CBI MARKET SURVEY

The Natural Stone and Stone Products market in France

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Report summary

This CBI market survey discusses the following highlights for the natural stone market in France:
At the EU scale, France is a mid-size traditional natural stones country. It has long-established natural stones consumption patterns (as can be seen in the funeral sector), supported by an important production of Blocks and Slabs. This branch of the industry is now undergoing difficulties, but France continues to imports mainly finished products. Because of the importance of intermediate production, developing countries have a traditionally modest trading history with France. Still developing countries' presence is developing in France as the competitiveness of the finished products they are now able to deliver is increasing.

This survey provides exporters of natural stone with sector-specific market information related to gaining access to France. By focusing on a specific country, this survey provides additional information, complementary to the more general information and data provided in the CBI market survey 'The Natural Stone and Stone Products Market in the EU', which covers the EU market in general. That survey also contains an overview and explanation of the selected products dealt with, some general remarks on the statistics used, as well as information on other available documents for this sector. It can be downloaded from http://www.cbi.eu/marketinfo .

Note: In the chapters about consumption and production, we refer to 3 product groups:

- Blocks and Slabs
- Landscape Design
- Monumental and Funeral

The last group (Monumental and Funeral) is an aggregate of 2 sub product groups that will be addressed separately in the Import/ Export section: Flooring and Cladding and Funeral and other arts. For more explanation about the product group segmentation, please refer to the Appendix A of the CBI market survey 'The Natural Stone and Stone Products Market in the EU'.

1 Market description: consumption and production

Industrial demand and consumption

- In 2004, the French consumption of natural stones products represented 2,646 thousand tonnes, of which 963 thousand tonnes of finished products worth €820 millions. (reminder: no value data for Blocks and Slabs)
- The consumption per capita of 0.4 square meters is one of the highest in Europe (somewhat behind Germany and appreciably behind Italy) and has risen at a considerable rate in the last few years.[1]
- Still in comparison with the large quantity of its natural resources, France still under-uses those products in the construction sector. For example only 1% of the road pavement is made of natural stones whereas the EU average usage rate ranks between 5 and 7%.
- As a whole, France remains a small consumer of natural stones in absolute value with 3% of the total EU 15 consumption in quantity. It ranks 6th, behind Italy and Spain consuming 51% and 18% respectively of total EU consumption, and behind other middle size consuming countries: Germany (9%), Greece (8%) and the UK (4%).

[1] source: www.stonereport.com

- French consumption has undergone an increase of 3% per year over 2002-2004. This moderate growth is partly linked to the decline of the construction industry in France over those years. As of 2004, the construction business has continuously progressed, which is a source of regained dynamism for the natural stones industry. The relative slow down of end 2006 of the construction industry is not considered as a long term evolution within the sector, so that the positive forecasts for the stone industry should be confirmed in 2007.[2]
- The French consumption of natural stones can be characterised by a prevalent consumption of Blocks and Slabs (64%), followed by Monumental and Funeral (24%) and to a minor extend Landscape design (12%).
- The most consumed product group of natural stones, i.e. Blocks and Slabs, has undergone a negative growth over 2002-2004 in quantity, while Monumental and Funeral products have had a steady but moderate yearly increase of 4%. Interestingly, the Landscape Design products have grown 18% a year. The fact that this consumption has not declined with the receding construction industry indicates that this products groups remains a promising market in France.

Table 1.1 French consumption split into product categories 2002 – 2005, value in € million; volume in 1,000 tonnes

	2002		2003		2004	
Product category	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Blocks and Slabs	1,750	-	1,740	-	1,683	-
Landscape design	228	51	292	58	317	64
Monumental building stones, funeral and other art	601	708	625	740	646	756

Source: Eurostat (2006)

Market Segmentation

The French market can be divided into the following segments of users of natural stone:

- Natural stone processing industry; processes Blocks and Slabs of natural stone into finished products to supply to the market segments below. This industry mainly consists of small to medium-sized companies facing decreasing market shares because of cheap finished products from developing countries.
- Building industry; using natural stone in a wide variety of applications for interior design as well as exterior coverings. The building industry is by far the biggest consumer of natural stone (about 85% of the consumption of all natural stones in France).
- Funeral industry; is a retail sector that sells funerary art such as tombstones, gravestones and urns to the consumer. Natural stone for funeral art is very common in France but only represents about 5% of the consumption of natural stones products.
- Other retail (consumer markets): include garden centres and the interior design sector.

Consumption trends

- A study conducted by Pierre Actual in 2003 has proven that French consumers highly value natural stones. Those products are recognised first for their associated aesthetic aspects, then for their solid and durable qualities, thirdly for their authentic and environmental-friendly values and finally for their noble aspect. Those characteristics prevail over negative associations like old, rustic, expensive or cold.
- The French funeral industry represent a specific case within the EU: In France, this sector is indeed stronger than other European countries which have in the 70's and 80's heavily imported cheaper raw material from developing countries in order to process them locally. Those country, for example Germany, now directly import finished Funeral and Other Arts products. France has instead preserved its market from imports and therefore strengthened its national producers and processors. Moreover standards in terms of design (every cemetery has its exact standards, demands different dimensions and other shapes) and the fact that the industry remains very conservative (i.e. speaking French is a must to

2 Source: Insee

make business with Funeral and other arts importers) make it very difficult for non-local producers to penetrate the market.[3]
- Whereas granite in this country was previously almost exclusively a material for gravestones and civil engineering, this natural stone is now also increasingly used for building.
- UNICEM, the sector organisation for natural stones extraction and processing industry, has developed since 2004 environmental criteria for French extraction sites. This is a sign of increased awareness from consumers of the sustainability issues that are affecting the natural stones sector.[4]

Production
- In 2004, France produced 1,937 thousand tones of natural stones products, worth € 876.4 million. Blocks and Slabs account for 81% of the total French production, while finished products account for only 20% (respectively 14% for Monumental and Funeral and 5% for Landscape Design).
- France is one of the smaller natural stones producers, ranking at the 6th position in EU 25 producing 2% of the EU total. In comparison, Italy, Spain, Greece, Germany and Poland produce respectively 51%, 19%, 8%, 7% and 5% of the European natural stones products.
- Between 2002 and 2004, the French production of natural stones has stagnated (-1%), a regression that is mainly due the negative growth of the Blocks and Slabs industry (-8%) and to a minor extent to the drop in the Monumental and Funeral production (-11%). On the other hand, the production of Landscape Design products has risen to respond to a consumption increase.
- Since 2002, the French production globally suffers not only from the shortage of external market openings, but also and to an even larger extent, from the fierce competition of cheaper imported products. In order to reverse this trend, the French producing sector of natural stones will have to heavily invest, innovate and adapt. This also applies to the development of new market openings and the restructuring of a fragmented sector (most producing companies are small businesses with about 20 employees).

Table 1.2 French production split into product categories 2002 – 2004, Value in € million; volume in 1,000 tonnes

	2002		2003		2004	
Product category	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Blocks and Slabs	1,583	-	1,556	-	1,574	267*
Landscape Design	90	30	112	32	98	30
Monumental building stones, funeral and other art	300	580	270	574	265	578

Source: Eurostat (2006), *French Ministère de l'économie, des finances et de l'industrie (2006)

- Some interesting French players for exporters in developing countries are listed below. Those companies do not per se represent the biggest actors in France, but illustrate how the French market is structured and what its requirements are.
    - **Solfrini**: A wholesaler of intermediate and finished natural stones products. The site illustrate the range of the French demand is terms of construction and funeral material.
      http://www.solfrini.com/01/0101.php
    - **Rocamat:** This company ranks amongst important producers of calcareous stones worldwide and exports its production widely.
      http://www.rocamat.com/home.php
    - **Dorn kerkastel**: A company specialised on funeral art showing samples of specific French funeral art.

[3] Source: Stone report, 2005 André Grünenwald, Warehouse and Sales Manager at Mondial Granit, M+Q Antwerp
[4] Source: http://www.unicem.fr/

http://www.dorn.fr/index.html

- **Association Française d'Information Funéraire:** Independent association presenting a range of funeral art and the type of natural stones use in this industry
  http://www.afif.asso.fr/francais/conseils/conseil39.html
  http://www.afif.asso.fr/francais/conseils/conseil36.html

Opportunities and threats

\+ French consumption is progressing, even if at a moderate rate, a trend supported by a diversification of the use of natural stones products (for example in the building industry) and a confirmed taste of consumers for those materials.
\+ Landscape Design products represent a secure market for importer since its growth is not directly coupled with the conjuncture of the construction industry and since the growth rate of consumption is higher than the growth of the French production.
\- Because of its limited market size, France represent only limited market openings for importers.
\- The decrease of the consumption of Blocks and Slabs product groups should be taken into account by potential importers that are not yet diversified into the processing of natural stones.
\- Because of the strong and traditional position of the funeral industry in France, it is very hard for an exporter from other countries to penetrate this market.

Note that the above mentioned opportunities and threats do not necessarily apply to your situation. Therefore, please use the developments and trends discussed in the previous chapters to make your own analyses. Let that determine whether the above mentioned opportunities and threats apply to your situation. For an example of such an analysis, please refer to chapter 7 of the CBI market survey 'The Natural Stone and Stone Products Market in the EU'.

Useful sources

- **Syndicat National des Industries de Roches Ornementales et de Construction**

e-mail: snroc@unicem.fr
This sector organisation represents French professionals working in the natural stones extraction and processing industry.

- **Le Centre de Promotion de la Pierre et ses Métiers**

http://www.lemoisdelapierre.com/?id=accueil
This organisation coordinates the promotion and communication activities of the natural stones sector in France.

- **Pierre actual**

http://www.pierreactual.com
This site and the related professional magazine provide technical and market information on the French natural stones industry, with a specific section related to funeral stones.

2 Trade channels for market entry

For a precise description of the trade channel in the natural stones sector, please refer to chapter 3 of the CBI market survey 'The Natural Stone and Stone Products Market in the EU'.

Trade channels

The most important trade channels in France are:

- **Wholesaler/importers:** buy their natural stone directly from supplying countries. The market, shared by small to medium sized companies, that can be divided into two types; the ones catering to the building sector and the ones catering to the funeral industry.
  - **Solfrini:** A wholesaler of intermediate and finished natural stones products.
    http://www.solfrini.com/01/0101.php
  - **Costa:** This companies imports and sells intermediate and finished natural stones products. Their providers come from Europe (Italy, Spain, Greece,

Portugal) and developing countries (mainly Turkey, Brazil, India and South Africa).
http://www.marbres-costa.com/index.htm
  - **Lardit:** a company that imports Blocks and Slabs and process them into finish products.
http://www.lardit.fr/
  - **Scadaccini:** wholesaler in intermediate products
www.spadaccini.fr

- **Natural stone processing industry:** buys from wholesalers/importers or distributors or depending on the size of the company directly from supplying countries. After processing these companies mainly supply to distributors and retailers.
  - **Gauthier Charente:** processor of construction and decoration stone products
http://www.gauthier-charente.com
  - La Pierre et le Marbre:
http://www.piere-marbre.com

- **Retailers**: mainly buy from wholesaler/importers or distributors; however large retailers are also known to buy from supplying countries directly.
  - **Stone-consult:** imports and sales to the construction industry
http://www.stone-consult.com/
  - **Menarvor**: a retailer of natural stones (imported or locally produced)
http://www.menarvor.com/en/news/default.asp
  - **Sofranit**: retailer in stones for funeral art
http://www.sofranit.com/
  - **Vienne Crarelage:** a retailer in finished products for habitation
http://www.viene-carrelage.com/index.htm

- **Other**: major companies (e.g. building) or governmental organisations buying directly from supplying countries for large building projects.
  - **French Government Building Agency:**
http://www.btp.equipement.gouv.fr
  - **Bouygues construction (big French building company)**
http://www.bouygues-construction.com/en

Price structure

Throughout the various trade channels, different prices and margins apply. The different prices per trade channel in the EU are almost identical in the different EU Member States. Therefore, please refer to chapter 3 of the CBI survey 'The Natural Stone and Stone Products Market in the EU' for an overview of prices and margins.

Selecting a suitable trading partner

- Wholesalers/importers and other importing parties in France either deal directly with producers in the supplying country or import through agents from the supplying country.
- The importer/wholesalers or processing industries that establish a direct relationship with producers are often bigger importing parties that can afford the extra costs of a direct relation (travel costs, translators etc.).
- The list below indicates internet sites where exporters can search for prospects in France in order to establish a direct contact with French importers.
  - **Euro pages**
http://energy-raw-materials.europages.net/en/
This site provides a directory of EU companies that can be selected per sector and country.
More, specifically, the following link goes to the actors of the French natural stone industry.

http://energy-raw-materials.europages.net/cgi/epq.cgi?L=en&TP=natural+stones&CPS.x=1&HC=03720&HC=00000&ok.x=3&ok.y=11&CC=FRA

- **Marble in The World**
  http://www.marbleintheworld.com/
  A worldwide stone directory, with a classification of actors per type of stone, activity and location.
- **Institut supérieur de recherche et de formation aux métiers de la pierre**
  http://www.institut-de-la-pierre.com
  This site provides a list of actors of the French natural stones (go to "Personne et Entreprise" and register to access the list).
- **Annuaire de la Pierre**
  http://www.annuaire-de-la-pierre.com/
  A directory of French agents, importers, wholesalers, traders and retailer can be consulted on this site. Search for "agent d'usine, distributeur, importateur, negociant" in the category "activité".

- In numerous cases, French importing parties also use agents in the supplying country. These agents find producers and compare the quality and prices of the product keeping in mind what is requested by the importers in France. Therefore it is also sensible for producers from developing countries to get in contact with the agents in their own country in order to access the French market.

3 Trade: imports and exports

Note: Because of unavailable data, this chapter does not take account the possible impacts of re-export on the imports and exports flows to and within Europe.

Imports

Total imports

- In 2005, France imported 1,080 thousand tones of natural stones, worth € 395 million.
- Behind Italy, Germany and the UK, France is the 4th largest EU importer of natural stones representing almost 13% of all EU imports.
- Over 2002-2005, the imports of natural stones to France have undergone an average yearly increase of 6%. This is slightly below the 7.5% average increase of the 5 largest EU importers and half of the increase of the 10 largest importers. While imports of natural stones used to cover one quarter of the French demand, it now only covers up one third.
- France is only the 7th largest EU importer of natural stone originating in developing countries, which represents a share of only 18% of French imports. This partly is due to the fact that France imports mainly finished or worked products.
- However, the share of developing countries has increased by 12% over the 2002-2005 period, a trend that seems to accelerate (+17% in 2005).
- The imports from developing countries are increasing for two reasons: First they can now supply competitive and good quality finished material, the most imported product group in France. Second, the French production sector is becoming less competitive internationally.
- The most important supplying countries are based in the EU accounting for about 79% of French imports. The biggest suppliers are Spain (49%), Italy (13%) and Belgium (7%).
- Within developing countries, China (5%), India (5%), Brazil (2%), Turkey (2%) and South Africa (1%) are the most significant partners. Most significantly, China and India are competing with Italy and Spain, traditional supplier of the French industry.
- Over the period 2002-2005, this ranking of the most important French suppliers has remained similar, even if developing countries are slowly gaining ground over other partners.

Imports by product group

- As mentioned above, France mainly imports finished products (85%):
  - Flooring and Cladding: 51%, of which 80% is provided by Spain. The market share of developing countries for this product group is only 5%, quite low compared to their market share for the 3 other product groups (each about 30%).
  - Funeral and other arts: 21%. India and China account for about 74% of the exports of developing countries to France.
  - Blocks and Slabs: 15%. Here again France show a strong preference to European suppliers (about 60% of imports) versus developing countries (30%), which is the very opposite of the trends seen in Europe as a whole.
  - Landscape Design: 13%. China is one of the most important suppliers of Landscape Design, but its penetration in France is lower than in the rest of the EU market.

Table 3.1 Imports by and leading suppliers to France 2002 - 2005, share in % of value

	2002 € mln	2003 € mln	2004 € mln	2005 € mln	Leading suppliers in 2005 Share in %	Share (%)
Total natural stones	332	355	366	395		
Intra EU25	269	287	291	311	Spain (49%), Italy (13%), Belgium (7%), Germany (4%), Portugal (4%)	79
Extra EU and DC	13	13	15	14	Canada (2%), Norway (1%), Switzerland (0.2%), Israel (0.2%), USA (0.2%)	4
From DC's	50	55	60	70	China (5%), India (5%), Brazil (2%), Turkey (2%), South Africa (1%), Croatia (1%), Indonesia (0.4%), Tunisia (0.3%), Egypt (0.1%), Vietnam (0.1%)	18
Flooring and Cladding	169	181	187	201		
Intra EU25	158	168	172	182	Spain (80%), Italy (6%), Belgium (2%), Portugal (0.9%), Germany (0.6%)	91
Extra EU and DC	5	7	8	8	Canada (4%), Israel (0,2%), Switzerland (0.2%), USA (0.1%), Bulgaria (0.01%)	4
From DC's	5	6	7	10	Turkey (2%), China (0.9%), India (0.8%), Brazil (0.4%), Indonesia (0.2%), Tunisia (0.2%), Egypt (0.1%), South Africa (0.1%), Syria (0.1%), Peru (0.1%)	5
Funeral and Other arts	63	75	76	83		
Intra EU25	50	55	52	56	Italy (27%), Spain (19%), Belgium (12%), Portugal (4%), Luxembourg (1.8%)	67
Extra EU and DC	1	2	1	1	USA (0.3%), Switzerland (0.3%), Israel (0.2%), Taiwan (0.1%), Bulgaria (0.1%)	1
From DC's	12	18	23	26	India (12%), China (11%), Croatia (3%), Turkey (2%), Indonesia (1%), Tunisia (0.9%), Brazil (0.4%), Vietnam (0.2%), Egypt (0.2%), Kenya (0.1%)	32

Blocks and Slabs	73	68	65	59		
Intra EU25	44	42	41	36	Spain (20%), Italy (17%), Portugal (10%), Belgium (7%), Germany (2%)	62
Extra EU and DC	6	5	6	5	Norway (8%), Bulgaria (0.3%), Switzerland (0.1%), Hong Kong (0.01%), Romania (0.01%)	8
From DC's	24	21	18	18	Brazil (9%), India (7%), South Africa (6%), China (4%), Turkey (1%), Croatia (1%), Zimbabwe (0.4%), Egypt (0.3%), Philippines (0.1%), Morocco (0.1%)	30
Landscape Design	27	31	39	53		
Intra EU25	17	21	26	36	Germany (21%), Belgium (18%), Italy (10%), Spain (8%), Portugal (6%)	69
Extra EU and DC	0	0	0	0	USA (0.2%), Israel (0.2%), Switzerland (0.1%), Bulgaria (0.1%), U.A. Emirates (0.02%)	0
From DC's	9	10	12	16	China (16%), India (8%), Brazil (5%), Turkey (2%), Argentina (0.3%), Croatia (0.3%), Vietnam (0.2%), Chile (0.2%), Armenia (0.2%), Indonesia (0.1%)	31

Source: Eurostat (2006)
*Developing Countries

Exports

- In 2005, France exported 210 thousand tones of natural stones, worth €117 million as indicated in the table 3.3 below.

Table 3.2 French export of natural stone 2002 – 2005, Value in € million; volume in 1,000 tonnes

2002		2003		2004		2005		Value '05/'00
Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	
241	133	213	119	268	118	210	117	-12%

Source: Eurostat (2006)

- In this sense, France is a small exporter of natural stones at the EU level, representing only 3% of total EU exports. This should be put in perspective with the fact that there are in Europe only two big exporters: Italy (46%) and Spain (24%). Other countries such as Portugal (6%), Belgium (5%), Germany or Greece (both 3%) export comparable amounts as France, which is the 5th EU exporter.
- Over the years 2002-2005, French exports have been decreasing. Even if the later years have showed a small improvement, French exports still suffer from increased international competition and a struggling production sector that needs to be restructured.

Opportunities and threats

+ Imports of natural stones to France are increasing at a moderate but steady rate. If this trend is confirmed in the next future, France will probably be a safer partner than other bigger but unstable EU countries.
+ The modest share of developing countries in French imports is increasing at a higher rate than in other EU member states.
+ Like other European countries, France imports progressively more finished products from developing countries which can produce good quality at lower cost.

- Historically, developing countries are not important partners of French natural stone dealers, making the entry to this market potentially more difficult than partners from other countries.
- France imports of Blocks and Slabs from developing countries are particularly low. Most suppliers are located in other EU countries.
- Unlike other EU countries, France imports are less dynamic. Therefore it offers fewer opportunities for potential importers.
- Even strong exporters from developing countries, particularly China and India, are not performing as well as in other EU countries, stressing the difficultly to enter the French market.

Note that the above mentioned opportunities and threats do not necessarily apply to your situation. Therefore, please use the developments and trends discussed in the previous chapters to make your own analyses. Let that determine whether the above mentioned opportunities and threats apply to your situation. For an example of such an analysis, please refer to chapter 7 of the CBI market survey 'The Natural Stone and Stone Products Market in the EU'.

Useful sources

- French industrial statistic site

http://www.industrie.gouv.fr/portail/chiffres/index_som.html ➔ search: 'construction', Go to 'Fournisseurs de la construction'.

- UNICEM (Union Nationale des Industries de Carrières et Matériaux de Construction)

http://www.unicem.fr/ ➔ go to: 'Activités'

- EU Expanding Exports Helpdesk

http://export-help.cec.eu.int/ ➔ go to: trade statistics

- Eurostat – official statistical office of the EU

http://epp.eurostat.cec.eu.int ➔ go to 'themes' on the left side of the home page ➔ go to 'external trade' ➔ go to 'data – full view' ➔ go to 'external trade - detailed data

4 Prices developments

Contrary to France, the average unit price level of natural stone and natural stone products in most EU countries has been falling over the last 10 years. The price of natural stones has increased moderately in France over the same period. The price of stone construction products has increased by about 12% over this period, with stagnation between 1999 and 2001, and has since then continued to rise. The price of natural stones used for monuments and Funeral and other arts has undergone a smaller increase of 11% over the last 10 years.[5]
This is the result of intermediate or finished products suppliers of the French natural stones industry being mainly French or located in other European countries, where price deflation has been inferior compared to developing countries.

Still this trend should be put into perspective with the fact that on the shorter term natural stones prices are fluctuating depending on the type of stones products (intermediate or finished), the stones nature, the product quality, the production costs, and exchange rates. Therefore it is recommended to regularly check current prices of natural stones in France through direct contact with importers. Some indication of prices can be found on the following sites:

- http://www.marmotheque.com/indexen.html
  ➔ go to: stone shopping
- http://www.findstone.com/
  ➔ go to 'Price List´ in the `For buyers´ section
  ➔ Select the type of material, then scroll down to France.

[5] Source: Insee

- http://www.stonesource.com/
  ➔ go to 'stone selector' in the left side
  ➔ make a selection per material, price range or other criteria.

5 Market access requirements

As a manufacturer in a developing country preparing to access France, you should be aware of the market access requirements of your trading partners and the French government. Requirements are demanded through legislation and through labels, codes and management systems. These requirements are based on environmental, consumer health and safety and social concerns. You need to comply with EU legislation and have to be aware of the additional non-legislative requirements that your trading partners in the EU might request.
For information on legislative and non-legislative requirements, go to 'Search CBI database' at http://www.cbi.eu/marketinfo, select natural stone products and France in the category search, click on the search button and click on market access requirements.

Additional information on packaging can be found at the website of ITC on export packaging: http://www.intracen.org/ep/packaging/packit.htm

Information on tariffs and quota can be found at http://export-help.cec.eu.int/
Information on eco-labelling and packaging legislation is included in the CBI market information database.

6 Doing business

General information on doing business like approaching potential business partners, building up a relationship, drawing up an offer, handling the contract (methods of payment, and terms of delivery) can be found in CBI's export manuals 'Export Planner' and 'Your image builder'. Furthermore cultural awareness is a critical skill in securing success as an exporter. Information on cultural differences in the EU can be found in chapter 3 of CBI's export manual 'Exporting to the EU'. These manuals can be downloaded from http://www.cbi.eu/marketinfo - go to search publications.

Since the French natural stones sector is traditional (small-medium size company with limited international opening), one of the prerequisite to approaching potential client is the possibility to communicate in French. This will provide exporters from developing countries with an undeniable competitive advantage since communicating issues are renowned to be a crucial aspect of a successful trading relation in the natural stones industry.

Also, in a market where competition is fierce and margins are small, it is becoming increasingly important to be a reliable partner. Respecting delivery and quality conditions are crucial for your trading partner and necessary for developing a long-term business relationship.

Establishing a first contact with players of the French natural stones sector can be done through the French sector associations, trade fairs or individual approach after an internet search (French business directories or French or international specialised stones websites). One can also decide to go through an agent in his/her country, who will represent the products of his/her clientele at trade fairs.

Useful sources

- **World Roc Expo**
  Check information on http://www.pierreactual.be/evenement_fr.html
- **French funeral art trade fair**
  www.salon-funeraire.com
- **Institut supérieur de recherche et de formation aux métiers de la pierre:**
  http://www.institut-de-la-pierre.com

This site provides a list of actors of the French natural stones (go to “Personne et Entreprise” and register to access the list).

- **Annuaire de la Pierre**
  http://www.annuaire-de-la-pierre.com/
  A directory of French agents, importers, wholesalers, traders and retailer can be consulted on this site. Search for “agent d’usine, distributeur, importateur, negociant” in the category “activité”.

This survey was compiled for CBI by CREM BV.