 bd Jules Carteret

Lyon 6907

PO Box 7025

69348 LYON Cedex 07

Tel: +33 4 37 28 73 50

Fax: +33 4 37 28 73 54

[EXO-DOM@wanadoo.fr](mailto:EXO-DOM@wanadoo.fr)

<http://exodom.com>

*Contact: Mr Jean-Pierre Imele*

*(Import, Export)*

### **FORESTRADE, INC. – U.S.A. OFFICE**

41 Spring Tree Road

Brattleboro, VT 05301

Tel: +1 802 257 9157

Fax: +1 802 257 7619

<http://www.forestrade.com>

Corporate office contact: Thomas Fricke  
EU Market Contact: George Cumberbeak  
Tel : +31 10 451 8334  
Email: forestrade-europa@planet.nl

## **FLANQUART**

64 bis boulevard Gambetta  
BP2  
62540 MARLES LES MINES  
Tel.: + 33 3 21 61 74 20  
Fax: + 33 3 21 61 74 29  
[www.flanquart.fr](http://www.flanquart.fr)  
[mldusaussay@flanquart.fr](mailto:mldusaussay@flanquart.fr)

*Organic grain. But is considering conventional dried fruits cubes for muesli. May be open to organic fruit cubes?*

## **F.PROJECTS**

9 place Alexandre 1er  
78000 VERSAILLES  
Tel.: + 33 1 30 21 68 07  
Mobile: + 33 6 85 40 36 20  
Fax: + 33 1 39 51 53 74  
Contact: Felice AMANTE  
[www.fproject-bio.com](http://www.fproject-bio.com)  
[felice.amante@fproject-bio.com](mailto:felice.amante@fproject-bio.com)

*Broker in organic food: carries products in bulk, products in retail packaging, tomato products. Works in partnership with farms having a total area of about 15.000 ha and 14 facilities; mainly located in Italy, China, Turkey and Brazil. The total output is about 40.000 tons. Specializes in tomatoes from Italy; one project with orange juice from Brazil. It has requests for some exotic products (dry coconut, dry banana, etc.) but at this stage they do not produce these products. They are open to discussion, especially related to canned products (pineapple, etc). Mr Amante sells on whole Europe.*

## **FRDP – FRANCE RECHERCHE & DEVELOPPEMENT**

Clos de Capely – Les Valayans  
84210 PERNES LES FONTAINES  
Phone: + 33 4 90 12 10 00  
Fax: + 33 4 90 12 10 09  
Contact: Marc MONTLUÇON  
[www.frdp.fr](http://www.frdp.fr)  
[marc.m@frdp.fr](mailto:marc.m@frdp.fr)

*Distribution of fresh and frozen fruits & vegetables. Canned vegetables. Could be interested in pineapple juice (aseptic barrels or frozen), puree in cans 5/1 of exotic fruits (pineapple, mango, guava, papaw). Works mainly for French further processing industry (specializes in organic, less and less with conventional) and a little bit for retail chains, a little bit with Germany and Belgium. Works only with organic fresh and further processed fruits. Produces organic frozen fruits & vegetables under contract. Can be contacted with offer & prices.*

**FRUITÉ**

ZI les Afforêts  
389 rue Ingénieur Sansoube  
74800 LA ROCHE SUR FORON  
Phone: + 33 4 50 03 21 46  
Fax: + 33 4 50 03 38 57

*This company is involved in the production of fruit juice and, more recently, yogurt. 4 companies: FRUITE SAS, BRIC FRUIT SAS, UNISOURCE, SAVOIE YAOURT. UNISOURCE has some organic fruit juices but not with exotic fruits (Contact : Pierre KLEIN, buyer, phone : + 33 4 67 11 61 77 ; [pierre.klein@fruite.fr](mailto:pierre.klein@fruite.fr)).*

**FRUIVAL**

1540 r Louis Saillant  
BP 109  
26802 PORTES-LES-VALENCE  
Phone: + 33 4 75 57 40 57  
Fax: + 33 4 75 57 03 03  
[contact@fruival.com](mailto:contact@fruival.com)

*Producer of juices, stewed fruits, concentrates. Subsidiary of the French ANDROS company (one of the French leader in jams, stewed fruits, etc. brands: Andros, Bonne Maman, etc). At the present small range of organic products like orange juice under the brand Andros + other small products under their own labels.*

**GEORGELIN LUCIEN SA**

La Prairie de Londres  
47200 VIRAZEIL  
Tel.: + 33 5 53 20 15 20  
Fax: + 33 5 53 20 66 63  
[georgelinsa@georgelin.fr](mailto:georgelinsa@georgelin.fr)

*Production of organic fruit preparations certified by Ecocert: orange, melon, green tomato, strawberries.*

**GIVRAFRUIT – MOULIN DE VALDONNE**

ZI de Valdonne  
13124 PEYPIN EN PROVENCE Cedex 01  
Phone: + 33 4 42 32 38 38  
Fax: + 33 4 42 72 49 62  
Contact: Mme BAZO.  
Buying department (at TEISSEIRE head office): + 33 4 76 43 69 69  
[www.teisseire.com/givrafruits.htm](http://www.teisseire.com/givrafruits.htm)

*Subsidiary of French TEISSEIRE GROUP (syrups and fruit juices). Fruit juices, lemonades, syrup. TEISSEIRE has a limited range of organic syrups and fruit juices (lemon, strawberry, blackcurrant). They are unable to import directly in small volumes. They do not want to develop a broader range, and if they did, it would not be with exotic fruits. One of their suppliers: TRADIN ORGANIC AGRICULTURE (The Netherlands with an office in France, see address in the list)*

**LA VIE CLAIRE**

(Group Distriborg - 120 shops)  
35 avenue du 1er mai  
91127 PALAISEAU Cedex  
Fax: +33 1 64 53 83 01

## **LE GOÛT DE LA VIE**

63 boulevard du Montparnasse

75006 PARIS

Phone: + 33 1 53 63 24 70

Fax: + 33 1 53 63 24 71

Contact: Jean GUERIN

[www.legoutdelavie.com](http://www.legoutdelavie.com)

[nchatelar@legoutdelavie.com](mailto:nchatelar@legoutdelavie.com)

*Created in 1995, LE GOUT DE LA VIE has 5 brands: Le Goût de La Vie, Favrichon, Pro-Sain, Liora and Diapason-Bio, with a total of 60 products in salted (pastas, sauces, vegetables, oils, etc.) and sweet (cereals, biscuits, jams, chocolate, etc). One production plant for organic jams, ready dishes and olive oil + suppliers for other products under the company brands. The company is present on-line through websites like Ooshop, Telemarket, Vivrebio, Iceurope.com, Biomarkets and in hyper- and supermarkets like Auchan, Carrefour, Leclerc, Stoc, Monoprix, etc. With CRENO, second French distributor of conventional fruits & vegetables (turnover: 600 million EUR, 400 000 tons distributed), the company has built a partnership in order to be leader in the distribution of organic fruits & vegetables.*

*At the present time, the company is using more temperate fruits for their sweet organic products. Nevertheless, if interested, the company would not import directly from overseas because volumes are too small. So, purchasing is done directly when in Europe or through traders (like TRADIN) for specialties. LE GOUT DE LA VIE produces end products (jams, etc). as well as intermediate products like fruits on sugar for the dairy industry.*

## **IMAGO TUTTI VERDI**

Marché Saint Charles

PO Box 5129

66031 PERPIGNAN

Tel: +33 4 68 68 40 40

Fax: +33 4 48 68 40 48

[imago1@wanadoo.fr](mailto:imago1@wanadoo.fr)

*(Importer)*

*Contact: Mr Garcia*

## **ISP VIVRAO**

22 allée des Gondoles

91650 BREUILLET

Tel.: + 33 6 08 36 98 55

Fax: + 33 4 42 46 09 64

*Production and distribution of deep frozen food, dried and fresh fruits, jam, stewed fruits and mashes, hive products.*

## **JACOBY**

14 avenue de la Corbera

75012 PARIS

Tel.: + 33 1 55 78 22 88

Fax: + 33 1 55 78 22 87

[www.jacoby.fr](http://www.jacoby.fr)

[contact@jacoby.fr](mailto:contact@jacoby.fr)

*French office for an important German producer of organic vegetable and fruit juice, sodas, tea, etc.*

**SA JEAN-LOUIS BOYÈRE**

Launay - CHAILLAND

BP 60

35500 ERNEE

Tel.: + 33 2 43 02 77 77

Fax: + 33 2 43 02 66 30

Contact: Damien BOYERE, Director

[damien.boyere@online.fr](mailto:damien.boyere@online.fr)

*Importer, wholesaler and packer of dried fruits and nuts. Brand : Vijaya. Part of Good Food Foundation (<http://www.goodfood.nl> group of European companies involved in the development of organic projects mainly in Turkey: a of fair trade company). Could be interested in dried pineapple and papaya in 5kg and 200g bags. The company is able to pack.*

**KERRY RAVIRUIT**

Les Jomards

26140 ANNEYRON

Tel.: + 33 4 74 84 08 53

Fax: + 33 4 74 84 14 56

[www.ravifruit.com](http://www.ravifruit.com)

[ravifruit@ravifruit.com](mailto:ravifruit@ravifruit.com)

*Manufacturing of further processed fruit for catering, pastry sector, etc. Very small range of organic fruits.*

**LEA VITAL GROUP**

Avenue Paul Langevin – BP 47

17180 PERIGNY

Phone: + 33 5 46 34 30 00

Fax: + 33 5 46 34 32 34

<http://www.institut-vital.fr>

E-mail: [vbizet@institut-vital.fr](mailto:vbizet@institut-vital.fr)

*Group which develops different ranges of health and organic products:*

- *Le Jardin Biologique : organic products ; first products launched in 1995*
- *Entouka : organic products for children between 3 and 12 years, launched in 2000*
- *Maison de Fleurance : regional traditional products*
- *Floressence : phytotherapy products*
- *Laboratoire Léa Nature: para-pharmaceutical products*
- *Silhouette: diet products*

**NATURENVIE SA – LE JARDIN BIOLOGIQUE**

(Same address)

Phone: + 33 5 46 34 37 34

Fax: + 33 5 46 34 59 60

*Organic products, natural products, dietetic products. Involved in fair trade too. Wide range of dry further products.*

**MAGIRON**

Le Grand Mas

13550 NOVES

Phone: + 33 4 32 62 13 08

Fax: + 33 4 32 62 13 09

Contact: Ginette.

[magiron@wanadoo.fr](mailto:magiron@wanadoo.fr)

*Contract packaging of fresh fruits & vegetables. MAGIRON is a distributor of fresh fruits & vegetables for the retail sector. Buys from big wholesalers and importers.*

### **MAGNETTE & CIE**

9 rue de la Durance  
67000 STRASBOURG  
Tel.: + 33 3 88 65 79 30  
Fax: + 33 3 88 40 14 11

*Trader of canned food products. Appears in with organic palm heart.*

### **MARKAL**

Z.A. Les Plaines – BP 18  
SAINT MARCEL LES VALENCES  
Phone: + 33 4 75 58 89 10  
Fax: + 33 4 75 58 81 85  
[www.markal.fr](http://www.markal.fr)  
commercial@markal.fr

*Dried fruits (cashew nuts, grated coconut, etc). MARKAL is more a wholesaler of dried fruits than an importer. Could be interested in cashew nuts but not in directly importing.*

### **MATERNE - BOIN**

Parc d'activité de Sans Souci  
330 Allée des Hêtres  
BP 36  
69579 LYON - LIMONEST  
Phone: + 33 4 78 66 32 32  
Fax: + 33 4 78 66 32 00

Buying department for stewed fruits: + 33 3 23 60 30 80 ; Ms DELFOSSE, fruit buyer

[www.materne.fr](http://www.materne.fr)  
[info@materne.fr](mailto:info@materne.fr)

*Producer of jam, stewed fruits for retail, fruit puree, fruit syrup and fruit preparation for the pastry industry, baby food under its own label, etc. One of the leaders in France for jams and stewed fruits. The company entered the organic field 3 years ago but has stopped since then because quantities of organic raw material were insufficient and irregular. Quality was not stable and the process of control and traceability is complicated. The company has no plans at this stage to re-enter again.*

### **MONOPRIX SA**

3 rue Paul Cézanne  
75008 PARIS  
Tel: +33 1 40 75 15 15  
Fax: +33 1 40 75 15 16  
*Groupe Monoprix 1 55 20 74 42*

### **NATURE IMPORT ET INDUSTRIES**

MIN – Bureau 93 bis – 5° Hall  
84300 CAVAILLON  
Phone: + 33 4 90 78 73 07  
Fax: + 33 4 90 78 73 17  
[www.pronatura.com](http://www.pronatura.com)

*Import-trading. Fruits & vegetables: fresh, frozen and other forms; exotic fruits...*

**NATURGIE SA – NEW DIET**

36 rue de l'Alma – BP 250  
92602 ASNIERES Cedex  
Tel.: + 33 1 47 93 59 59  
Fax: + 33 1 47 93 92 44  
Contact: Olivier LEGAY, buyer (tel.: + 33 1 47 93 67 02)  
[www.michelmontignac.tm.fr](http://www.michelmontignac.tm.fr)  
[export@naturgie.com](mailto:export@naturgie.com)

*Distributor/trader of gourmet food under the brand “Michel MONTIGNAC” also carries organic wine and organic fruit jams and juices.*

**NAUTILUS**

12 rue du 14 septembre  
75002 PARIS  
Tel.: + 33 1 49 26 00 26  
Fax: + 33 1 49 26 00 35  
[www.nautilusfood.com](http://www.nautilusfood.com)  
[nautilus@nautilusfood.com](mailto:nautilus@nautilusfood.com)

*Importer and distributor of seafood under the brand Nautilus for catering and retail chains. Proposes too handle organic heart of palm.*

**OTIEC**

22 rue de l'Arcade  
75008 PARIS  
Phone: + 33 1 42 65 05 35  
Fax: + 33 1 47 42 57 51  
[otiec.lemondebio@wanadoo.fr](mailto:otiec.lemondebio@wanadoo.fr)

*Importation and distribution of organic food (only end products).*

**PRONATURA**

MIN 68  
PO Box 70  
84953 CAVAILLON Cedex  
Tel: +33 4 90 78 73 07  
Fax: +33 4 90 78 73 14  
[patrice@pronatura.com](mailto:patrice@pronatura.com)  
<http://www.pronatura.com>

*(Importer and trader)*

*Contact: Patrice Brechette*

**P.F.S. (PROCESSED FRUIT SUPPLIERS)**

45 avenue André Roussin  
BP 75  
13321 MARSEILLE Cedex 16  
Tel.: + 33 4 96 15 25 70

Fax: + 33 4 96 15 25 74

Contact: Ms Farida BENRABA, buyer

[www.pfs-france.com](http://www.pfs-france.com)

[pfs@pfs-france.com](mailto:pfs@pfs-france.com)

*Broker specialized in raw materials and ingredients. Is one of the main suppliers of processed fruits and vegetables for the French Food Industries. Products: single strength, concentrated juices, pulps and purees, frozen pieces of fruits, IQF, essential oils, powders, dehydrated fruits. Handles a small range in organics: banana, lemon, orange in pure juice, concentrate or puree. Is interested in organic crushed pineapple in 5kg cans aimed at baby food production. Some demand from their customers for organic mango puree and organic passion fruit juice.*

### **RAPUNZEL FRANCE**

2 avenue de Fontcouverte

84000 AVIGNON

Phone: + 33 4 90 87 69 27

Fax: + 33 4 90 87 68 92

[www.rapunzel.fr](http://www.rapunzel.fr)

[rapunzel@rapunzel.fr](mailto:rapunzel@rapunzel.fr)

*French subsidiary of a German company. Wide range of primary products for further processing: dried fruits, cereals, spices, sugar, cocoa and end products, etc. The group has shops in Germany, offices in Turkey, Madagascar, United States. RAPUNZEL is involved in two big projects, in Turkey and Sri Lanka. In Turkey, RAPUNZEL has more than 870 contract producers in 7 regions of Turkey (for organic dried fruits, nuts, herbs and spices), In Sri Lanka, RAPUNZEL produces under contract of organic coconut (+ pineapple, mango, banana, papaya and pepper). Furthermore RAPUNZEL is involved in fair trade. The company has partnerships in 30 countries from Brazil to Sri Lanka, United States to Switzerland.*

*The French office does only distribution to specialized shops and further processors (bulk products). For import, Sonia must be contacted in Germany (she speaks English and French)*

### **RAPUNZEL NATURKOST AG**

Haldergasse 9

87764 Legau - Germany

Tel.: + 49 8330 910 0

Fax: + 49 8330 910 188

[www.rapunzel.de](http://www.rapunzel.de)

[info@rapunzel.de](mailto:info@rapunzel.de)

### **RELAIS VERT**

66000 PERPIGNAN

Phone: + 33 4 90 67 23 72

Fax: + 33 4 90 60 52 91

Contacts: Thierry for fresh fruits & vegetables, Eric for further processed

[relais.vert@free.fr](mailto:relais.vert@free.fr)

*Distribution of fresh fruits & vegetables, further processed and other organic products under its own label "Relais Verts". Imports fresh fruits and cashew nuts from Africa (Mali). But for other products (concentrates), the company buys from importers because it uses only small quantities.*

### **RICHARD DE NYONS**

40, avenue des terroirs de France

75012 Paris

Tel: 33 1 44 74 54 97  
Fax: 33 1 44 74 51 53  
rdn@club-internet.fr

### **SDP RUNGIS S.A. CANTO BIO**

6/8 rue des Oliviers  
94537 ORLY Cedex  
Phone: + 33 1 46 87 22 79  
Fax: + 33 1 46 87 51 04

Contact: Miss MARTINEZ, buyer.

*Range of organic products for restaurants and bakeries (brand Canto Bio)*

*Distributor of conventional and organic food products (except fresh/frozen): canned products, pastas, biscuits, wine, etc. Could be interested in heart of palm and pineapple but not sure they can import directly.*

### **SENFAS SARL**

ZA des Espinaux  
30340 SAINT PRIVAS DES VIEUX  
Contact: Gisèle CASASSUS (purchasing and sales)  
Phone: + 33 4 66 54 33 50  
Fax: + 33 4 66 54 33 54  
[Senfas30@wanadoo.fr](mailto:Senfas30@wanadoo.fr)

*SME. Production and trade of food product: production of nut cream, trade of products (chocolate, vanilla, sugar, canned fruits, etc.). Specializes in ingredients for bakeries and biscuits plants (fats, butter, sugar, no flour). Interested in canned pineapple 400 ml without label (SENFAS distributes under its own label), coconut milk in 400 ml, canned fruit cocktail (3 fruits which can be exotic) in 400 ml, cashew nuts, dried fruits (banana, pineapple, mango) in 1 to 5 kg bags to be sold bulk in specialized shops. But as the volumes treated are small, the company is not able to import directly. In this case, it buys from traders like TRADIN. SENFAS directly imports dry fruits (apricot, sultana raisin, fig) from Turkey which go through the port of Marseille in 20-foot containers.*

### **SURAL - SACICC**

31 route de Brie  
91800 BRUNOY  
Tel.: + 33 1 69 39 11 30  
Fax: + 33 1 69 39 03 66  
[sacicc@wanadoo.fr](mailto:sacicc@wanadoo.fr)

*Trading company specialized in canned food products, including wild heart of palm certified by Ecocert international.*

### **TRADIN FRANCE**

30900 NIMES  
Phone: + 33 4 66 21 11 26  
Fax: + 33 4 66 21 27 50  
Contact: Alexandre FERNEZ  
[interbio@mnet.fr](mailto:interbio@mnet.fr)

*French office of the Dutch company. TRADIN ORGANIC AGRICULTURE BV is one of Europe's largest trading companies of basic organic commodities, founded at the end of the 1970's in the Netherlands.*

*Seems to be the first importer in organic product for industry but not the main distributor in organic product in general. All the products enter Europe via the Netherlands.*

*Interested in mango pulp in small packaging (cans of 3 and 5kg) for different uses ; they work already with barrels of 200kg but it's too big for some companies.*

*Interested in papaw and guava, frozen or aseptic barrels.*

*Buying usually in 20-foot containers. They can buy less but not sure that the supplier remains competitive.*

*No price given; you can make your offer to this contact or directly in the Netherlands.*

#### **FRENCH SOURCES FOR FRUITS: ASEPTIC, JUICES, PUREES AND CONCENTRATES**

<b>Product</b>	<b>Origin</b>	<b>Certifier</b>	<b>Packaging</b>
Apricot puree	Hungary	Skal	Aseptic barrels
Peach puree	Italy	BAC	Aseptic barrels
Pear puree	France	ECOCERT	Aseptic barrels
Banana puree	India	ECOCERT	Aseptic barrels
Guava puree	Fidji	BIOGRO	Frozen
Mango puree	Colombia	BCS	Aseptic barrels
Passion fruit puree	Chine	Skal	Aseptic barrels
West Indies cherry puree (acerola)	Brazil	Biodynamico	Frozen
Orange juice	Italy	BAC	Frozen
Orange concentrate 65 brix	Cuba	BCS	Frozen
Lemon concentrate 48 brix	Italy	BAC	Aseptic barrels
Apple concentrate 69 brix	Turkey	Skal	Aseptic barrels
Pure pineapple juice	Honduras	Skal	Aseptic barrels
Pineapple crush	Honduras	Skal	Aseptic barrels
Tomato concentrate	Turkey	Skal	Aseptic barrels
Tomato concentrate x3	Turkey	Skal	Aseptic barrels
Pineapple concentrate 60 brix	India	ECOCERT	Aseptic barrels
Papaw puree			
Morello cherry concentrate			

### FRENCH SOURCES FOR CANNED FRUITS

Product	Origin	Certification	Packaging
Pieces of pineapple	Sri Lanka	Skal	Cans 3.1kg
Sliced pineapple	Sri Lanka	Skal	Cans 3.1kg

### FRENCH SOURCES FOR DRIED FRUITS

Product	Origin	Certifier	Packaging
Bananas	Honduras	Skal	100g
Raisin Sultanas	Turkey	Skal	12.5kg
Pineapple	Honduras	Skal	100g
Mango	Honduras	Skal	100g
Dates	Tunisia	ECOCERT	12.5kg
Dates in pieces	Tunisia	ECOCERT	12.5kg
Prune	Yugoslavia	Skal	50kg
Apple	Yugoslavia	Skal	12.5kg
Pear (dices)	Yugoslavia	Skal	10kg
Quince (dices)	Yugoslavia	Skal	10kg
Thompson Raisin	California	CCOF	10kg

### FRENCH SOURCES FOR CASHEW NUTS AND COCONUT PRODUCT

Products	Origin	Certifier	Packaging
Cashew nuts	Brazil	IBD	25kg
Cashew nuts	Sri Lanka	Skal	25kg
Coconut	Sri Lanka	Skal	25kg

#### LAITERIE TRIBALLAT

2 rue Julien Neveu – BP 93106

35531 NOYAL SUR VILAINE Cedex

Phone: + 33 2 99 04 11 11

Fax: + 33 2 99 04 11 44

Contact: M.GARNIER

[www.triballat.com](http://www.triballat.com)

[contact@triballat.com](mailto:contact@triballat.com)

*Production of dairy conventional and organic products, organic dairies and milk based deserts under the brand “Vrai”. Range of conventional soy drinks and yogurts (apricot/guava, pineapple/orange, mango/lemon under the brand “Soja Sun Fruits”).*

*The company does not import directly but buys from French companies like WILD France. WILD is one of the most important suppliers of natural ingredients for the food and beverage industry world-wide. At*

*present exotic fruits are not used in large amounts. But in the future, the company could be interested in more exotic fruits.*

**UNI-VERT**

Route de Bellegarde  
30129 MANDUEL  
Tel: +33 4 66 20 75 25  
Fax: +33 4 66 20 75 26  
uni-vert@uni-vert.com  
*Contact: Mme Sophie or Mr Hans  
(Producer, importer)*

**VIABIO**

21, rue des Iscles  
BP 15 13834 Chateaurenard  
Cedex  
Tel: 33 4 90 94 12 00  
Fax: 33 4 90 94 02 68  
E-mail: viabio@viabio.com

**VITAGERMINE**

ZI Actipolis r Ferdinand de Lesseps  
33610 CANEJAN  
Phone: + 33 5 57 96 56 56  
Sales department: + 33 5 57 96 56 60  
Fax: + 33 5 57 96 56 50  
Contact: Philippe DESCORS (direct number: + 33 5 57 96 56 75)  
[www.vitagermine.com](http://www.vitagermine.com)  
[info@vitagermine.com](mailto:info@vitagermine.com)

*Founded in 1952, VITAGERMINE is a SME (30 people) which produces organic products with four brands:*

- *Babybio: organic babyfood*
- *Kalibio: organic food for children*
- *Vitagermine Bio: organic for adults with a full range of organic food (jam, juices...)*
- *Vita Sport: diet food*

**VITAMONT SA / SECOPRA**

Z.A. "Fon de Pommier" B.P. 11  
47150 Monflanquin  
Phone: + 33 5 53 36 50 63  
Contact: Dominique DUTHEUIL, buying manager  
Phone production/buying: + 33 5 53 36 57 63  
[dominique.dutheil@vitamont.com](mailto:dominique.dutheil@vitamont.com)  
[vitamont@vitamont.fr](mailto:vitamont@vitamont.fr)  
Fax: + 33 5 53 36 42 48  
[www.vitamont.com](http://www.vitamont.com) (in construction)

*Fruit juices packer, processor of syrups and jams; under the names Vitalia and Vitamont. The largest organic juice processor in France. Range: fruit juices, vegetable juices, flavored tea, fruit puree, lemonade. VITAMONT uses mainly temperate fruits & vegetables: apple, grape, carrot, tomato,*

*horseradish, prune, fennel. But also pineapple and citrus. More than 1300 tons of fruits & vegetables used per year, mainly from France.*

Interested first of all in pineapple juice (in aseptic 200 liters barrels) and mango (stewed, extracted, refined and aseptic packed in barrels of 20kg). No other information provided.

#### **4. OTHER ACTORS IN THE FRENCH ORGANIC SECTOR**

##### **AGENCE BIO**

12 bis rue des Colonnes du Trône  
75012 PARIS

Tel.: + 33 1 53 17 38 38

Fax: + 33 1 53 17 38 39

Contact: Katell GUERNIC, Bernard COLY

Direct tel.: + 33 1 53 17 38 30

[katell.guernic@agencebio.org](mailto:katell.guernic@agencebio.org)

[bernard.coly@agencebio.org](mailto:bernard.coly@agencebio.org)

[www.agencebio.org](http://www.agencebio.org)

*French agency for the development and promotion of organic agriculture. Opened in 2001.*

##### **ANNUAIRE VERT - OCEP ÉDITIONS**

11 rue Saint-Ambroise  
75011 PARIS

Tel.: + 33 1 47 00 46 46

Fax: + 33 1 47 00 24 91

[occp@wanadoo.fr](mailto:occp@wanadoo.fr)

*Professional guide for organic products in France.*

##### **ANNUAIRE FABRICANTS DE PRODUITS BIO – ÉDITIONS ECHONAT**

Rue Ariane – ZA Toussaint Catros  
33185 LE HAILLAN

*Professional guide for French organic products' manufacturers.*

##### **BIOCONTACT**

Contact: Jean-Pierre CAMO

BP 8

81601 Gaillac cedex

Tel.: + 33 5 63 41 04 00

Fax: + 33 5 63 41 03 60

[biocontact@wanadoo.fr](mailto:biocontact@wanadoo.fr)

*Free monthly magazine Biocontact.*

##### **DEMETER FRANCE**

Association (farmers, processors, traders, consumers)

B.P. 286

67606 SLESTAT Cedex

Tel: +33 3 88 82 88 78

Fax: +33 3 88 82 88 78

**DIRECTION GENERALE DE L'ALIMENTATION**

Bureau des labels et des certifications de produits

175, rue du Chevaleret

75646 PARIS Cedex 13

Tel: +33 1 49 55 80 03

**ECOCERT**

BP 47

32600 L'ISLE-JOURDAIN

Contact: Philippe BLAIS, Customers Quality Manager

[philippe.blais@ecocert.fr](mailto:philippe.blais@ecocert.fr)

Tel.: + 33 5 62 07 34 24

Fax: + 33 5 62 07 11 67

[www.ecocert.fr](http://www.ecocert.fr)

[info@ecocert.fr](mailto:info@ecocert.fr)

*One of the 6 French certifiers.*

**FEDERATION FRANÇAISE DE LA DIETETIQUE**

French Dietetic Federation: federation of several professional unions organizing the

DIETEXPO trade show in Paris

14 terrasse Bellini

92807 PUTEAUX

Tel: +33 1 47 75 03 09

Fax: +33 1 47 55 03 09

**GREENTRADE.NET**

8 rue Professeur Roux

92370 CHAVILLE

Tel.: + 33 1 47 50 02 73

Fax: + 33 1 47 50 28 67

[www.greentrade.net](http://www.greentrade.net)

[info@greentrade.net](mailto:info@greentrade.net)

*International organic products market place. Possible to identify offers, and demand per product families and operators. For example, the following notice was on the website available: offer of "Organic Dried Pineapple 0.5-2mm cut size. Minimum Order Quantity 1000 KG 10.71 Euro per KG» from Sri Lanka.*

**FRANCE NATURE** (ex PRONAT catalog)

**ALPHAMÉDIAN****EDITIONS LOUIS JOHANET**

38 bd Henri Sellier

92156 Suresnes cedex

Tel.: + 33 1 47 28 70 70

Fax: + 33 1 47 28 73 83

[www.alphamedian.fr](http://www.alphamedian.fr)

[postmaster@alphamedian.fr](mailto:postmaster@alphamedian.fr)

*Professional guide for organic products, which covers 16 European countries. Catalog is available free on internet.*

## **MINISTERE DE L'AGRICULTURE ET DE LA PECHE**

Ministry of Agriculture and Fisheries

30 rue Las Cases

775340 PARIS Cedex 07

Tel: +33 1 49 55 57 03

Fax: +33 1 49 55 56 01

Web: [www.agriculture.gouv.fr](http://www.agriculture.gouv.fr)

## **MOUVEMENT DE CULTURE BIO-DYNAMIQUE (DEMETER)**

### **GROUP OF PROFESSIONALS AND CONSUMERS INVOLVED IN ORGANICS**

5, Place de la Gare

68000 COLMAR

Tel: +33 3 89 24 36 41

## **SETRABIO**

c/o FFD

14 terrasse Bellini

92807 PUTEAUX Cedex

Tel.: + 33 1 49 67 15 83

Fax: + 33 1 49 67 15 82

[www.setrabio.com](http://www.setrabio.com)

[setrab@setrabio.com](mailto:setrab@setrabio.com)

Contacts:

Gwenaelle LEGUILLOU, Director, in charge of legislation

Marjolaine MOUREN, in charge of the Bio Equitable label

Xavier DUPUY, in charge of legislation

*French organization which represents organic food industries. 150 members above 1500 – 2000 in France (bakeries excepted).*

## **SYNADIS – SUNDICAT NATIONAL DES DISTRIBUTEURS**

62, rue Fonneuve

33500 LIBOURNE

Tel: +33 5 57 25 38 14

Fax: +33 5 57 51 47 17

*Specializes de produits Biologiques et Dietetiques*

*Union of distributors involved in organics*

## **SYNADIS**

62 rue Fonneuve

33500 LIBOURNE

Tel.: + 33 5 57 25 38 14

Fax: + 33 5 57 51 47 17

[synadis@wanadoo.fr](mailto:synadis@wanadoo.fr)

*French association for specialized distributors in organic and dietetic products.*