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Guyana Economic Opportunities

EXPORT MARKET OPPORTUNITIES

MARKET PROFILE:
THE FRENCH ORGANIC SECTOR

Prepared by

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and
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Guyana Office for Investment
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With the assistance of the United States Agency for International Development
<table>
<thead>
<tr>
<th>Acronym</th>
<th>Full Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>EC</td>
<td>European Commission</td>
</tr>
<tr>
<td>EU</td>
<td>European Union</td>
</tr>
<tr>
<td>FAO</td>
<td>Food and Agriculture Organization of the United Nations</td>
</tr>
<tr>
<td>ITC</td>
<td>International Trade Centre</td>
</tr>
<tr>
<td>ONAB</td>
<td>Observatoire National de l’Agriculture Biologique</td>
</tr>
<tr>
<td>PMO</td>
<td>Primary Market Operators</td>
</tr>
<tr>
<td>SNM</td>
<td>Service des Nouvelles des Marchés</td>
</tr>
<tr>
<td>USDA</td>
<td>United States Department of Agriculture</td>
</tr>
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</table>
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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
SECTION 1

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 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.

<table>
<thead>
<tr>
<th>Exhibit 1: Imports of organic fruit and vegetables (exportable from Guyana) into France by origin in 1999 (tonnes)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Origin</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Fruit</strong></td>
</tr>
<tr>
<td>Coconut</td>
</tr>
<tr>
<td>Guava</td>
</tr>
<tr>
<td>Mango</td>
</tr>
<tr>
<td>Papaya</td>
</tr>
<tr>
<td>Pineapple</td>
</tr>
<tr>
<td><strong>Vegetable</strong></td>
</tr>
<tr>
<td>Fresh ginger</td>
</tr>
<tr>
<td>Sweet potato</td>
</tr>
</tbody>
</table>

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

Source: FAO survey of importers (World Markets)

---

1 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.
Exhibit 2: Origin of organic fruit and vegetables imported into France in 1999 (tonnes)

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


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.
SECTION 2

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, Bioprim 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\(^2\). 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.

\(^2\) Australia, Argentina, Hungary, Israel, and Switzerland
## Exhibit 3: French Market Prices for imports in May 2003 (mid-April to mid-June)

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

(*) kg used unless otherwise indicated

Source: Service des Nouvelles des marchés (SNM) website
SECTION 3

Opportunities and Constraints for Entering the French Organic Market

A. Opportunities and Constraints Overview


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 difference 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 countries3. 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.

3 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.
ANNEX A

Bibliography


Market Profile: The French Organic Market

Part II

The Market for Processed Tropical Products

Prepared by
Bettina Balmer
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PART II THE MARKET FOR TROPICAL PROCESSED PRODUCTS

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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.

<table>
<thead>
<tr>
<th>Country</th>
<th>Sales billion EUR</th>
<th>% in conventional supermarkets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>2.8</td>
<td>35%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1.3</td>
<td>80%</td>
</tr>
<tr>
<td>France</td>
<td>1.2</td>
<td>50%</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>0.4</td>
<td>50%</td>
</tr>
<tr>
<td>United States</td>
<td>7.8</td>
<td></td>
</tr>
</tbody>
</table>

- 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

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

<table>
<thead>
<tr>
<th>Fruit</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pineapple</td>
<td>+++</td>
</tr>
<tr>
<td>Mango</td>
<td>++</td>
</tr>
<tr>
<td>Coconut</td>
<td>++</td>
</tr>
<tr>
<td>Cashew</td>
<td>++</td>
</tr>
<tr>
<td>Guava</td>
<td>+</td>
</tr>
<tr>
<td>Papaya</td>
<td>+</td>
</tr>
<tr>
<td>Surinam cherry</td>
<td>+</td>
</tr>
<tr>
<td>Starfruit</td>
<td>+/-</td>
</tr>
<tr>
<td>Plantain</td>
<td>-</td>
</tr>
<tr>
<td>Manioc</td>
<td>-</td>
</tr>
<tr>
<td>Bread fruit</td>
<td>-</td>
</tr>
<tr>
<td>Sweet potato</td>
<td>-</td>
</tr>
</tbody>
</table>

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: DISTRIBUTOR (the leader), BIOPRIM, RCS DISTRIBUTION, BIO CER, BRETAGNE VIANDE BIO (meat), BIO GAM (dairies, eggs, oils), CABSO SARL (fruits & vegetables), VANDENDRIESSCHE, BIO DISTRIFRANIS, CHANDOBET, GUADISUCRE, J.L. BOYERE, SARL NATURAL… The big player is this sector is DISTRIBUTOR 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), DAMI NATURE (3), LA VIE CLAIRE (9), EAU VIVE (4), LA VIE SAIN (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:

- DISTRIBUTOR 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. (PROCESSED 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, 18th to 20th of October 2003 (every two years)  
[http://www.natexpo.com](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

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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 Loriol
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 HARCOÛET
Tel.: + 33 2 33 49 21 95
Fax: + 33 2 33 49 59 10

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
info@andresy-confitures.com
Specializes in production of quality jams and jellies. Traditional process of production.

ARCADA
Domaine du Blazy
47130 PORT SAINT-EMMANUEL
Tel: +33 5 53 87 20 24
Fax: +33 5 53 87 26 18
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-
ette
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

23rd. Benoit Dubus from Bureau des achats des fruits et legumes – 33 3 20 08 55 14, bdubus@auchan.fr – organics. Mr. Frisch will be back on 7/17. Spoke with the assistant buyer, Celine (cthiebaide@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
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/0bioccop.html
Service de produits
02 41 79 70 00
Mr. Vincent Rousselet
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
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
Contact: Dick Troost

**BIOCONVERGENCE**
16, rue Claude Bernard
75321 PARIS Cedex 05
Tel : 33 1 53 44 79 65
mcm.bioconvergence@wanadoo.fr
Contact: Madame Mouen
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
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
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

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
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
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
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
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 Courtabeuf Cedex  
Tel.: +33 1 69 07 83 46  
Fax: +33 1 69 82 98 66  
Contact: Ms. POLLET  
www.colindis.com  
E-mail: 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  
all.arle@wanadoo.fr  
*Small company. Use domestic products; transformation by artesional 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  
contact@confitdeprovence.com  
*Produces jams and deserts. Does not use exotic fruits and does not want to.*

**CONSERVERIES 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  
*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
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

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/l. DANIVAL foresees no near term developments with exotics fruits, but could be interested to have a supplier for the future.

DISTRIBUTORG 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

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  

*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  
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
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
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);
- BIORAND 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.

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
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 Cummerbeak
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
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
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
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.
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).

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.

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

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)
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
(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
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
damienn.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
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
E-mail: 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

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
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
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
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
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
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
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
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
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
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
info@rapunzel.de

RELAI S 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
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
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
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
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
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.
Interests 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

<table>
<thead>
<tr>
<th>Product</th>
<th>Origin</th>
<th>Certifier</th>
<th>Packaging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apricot puree</td>
<td>Hungary</td>
<td>Skal</td>
<td>Aseptic barrels</td>
</tr>
<tr>
<td>Peach puree</td>
<td>Italy</td>
<td>BAC</td>
<td>Aseptic barrels</td>
</tr>
<tr>
<td>Pear puree</td>
<td>France</td>
<td>ECOCERT</td>
<td>Aseptic barrels</td>
</tr>
<tr>
<td>Banana puree</td>
<td>India</td>
<td>ECOCERT</td>
<td>Aseptic barrels</td>
</tr>
<tr>
<td>Guava puree</td>
<td>Fidji</td>
<td>BIOGRO</td>
<td>Frozen</td>
</tr>
<tr>
<td>Mango puree</td>
<td>Colombia</td>
<td>BCS</td>
<td>Aseptic barrels</td>
</tr>
<tr>
<td>Passion fruit puree</td>
<td>Chine</td>
<td>Skal</td>
<td>Aseptic barrels</td>
</tr>
<tr>
<td>West Indies cherry puree (acerola)</td>
<td>Brazil</td>
<td>Biodynamic</td>
<td>Frozen</td>
</tr>
<tr>
<td>Orange juice</td>
<td>Italy</td>
<td>BAC</td>
<td>Frozen</td>
</tr>
<tr>
<td>Orange concentrate 65 brix</td>
<td>Cuba</td>
<td>BCS</td>
<td>Frozen</td>
</tr>
<tr>
<td>Lemon concentrate 48 brix</td>
<td>Italy</td>
<td>BAC</td>
<td>Aseptic barrels</td>
</tr>
<tr>
<td>Apple concentrate 69 brix</td>
<td>Turkey</td>
<td>Skal</td>
<td>Aseptic barrels</td>
</tr>
<tr>
<td>Pure pineapple juice</td>
<td>Honduras</td>
<td>Skal</td>
<td>Aseptic barrels</td>
</tr>
<tr>
<td>Pineapple crush</td>
<td>Honduras</td>
<td>Skal</td>
<td>Aseptic barrels</td>
</tr>
<tr>
<td>Tomato concentrate</td>
<td>Turkey</td>
<td>Skal</td>
<td>Aseptic barrels</td>
</tr>
<tr>
<td>Tomato concentrate x3</td>
<td>Turkey</td>
<td>Skal</td>
<td>Aseptic barrels</td>
</tr>
<tr>
<td>Pineapple concentrate 60 brix</td>
<td>India</td>
<td>ECOCERT</td>
<td>Aseptic barrels</td>
</tr>
<tr>
<td>Papaw puree</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Morello cherry concentrate</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### FRENCH SOURCES FOR CANNED FRUITS

<table>
<thead>
<tr>
<th>Product</th>
<th>Origin</th>
<th>Certification</th>
<th>Packaging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pieces of pineapple</td>
<td>Sri Lanka</td>
<td>Skal</td>
<td>Cans 3.1kg</td>
</tr>
<tr>
<td>Sliced pineapple</td>
<td>Sri Lanka</td>
<td>Skal</td>
<td>Cans 3.1kg</td>
</tr>
</tbody>
</table>

### FRENCH SOURCES FOR DRIED FRUITS

<table>
<thead>
<tr>
<th>Product</th>
<th>Origin</th>
<th>Certifier</th>
<th>Packaging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bananas</td>
<td>Honduras</td>
<td>Skal</td>
<td>100g</td>
</tr>
<tr>
<td>Raisin Sultanas</td>
<td>Turkey</td>
<td>Skal</td>
<td>12.5kg</td>
</tr>
<tr>
<td>Pineapple</td>
<td>Honduras</td>
<td>Skal</td>
<td>100g</td>
</tr>
<tr>
<td>Mango</td>
<td>Honduras</td>
<td>Skal</td>
<td>100g</td>
</tr>
<tr>
<td>Dates</td>
<td>Tunisia</td>
<td>ECOCERT</td>
<td>12.5kg</td>
</tr>
<tr>
<td>Dates in pieces</td>
<td>Tunisia</td>
<td>ECOCERT</td>
<td>12.5kg</td>
</tr>
<tr>
<td>Prune</td>
<td>Yugoslavia</td>
<td>Skal</td>
<td>50kg</td>
</tr>
<tr>
<td>Apple</td>
<td>Yugoslavia</td>
<td>Skal</td>
<td>12.5kg</td>
</tr>
<tr>
<td>Pear (dices)</td>
<td>Yugoslavia</td>
<td>Skal</td>
<td>10kg</td>
</tr>
<tr>
<td>Quince (dices)</td>
<td>Yugoslavia</td>
<td>Skal</td>
<td>10kg</td>
</tr>
<tr>
<td>Thompson Raisin</td>
<td>California</td>
<td>CCOF</td>
<td>10kg</td>
</tr>
</tbody>
</table>

### FRENCH SOURCES FOR CASHEW NUTS AND COCONUT PRODUCT

<table>
<thead>
<tr>
<th>Products</th>
<th>Origin</th>
<th>Certifier</th>
<th>Packaging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cashew nuts</td>
<td>Brazil</td>
<td>IBD</td>
<td>25kg</td>
</tr>
<tr>
<td>Cashew nuts</td>
<td>Sri Lanka</td>
<td>Skal</td>
<td>25kg</td>
</tr>
<tr>
<td>Coconut</td>
<td>Sri Lanka</td>
<td>Skal</td>
<td>25kg</td>
</tr>
</tbody>
</table>

**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
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  
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  
vitamont@vitamont.fr  
Fax: +33 5 53 36 42 48  
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 Colonnnes 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
bernard.coly@agencebio.org
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
ocep@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
bioc@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
Tel.: + 33 5 62 07 34 24
Fax: + 33 5 62 07 11 67
www.ecocert.fr
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
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
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

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
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 – SNDICAT 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
French association for specialized distributors in organic and dietetic products.