CBI MARKET SURVEY

THE CUT FLOWERS AND FOLIAGE MARKET IN FRANCE

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Report summary
This CBI market survey discusses, amongst others, the following highlights for the market for cut flowers and foliage in France:

- France is the third largest market for cut flowers and foliage in the EU. A small increase in the consumption of cut flowers is expected for the coming years.
- France is the fourth largest EU importer of cut flowers and foliage. Imports sourced in developing countries are small and decreased between 2001 and 2005. However, many flowers originating in developing countries are imported via The Netherlands.

This survey provides exporters of cut flowers and foliage 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 market for cut flowers and foliage in the EU', which covers the EU 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.nl/marketinfo

1. Market description: consumption and production

Consumption

Total market size
France is the third largest market for cut flowers and foliage in the EU. The value of the market amounted to € 1,891 million in 2005. Between 2001 and 2003 the value of the market increased by 0.7% on average annually, then between 2003 and 2005 the market decreased by 2% on average annually. Note that according to a consumer panel of Viniflhor, the value of the market amounted to only € 963 million. Moreover, figures from Viniflhor indicated a 15% decrease between 2001 and 2003 and a 7% increase between 2003 and 2005. Volumes decreased by 23% between 2001 and 2003 and increased by 13% between 2003 and 2005. This is the opposite of what the figures of the Flower Council of Holland depict. However, both sources indicate a small decrease over the total period 2001-2005.

According to the area manager of the Flower Council of Holland, a small increase in the consumption market of cut flowers is expected for the coming 2 years, reaching a total value of 1,900 million in 2007.

France is ranked tenth for its per capita expenditure on cut flowers and foliage. The per capita consumption decreased from € 33 in 2001 to € 31 in 2005. The decrease in the share of people purchasing flowers partly explains the decrease in per capita consumption. This share decreased from 43% in 2002 to 41% in 2004. The average number of flower purchases per consumer remained approximately the same. Consumers purchased 6.3 mono-bunches and 6.3 mixed bouquets in 2004.

French consumers buy flowers to express their feelings or emotions. Flowers are also associated with decoration and moments of joy. The short lifetime is seen as a negative characteristic. French consumers of flowers are impulsive buyers. Most purchases of flowers are made spontaneously. They generally purchase flowers as a present for someone else.

Approximately 62% of flowers is bought to give away as presents, while 23% was destined for funerals and graves and 15% for own use. The major occasions for buying gift flowers are birthdays (22%), visits (18%), Christmas and New Year (9%) and congratulations (7%) (2004 figures).

Product groups
In 2004, mono-bunches accounted for 38% of all flower sales; flower arrangements accounted for 32% and mixed bouquets for 30%. Both mono-bunches and mixed bouquets have increased their market shares in recent years at the cost of compositions.

Table 1.1 Market shares of flower species in France, 2001-2004, in % of expenditure

	2001 (%)	2002 (%)	2003 (%)	2004 (%)
Rosa	40	41	43	42
Tulipa	14	14	14	14
Dianthus	13	11	10	9
Dendranthema	7	7	5	4
Gladiolus	2	3	2	2
Other	24	26	25	30
Total	100	100	100	100

Source: Oniflhor

When asked what factors influence the choice of purchasing flowers for own use, 66% of the consumers indicates that colour is important, 33% indicates the importance of the type of flower and 30% indicates the importance of the price. When buying flowers as a present, the main characteristics are colour (48%), price (28%) and type of flower (20%).

Market segmentation
- Flower purchases are quite evenly spread over the different age categories. Only people younger than 25 buy significantly less flowers.
- 43% of the French women buy flowers, versus 40% of the men.
- People in the city of Paris spend significantly more on flowers than people in other parts of France.
- An estimated € 71 million is spent on cut flowers by French companies. In 2003, 48% of French companies with more than 10 employees bought flowers and plants. This is a decrease compared to 2000 when 77% of these companies had flowers and plants.

Trends in consumption
- Total consumption decreased slightly over the period 2001-2005.
- Mother's Day is becoming increasingly important for flower sales. It accounts for 16% of sales of single flower stems.
- According to Viniflhor, flower purchases for own use contributed most to the general recovery of the market in recent years. Purchases for funerals and cemetery use remained at the same level and gift purchases decreased in relative importance.
- Rise in per capita consumption is expected for 2007. Since the French are depicted as rather chauvinistic, the area manager of the Flower Council expects that the strongest growth will be in the sales of domestically grown flowers and Rosa.

Production

Total production
France is the fifth largest producer of cut flowers and foliage in the EU. The French cut flower production decreased by 5.2% annually between 1998 and 2003 and amounted to € 205 million in 2003. The production took place on 2,678 hectares in 1999. The number of producers (both flowers and plants for decoration) is decreasing by about 5% annually. Since 1989, about 50% of the growers disappeared due to the high pressure from international

competition. The average size of companies producing flowers is 7,000 m². 34% of French producers have a non-agricultural side job as well. Those focusing exclusively on agriculture have a large differentiation within their companies. Cut flowers do not have to be their main activity. The size of cultivated area has not changed. The most important region producing cut flowers is Provence-Alpes-Cotes-d'Azur. However, land in the South of France is expensive and is therefore often more attractive for investments in the tourist business.

In France, the most popular products cultivated are Rosa, Dianthus and Gladiola. Other major cut flowers produced are Dendranthema and Tulipa.

Main players

The National Federation of Horticultural Producers (FNPHP) organises French flower and plant producers.

An up-to-date listing of French growers can be found on the website of Hortilien: http://www.hortilien.com. Go to "Annuaire" and choose "Producteurs, Fleurs Coupée", i.e. cut flowers.

Trends in production

Domestic production is facing many challenges. French growers will need to modernize their production processes to keep pace with the strongest players in the EU market.

French cut flower producers are diversifying with support from the National Office for Professionals in the sector for fruit, vegetables, wine and horticulture (Oniflhor). They are introducing new varieties which need to replace a number of other varieties and also to extend the assortment. This diversification mainly concerns varieties of Rosa. In general, French production has been increasing slightly in recent years.

The French market is characterized by many franchise companies, which also applies to the flower market. Franchise companies are taking over the flower market, thereby pushing the smaller independent retailers out of the market. Therefore, the most considerable, absolute growth can be expected in sales by franchise florists and lower priced flowers in supermarkets, as they invest in marketing campaigns and can 'bring' the product closer to the final consumer.

Opportunities and threats

France is a major EU market for cut flowers and foliage. Moreover, the specific taste and trends in French consumption offer various opportunities for producers in developing countries. Current threats are the changing preference in the institutional market from foliage plants to artificial flowers and the increased scales of plant growers, which make the competition in France harder.

Useful sources

- Office National Interprofessionnel des Fruits, Légumes et de l'Horticulture (ONIFLHOR): http://www.oniflhor.fr
- Fédération Nationale des Producteurs de l'Horticulture et des Pépinières (FNPHP): http://www.fnphp.com
- Association nationale des structures d'expérimentation et de démonstration en horticulture (ASTREDHOR): http://www.astredhor.asso.fr
- Institut National d'Horticulture (INH): http://www.inh.fr

2. Trade: imports and exports

Imports

France is the fourth largest EU importer of cut flowers and foliage, accounting for 13% of total EU imports. Imports remained stable between 2001-2005, amounting to € 421 million in 2005. The value of imports sourced in developing countries decreased by 13% annually between 2001 and 2005, amounting to € 13.2 million in 2005, signifying an import share of only 3%. This share is really small compared to other EU countries of a similar-sized import market for cut flowers and foliage. The low market share is a direct result of the strong position held by Netherlands export wholesalers in the French market. Many flowers originating in developing countries are imported via The Netherlands.

France's most important developing country suppliers are Kenya (0.8%) and Colombia (0.8%). Imports from Kenya increased annually by 6%, while imports from Colombia decreased sharply by 15% annually between 2001 and 2005.

The supply of cut flowers and foliage to France is heavily concentrated in only a handful of suppliers, of which The Netherlands is by far the most important, with an import share of 89%. Its import share remained unchanged between 2001 and 2005. The Netherlands is followed at a distance by Belgium (4%) and Italy (2%). Note that supply from The Netherlands is approximately 21 times larger than that of the second largest supplier, Belgium. However, a large part of exports from The Netherlands consists of re-exports, due to the countries' strategic position in the EU.

As can be seen in table 2.1 'other fresh cut flowers' account for nearly half of France's imports of cut flowers and foliage. The imports of the different product groups show mixed results during the period reviewed, with significant annual decreases and some small increases. The import of Dianthus and 'prepared cut flowers' decreased most, by 15% and 25% annually respectively. Most of this can be attributed to the strong losses in shares for The Netherlands and Spain in their supply of Dianthus and the strong losses in shares for The Netherlands and Belgium in their supply of prepared cut flowers. Imports of Rosa, the second largest species imported by France, increased by 4% annually.

There are three wholesale companies specialised in importing tropical cut flowers and foliage like Heliconia, Ginger, etc. located at the wholesale market in Rungis. These three wholesale companies import mainly from Cote d'Ivoire and Costa Rica. The position of Cote d'Ivoire is relatively strong in this French market segment, because there is a direct freight connection between the country and the international airport near Rungis.

Table 2.1 Imports by France and leading suppliers to France, 2001 - 2005, € million / share in % of value

Product	**2001** € mln	**2005** € mln	**Leading suppliers in 2005** share in %		**Share in France imports**
Total cut flowers and foliage	427.2	421.2	Intra-EU:	The Netherlands (89), Belgium (4), Italy (2), Spain (2).	97%
			Extra-EU excl DC:		0%
			DC*:	Kenya (1), Colombia (0.5), Ecuador (0.5).	3%
Rosa	99.4	116.1	Intra-EU:	The Netherlands (93), Belgium (2).	96%
			Extra-EU excl DC:		0%
			DC*:	Kenya (2), Ecuador (1).	4%
Dianthus	21.0	10.7	Intra-EU:	The Netherlands (62), Spain (19), Germany (3).	90%
			Extra-EU excl DC:		0%

Product	2001 € mln	2005 € mln	Leading suppliers in 2005 share in %		Share in France imports
			DC*:	Colombia (4), Morocco (4), Kenya (2).	10%
Orchids	17.8	17.9	Intra-EU: Extra-EU excl DC: DC*:	The Netherlands (94), Belgium (4). Thailand (1).	99% 0% 1%
Gladiolus	1.8	1.8	Intra-EU: Extra-EU excl DC: DC*:	The Netherlands (94), Spain (3),Belgium (2). Marocco (0.1), Colombia (0.1).	100% 0% 0.2%
Dendranthema	35.6	26.8	Intra-EU: Extra-EU excl DC: DC*:	The Netherlands (96), Spain (2),Belgium (2). Colombia (1)	99% 0% 1%
Other fresh cut flowers	205.8	229.8	Intra-EU: Extra-EU excl DC: DC*:	The Netherlands (90), Belgium (5) Italy (2). Cameroon (0.4), Costa Rica (0.4).	98% 0% 2%
Prepared cut flowers	36.0	11.2	Intra-EU: Extra-EU excl DC: DC*:	The Netherlands (64), Belgium (14), Spain (5), Italy (4). USA (0.2). Colombia (4), India (3).	89% 0.2% 10%
Foliage	9.8	6.8	Intra-EU: Extra-EU excl DC: DC*:	The Netherlands (29), Belgium (19), Spain (15), Italy (14). USA (0.4). India (6), Philippines (4),China (3).	84% 1% 16%

Source: Eurostat (2006)
*Developing Countries

Imports by product group

The picture looks a bit unstable for developing country suppliers of cut flowers and foliage to France. Imports from developing countries by France decreased considerably during the period revised, except for imports of Dendranthema. Colombia, one of the two developing country suppliers of Dendranthema, increased its exports by an impressive 23% annually. Nevertheless, the country still only accounts for 0.7% of Dendranthema supply. Developing countries used to account for a considerable part of French imports of Dianthus. However, between 2001 and 2005, imports of Dianthus from developing countries decreased by 20% annually. Rosa and 'prepared cut flowers' are probably the most interesting product groups for developing countries in terms of import share and value.

Whilst only 4% of French imports of Rosa is supplied by developing countries, the value is still considerable: € 4.5 million in 2005. Nevertheless, the import value from developing countries decreased annually by 10% between 2001 and 2005. Kenya is the largest developing country supplier of Rosa (€ 2.5 million) achieving still-increasing exports (5% annually) for the period 2001-2005. Ecuador is the second largest developing country supplier (€ 1.3 million) but imports from this country decreased sharply by 18% annually. Colombia experienced strong growth (10% annually) now accounting for 0.5% of France's imports of Rosa.

Total French imports of prepared cut flowers deceased considerably by 25% annually between 2001 and 2005. Imports from developing countries decreased less, by 14% annually. Colombia is by far the largest developing country supplier of prepared cut flowers, accounting for 5% of French imports of this product group, valued at € 491 thousand in 2005.

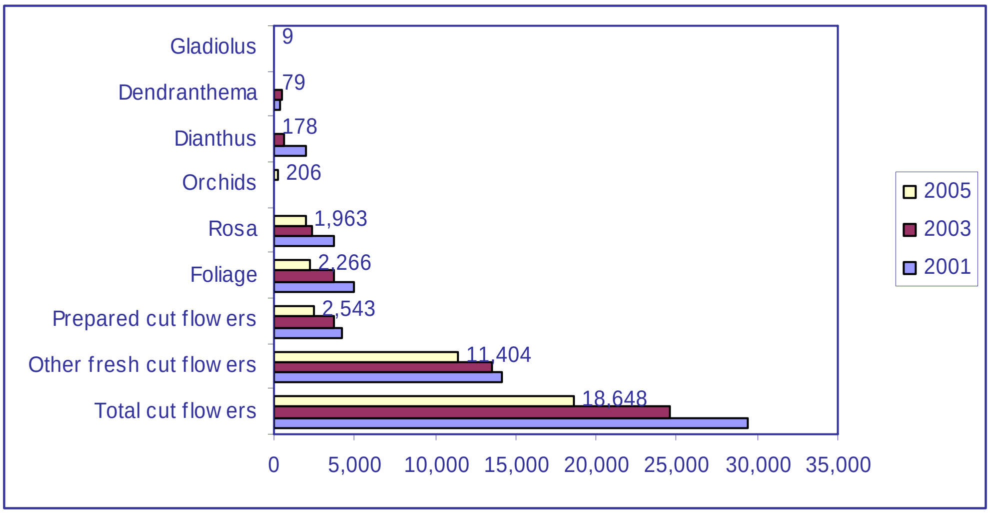
Exports

France is ranked seventh among EU exporters of cut flowers and foliage. Exports decreased considerably by 36% between 2001 and 2005, amounting to € 18.6 million in 2005, turning the country into a strong net importer of cut flowers and foliage. This large difference between import and export value can be partly explained by the large size of the domestic consumption market compared to its production.

France's top three export destinations are The Netherlands (€ 3.8 million), Italy and Switzerland (both € 3.5 million). Half of French exports is destined for these countries.

As can be seen in figure 2.1, exports of all flower species decreased between 2001 and 2005. France hardly exports Gladiolus, Dendranthema, Dianthus or Orchids. Exports are mainly composed of 'other fresh cut flowers' like summer flowers and different bulb flowers.

Figure 2.1 French exports of cut flowers and foliage, 2001-2005, in € thousands



Source: Eurostat (2006)

Opportunities and threats

It seems, based on the figures, that the French market is showing signs of saturation. Decreases were experienced for almost every product group concerned and even more for imports from developing countries.

Although France is a net importer of cut flowers and its domestic consumption market is among the largest of the EU, not many opportunities exists for developing country suppliers as they account for only a small share of French imports. Furthermore, the import value of developing countries' supplies also decreased annually by 13% between 2001 and 2005. Niche products or specialties which distinguish themselves might be interesting to offer directly to French importers. At the moment, the easiest way to supply the French market is actually by exporting to Netherlands wholesalers who in turn supply the French market.

Useful sources

- 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 - 'external trade' - 'data – full view' - 'external trade - detailed data'.

3. Trade structure

Trade channels

French distribution of cut flowers and foliage is characterised by the importance of short channels, from producer to retailer or consumer. Only a small part is handled by wholesalers, which are few in number but large in size. A considerable part of the import from developing countries is handled by them or by export wholesalers from The Netherlands.

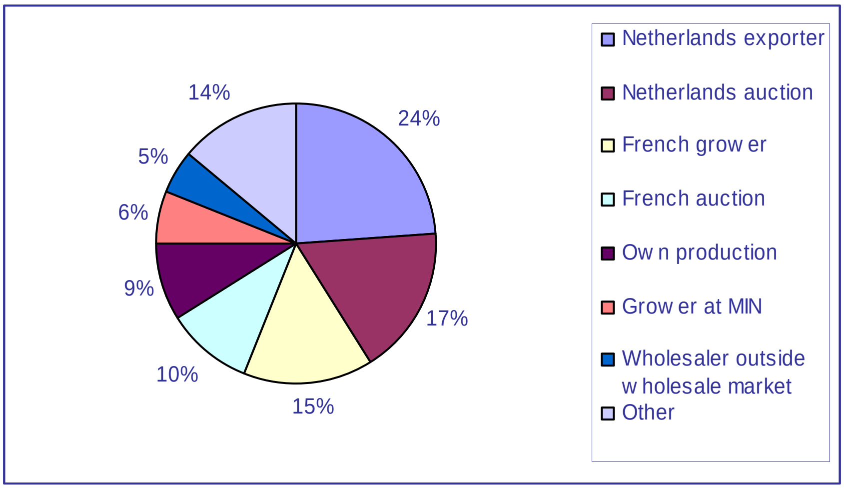
There were about 550 wholesalers in France, of which about 350 are located **outside** a wholesale market and 200 **in** a wholesale market. In France, there are two different kinds of wholesale markets: the MPI (Marché Privés Interproffessionels) and the MIN (Marchés d'Intérêts Nationaux). The first mentioned are private, while the latter are governmental markets. All producers are allowed to register for both markets.

The 4 MIN's are located near Rungis, Marseille, Lille, Lyon, Toulouse, Montpellier, Nice, Nantes, Rouen. The MPI's are MPI d'Antibes, SICA Marché aux fleurs d'Hyères, SICA Aquiflor and Marché-gare de carpentras.

The leading wholesale market is Rungis, which mainly supplies retailers in Paris and the large Ile de France region. Besides the markets supplying retailers, there are also two main dispatch markets situated in southern France (at Nice and Hyères-Ollioules); these market regional produce to both wholesalers and retailers. Some of the wholesalers at these two markets import products to complement their assortment.

Major wholesalers in France are: Flower System in Paris, Flora Partner in Bordeaux, SCA Flore Distri in Rouen, Thomas Fleur in Sorgues and Vincent Flor in Nantes.

Figure 3.1 Sources of French wholesalers



Source: Flower Council of Holland (2005)

Retail trade

There are approximately 12,000 florists in France. These florists dominate the sales to consumers. The strong position of the florists is the result of the success of specific shop formulas. These compensate for the loss of traditional florists. Franchises are becoming increasingly important. However, supermarkets and garden centres are also important retail outlets in France, where people mainly buy flowers because of the convenience. They can do the groceries and buy flowers at the same time, so do not have to visit different places.

Table 3.1 Share in retail market for flowers and plants in France, % of total sales, 2001-2005

	2001	2002	2003	2004	2005
Florist	56.0	55.7	55.2	55.9	54.4
Grower	6.3	6.3	7.2	7.3	6.5
Market	9.7	9.4	8.9	8.3	7.9
Garden centre	7.8	8.4	7.8	7.9	9.7
Supermarket	15.9	15.8	16.1	16.4	16.5
Other	4.3	4.4	4.8	4.1	5.1
Total	**100**	**100**	**100**	**100**	**100**

Source: Viniflhor (2006)

The major chains of florists are Jardin des Fleurs, Rapidflore, Monceau Fleurs and Un Été a la campagne. Together, franchises account for about 16% of retail sales.

Trends

Wholesalers are increasingly cooperating to profit from economies of scale. This leads to lower prices for buyers and better services.

Florists grow in number due to successful franchises like Jardin des Fleurs, Rapid'Flore, Monceau Fleurs and Un été a la campagne. These franchises can profit from economies of scale. They pay low prices for their products and share the costs for promotion activities. Moreover, customers recognise their formulas, which increases confidence levels.

Main players

The website of the wholesale market Rungis offers a listing of wholesale companies active on the wholesale market.

Useful sources

- Union Fleurs (International Association of Flower Wholesalers):http://www.unionfleurs.com
- International Chamber of Commerce: http://www.iccwbo.org
- Association of European Chambers of Commerce and Industry: http://www.eurochambres.be
- Oniflhor: http://www.oniflhor.fr
- L'annuaire internet des professionnels: http://www.indexa.fr/entreprises/annuaire/commerce/fleuristes
- Rungis wholesale market: http://www.rungisinternational.com

4. Prices and margins

In general, price development is in line with the rest of the Northern European markets. The Netherlands auctions set the price for most flowers sold in France. Particularly, because many of the flowers traded in France passed through the Netherlands auction system or have been supplied by Netherlands wholesalers. Refer to the VBN statistical yearbook for average prices paid for the products auctioned: http://www.vbn.nl.

Prices and margins

According to recent figures, retail prices of mono-bunches are increasing slowly. Prices of mixed bouquets fluctuate and prices of compositions have decreased since 2003.

Table 4.1 Retail prices of flowers in France, 2001-2005, €

	2001	2002	2003	2004	2005
Mono-bunch	5.3	5.8	6.1	6.0	6.2
Mixed bouquet	8.5	10.1	10.3	9.3	9.1
Composition	43.2	44.4	43.1	32.7	34.3

Source: Viniflhor (2006)

It should be noted that prices paid for flowers differ between sales channels. Highest prices are paid at florists, where people go to purchase high quality flowers from a wide assortment. Lowest prices are paid at supermarkets and markets, where people mainly purchase flowers for own use.

Table 4.2 Average prices for flowers and plants at different retail channels, 2001-2005, in €

	2001	2002	2003	2004	2005
Florist	16.0	16.6	16.5	14.9	15.0
Grower	9.7	11.7	11.3	9.7	9.2
Market	5.6	6.3	6.3	6.2	6.2
Garden centre	9.3	10.1	8.7	8.6	9.1
Supermarket	5.6	6.4	6.4	5.9	5.8

Source: Viniflhor (2006)

Useful sources

The French Ministry of Agriculture publishes prices of the French wholesale markets on its website. A few European organisations publish prices on a regular basis. ITC in Geneva collects prices at the wholesale level on EU markets and publishes a weekly bulletin. The International Association of Horticultural Producers (AIPH) publishes information on prices and trends for cut flowers and foliage in their statistical yearbook.

- French Ministry of Agriculture: http://www.snm.agriculture.gouv.fr/cgi-bin/cgiaccueil
- ITC Market News Service (MNS): http://www.intracen.org
- International Association of Horticultural Producers: http://www.aiph.org

5. Market access requirements

As an exporter 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

Legislative requirements

Adherence to national legislation in EU countries is compulsory for all products traded within the country concerned. Therefore, as an exporter in a developing country you have to comply with the legislative requirements which are applicable to your products. For information on legislation for the market for cut flowers and foliage, go to 'Search CBI database' at http://www.cbi.nl/marketinfo, select your market sector, and the EU country of your interest in the category search, click on the search button and click on legislative requirements for an overview of all documents on legislation in your country of interest.

Non-legislative requirements

Social, environmental and quality-related market requirements are of growing importance in international trade and are often requested by European buyers through labels, codes of conduct and management systems. For information on non-legislative requirements applicable to the market for cut flowers and foliage, go to 'Search CBI database' at http://www.cbi.nl/marketinfo, select your market sector and the EU country of your interest in the category search, click on the search button and click on your subject of interest under non-legislative requirements for an overview of all documents on the subject concerned in your country of interest.

Packaging, marking and labelling

In general, the requirements for packaging, marking and labelling should be determined in cooperation with the buyer or auction.

Refer to the market survey 'The cut flowers and foliage market in the EU' for more information on packaging, marking and labelling.

Tariffs and quota

Tariffs and quota applicable in France are the same as for the EU. Information regarding these market requirements can be found in the CBI market survey covering the EU market. The general VAT rate in France is 19.6% as of February 2006. However, the VAT rate generally applied to flowers is 5.5%.

6. Business practices

For general information on business practices, exporters should refer to the CBI market survey covering the EU market, CBI's Export Planner and CBI's Image Builder manual.

Selecting a suitable trading partner

Finding a trade partner in France should not deviate from the general EU method as described in the CBI market survey covering the EU market. French importers use to look for new suppliers in developing countries visiting the country of interest, through recommendations or through trade fairs. The most common ways for developing country exporters to approach French customers are through direct (e)mail, personal visits as follow up, inviting potential French customers, building a network and visiting international trade fairs.

After obtaining contacts, evaluating potential trade partners should be done according to criteria such as information quality, geographic coverage, the kind of trade relation the partner is interested in, the position of the partner and the financial status and credibility.

Coming to terms with your trade partner

As in the rest of Europe, both general and specific offers are common in France. Therefore, common practices as detailed in the CBI market survey covering the EU market apply. When establishing an overseas price for your products, factors involved are competition; costs such as production, packaging, transportation and handling, promotion and selling expenses; the demand for your product or service and the maximum price which the market is willing to pay. Conformity to market prices depends on the products novelty. How you price your product is worth a good deal of thought and effort, since it directly affects your ability to make a profit.

The most commonly used terms in the plant trade are *open account* and *payment in advance*. Selling on open account carries the greatest risk for the exporter. Sometimes, initial export shipments are partly pre-paid before the products are shipped. In the case of co-operation agreements with overseas companies, payment terms could also include periodical payments.

Export terms of sale which determine costs are covered in the price of the cargo, at what point ownership transfers to the buyer and at what point responsibility for the cargo is transferred. The most commonly used term of sale is FOB (Free on Board), Under this term, the seller quotes a price for goods which includes the cost of loading at the port of departure. The buyer arranges for transportation and insurance. CFR (Cost and Freight) and CIF (Cost, Insurance, Freight are less frequently used in terms. Special attention should also be given to contract fulfilment in reference to contingencies which might occur while the sale order is being processed, shipped etc.

Cultural differences

A profound knowledge of the French business culture is one of the main keys to a durable relationship. In spite of all modern communication tools, the personal relationship with a trading partner often decides a durable co-operation. The general business culture of France is described below:

- French are formal, polite and not too direct.
- They like shaking hands, both at the beginning and the end of a meeting.
- French companies are very hierarchical; your counterpart is probably not empowered to make any decisions.
- Instead they want to gather as much information as possible about your company and your products, so they can report back to their superiors.
- French are rather chauvinistic; they prefer you to conduct the conversation in French and that you are familiar with French culture.
- French buyers can sometimes seem arrogant and treat you as much lower in status than themselves.
- Do not expect to come to business during the first meeting; the building of a relationship between you and your French counterpart is essential before any business can be done.
- Patience is an important virtue in dealing with the French; it takes a rather long time to commence business; however, when the relationship is established they are rather loyal customers.
- Dress correctly and conservatively; no flashy and contrasting colours.
- French remain formal to their business partners; first names are not used.

Many sources on business practices and culture can be found on Internet, such as http://www.communicaid.com/france-business-culture.asp. Please keep in mind that the above concerns general remarks and therefore, in conducting business, use your intuition and an understanding attitude.

Sales promotion

Common practices of trade promotion should not differ considerably from other European countries. It is preferable that export/sales personnel of your company is capable of speaking French, as this will be highly appreciated by many French importers. In general, good care should be taken of existing contacts, by using prompt, constant and reliable communication. Letters of inquiry should always be replied to. An essential tool used in sales is a detailed and up-to-date customer database.

Visiting and participating in a trade fair can be an efficient tool for communicating with prospective customers or even trading. It can also be an important source of information on market developments, production techniques and interesting varieties.

Assistance with market entry can also be sought through local business support organisations, import promotion organisations such as CBI and branch organisations focussing on the horticultural sector.

Trade associations:

- La Fédération Nationale des Producteurs de l'Horticulture et des Pépinières: http://www.fnphp.com
- Oniflhor: http://www.oniflhor.fr
- Fédération des grossistes en fleurs et plantes (FGFP) (French wholesalers' federation): http://www.fgfp.com

Trade fairs:
- Salon du Végétal: www.salon-du-vegetal.com
- Salon International de l'Agriculture: www.salon-agriculture.com
- Florissimo 2010: http://www.dijon-congrexpo.com
- Hortiflor: http://www.hortiflor-expo.com

Trade press:
- Lien Horticole: http://www.hortilien.com
- Points de Vente: http://www.pointsdevente.fr
- Horticole Plasticulture: http://www.plasticulture.com/ingles/i_welc.html
- PHM Revue: http://www.hortilien.com/?menu=7&mode=1
- La France Agricole: http://www.lafranceagricole.fr
- Jardinèries - Vègètal: http://www.jardineries.com

This survey was compiled for CBI by ProFound – Advisers in Development and Milco Rikken of ProVerde in collaboration with Mr. Jan Lanning.