2.1 GENERAL ECONOMIC SITUATION

The French gross national product (GNP) increased in the year 2000 by 3.5%. This was slightly above the average growth rate for the economies in Europe. As the first three quarters of the year 2001 indicate, the growth rate of the French economy in 2001 was 1.5% and therefore lower than the year before, as in other European countries. Overall inflation was quite low with 1.7% in 2000 and 1.6% in 2001.

A major problem for the French economy is the unemployment rate, which was 8.8% in 2001. Although the unemployment rate has been reduced compared to the year before, it is still slightly higher than the average unemployment rate in Switzerland and other EU countries.

2.2 THE MARKET FOR OUTERWEAR

2.2.1 Market size

As Table 2-1 indicates, the market size of outerwear in France amounted to 17.62 billion € in 2001 and ranks in the fourth position after Germany, Italy and the UK among all EU countries. Apparel imports with 10.21 Billion € are nearly as high as the local production with 10.27 Billion €. The statistics show an increase in the import flow by 2.7% compared to 2000. The local production increased 16.7%, out of which goods amounting 2.86 Billion € are exported (27.8 %).

Table 2-1 Size of the French clothing market, 2001

	in bn. €
Import Market	10.21
Local Production	10.27
Exports	2.86
Total Market	**17.62**

Source: Journal du Textile, Paris (2002)

Additional information provided by Eurostat indicates that only 52.7% of the imported outerwear is womenswear. The statistics from the Fédération Française du Prêt à Porter Féminin (French Ladies Wear Manufacturers Association) and the Fédération Française des Industries du Vêtement Masculin (French Men's Wear Manufacturers Association) indicate that three times more womenswear is exported than menswear.

2.2.2 Market characteristics

French clothing, French design and French labels have a long tradition and a good reputation. Clothing labels originating from France are internationally considered to be fashionable and of good quality. The internationalised French expression "haute couture" (= superior seam) signals the worldwide importance of French fashion and French clothing brands. Fashion is often associated with French fashion design.

Compared to other EU countries, France is said to be dominated by price-conscious consumers. The reasons for this can be found in an unemployment rate of around 10% and a relatively low economic growth rate. It has been reported that spontaneous purchases are fewer than in other European countries.

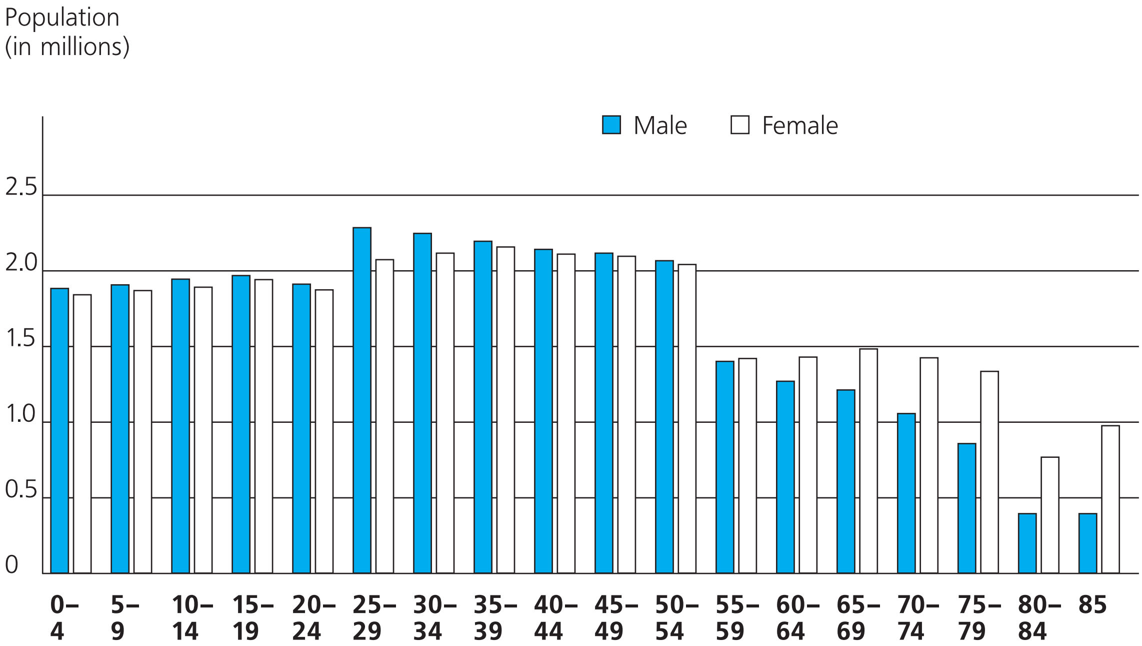
There is a high share of independent retailers in France that are run as smaller boutiques all over the country. On the other hand, the retail market can be characterised by another extreme: the so called "centrales d'achat", huge supermarkets (Carrefour, Leclerc, Itermarché etc.) and clothing chains like Promod, Pimkie, Kookai etc. have gained importance on the French clothing market. In this scenario it is obvious that the French clothing retail system is very fragmented.

France disposes of the largest network of outlets and franchise systems operated by clothing manufacturers within Europe. Both systems, franchising as well as own outlets, merge with each other and collaborate very closely. Well-known manufacturers like Cacharel (147 outlets) Chevignon (60), Courrèges (255), Etam (168), Naf Naf (150) or Petit Bateau (65) sell their collections through their own distribution system and play a major role in the French clothing retail system. The largest franchise companies are Phildar (1.530 French partners), Stefanel (1.465), Kookai (150) and Jacadi (240).

2.2.3 Demographic Characteristics

As Figure 2-1 shows, in the long-term the birth rate declines year after year and as such the young population in France shrinks. The French population (59.2 million inhabitants on the whole) is, as in other European countries, getting older on the average. The age groups of 25 to 54 have the highest shares in the population structure.

Figure 2-1: Age structure of the French population by sex, 2000



Source: U.S. Bureau of the Census, International Data Base.

While the share of the young population is shrinking, the consumption of ladies' wear in the same age group is quite high. Although the age groups of 13 to 18 years and 19 to 24 years, according to the statistics in Table 2–1, contain the range of six years (and not five like the other age groups-except 75+), it can be said that the younger female consumers in particular are buying high quantities of clothing.

This probably relates to the statement of a buying manager who remarked that purchases of female clothing is particularly dominated by the wish for fashionable casual clothing. 45.1% of all womenswear items are bought by women between 13 and 34. While the clothing consumption between the age 35 and 49 drops, the clothing expenditures of women peaks again at the age between 45 and 54 (for menswear there were no statistics available about age groups).

Table 2-2: Consumption of womenswear by age group (in % of total consumption), 2000

Age	13-18	19-24	25-29	30-34	35-39	40-45	45-49	50-54	55-59	60-64	65-69	70-74	75+
%	12.9	14.6	9.5	8.0	6.4	6.8	7.9	8.7	5.8	5.5	5.9	3.5	4.5

Source: Fédération Française du Prêt â Porter Féminin, 2000

2.2.4 Retail Sales by product category

Table 2–3 gives a conclusive survey on the market-shares for the most relevant clothing segments, divided into men and women. French consumers tend to buy more formal clothing than consumers e.g. in Germany or The Netherlands.

With around 40% consumption of formal clothing, France has similar sales in this segment to those found in Italy or the UK. Astonishingly, at the same time, the sales volume of basic leisure wear is higher than in most other EU countries. Looking at the shares of casual wear in total clothing sales, it is lower than in other EU countries.

Table 2-3: Market shares of outerwear by sex, 2000

in % of total value	Men	Women	in % of total value		Women
Formal Clothing	39	41	Casual wear	27	28
Coats	6	9	Outdoor jackets	8	9
Suits/jackets	17	9	Shirts	5	5
Trousers	9	6	Jumpers/cardigans	–	9
Dresses/skirts	–	13	Pullovers	8	–
Shirts/blouses	7	4	Trousers	6	5
Basic leisure wear	27	25	Active sports wear	7	6
T-shirts	8	6	Track/jogging suits	4	3
Tops/bodies	–	7	Tops and shorts	2	2
Shorts	2	2	Other	1	1
Jeans trousers	11	6	Sweaters/fleeces	6	4

Source: CBI Marketing Handbook 2001

As the figures in Table 2–4 indicate, out of the different clothing items for women; sweaters, trousers and tailors/ensembles are those items that are sold most in France with over 1.2 Billion € in each category. Following Table 2–4 with sales in Euro, the segments dresses, skirts, t-shirts and coats amount to approximately 750 Million € in each product category. The strongest increase of +27.9% among the listed products can be noted for sweaters/waistcoats with 1.249 Million € in 2000.

bles, skirts, jeans, t-shirts. Table 2-4 shows that the category 'tailor and ensembles' have been even reduced in € sales by 1.6%, but at the same time the sales quantities rose by 16.6%.

However, not all product categories demonstrate a higher sales increase in pieces. The picture is contradictory and not that clear. Sweaters, for instance, have sold well in 2000 and sales increased by 27.9% in Euro, but the increase in sold pieces is lower by 19.8%.

Table 2-4: Turnover of womenswear by product categories, 1999–2000

in mio. €	1999	2000	+/– from previous year
Coats impermeable	935	790	–15.5%
Tailor, ensembles	1513	1489	–1.6%
Dresses	814	800	–1.8%
Skirts	705	771	+9.5%
Jacket, blazer	365	231	–36.9%
Trousers	1190	1259	+5.8%
Jeans	531	532	+0.2%
Blouses	764	646	–15.5%
Sweaters, waistcoats	1249	1598	+27.9%
T-Shirt	694	709	+2.2%

Source: Fédération Française des Industries du Vêtement Féminin

Table 2-5: Sales of womenswear by product categories, 1999–2000

in mio. pieces	1999	2000	+/– from previous year
Impermeable coats	9 157	8 698	–5.0%
Tailor, ensembles	15 766	18 385	16.6%
Dresses	20 689	20 128	–2.7%
Skirts	25 947	28 819	11.1%
Jacket, blazer	7 744	4 466	–42.3%
Trousers	7 736	7 945	2.7%
Jeans	15 039	15 579	3.6%
Blouses	29 509	26 719	–9.5%
Sweaters, waistcoats	49 070	58 763	19.8%
T-Shirt	67 045	69 977	4.4%

Source: Fédération Française des Industries du Vêtement Féminin (2001)

Table 2–5 indicates the sales development of the same ladies clothing segments in million pieces. When looking at the volume a price deflation in France is noticeable for some categories of outerwear. Compared to the increase of the sales in Euro, the sales in volume terms are rising sharper in half of the listed product categories, e.g. coats, ensem-

2.2.5 Consumer behaviour

2.2.5.1 Consumer preferences

Table 2–6 is a good record on sales made in different clothing retail channels, separated according to men's and ladies' wear in 2000. The sales in independent clothing shops for womens-

wear and for menswear are nearly equal at 25.6% and 26.0% respectively. Clothing multiples have taken a 25% share of womenswear sales and a 22.9 % share of menswear sales by value. Mail order houses took some 10.2% of womenswear value sales in 2000; they are much less significant in menswear, where they only accounted for some 4.0% of sales. 33.4% of menswear sales and 24.6% of womenswear sales were generated in super & hyper markets, sport shops and specialist large surface stores.
This difference is interesting because in 2000 these outlets represented an even higher share of boyswear (data not listed in Table 2–6). Super & hyper markets, sport shops and specialist large surface stores accounted for 59.1% of boyswear sales by value. Sport shops took more than 7% of menswear and 15.8% of boyswear sales by value while they accounted for only 4.7% of womenswear sales.

The principal names of the most preferred shops for men, women and children are C&A, Kiabi and Eurodif, where the consumer finds more 'general clothing' with no specific purpose. The main retail companies for French women are Pimkie, Promod and Chamaïeu Femme. French men prefer to buy their clothing at Celio, Chamaïeu Homme, Devred, Manarès and Burton. The favourite shops for children's wear are Zannier, Jacadi and Catamani, all of which are specialised shops only offering kid's wear.

Table 2-6: Market shares of clothing retail channels by sex, 2000

in % of total sales	Womens-wear	Mens-wear
Independents	25.6	26.0
Clothing multiples	25.0	22.9
Department & variety stores	6.1	6.2
Mail order	10.2	4.0
Super & hyper markets	7.3	11.7
Sport shops	4.7	7.3
Specialist large surface stores	12.6	14.4
Market and fairs	3.4	2.6
Others	5.0	4.9
Total	**100.0**	**100.0**

Source: Fédération Française du Prêt â Porter Féminin and Fédération Française des Industries du Vêtement Masculin, Paris (2000)

A look at French kids most preferred product categories show similar preferences to other central European countries. Children like U.S. fashion styles and are influenced by American culture. Therefore, American brands and/or American perceived brands are particularly successful in the children's wear segment. The youngsters are also interested in sportswear, which is used also as everyday clothing. Sports like baseball, football and basketball are quite popular, but as a buyer for rugby clothing stated, rugby is also quite popular.

The trends for "American" styles and the preferred sportswear is expressed in the sales of items like t-shirts, sweatshirts, polo-shirts in combination with baseball caps. The demand for sportswear of young consumers helped the largest sports retailer Decathlon to increase its sales of children's clothing in the last few years.

Regarding fabrics, there is a trend towards natural, easy to wear and modern fibers (jersey, cotton flannel, stretch, technical fabrics, polar fleeces). The children's parents prefer clothing that is easy to wash and which requires no ironing. However, 70% of the clothing of 4 to 14 year old kids is selected by the children themselves and not by the parents. Children from six years up develop a brand awareness, which is mainly formed by their peer group and TV advertising.

2.2.5.2 Consumer expenditures

France has a population of 59.2 million inhabitants (excluding overseas départments) and the expenditures for clothing per capita with is slightly less than the average in the EU.

As Table 2–7 shows, the share of consumption of the average French households for clothing (in all consumption) remained consistently at a level of 3.4% from 1997 to 1999. Other sectors like food or housing declined. Only the sectors 'transport and communication as well as leisure, spectacles and culture have increased in importance.

Table 2-7: Structure of household spending in France, 1997–999

	1997 in %	**1998 in %**	**1999 in %**
Clothing	3.4	3.4	3.4
Food	11.9	11.7	11.5
Housing, heating, lighting	19.3	19.0	18.9
Household appliances	5.1	5.1	5.1
Medical & health services	2.9	2.9	2.9
Transport and communication	13.0	13.4	13.8
Leisures, spectacles, culture	6.9	7.1	7.3
Other	37.5	37.4	37.1
Total	**100.0**	**100.0**	**100.0**

Source: Fédération Française du Prêt â Porter Féminin, Paris (2000)

According to Table 2–8. Which considers the expenditures of outerwear in France, consumption of women's and girls' clothing was 12.1 billion € in 1999 and accounted for 58% of the total clothing consumption. From 1997 to 1999, the expenditures of French women for outerwear have increased on average by +2.1%, while at the same time the expenditures for men's and boys clothing increased by only +1.2%. Since the French economy grew in 2000, the clothing sector also expanded. Latest available figures indicate that the sector 'womenswear' in France grew by +2.6% in the year 2000.

Table 2-8: Consumer expenditures on clothing by sex, 1997–1999

	1997 in bn. €	1998 in bn. €	1999 in bn. €
Men & boys	8.4	8.6	8.6
Women, girls & infants	11.6	11.8	12.1
Total	20.0	20.4	20.7

Source: CTCOE, 2000

2.2.6 Price development of clothing

The price development of consumed womenswear can be examined from Table 2-9. While the consumption in value only rose from 10.9 Billion € to 11.1 Billion € by only +1.8%, the consumption in volume strongly increased by +9.6% (1999 to 2000). This opposite development of import value and import volume does not necessarily mean that more lower quality clothing is sold in the market. This development has been confirmed by the interviews made for this survey, also indicating a clear price deflation for outerwear in the market (with falling prices). The overall inflation rate of the French economy was at a very low level in 2000 and 2001, namely with around +1.7% and +1.6% respectively.

Table 2-9: Price development of womenswear, 1999–2000

	1999	2000	+/– from previous year
in million €	10 916	11 117	+1.8%
in million pieces (large+small)	330 262	361 912	+9.6%

Source: Fédération Française du Prêt â Porter Féminin, Paris (2001)

Furthermore, looking at the imports of outerwear in tons indicated in Table 2-10, the growth rates are less than the increase in €. In 2000 the imports in tons only increased by +6.2% and in 2001 by +14.6%.

Table 2-10: Price development of imported outerwear, 1999–2001

	1999	2000	2001	+/– from previous year
Imports in 1.000 €	4 126 583	4 713 707	5 704 896	21.0%
Imports in tons	239 957	254 742	292 052	14.6%

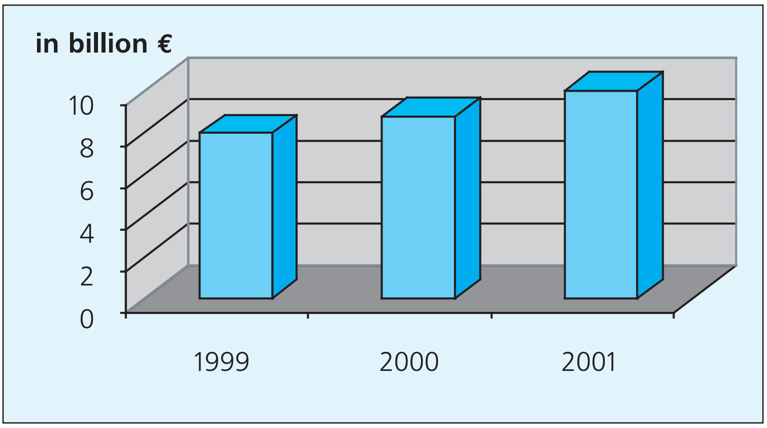
Source: Eurostat March 2002 (year 2001 based on extrapolation Jan. to Aug. 2001)

2.3 IMPORTS

2.3.1 Total imports

According to Figure 2–2 the total imports of apparel into France amounted to 10.2 Billion € in 2001. Since 1999, there has been a continuous increase in clothing imports. In 2000, the imports grew by 10.2% and in 2001 by +16.3%. The share of imports of outerwear in the total French clothing consumption is over 30%. The increasing imports is gradually replacing the shrinking domestic outerwear production.

Figure 2-2: Clothing imports, 1999–2001



Source: Eurostat March 2002 (year 2001 based on January to August 2001)

A comparison of the following Table 2–11 and Table 2–12 shows that the relation of men's and womenswear imports into France are different for knitted and woven outerwear. While the imports of woven outerwear for men (2.552 million €) and women (2.949 million €) are at a similar level, the imports of knitted womenswear (571 million €) clearly surmount the imports of knitted menswear (301 million €). The imports of woven outerwear are, depending on the product category, five to eight times higher than the imports of knitted outerwear.

According to Table 2–11, the imports of knitted outerwear into France increased from 1999 to 2001. In particular, the outerwear for both sexes such as T-Shirts, jerseys, pullovers, cardigans, babies garments and impregnated clothing requires mentioning. This largest sector of knitted outerwear was 2.552 million € in 1999 and amounted to 3.415 million € in 2001. A strong increase can be also noted for sportswear with +302 million € in 2001.

The share of the non-EU countries in the men's wear imports in € in 2001 was 54.7%, whereas for women it accounted for 46.2% only. The highest rate, and therefore the relatively best sales opportunities, can be observed for outerwear for both sexes (T-shirts, cardigans etc.) with an import share of 56.6% from non-EU countries.

Table 2-11: Imports of knitted outerwear by sex and product categories, 1999–2001

	1999 Tons	1999 1000 €	2000 Tons	2000 1000 €	2001 Tons	2001 1000 €
For men or boys						
Coats, raincoats, anoraks etc. (61.01)	739	18 080	684	16 507	622	16 874
Suits, jackets, ensembles, trousers, shorts etc. (61.03)	3 617	58 189	3 777	65 297	3 876	66 196
Shirts (61.05)	10 351	202 553	9 517	191 050	10 400	217 928
Total	**14 707**	**278 822**	**13 977**	**272 854**	**14 898**	**300 998**
Total extra EU	**9 985**	**154 796**	**9 110**	**146 196**	**9 462**	**161 836**
For women or girls						
Coats, raincoats, anoraks etc. (61.02)	1 498	34 598	1 361	37 385	1 327	31 114
Suits. Ensembles, jackets, dresses, skirts, trousers (6104)	20 182	376 915	20 650	419 044	21 766	427 401
Blouses and shirt blouses (6106)	4 456	104 059	4 290	104 718	4 427	112 533
Total	**26 137**	**515 571**	**26 300**	**561 147**	**27 520**	**571 048**
Total extra EU	**14 984**	**232 307**	**14 813**	**251 865**	**15 164**	**265 630**
For both sexes						
T-shirts, singlets etc. (61.09)	55 133	812 779	56 427	909 248	70 487	1 191 371
Jerseys, pullovers, cardigans, waistcoats etc. (61.10)	73 771	1 526 336	75 654	1 689 539	77 255	1 810 213
Babies garments (61.11)	15 653	296 163	16 069	339 806	16 568	383 408
Impregnated clothing (61.13)	1 214	21 762	917	21 669	1 276	29 573
Total	**145 771**	**2 657 039**	**149 067**	**2 960 262**	**165 586**	**3 414 565**
Total extra EU	**87 825**	**1 377 089**	**94 993**	**1 617 511**	**108 248**	**1 929 123**
Active Sportswear						
Track suits, ski suits and swimwear (61.12)	7 470	161 898	7 416	170 200	8 265	213 964
Other sportswear (61.14)	2 406	65 078	2 770	78 327	2 923	87 659
Total	**9 876**	**226 976**	**10 185**	**248 527**	**11 188**	**301 623**
Total extra EU	**5 496**	**102 515**	**5 340**	**113 376**	**5 867**	**133 321**

Source: Eurostat March 2002, Year 2001 based on Jan. to Aug. 2001 and extrapolated till Dec. 2001

Table 2–12 indicates that there are more imports of woven menswear units but less in € compared to the ladies´ segment. The import of the women's woven segment increased from 2017 million € in 1999 to 2552 million € in 2001. The imports of woven womenswear amounted 2949 million € in 2001 (1999: 2145 million €). Woven suits for men (1662 million €) and women (2180 million €) have the highest share of imports. The shares of non-EU countries in the woven outerwear segment shows different developments: For example the share of non-EU countries in the women and girls´ outerwear category has grown from 52% in 1999, over 55.8% in 2000 to 58.6% in 2001. Sales possibilities for foreign manufacturers into France have definitely increased during this period.

Table 2-12: Imports of woven outerwear by sex and product categories, 1999– 2001

	1999 Tons	1999 1000 €	2000 Tons	2000 1000 €	2001 Tons	2001 1000 €
For men or boys						
Coats, anoraks, wind cheaters etc. (62.01)	12 958	309 036	13 560	329 531	12 442	321 112
Suits, jackets, ensembles, trousers, shorts etc. (62.03)	64 013	1 249 296	69 019	1 384 247	78 455	1 661 658
Shirts (62.05)	22 970	458 548	21 068	476 967	24 508	569 058
Total	**99 941**	**2 016 880**	**103 647**	**2 190 745**	**115 405**	**2 551 827**
Total extra EU	**70 009**	**1 183 582**	**72 682**	**1 278 013**	**80 866**	**1 522 746**
For women or girls						
Coats, capes, anoraks, windjackets etc. (62.02)	13 568	350 513	13 014	360 895	13 830	380 362
Suits, ensembles, jackets, dresses, skirts, trousers (6204)	60 812	1 513 421	67 534	1 754 719	82 139	2 179 615
Blouses and shirt blouses (6206)	9 081	280 809	9 375	305 715	11 983	389 341
Total	**83 461**	**2 144 742**	**89 923**	**2 421 329**	**107 952**	**2 949 319**
Total extra EU	**51 960**	**1 114 701**	**59 102**	**1 349 924**	**72 713**	**1 728 660**
For both sexes						
Babies garments (62.09)	6 313	134 368	5 831	143 680	6 731	178 867
Other incl. Impregnated (62.10)	–	251 931	–	–	–	–
Total	**6 313**	**386 299**	**5 831**	**143 680**	**6 731**	**178 867**
Total extra EU	**4 235**	**236 046**	**4 294**	**103 547**	**5 100**	**135 347**

Source: Eurostat March 2002, Year 2001 based on Jan. to Aug. 2001 and extrapolated till Dec. 2001

2.3.2 Outward Processing Trade (OPT)

The analysis of the largest suppliers of OPT outerwear into France in Table 2–13 shows an overall negative trend: The OPT imports to France have been strongly reduced by –29.5% in 2001 to 35.8 million €. This is even greater than the reduction the year before, registering –5.4%. The OPT business only accounts for 0.35% of the total imports to France.

The Ukraine is by far the most important OPT partner country for France. 70.9% of the OPT imports originate from Ukraine. However, in 2000, these imports shrank by 9.8%. While the Ukraine OPT imports amount 25.4 million €, the normal imports from the Ukraine are only given from Eurostat with 4.1 million €. Romania and China, far behind Ukraine, rank in position No. 2 and three. The growth rates show, that the OPT business fluctuates greatly, e.g. Madagascar had an increase of +188% in 2000 and 73.4% in 2001.

Table 2-13: Largest supplying countries of OPT outerwear, 1999–2001

Position	Country	1999 in 1000 €	+/- from 1999	2000 in 1000 €	+/- from 2000	2001 in 1000 €
1	Ukraine	24 084	+16.8%	28 137	–9.8%	25 373
2	Romania	6 152	-12.1%	5 405	–57.2%	2 314
3	China	1 034	+25.9%	1 301	+40.7%	1 831
4	Madagascar	2 352	+188.0%	6 772	–73.4%	1 800
5	Belarus	405	+53.4%	622	156.6%	1 595
6	Tunisia	8 141	-87.3%	1 030	–6.9%	959
7	Bosnia and Herzegovina	215	+211.4%	668	+20.0%	802
8	Poland	41	+141.9%	98	+566.4%	656
9	Serbia and Montenegro	189	-72.4%	52	+727.7%	433
10	Hungary	132	-76.5%	31	–27.3%	23
11	Russia	310	-89.4%	33	–39.4%	20
12	Morocco	253	-68.7%	79	–96.7%	3
	Extra European Union	53 711	-5.4%	50 796	–29.5%	35 810

Source: Eurostat March 2002, year 2001 based on January to August 2001

2.3.3 Largest suppliers of outerwear

Table 2–14 gives a very good survey on the major twenty clothing supplying countries to France from 1997 to 2001. The share of clothing imports from extra EU countries in France was 51.9% in 1999 and has increased to 55.9% in 2001. The imports from outside the EU in 2001 amounted to 5705 million €, whereas 4492 Million € were imported from the European Union. The total imports to France in 2001 amounted to 10 197 million €.

The development of imports from countries outside the EU also showed a positive trend: It increased from 1999 to 2001 by 38.2%. The growth rates for the years 2000 and 2001 were both positive (14.2% and 21.0% respectively). The imports from EU countries increased from 1999 to 2001 by only 17.4%, a less sizeable figure than the imports from "extra EU" countries. The growth rates of imports from EU countries for 2000 and 2001 were "only" 6.0% and 10.8%.

The main import countries for France outside Europe are Morocco (5704 million €) and Tunisia (941 million €). The import countries Morocco and Tunisia are French speaking. This is a very important advantage for these countries when exporting to France. The interviews with French clothing companies showed, that not many of the employees in French companies speak English. Even some buyers of outerwear have language problems regarding English and definitely prefer to speak French. This fact should be considered by foreign manufacturers wishing to sell in the French market.

In France, the share of imports from China in total imports is only 6.9%. The UK, for example has 10.4 billion € imports – nearly the same amount of imports as France. But the UK imports from China accounts for 13.8% (Spain: 13.9%, Germany: 9.2%). The main import country is the relatively small EU country Belgium, which is characterised as a multilingual country, including the French language. Much business with Belgium is done on a subcontracting basis.

Table 2-14: Largest supplying countries of outerwear, 1999–2001

Position	Country	1999 in 1.000 €	+/- from 1999	2000 in 1.000 €	+/- from 2000	2001 in 1.000 €
1	Belgium	1 038 909	10.8%	1 151 466	11.3%	1 281 238
2	Morocco	760 297	4.3%	793 158	18.8%	941 840
3	Italy	819 066	–0.8%	812 912	6.9%	869 288
4	Tunisia	592 047	10.1%	652 097	24.3%	810 430
5	Fr Germany	563 326	9.5%	616 977	15.9%	714 734
6	China	441 762	18.3%	522 479	35.2%	706 352
7	Portugal	475 437	–11.4%	421 010	8.9%	458 573
8	Netherlands	211 478	46.7%	310 298	38.3%	429 185
9	Turkey	285 330	8.5%	309 505	30.6%	405 018
10	India	250 753	13.2%	283 904	38.3%	392 668
11	Bangladesh	263 188	24.3%	327 179	14.2%	373 702
12	Spain	258 318	16.0%	299 775	11.0%	303 074
13	UK	308 830	–4.3%	295 542	3.9%	283 930
14	Mauritius	218 336	7.9%	235 685	17.4%	276 795
15	Romania	100 678	32.3%	133 193	36.9%	182 289
16	Hong Kong	136 985	27.8%	175 098	1.3%	172 887
17	Indonesia	91 249	32.3%	107 511	8.6%	116 769
18	Macao	83 228	27.8%	97 853	9.5%	107 145
19	Thailand	87 178	30.1%	113 435	–11.8%	100 001
20	Madagascar	78 526	13.0%	88 766	9.4%	97 125
	EU	3 825 293	6.0%	4 052 930	10.8%	4 492 042
	Extra EU	4 126 583	14.2%	4 713 707	21.0%	5 704 896

Source: Eurostat Luxemburg March 2002, year 2001 based on January to August 2001

2.4 TRADE STRUCTURE

2.4.1 Developments in the retail trade

It would be too simple to assume that price is the only area of competition in the French market. Quality, style and trend also play an important role. Marks & Spencer drew back from the French market while international chains like Zara, GAP, Mango and H&M (Hennes & Mauritz) gained market shares.

The clothing retail sector in France went through major changes over the last years. From the beginning of the 1980s, the consumers were used to independent shops that offered various brands. Apparel sold by independent retailers in France accounted for 39.1% of total sales in 1995. Today, the market share dropped clearly below 30%. Within the last 6–7 years the multiples also (as in other European countries) invaded France, and consumers are more likely to buy in specialty chain stores with large outlets. This development enhanced lower prices for outerwear through the greater competition and number of goods imported by these chains. These companies, out of which most are French chains, have a very up-to date concept with a high standard in logistics, IT and advertising. The management system in the clothing sector swept away small retailers. This development has been a concentrated process that has given the retailers more purchasing power against the manufacturers in comparison with the formerly fragmented small retailers.

The multiples are now in the position to react more quickly to consumer demands by following a strategy of greater "just in time" supply to the shops and the consumers. The chains act like manufacturers in this respect. However, the link to the manufacturers has become closer. The importance of middlemen has been reduced and retailers buy directly from the clothing companies (abroad). The increased purchasing power of the retailers stimulated some clothing manufacturers to build up an independent distribution system by operating self-owned outlets or using a 'franchise system'.

2.4.2 Leading retailers

As mentioned previously, the French market shows a high degree of concentration at clothing retail level. The large outlets (called 'surfaces' in French) are spread all over France. Table 2–15 gives a good survey on the eighteen most important French clothing multiples. The retail chain Chamaïeu Femme with 288 outlets is number one in France, the shops are focused on womens wear. The biggest clothing chain for menswear is Celio with 180 outlets. Typical for the French market is the strong market presence of kid's wear shops. The second and third largest chains in France (Jacadi and Groupe Zannier with 282 and 252 outlets respectively) are specialised in kid's wear.

Table 2-15: Largest clothing retail chains by number of outlets, 2000

Retailer	Parent Company	Sector	Number of outlets
Chamaïeu Femme	Cime-Chamaïeu	Womenswear	288
Jacadi	Jacadi	Children's wear	282
Groupe Zannier	Groupe Zannier	Children's wear	252
Natalys	Natalys	Baby/maternity wear	238
Pimkie	Auchan Mulliez	Womenswear	230
Promod	Promod	Womenswear	230
Celio	Celio	Menswear	180
Bebe 9	France Maternite	Baby/maternity wear	160
Décathlon	Auchan	Sportswear	160
Catamini	Catamini	Children's wear	135
Chamaïeu Homme	Auchan Mulliez	Menswear	103
Prenatal	Prenatal	Baby/maternity wear	100
Devred	UOCR Eurodif	Menswear	92
Kiabi	Auchan Mulliez	General Clothing	82
Eurodif	UOCR Eurodif	General Clothing	79
Burton	UOCR Eurodif	Menswear	71
C&A	C&A	General Clothing	68
Manarès	UOCR Eurodif	Menswear	31

Source: French Retailers Association 2000

Table 2–16 gives a more general view of the leading French retailers. All nine companies listed are active in the clothing business. The data given about the sales refer to clothing and non-clothing products. The market shares refer to the importance within the total retail market.

Table 2-16: Leading clothing retailers by turnover and market share, 2000

	Retailer	Operations	No of Outlets	French Sales (in million €)	Market share of total retail sales (in %)
1.	Leclerc	Grocery, clothing	540	24 072	7.2
2.	Auchan/Mulliezd	Grocery, clothing, sport, DIY	1 332	21 038	6.3
3.	PPR	Mixed, mail order, durables	435	7 744	2.3
4.	Galeries Lafayette	Department & variety stores	460	5 549	1.7
5.	Groupe André	Clothing	1 688	1 951	0.6
6.	Trois Suisses	Mail order	–	1 189	0.4
7.	Eram	Footwear, clothing,	1 779	899	0.3
8.	C&A	Clothing	66	610	0.2
9.	Etam	Clothing, footwear	625	595	0.2

Source: Retail Intelligence, London (2000)

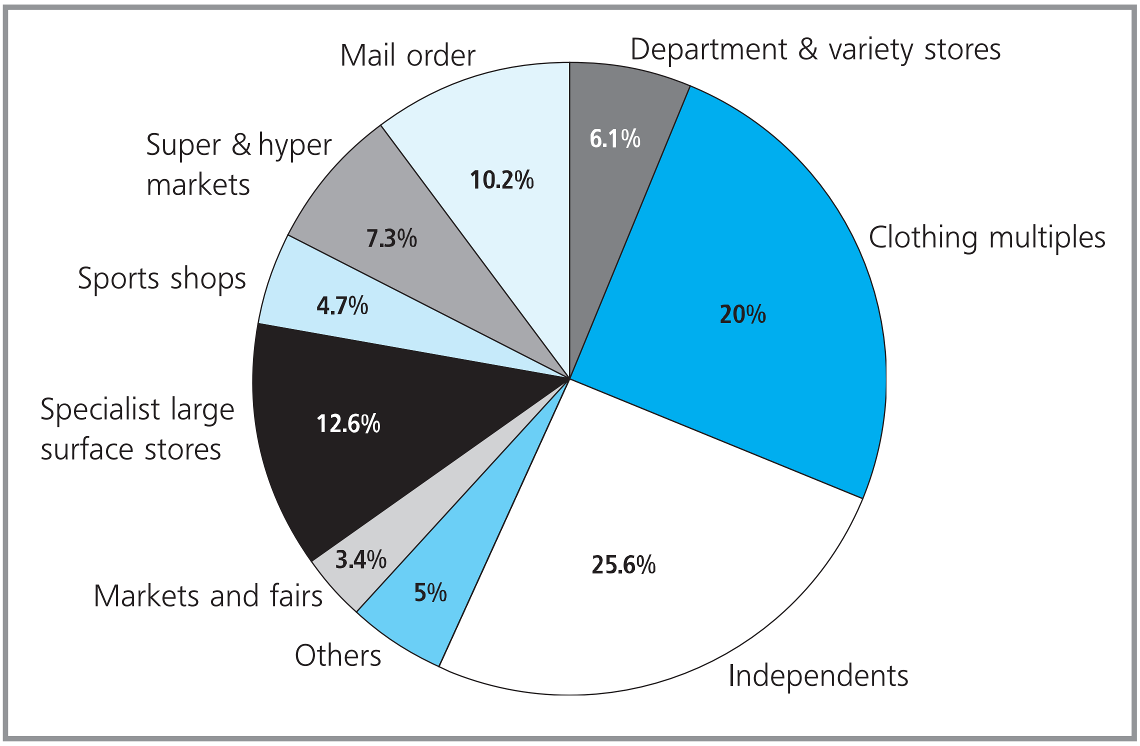
2.4.3 Distribution Channels

2.4.3.1 Retailers

The French distribution system still has a large share of 'independents' with 25.6%. Compared to other EU countries the share is low. Exactly of all clothing in France is sold through clothing multiples, which take the second position just after the independent retailers.

Specialist large surface stores, a strong distribution channel in France in particular, account for 12.6% of all sales. As in Germany or Switzerland; mail-order holds a strong share in the market with 10.2%, followed by super- and hypermarkets (7.3%), department and variety stores (6.1%) and sports-shops (4.7%). The shares of the various distribution channels for clothing are summarised in Figure 2–3.

Figure 2-3: Clothing retail channels by market shares, 2001



Source: Retail Intelligence, London (2001)

2.4.3.1.1 Independent specialised retailers

The independent retailers decreased from 28% in 1995 to 26% in 2000. Independent retailers are defined as retailers with less than five 'active' outlets. There are around 25,000 independent outlets in France. Their buying sometimes is linked to franchise organisations. Although the share of independent specialised retailers is decreasing, it is still much higher than in other countries. In the UK the share of independent retailers, for instance, only accounts for around 10%.

Market share: 25.6% in 2000
Trend: Decreasing

2.4.3.1.2 Clothing multiples

There is diverging information about the strength of the increase in market-shares of clothing multiples. While the long-term trend indicates a higher importance of clothing multiples compared to the past few years (Journal de Textile), the short-term development from 1999 to 2000 shows (also for other distribution categories) contradictory results with a decreasing share of clothing multiples. Generally, it can be said that the French market is less concentrated in the retail sector than other European countries. The number of chains' outlets for general clothing is 4,200. The outlets of multiples for menswear stand at 1,100. The outlets for children's wear are doubly as high, with 2,100 outlets. There are three times less outlets of clothing multiples for men (1,100) than for women (3650).

The biggest player in the retailing business is the Groupe Vivarte (formerly Groupe André). Groupe Vivarte owns the clothing chains Caroll, Kookaï, Creeks, Liberto and La Halle aux Vêtements. Shoe shop chains called André, San Marina, Orcade-Minelli, La Halle aux Chaussures and Chaussland et Besson also belong to Groupe Vivarte. In November 2001, the former Groupe André was renamed Groupe Vivarte.

Market share: 25.0% in 2000
Trend: Increasing

2.4.3.1.3 Department-stores

The main department store in France is Les Galeries Lafayette, which also operates under the name Nouvelles Galeries. Another departement store of importance in France is PRP (Pinault-Printemps-Redoute). Marks & Spencer is no longer operational in the French market. Variety stores include Prisunec, Monoprix and Inno, which belong to Galeries Lafayette. The importance of department stores in the last few years is decreasing.

Market share: 6.1% in 2000
Trend: Decreasing

2.4.3.1.4 Mail-order houses

The mail-order business in France is obviously decreasing. From 12% in 1995, it dropped to around 10% in 2000. Among the mail-order houses, La Redoute and 3 Suisses must be mentioned. La Redoute is owned by PRP, and 3 Suisses belongs to the Groupe 3 Suisses International, which also carries the mail-order business Blanche Porte. Mail order houses are said to have aggressive sales policies and heavy promotion. An interesting statement from the mail-order company Blanche Porte was that they prefer to buy within France because of faster deliveries. This shows how important quick response is for (French) retailers.

Market share:	10.2% in 2000
Trend:	Decreasing

2.4.3.1.5 Textile discounters

There are some relevant textile discounters all over France that are mainly based outside the larger cities such as Paris, Lyon, Marseille, but also around towns with more than 250.000 inhabitants where a demand exists for 'cheap' clothing, mainly for lower income households. Larger French textile discounters import directly from abroad (mainly ready-made items from Asia) or buy from French importers specialised in the product groups in demand. Specific figures on the market-shares of textile discounters are not available, but are included in the distribution channel 'specialist large surface stores'.

Market share:	12.6% (Specialist large surface stores including textile discounters) in 2000
Trend:	Increasing

2.4.3.1.6 Grocery super- and hypermarkets

The grocery and hypermarkets have a retail market share in the clothing sector of 7.3% for womenswear and 11.7% for menswear. The supermarkets and hypermarkets that have a higher share in the menswear segment have done better for major items, but are reported to have problems with small items, although socks and underwear constitute their main clothing business. A trend can be noted away from cheap products to fashionable clothing offering better quality.

Market share:	7.3% in 2000
Trend:	Slightly increasing

2.4.3.1.7 Others

The share of other distribution channels is slightly increasing with around 5% in 2000. In 1995, only 4% of the clothing was bought in other distribution channels (sport shops: 4.7% of womenswear and 7.3% of menswear, market and fairs 3.4% and 2.6% respectively, specialist large surface stores even 12.6% and 14.4% respectively for womenswear and menswear).

Market share:	5.0% in 2000
Trend:	Increasing

2.4.3.2 Sales Intermediaries

2.4.3.2.1 Clothing Manufacturers

French manufacturers have lost shares against the retailers and their position has weakened in recent years. This is also confirmed by the fact that there are fewer 'manufacturer's brands', because they are partially being replaced by the 'retailer's brands'. The price pressure, mainly caused by the reduction in price conscious consumption, causing manufacturers to follow the retailers. French manufacturers often produce on their own, but also buy a considerable share of their product assortment from manufacturers abroad. Interviews revealed that the manufacturers have their core product range and 'add' certain products to complete their collection.

The clothing manufacturer has to rely on the distributors promotion and advertising for its respective collection. Brand names may be promoted inadequately. This can only be avoided by the installation of a costly own retail system by the manufacturer. Because of the strength of retailers, some French clothing brands face these greater financial investments and prefer to establish their own retailers to be able to adapt more quickly to evolving market trends. With these own distribution channels, the manufacturer has much more influence on the distribution, training the sales personnel according to the marketing strategy and image and exhibiting more control over possible damages of the brand. In any case, it is recommendable that clothing exporters selling to France not neglect the apparel manufacturers while reducing their local production and building up their own retail system and acting like retailers.

2.4.3.2.2 Central buying associations

There are not many important buying organisations for independent retailers in France, as they are mainly provided by the French clothing manufacturers and the wholesalers and importers. Mainly in the sportswear segment, there are some buying associations of importance, namely Intersport, Go Sport and Sport 2000.

2.4.3.2.3 Sales Agents

A sales agent based in France normally takes a commission of 10–15% if the manufacturer originates from overseas. (slightly higher commission because of higher risks). The sales commission within France or Europe is normally below 10%. Clothing exports into the French market via a sales agent is very common. Especially in the case of France, it is recommendable for manufacturers from extra-EU to work with agents as the buying of clothing is very much concentrated on the so called 'centrales d'achats' and the buying managers often import through sales agents based in France representing reliable manufacturers from abroad.

2.4.3.2.4 Importers/wholesalers

As described in the chapters before, some of the French retailers (mainly super- and hypermarkets, textile discounters and partially clothing chains) not running own control and sourcing units in overseas market but wishing to buy clothing at market attractive prices buy via importers/wholesalers. Since the end of the eighties, the importers have gained importance as the previously very strong national French clothing industry became less competitive due to increasing production costs; as a result, many importers/wholesalers developed strongly by increasing apparel imports.

2.5 FRENCH FASHION TRADE FAIRS

The most important tradeshow in France for Menswear is the Salon International de l'Habillement Masculin (Le Nouveau SEHM), which is held twice per year, namely in January and July. This is an exhibition for the whole range of men's and boy's apparel, including accessories. It must be mentioned that this is a relaunch of a previously important men's wear fair. The present position of the SEHM at European level is weak. Before attending or exhibiting at the SEHM, the manufacturer should collect more data about the visitor and exhibitor's structure.

The 'Prêt-à-Porter Trade Fair' is an international ladies' ready-to-wear exhibition with a "boutique" section. The collections are normally presented on the classical 'pre-order system, meaning year ahead of the actual sales in the shops. The winter collection is shown in March, the summer collection in September of the previous year. The fair has a certain importance at the European level, nevertheless it has more of the character of an image fair; this differs from the German CPD, as the main competing ladies wear fair, ¨where there is more business orientation.

The trade fair 'French Planète 0>16', with its former name Mode Enfantine and Mode de l'Enfant, is relevant for the children's clothing segment. The trade fairs SEHM and Mode Enfantine are held twice a year in January and July. In the highly competitive world, French trade fairs are major opportunities for business and marketing on an international scale, although – as already mentioned- the SEHM in particular and the 'Prêt-à-Porter' have lost shares against the Italian and German clothing trade fairs in recent years.

The FATEX Fair in Paris, which takes place twice per year (May and November), was founded in 1984 and has around 450 exhibitors and on average between eight to ten thousand visitors (data of 1999/2000). Approx. 10% of the exhibitors originate from abroad.

2.6 LIST OF MAJOR BUYERS OF LADIES', MEN'S AND CHILDREN'S WEAR IN FRANCE

Clothing Chain Stores

Agnes B
17, rue de Dieu
F-75010 Paris
Tel. +33 – 1 – 40034500
Fax. +33 – 1 – 40034550
www.agnesb.fr

Product range: ladies', men's, children's wear

Price segment: high price level

Number of outlets: 280 shops
+ 15 franchising partners

Aubert
4, rue de la Ferme
F-68700 Cernay
Tel. +33 – 389 – 383200
Fax. +33 – 389 – 754167
aubert.contact@aubert.fr
www.aubert.fr

Product range: children's, babies' wear

Price segment: middle price level

Number of outlets: 70 shops + mailorder

Caroll International
38, rue du Hameau
F-75740 Paris Cedex 15
Tel. +33 – 1 – 56233333
Fax. +33 – 1 – 56233406
contact@caroll.com
www.caroll.com

Product range: ladies' wear

Price segment: middle price level

Number of outlets: 101 shops, 115 franch.
Partners + mailorder

Chattawak
29, boulevard des Italiens
F-75002 Paris
Tel. +33 – 1 – 44948060
Fax. +33 – 1 – 42669392
www.chattawak.fr

Product range: ladies', men's wear

Price segment: middle price level

Number of outlets: 25 shops + 20 franch.
partners

Eurodif
27, rue de Cléry
F-75002 Paris
Tel. +33 – 1 – 44821010
Fax. +33 – 1 – 40284584
www.eurodif.fr.fm

Product range: ladies', men's, children's wear

Price segment: low to middle price level

Number of outlets: 270

Note: belongs to Groupe UOCR – shops called Devred, Bouchara, Burton

Fabristyle – Brice
142, avenue du Panorama
F-72100 Le Mans
Tel. +33 – 2 – 43614444
Fax. +33 – 2 – 43614422
www.brice.fr

Product range: men's wear

Price segment: middle price level

Number of outlets: 90

Infinitif
26, rue du Caire
F-75002 Paris
Tel. +33 – 1 – 40399703
Fax. +33 – 1 – 42655527
www.infinitif.com

Product range: ladies' wear

Price segment: middle to high price level

Number of outlets: 35

Kookai
45, Av Victor Hugo
Bat., 201
F – 93534 Aubervilliers
Tel. +33 – 1 – 43 525 252
Fax: +33 – 3 – 43 525 266
www.kookai.fr

Product range: ladies' wear

Price segment: middle price level

Number of outlets: 30 outlets + 120 franchise partner + 320 Franchise partner abroad

Note: belongs to the André Group, Paris

La Halle aux Vêtements
26, rue de Flandres
F-75019 Paris
Tel. +33 – 1 – 533 50 425
Fax: +33 – 1 – 533 50 480

Product range: ladies', men's, children's wear

Price segment: low to middle price level

Number of outlets: 215

Note: belongs to the André Group, Paris

Maison des 100.000 Chemises
112, rue Richelieu
F-75002 Paris
Tel. +33 – 1 – 42966612
Fax. +33 – 1 – 42605014

Product range: men's wear, especially shirts

Price segment: middle price level

Number of outlets: 42

Oliver Grant Diffusion
74, rue Elisée, Reclus 69
F-69150 Décibes Cedex
Tel. +33 – 472 – 812560
Fax. +33 – 472 – 812561

Product range: ladies', men's wear, sportswear

Price segment: middle to high price level

Number of outlets: 22 shops, 3 franchising partners

PROMOD – Centrale d'Achat
Chemin du Verseau
F-59847 Marcq en Baroeul
Tel. +33 – 3 – 20457551
Fax. +33 – 3 – 20457454
www.promod.fr

Product range: ladies' wear

Price segment: low price level

Number of outlets: 130 shops in France and many more in other countries

Tartine et Chocolat
105, rue Fbg. St. Honoré
F-75115 Paris
Tel. +33 – 1 – 45 62 44 04
Fax: +33 – 1 – 45 62 339

Product range: children's wear

Price segment: middle price level

Number of outlets: 3 shops, 15 franchising partners

TATI SA
82, avenue de Maine
F-75018 Paris
Tel. +33 – 1 – 568 00 680
Fax: +33 – 1 – 142 52 32 44
contact@tati.fr
www.tati.fr

Product range: all kinds of clothing and wedding dresses

Price segment: low and middle price level

Number of outlets: 32

Zannier Groupe
6 bis, rue Gabriel Laumain
F-75010 Paris
Tel. +33 – 1 – 44834545
Fax. +33 – 1 – 44834530
www.groupezannier.fr

Product range: children's wear

Price segment: middle price level

Number of outlets: 120 shops + 115 franchising partners

Note: own brands like Trios Pommes, Hawai – 60% of the clothing is sourced from outside

Jeans- and Sportswear

Big Star
Z.I. Route de l'Industrie
F-68360 Soultz
Tel. +33 – 389 – 746575
Fax. +33 – 389 – 746581
office@bigstar.com
www.bigstarjeans.com

Product range: Jeans and sportswear

Price segment: middle price level

Number of outlets: 40 + 35 franchise partners

Chausport
9, rue des Ingres
F-59100 Roubaix
Tel. +33 – 3 – 20896633
Fax. +33 – 3 – 20896622

Product range: Casual wear and active sportswear, sports articles

Price segment: middle price level

Number of outlets: 75

Coprint Sportswear
141, rue Louis Armand
F – 73200 Albertville
Tel. +33 – 47 – 9390 909
Fax. +33 – 47 – 9390 001

Product range: Sportswear

Price segment: middle price level

Number of outlets: 75 shops + 20 franchise partners

Decathlon-Sport
4, Boulevard de Mons
F-59650 Villeneuve d'Asqu
Tel. +33 – 3 – 20335000
Fax. +33 – 3 – 20335001
www.decathlon.com

Product range: Casual wear and active sportswear

Price segment: middle price level

Number of outlets: 35

Decouverte Vêtements
16 rue des Petits Camps – ZI Sud
F – 35400 Saint Malo
Tel. +33 – 299 – 822635
Fax. +33 – 299 – 824942

Product range: Ladies wear and sportswear

Price segment: middle price level

Number of outlets: 10 + 45 franchise partners (Brands: Cache Cache, Caroll, Old River)

Donald Diffusion
21 Boulevard de la Liberté
F – 13001 Marseille
Tel. +33 – 491 – 504389
Fax. +33 – 491 – 620789

Product range: sportswear

Price segment: lower to middle level

Number of outlets: 70 shops + 50 Franchise partner

Note: own brand 'Landers'

ITM Entreprises
24, rue August-Chabriires
F-75737 Paris
Tel. +33 – 1 – 45337417
Fax. +33 – 1 – 45331208

Product range: all kinds of clothing incl. sportswear

Price segment: lower level

Number of outlets: 110 shops "Vetimarché

Lasserre
20 chemin de Laporte
F – 31300 Toulouse
Tel. +33 – 561 – 491313
Fax. +33 – 561 – 499848

Product range: sportswear

Price segment: middle price level

Number of outlets: 40 + 35 franchise partners

Naf Naf – Chevignon
6-10 Boulevard Foch
F – 93807 Epinay sur Seine
Tel. +33 – 1 – 4813 8888
Fax. +33 – 1 – 4813 8850
production@nafnaf.fr
www.nafnaf-sa.com

Product range: ladies wear

Price segment: middle to high price level

Number of outlets: 150 + 15 in neighbouring countries

Note: app. 300 Million € turn-over

Paparazzi
Route Saint Bernard – B.P.151
F – 06220 Vallauris
Tel. +33 – 493 – 646140
Fax. +33 – 493 – 644770

Product range: ladies and men's wear

Price segment: middle level

Number of outlets: 22 + 20 franchise partner

Department Stores

Au Bon Marche (ABM)
5, rue de Babylone
F-75322 Paris Cedex 07
Tel. +33 – 1 – 44398000
Fax. +33 – 1 – -44398050
www.lebonmarche.fr

Product range: all kinds of clothing

Price segment: middle price level

Number of outlets: approx. 150

Note: textile share app. 49% –
1.500 employees – mail-order business

Galeries Lafayette
40, Boulevard Haussmann
F-75009 Paris Cedex 07
Tel. +33 – 14 – 8782519
Fax. +33 – 14 – 2828023
www.galerieslafayette.fr www.groupega-lerieslafayette.fr

Product range: ladies' wear

Price segment: high price level

Number of outlets: 130 shops in France and more in other countries

Nouvelles Galeries Reunis
66 , rue des Archives
F-75150 Paris Cedex
Tel. +33 – 1 – 42 748 212
Fax: +33 – 1 – 42 74 66 52

Product range: all kinds of clothing

Price segment: middle price level

Number of outlets: 287 shops

Note: belongs to Galeries Lafayette Group
– textile share in assortment 25%
– app. 25.000 employees

Printemps
102, rue des Provence
F-75009 Paris
Tel. +33 – 1 – 42855000
Fax. +33 – 1 – 42823600
17 shops + related shops
www.printemps.com

Product range: all kinds of clothing

Price segment: middle price level

Number of outlets: 20

Mail Order Companies

Cyrillus (Redcats)
Avenue Amsterdam
F-59910 Bondues
Tel. +33 – 3 – 209 9330
Fax: +33 – 3 – 209 9332

Products: ladies', men's, children's wear

Mailorder + 25 shops also in B, CH and D

www.cyrillus.fr

Good Life
33, rue de l'Assomption
F-75016 Paris
Tel. +33 – 1 – 45245650
Fax. +33 – 1 – 45245599

Products: ladies', men's wear

Mailorder + retail

www.goodlife.fr

La Blanche Porte
22, rue de la Blanche
F-59200 Tourcoing
Tel. +33 – 3 – 20282028
Fax. +33 – 3 – 20282029
www.lablancheporte.fr

La Redoute a Roubaix S.A. (Redcats)
57, rue Blanchemaille
F-59100 Roubaix
Tel. +33 – 3 – 20696000
Fax. +33 – 3 – 20240337
www.redcats.com

Maison de Valerie
ZI, rue Jacquart
F-41350 Vineuil
Tel. +33 – 2 – 54425254
Fax. +33 – 2 – 54815053

Neckermann Sarl
5, rue du Château d'Angleterre
F-67300 Schiltigheim
Tel. +33 – 3 – 88191010
Fax. +33 – 3 – 88191030

Note: all kinds of clothing – 260 employees – textile share 75%

Trois Suisses International
4, place de la République
F-59962 Croix
Tel. +33 –3 – 20203062
Fax. +33 – 3 – 20720406
www.3suisses.fr
www.3suissesinternational.com

Auchan
Rue de la Recherche 200
F – 59650 Villeneuve-d’Asqu
Tel. +33 – 320 – 431212
Fax. +33 – 320 – 436400

Product range: all products

Price segment:

Number of outlets: 14 countries, 294 hypermarkets, 588 supermarkets

Carrefour SA
ZAC Saint-Guénault
BP 75
F – 91002 Evry Cedex
Tel. +33 – 360 – 913737
Fax. +33 – 360 – 794498
www.carrefour.com

Product range: all products

Price segment:

Number of outlets: 215 hypermarkets

Casino-Groupe
24, rue de la Montat
F – 42004 Saint-Etienne
Tel. +33 – 477 – 454256
Fax. +33 – 477 – 454365

Product range: all products

Intermarché
1, rue du Chemin Blanc
F – 91160 Longjumeau
Tel. +33 – 164 – 545500
Fax. +33 – 164 – 545190

Product range: all products

Number of outlets: approx. 75

Leclerc
Rue Camille Desmoulins 52
F – 92451 Issy Les Moulineaux
Tel. +33 – 146 – 625200
Fax. +33 – 146 – 629600
www.e-leclerc.com

Product range: all products

Promodes
Z.I. route de Paris
F – 14127 Mondeville Cedex
Tel. +33 – 231 – 706000
Fax. +33 – 231 – 706000

Product range: all products

Manufacturers/Importers and Wholesalers/Importers

Adolphe Lafont SA
320, rue Georges Foulc
F-69665 Villefranche sur Saone
Tel. +33 – 474 – 626868
Fax. +33 – 474 – 622399

Products: ladies', men's wear, professional wear

Manufacturer and wholesaler

Catimini SA
94, rue Choletaise
F – 49 – 450 St.Macaire-en-Mauges
Tel. +33 – 241 – 714141
Fax. +33 – 241 – 714132

Product: children's wear and maternity wear

Manufacturer + 51 shops + 59 franch. Partners and 20 shops + 30 franchise partners abroad

Chipie International
11 avenue du Général Leclerc
F-11003 Carcassonne Cedex
Tel. +33 – 468 105454
Fax. +33 – 468 105455
www.chipie.tm.fr

Products: ladies', men's, children's wear

Manufacturer of sportswear, leisure wear, 35 own shops – brand 'Chipie'- high price level

Chouette Sportswear
216, rue St. Denis
F-75002 Paris
Tel. +33 – 1 – 42363950
Fax: +33 – 1 – 423 64 554

Products: ladies' wear, sportswear

Manufacturer

Class Affaire
67, rue de Sedaine
F-75011 Paris
Tel. +33 – 1 – 48064606
Fax. +33 – 1 – 48064692

Products : ladies', men's wear

Manufacturer + 37 shops

Coup de Cœur
6, rue de Bachaumont
F-75002 Paris
Tel. +33 – 1 – 44828500
Fax. +33 – 1 – 44828501

Product: ladies' wear

Manufacturer + 10 shops

Eden Park
9, av. Hoche
F-75008 Paris
Tel. +33 – 1 – 53890010
Fax. +33 – 1 – 49530697
www.eden-park.tm.fr

Product: men's wear

Manufacturer+ 7 shops, 15 franchising partners

Fusalp (Creations) SA
114 Avenue de France
F – 74000 Annecy
Tel. +33 – 450 – 238888
Fax. +33 – 450 – 238899
www.catimini.com

Manufacturer jeans- and sportswear

Buying Associations

Disco SA
18 – 20 avenue Gustave Ferrie
Zone Industrielle, BP 926
F – 49309 Cholet
Fax. +33 – 241 – 714 452
Fax: +33 – 241 – 71 43 99

Buying for app. 4.000 retailers
– app. 1.5 Billion € turn-over p.a.

Promodes
9, rue Close Famille/B.P. 19
F – 78240 Chambourcy
Tel. +33 – 139 – 793 944
Fax: +33 – 139 – 794 662

Buy.Ass. for Discounters, buying via C.I.M.

Sagam SA
4, allée Verte
F-75011 Paris
Tel. +33 – 1 – 143 57 77 48
Fax: +33 – 1 – 143 57 46 58

Product: children's wear and maternity dresses
– 226 members

Sport Europe Distribution S.E.D.
10, rue d'Arcelle
F-38600 Fontaine
Tel. +33 – 4 – 768 59276
Fax. +33 – 4 – 765 31067

Product: sportswear

VEDITEX – VEDIMO
4, Cité de Roquette
F-75011 Paris
Tel. +33 – 1 – 47006796
Fax. +33 – 1 – 47006770

Products: ladies', men's, children's wear