



Agriculture and  
Agri-Food Canada

Agriculture et  
Agroalimentaire Canada

Publication Date: April, 1998

Canada



## The Biscuit Market In France

April 1998

(Également disponible en français sous le titre;  
Le marché des biscuits en France)

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and International Trade

Ministère des Affaires étrangères  
et du Commerce international

Canada

The Team Canada Market Research Centre produces a wide range of market reports by region and sector for Canadian exporters.

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## The Biscuit Market in France



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### EXECUTIVE SUMMARY

The French market for biscuits is highly competitive. In 1997, France was the fourth largest market for biscuits with sales of over US\$1.7 billion. Only the United States, the UK, and Japan had higher biscuit consumption than France.

French consumers are among the most demanding in the entire world, however, the market for sweet and savoury biscuits can be extremely lucrative once a manufacturer is established within the market. Consumption of biscuits is largely affected by the age distribution within the country, the increasing demand for healthier, convenient products, and by the time pressures of the working population.

French biscuit consumption is forecast to grow 8% by the year 2002.

The recent growth in consumption of savoury biscuits, and the steady growth of the sweet biscuits market provide Canadian exporters with an excellent opportunity to take advantage of the French market. Canadian companies will face stiff competition from large European producers such as Danone (France) and Delacre (England) and their subsidiary companies. However, smaller, private label producers have already succeeded in gaining a significant share of the French market.

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## The Biscuit Market in France



### MARKET OVERVIEW

For this report, the biscuit market will be further broken down into sweetened, unsweetened, and savoury biscuits (crackers).

With a population of 58.3 million, France is one of the world's top markets for biscuit consumption. Although many producers market their biscuits to appeal to younger generations, the main advantage of the biscuit market is that these products appeal to a wide spectrum of the population due to their variety and convenience.

The biscuit market in France is extremely competitive and consumers have shown a tendency to buy recognisable, brand-name products. This trend makes shelf position, price, and sales strategies key factors to consider for potential exporters to France.

The French biscuit market is dominated by sales of sweetened biscuits, however, sales of savoury biscuits have increased dramatically since 1994. The French market for biscuits had sales of approximately US\$1.7

billion in 1997 and consumption is anticipated to grow in coming years as a result of increased competition in the sweet biscuit market and continued growth of the savoury biscuit market.

## Sweet Biscuits

Sweet biscuits account for over 80% of total biscuit sales in France. The largest sales in this sector come from chocolate biscuits. Sales of plain biscuits have declined slightly in recent years and currently hold 20% of the total sweet biscuits sales. As Table 1 shows, egg-based biscuits, wafers, and cereal bars have all suffered a decline in popularity since 1991.

In France, snacking has become a much more common occurrence in recent years. French biscuit producers have responded to this trend by marketing more single-serve packages. Although these products tend to be focused towards children, single-serve packages also appeal to consumers who do not have time to eat full meals.

**Table 1. Sweet Biscuits: Segmentation by Volume 1991, 1994, 1996**

Type of Biscuit	Volume (%)		
	1991	1994	1996
Fancy	35.6	37.1	39.4
Biscuit Countlines	6.4	7.0	7.5
Gouters	20.6	21.6	21.7
Dry/Plain	23.5	21.5	20.1
Assortments	5.1	4.9	4.5
Wafers	4.0	3.7	3.2
Egg-Based	3.8	3.3	2.9
Cereal Bars	1.0	0.9	0.7

Source: November 1997. ERC Statistics International, *Biscuits and Snacks: World's Developed Markets: Volume 1 France*,

## Unsweetened Biscuits

The market for savoury biscuits in France has experienced significant growth over the last four years. Until recently, sales of savoury biscuits were minimal primarily because, unlike sweet biscuits, they have not traditionally been considered a snack food.

In the mid-1990's, companies such as Auga and Heudebert introduced new savoury biscuit products, which were originally advertised as bread substitutes. More recently, manufacturers have captured an increased market share by adding chocolate chips, honey and raisins to their biscuits. This has blurred the distinction between sweet and savoury biscuits, however, as Table 2 shows, it has also led to increased sales of savoury biscuits.

The development of the savoury biscuits market in France may be slightly hindered by the propensity for French consumers to buy sweetened biscuits and other products.

**Table 2. Volume Sales of Savoury Biscuits 1993-1997 (tonnes)**

Year	Savoury Biscuits	Growth (%)
1993	86	n/a
1994	256	197.7
1995	456	81.6
1996	835	79.6
1997	1,465	75.4

Source: Euromonitor, *Sweet and Savoury Biscuits in France, December 1997*

## Key factors shaping market growth

French food consumption has slowly changed in recent years. Consumers now have less time to eat full meals, which has led to increased consumption of snack foods such as biscuits. Not surprisingly, the biscuit market has grown, and is projected to continue to grow, in response to consumer demand.

Consumers in France are now eating more often per day. In a recent survey by the University of Toulouse Le-Mirail, 81 percent of the people surveyed considered snacking between meals to be a problem. However, nearly three-quarters of consumers snack between meals. This trend is especially prevalent among students and people in the workplace. Snacking between meals has made full meals less compulsory, however, still quite common.

Although the French are still extremely concerned about eating healthy meals, one result of eating modern, lighter meals, is increased snacking between meals. Over half of this snacking occurs in the workplace. The biscuit market has responded to this trend by increasing the availability of single serving packages.

Heightened health awareness has led to a demand for healthier sweet and savoury biscuits. Sales of low-salt, and low-calorie biscuits have gained a notable share of the French market. These healthier products tend to charge premium prices, however, some French consumers consider their health before their pocketbook.

Younger consumers have shown an increasing interest in American-style products. This curiosity combined with the image of the product is often as important, if not more important than how it tastes.

## Opportunities

The savoury biscuit market represents a promising opportunity for Canadian exporters. This market has shown strong growth over the last four years. Until recently, savoury biscuits were not considered to be snack foods but increased marketing of these products has resulted in the steady growth of this market.

Currently, the most successful biscuits that have been introduced to the French market have been chocolate flavoured or have been oriented towards children (eg. biscuits in the shape of animals). Many of these products have been advertised as convenient for children to take to school or for adults to take to work.

Biscuits which stress health benefits, and single serving biscuits have experienced a growth in popularity, which is anticipated to continue. Smaller, private label products have been able to establish a competitive position in the market for healthier biscuits and those sold in single-serving packages. Danone, Biscuiterie Nantaise, and Delacre still hold dominant positions in the French market, nevertheless, small companies have maintained a notable share of the total market.

Vending machines in the work place and at schools are gradually becoming more common. This has provided manufacturers with yet another means to access the French market. Vending machines were recently put in Paris Metro stations and have proved to be extremely successful.

## Actual and planned projects

In November 1997, United Biscuits (UB) announced an asset swap with one of its competitors, PepsiCo Inc. UB sold two Australian subsidiaries in return for PepsiCo's French biscuit producer, Biscuiterie Nantaise, which makes "le BN", France's most popular sandwich biscuit. UB disclosed that as a result of the PepsiCo deal, it would distribute approximately US\$240 million in the form of bonus stock to its shareholders.

In 1998, Biscuiterie Nantaise (BN) plans on moving more towards the production of savoury snacks, such as chips, and away from the production of sweet biscuits. BN's savoury snacks, led by sales of Doritos chips, registered double-digit growth in 1997, compared to 5% growth of its sweet biscuits.

On February 1, 1998, Biscuits Delacre merged with Campbell France - the French subsidiary of Campbell Soup. The merger is not anticipated to have any noticeable effect on Biscuits Delacre's production capability as the company will preserve its identity, marketing policies, distribution channels, etc.

## COMPETITIVE ENVIRONMENT

### Local capabilities

France has a highly developed biscuit market. French biscuit producers benefit from the existence of government agencies such as SOPEXA, which aids producers in the marketing of their products, and CFCE, which conducts market research and helps local manufacturers develop marketing strategies.

Danone currently holds the largest share of the domestic market at 43% in 1997. Other manufacturers such as Biscuiterie Nantaise, Delacre and Bahlsen Saint-Michel all have between 4 to 6.5% of the total market. Smaller, private producers and imports accounted for the remaining 40% of biscuit sales.

Individual producers hold down more significant shares of the sweet and savoury market subsectors. For example, Verkade's share of the savoury biscuits market was roughly 9% in 1996 and Delacre share of the assorted biscuits market was nearly 30%.

Private label producers and imports have become more competitive with the recent interest in savoury biscuits, healthy biscuits and the demand for higher quality products.

### International competition

In 1997, France continued to import large quantities of biscuits from the rest of the world. Imports of sweet biscuits were valued at nearly US\$400 million, with the majority of these imports coming from other EU countries.

Manufacturers within the EU have the advantages of location and preferential tariffs. Not surprisingly, nine of the top ten countries which export biscuits to France are EU members. Belgium, Germany, and the Netherlands are the top three exporters, accounting for over 70% of the total biscuit imports.

### Canadian position

Currently, Canadian companies have a limited presence in the French biscuit market, mainly due to the duties which biscuits face. In 1997, Canadian exports of sweet biscuits were valued at US\$35,827. Canadian exports represented only 0.01% of the total French biscuit imports.

Since 1992, Canadian exports of sweet biscuits to France have fluctuated significantly. In 1994, exports to France reached their highest levels at approximately US\$75,000. Although the French are considered to be

among the most demanding consumers in the world, high quality Canadian biscuits are in an excellent position to enter the growing French market for sweet and savoury biscuits.

Opportunities for joint ventures with large producers, such as Danone, are seen as limited, but may exist with smaller, private label manufacturers.

### **Competitive advantage through Canadian government policies and initiatives**

The Export Development Corporation (EDC) does not have a financing program established to aid Canadian companies export biscuits to France. The EDC does, however, provide Canadian exporters with receivables insurance. The Global Comprehensive Insurance Policy, provided by the EDC, covers up to 90% of losses resulting from risks such as:

- insolvency or default of your foreign customer;
- payment delay caused by a blockage of funds or transfer difficulties;
- refusal of goods by your foreign customer (provided contract terms are met);
- war or hostilities in your customer's country or between two or more other countries;
- cancellation or non-renewal of export or import permits.

The EDC does have other, more customized, financial instruments to help meet the needs of Canadian exporters and lower their risks.

The Canadian Commercial Corporation (CCC) can also help exporters penetrate the French market. The CCC can aid exporters in finding opportunities, assessing proposed transactions and the various parties to see if the CCC can provide support, preparing transaction bids or proposals, developing sales strategies, and developing financing packages. CCC participation essentially provides a guarantee from the Canadian Government that the contract will be carried out.

After the CCC assesses the risks of the deal, and the capabilities of the parties involved, it acts as the prime contractor. Banks which provide funds for these export sales will boost the line of credit because the CCC is involved. Once the funds have been provided, the CCC ensures that the contract is performed.

The CCC provides support for small to medium-sized companies (those with sales of C\$50 million or less). Financial institutions which are involved in the CCC's Progress Payment Program (PPP) are:

Bank of Nova Scotia  
Bank of Montreal  
Caisse Centrale Desjardins  
Canadian Imperial Bank of Commerce  
Royal Bank of Canada  
Toronto-Dominion Bank  
National Bank of Canada  
Hong Kong Bank of Canada  
Société générale  
Banque Nationale de Paris

Banks limit credit lines to C\$2 million per transaction and no one company is extended more than C\$2 million in credit at one time.

### **PRIVATE SECTOR CUSTOMERS**

There is a large consumer base for imported biscuits in France. With a population of 58 million, France was still one of the world's largest importers of biscuits, valued at over US\$400 million in 1997.

Consumption of sweet biscuits has become so entrenched in the French market that even lower-income consumers tend to purchase substantial quantities of biscuits as snacks. Savoury biscuits are becoming more popular in the French market as snacks and are anticipated to grow in popularity as more brands become available to consumers.

Customers main locations for purchasing biscuits are supermarkets and hypermarkets. Almost all food imports to France rely on agents or distributors in order to access the market.

## **PUBLIC SECTOR CUSTOMERS**

France has extremely well developed distribution channels. French restaurants, hospitals, schools, and other organizations almost exclusively use the same wholesalers or distributors that supermarkets and hypermarkets use.

Although food consumption outside the home was estimated to be US\$28 billion in 1994/95, less than 1% of biscuit purchases were through institutions such as hospitals, schools, and restaurants.

## **MARKET LOGISTICS**

The food distribution system in France is extremely efficient and has a number of channels to ensure speedy delivery of products in good condition. Costs associated with the distribution of food products are relatively low due to the existing system.

Canadian exports of biscuits would most likely arrive in the French port of Le Havre, or through the ports of Antwerp and Rotterdam in the Netherlands. From these ports products would be distributed using trucks and/or trains.

Exporters should note that strikes by truck drivers, as well as employees of trains and airlines can slow products from reaching their destination on time. By anticipating other possible routes within the distribution system, producers can minimize logistical problems.

## **Channels of distribution**

The distribution network for most imported biscuits is concentrated around the urban centres of the country. As shown in Table 3, supermarkets and hypermarkets are responsible for most biscuit sales in France. In 1997, supermarkets and hypermarkets accounted for 95% of biscuit sales, while other smaller, convenience stores and department stores held 5% of the market.

**Table 3. Distribution Channels of Sweet and Savoury Biscuits 1993-1997 (%)**

<b>Source</b>	<b>1993</b>	<b>1994</b>	<b>1995</b>	<b>1996</b>	<b>1997</b>
Supermarkets	53	53	52	52	53
Hypermarkets	39	40	41	42	42
Other Sources	8	7	7	6	5

Source: Euromonitor, Sweet and Savoury Biscuits in France, December 1997.

Within supermarkets and hypermarkets, shelf location is extremely important for biscuit sales. Although biscuits are popular among a majority of consumers, many sweet and savoury biscuits are purchased on impulse. French consumers also tend to purchase recognizable brands which makes product visibility and promotions very important in order to capture a share of the market.

## **Direct sales**

It is possible, however rare, to sell directly to retail outlets. Most companies prefer to establish a



relationship with a distributor or agent.

## **Distributors and wholesalers**

The distribution system in France allows exporters numerous options for accessing the market. The sheer size of the French biscuit market will provide well-established distribution channels and knowledgeable distributors/wholesalers for potential exporters.

French buyers have a long history of using distributors services. Therefore, to ensure efficient distribution of the product, exporters should retain the services of a distributor/wholesaler. Distributors/wholesalers have varying degrees of market coverage, some cover large portions of the country while others only service urban centres. This means that more than one distributor/wholesaler may be necessary to guarantee national distribution.

When looking for a distributor, the following points should be considered:

- Their relationships with local governments;
- Their relationships with buyers;
- The condition of their facilities;
- Their willingness and ability to keep inventory; and
- Their relationships with Banks.

## **Agents and sales representatives**

An agent is a good way to introduce a new product to the French market. Agents generally solicit business' and enter into agreements on behalf of the exporter they are representing, but do not take ownership over products they sell.

An exporter must weigh a number of factors when choosing an agent. Just a few of the considerations are what region of France that the agent covers, their reputation, the agents product knowledge, their experience in handling the exported product, the commission to be paid, what (if any) after sales service is provided, the agents track record, and the size and quality of staff.

## **Market Entry Considerations**

The arrival of the "Euro" should help Canadian exporters in the future. By the year 2002, national currencies are forecast to be replaced by the Euro currency which will be used throughout the European Union. The Euro will, however, be in place January 1, 1999, for industrial sales. Exporters to France will be able to analyze factors such as local demand, tariff and duty costs, and transportation costs, compared to their sales prices, much more effectively once the new currency is implemented.

Although the French market is quite modern and presents a great opportunity for Canadian exporters, it also tends to be quite bureaucratic. Exporters need to realize that in order to conduct business in France, they must have the patience to deal with the existing bureaucracy.

France is notoriously known for having phytosanitary testing requirements which exceed reasonable safety levels.

## **Suggested business practices**

### *Cultural Etiquette*

Companies that do business in Canada and the United States tend to consider cultural differences as part of conducting business. Although some aspects of doing business in France are similar to those employed in Canada and the US, certain cultural behaviours and reactions, though they may seem minor, can be quite different. Attention to these details can mean the difference between coming to an agreement or not.

There are major cultural differences that affect virtually every aspect of business relationships. The French business community is one of conservative formality and in order to establish a successful business relationship, it is therefore essential for Canadian exporters to understand and adapt to French customs.

Small details can be the key to success in France. Everything from speaking the language to a knowledge of French history and culture can help an exporter establish their products within in the market.

Bureaucracy is a fact of almost all business conducted in France. The French have an exorbitant interest in technicalities and few business people will break with the established hierarchy in order to complete a deal. Canadian exporters will need patience and understanding in order to avoid frustration.

## **Import regulations**

France, as a member of the European Union, follows the Community Integrated Tariff (TARIC) system, which applies duties to all imports from non-EU countries. Biscuits are subject to a duty which ranges between 20-30%. The exact level of the duty depends on the composition of the biscuit.

The Association Française de Normalisation (AFNOR) is in charge of French trade standards. Both AFNOR and the Canadian Embassy in France can provide updated literature on import and product regulations.

AFNOR  
Tour Europe  
92049 Paris La Defense Cedex 7  
France  
Tel: (33) 1-42-91-56-55  
Fax: (33) 1-42-91-56-56

## **Local standards, certificates or registrations**

All products which are exported to France must be accompanied by a standard set of shipping documents. Additional documents may speed up the processing of goods at the French border but due to the complexity of French regulations, Canadian exporters should request any additional information from the importer before goods are shipped. It is recommended that all documents are completed in both French and English to avoid any unnecessary delays.

### *Commercial Invoice*

The commercial invoice serves as a bill to the buyer from the exporter. The invoice should be thoroughly checked as any errors or omissions can result in serious delays, fines, or even confiscation. No special form is required, however, it should be written in both French and English and must include:

- the place and date of issue;
- the names and addresses of the importer and exporter;
- a detailed description of the merchandise, including identifying marks, quantities (in units customary of international trade), quality, and kinds;
- the method of shipment;
- all freight and insurance charges;
- the signature of the responsible officer, along with the name and title; and
- the shipper's invoice number and customer's order number.

Any promotional information should also be sent along with numerous copies of the commercial invoice.

### *Bill of Landing or Air Waybill*

This document is the agreement between the owner of the goods and the carrier. Shipments may be made freight collect and no other consular formalities are necessary.

*Certificate of Origin*

A certificate of origin verifies that the goods originate in Canada, and therefore are subject to all duties or taxes that apply to Canadian products. Certificates of origin are not required for all products but exporters are recommended to complete these forms to avoid any possible problems or delays.

*Packaging and Labelling*

It is recommended that Canadian exporters examine both French and European Union regulations regarding packaging and labelling standards. All labels of biscuits imported into France must be in French and include:

- the name of the product;
- it must state what the product is;
- the name of a representative (manufacturer/importer)
- the expiry date and any other storage requirements;
- the product's country of origin;
- the manufacturer's lot or batch number;
- all nutritional information;
- a list of ingredients and weights in metric units;
- a list of additives, preservatives, or colouring used.

*Authentication of documents*

Documents that need to be authenticated, such as certificates of sale and letters authorizing an exporter's local agent or importer to act on their behalf, must first be notarized in Canada. Then, the notarized documents can be authenticated by sending them to (there is no fee for this service):

Department of Foreign Affairs and International Trade  
 Authentication and Service of Documents (JLAC)  
 125 Sussex Drive, Ottawa K1A 0G2  
 Telephone: (613) 992-6602  
 Facsimile: (613) 992-2467

**Export credit risks, restrictions on letters of credit or currency controls**

One of the greatest risks for Canadian exporters involves receiving payment. In the past, many wholesalers and distributors defaulted on payments to Canadian suppliers as a result of the financial insolvency of small- and medium-sized businesses. This situation has significantly improved and letters of credit now ensure payment from French business partners. However, it is recommended that Canadian exporters include an arbitrator clause in any contract along with a letter of credit. This will help ensure payment in the event of any unforeseen problems.

**PROMOTIONAL EVENTS****Event / Description**

**Salon des Metier de Bouche - Sirha**  
 Lyon, France  
 January 23-27, 1999  
 (Food and Beverage Show,  
 food processing equipment,  
 bakery equipment and products)

**Organizer**

**Sepelcom**  
 P.O. Box 87  
 69683 Chassieu Cedex  
 Lyon, France  
 Tel: (33) 04 72 22 33 44  
 Fax: (33) 04 72 22 32 70

**SIAL**

Paris, France  
 October 22-26, 2000  
 (Food & beverage)

**Intersuc**

Paris, France  
 February 13-17, 1999  
 (International confectionary,  
 chocolate making, biscuit making)

**Europain**

Paris, France  
 February 13-17, 1999  
 February 19-22, 2000  
 (Equipment supplies and services  
 for the bakery industry)

**Exposium**

1 rue du parc 92593  
 Paris, France  
 Tel: (33) 01 49 68 51 00  
 Fax: (33) 01 47 37 74 38  
 Internet: <http://www.sial.fr>  
 E-mail: [sial@sial.fr](mailto:sial@sial.fr)

**La Fayette Developpement**

103 rue la fayette 75481  
 Paris, France  
 Tel: (33) 1 42 85 18 20  
 Fax: (33) 1 40 16 01 45

**Europain Gestion**

55 quai alphone le Gallo  
 PO Box 317, 92107  
 Paris, France  
 Tel: (33) 1 49 09 61 52  
 Fax: (33) 1 49 09 60 03  
 Internet: <http://www.comite-expo-paris.asso.fr>  
 E-mail: [info@comite-expo-paris-asso.fr](mailto:info@comite-expo-paris-asso.fr)

## KEY CONTACTS AND SUPPORT SERVICES

### Canadian government contacts

**Canadian Embassy**

35, avenue Montaigne  
 75008 Paris, France  
 Tel: (011-33) 144.43.29.00  
 Fax: (011-33) 144.43.29.98

**Export Development Corporation**

151 O'Connor Street  
 Ottawa, ON, K1P 5T9  
 Tel: (613) 598-2500  
 Fax: (613) 598-2503  
 E-mail: [export@edc4.edc.ca](mailto:export@edc4.edc.ca)  
 Internet: <http://www.edc.ca>

**Department of Foreign Affairs & International Trade Infocentre**

Tel: 1-800-267-8376

**Business Development Bank of Canada**

#400, 5 Place Ville Marie  
 Montreal, QC  
 Tel: 1-888-463-6232  
 Fax: (514) 283-0617  
 Internet: <http://www.bdc.ca/>

**Agriculture and Agri-Food Canada**

Sir John Carling Building  
 930 Carling Avenue  
 Ottawa, ON, K1A 0G2  
 Tel: (613) 995-7662  
 Fax: 944-1604

**Department of Foreign Affairs & International Trade**

Market Support Division (TCM)  
 125 Sussex Drive  
 Ottawa, ON, K1A 0G2  
 Tel: (613) 995-1773  
 Fax: (613) 943-1103

**Alliance of Manufacturers and Exporters Canada**

75 International Boulevard, 4th Floor  
 Toronto, ON, M9W 6L9  
 Tel: (613) 563-9218 or (416) 798-8000  
 Fax: (416) 798-8050  
 Internet: <http://www.plantir.ca/the-alliance>  
 E-mail: [national@the-alliance.com](mailto:national@the-alliance.com)

**Canadian Commercial Corporation**

50 O'Connor Street, 11th Floor  
 Ottawa, ON, K1A 0S6  
 Tel: 1-800-748-8191 or (613) 996-0034  
 Fax: (613) 995-2121  
 Internet: <http://www.ccc.ca>  
 E-mail: [info@ccc.ca](mailto:info@ccc.ca)

## French offices in Canada

### Embassy of France in Canada

42 Sussex Drive  
Ottawa, ON, K1M 2C9  
Tel: (613) 789-1795  
Fax: (613) 562-3702

### Consulate General of France

1201-736 Granville Street  
Vancouver, BC, V6Z 1H9  
Tel: (604) 681-4345  
Fax: (604) 681-4287

### Consulate General of France

25 rue St-Louis  
Quebec City,  
G1R 3Y8  
Tel: (418) 694-2294  
Internet: [consulfr@consulat-france-gc.org](mailto:consulfr@consulat-france-gc.org)

### Department of Foreign Affairs & International Trade

Western European Division (REO)  
Ottawa, ON, K1A 0G2  
Tel: (613) 995-8269  
Fax: (613) 995-5772

## Chambers of Commerce

### American Chamber of Commerce

21 avenue Georges V  
75008 Paris, France  
Tel: (33) 1.47.23.80.26  
Fax: (33) 1.47.20.18.62

### French Chamber of Commerce

7 rue Jean Goujon  
75008 Paris, France  
Tel: (33) 1.42.56.05.00  
Fax: (33) 1.43.59.50.15

### Chamber of Commerce and Industry of Paris

2 rue de Viarmes  
75001 Paris, France  
Tel: (33) 1.45.08.36.0  
Fax: (33) 1.45.08.35.80

### Assemblée des Chambres Françaises de Commerce et d'Industrie

45 avenue d'Iena  
BP448 16  
75769 Paris Cedex 16  
Tel: (33) 1.40.69.37.00  
Fax: (33) 1.47.20.61.28

## BIBLIOGRAPHY

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ERC Statistics International, *Biscuits and Snacks: World's Developed Markets: Volume 1 - France*, November 1997.  
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USDA, *Annual Marketing Plan*, 08/01/97.  
US Department of Commerce, *Trade Regulations and Standards*, 08/21/96.  
World Trade Atlas, 1998.

## OTHER REFERENCE MATERIAL

### Useful Internet sites

- Agri-Food Trade Service: <http://atn-riae.agr.ca>  
Canadian Embassy in France: <http://www.dfait-maeci.gc.ca/~paris/english/menu-e.htm>  
Canadian International Development Agency (CIDA): <http://www.acdi-cida.gc.ca/index.htm>

DFAIT Website: <http://www.dfait-maeci.gc.ca>  
 Export Development Corporation: <http://www.edc.ca>  
 Exportsource: <http://exportsource.gc.ca>  
 InfoExport: <http://www.infoexport.gc.ca>  
 Strategis: <http://strategis.ic.gc.ca/engdoc/main.html>  
 Tradeport: <http://www.tradeport.org>  
 Trade Show Central: <http://www.tscentral.com>  
 USDA: <http://ffasusda.gov>

## Reader Evaluation

Please help the Team Canada Market Research Centre to produce market reports which meet your information needs by completing this evaluation form and returning it by facsimile at (613) 943-8820. Thank you for your valuable input.

### 1. How did you obtain a copy of this market report?

- InfoCentre FaxLink system     Government worldwide web site  
 InfoCentre help line             InfoCentre bulletin board system  
 Local government office     Other: \_\_\_\_\_

### 2. How would you describe this market report?

Strongly agree    Agree    No opinion    Disagree    Strongly disagree

- |                       |                          |                          |                          |                          |                          |
|-----------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <b>Useful</b>         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Complete</b>       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Well organized</b> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Well written</b>   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Ideal length</b>   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

### 3. In what form do you prefer to obtain these reports?

- Print                       Electronic

### 4. Based on the information in this report, what specific action(s) does your organization plan to take in this market? Check all that apply.

- Seek an agent/distributor                       Contact Canadian trade office abroad  
 Visit the market                                       Participate in a trade show abroad  
 Do more research                                       Nothing  
 Other: \_\_\_\_\_

**5. What other market reports would be of benefit to your organization? Please identify specific products and countries.**

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**6. Which of the following categories best describes your organization? Check one only.**

- Processor/manufacturer     Government
- Trading house                 Student/academia
- Export service provider     Consultant
- Industry/trade association    Other: \_\_\_\_\_

**7. What were your organization's total sales last year, in Canadian dollars?**

- Less than 10 million     10 million to 50 million
- More than 50 million     Not applicable

**Additional comments/suggestions for improvement:** \_\_\_\_\_

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**OPTIONAL** — The name of your organization is: \_\_\_\_\_

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