

# Handicrafts Market in France



Prepared for:



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**OBJECTIVES & METHODOLOGY**

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## OBJECTIVES

As a developed economy with immense growth prospects and the reputation for the appreciation of finer things, France is a valuable market for business in the handicrafts segment. With the aim of enhancing the market share of Indian handicrafts in the French market, the Indian embassy has requested INEA Consulting, France, to research and review the Handicrafts Market in France and identify needs, niches, trends and modalities that would enhance business prospects for Indian companies.

This proposal thus is based on a market survey conducted in the Handicrafts sector in France aiming to identify business options, demand, goals, paths and prospects for Indian companies. This report will be shared by the Indian Embassy with commercial and government bodies in India to provide a clear picture of ground realities, valuable inputs on market expectations and demand sectors, exploring the nature and complexities of the French market. This would provide inputs on the challenges to be faced by the players in the Indian handicrafts segment to enhance their market share competitive space.

## METHODOLOGY

Desk Research was mainly used keeping in mind the exploratory nature of the research

Information has been collected from

- The French, Indian and International Press
- Various relevant websites of the main players and trade associations
- Data from the Customs department
- Leading market research reports

## **EXECUTIVE SUMMARY**

The latest developments in the handicraft market in France bring new opportunities and challenges for the Indian Handicrafts industry.

There is a growing market for low-cost, high-volume, Western-designed products. Growing categories are the so called “global style” products, which combine ethnic elements with contemporary design. Consumers are avoiding cheaply designed products and looking for more unique articles.

Manufacturers are expected to offer a wide range of good quality products in the low-price segment, in order to be competitive in the market. Due to the lower incomes and decreasing purchasing power, the focus of consumers is mostly on greater value for a lesser price. However some are reluctant to compromise on quality.

The French market also has a great affinity for antiques. This attraction can be traced back to its colonial heritage. The value of the antiques market in France is estimated to be approximately € 20 million for replicas from Asian countries.

Environmental awareness is also a growing trend in France. Hence clean processes, socially-responsible concepts, and sustainability are increasingly key factors in France.

Hence, in spite of the less than favorable economic conditions, there is an opportunity for the Indian handicrafts industry to target the French market by recognizing the prevalent trends in this market and using new channels of distribution to increase the market share of Indian handicrafts in the French market.

HOME DECOR

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## CANDLES

### Market characteristics

#### Consumption

The French market for candles is valued at € 1241 million in 2010. France was one of the big markets in terms of consumption. The candle consumption in grams per capita (555 grams per person in year) in France achieves only half the EU average. The market showed signs of a slowdown in 2010 due to further decreased consumer confidence (candles are non-essential items) and the general inclination of the French towards cheaper purchase during crisis. Market stability however returned in 2011. The sales are predicted to remain stable in the coming years.

#### Production

French production of candles is valued at € 72 million in 2010. France was one of the big producers in the EU. In comparison, French production of candles was € 75 million and € 57 million in 2008 and 2007. French production decreased by over the period 2006 - 2010. Forecasts for the production of candles are for stable process in the near future.

#### Trade

Analysis of imports of Candles (€ million)

	Demand		Imports		Imports from Developing Countries		
	Value 2009	CAGR	Value 2010	CAGR	Value 2010	CAGR	Share in Total Imports
<b>France</b>	124	2.0%	88	5.4%	23	4.3%	26%

#### CAGR: Compound Annual Growth Rate

French imports of candles are valued at € 88 million in 2010, making France a big EU importer of candles. French imports increased by 5.4% per annum in the period 2006 - 2010 while imports from developing countries increased by 4.3% per year for the same period. The share of total imports from developing countries into France in 2010 was 26.4%, compared to 27.6% in 2006. The main suppliers from developing countries to France in 2010 were:

- China (16.9%)
- Tunisia (3%)
- Dominican Republic (2%)
- Vietnam (1.3%)
- Philippines (1.1%)

## **Trends**

The following trends should be considered:

- Retail chains are becoming more 'lifestyle', offering broad, cross-category ranges instead of just focusing on furniture or garden, for instance. This stems from the fact that French consumers are finding one-stop-shopping convenient and fun. Home brands such as IKEA, Fly and Alinea are increasing their market share in the home decoration sector.
- Wellness is an important factor in French society, and candles providing that benefit (from relaxation to aromatherapy) will attract the French consumer. A good combination between burning quality, safety and the absence of pollutants is always appreciated by the consumers.
- Candles increasingly correspond to market trends in Home Decor, related to shape, color and even scent. This is also a very strong trend in the European market generally.
- French consumers are tea drinkers, and tea lights will remain fashionable for this market.
- The French have a 'cafe culture' and spend time enjoying dinner and lunches with friends. Candles will continue to be important on such occasions in France.
- Outdoor activities are strong in France, especially as eating outside is a tradition. This promotes sales of outdoor and garden candles.

## **Price and price development**

The prices of candles are expected to rise in the medium and long term period, due to the expected rise in prices of paraffin wax and the shifting to alternative base materials such as vegetable oils and fats.

## **Niches**

- The French market for Home Decor is exceptionally segmented, ranging from the extreme lower-end of functional basics offered by hypermarkets, to specialized and niche gift shops in urban centers.
- Environmental awareness is also growing in France, although we tend to see it marketed less than in other West- European countries. However, clean processes, socially- responsible concepts and well-being are also increasingly key factors in France.

## Promising products

- The latest market developments on the home decoration market bring new opportunities and challenges for exporters from developing countries: especially mid-market consumers are looking for a combination of good quality, unique design and reasonable price.
- Scented and unscented tea lights, dinner candles, pillar candles, filled container candles, ball candles are among the best selling articles in the candles sector according the European Candle Association.
- A growing category in the home decoration market is products which combine ethnic elements and contemporary design. Consumers are avoiding cheaply designed products and looking for more unique articles.

## Market approach

### Suitable trade channels

The French market can be entered in several ways. The most useful trade channels are importers, wholesalers, buying and selling agents and retail organizations (department stores, chains and hypermarkets).

### Important players

Below are listed some interesting players on the French market for candles.

- **IKEA** - [www.ikea.com](http://www.ikea.com)  
IKEA sells home furnishings. It offers furniture, accessories, and bathrooms and kitchen products through retail stores.  
Contact Details for IKEA in India:  
*IKEA Trading (India) Pvt. Ltd.,  
1st and 2nd floor, Radisson Commercial Plaza, NH8, Mahipalpur, Delhi  
PH: 011-26779381*
- **Conforama** - [www.conforama.fr](http://www.conforama.fr)  
Conforama provides furniture, electric household appliance, and computer retailing services. It offers traditional and contemporary furniture, decorative items, home appliances, and consumer electronics; and textiles and general merchandise. They have stores in France and Europe. The company was founded in 1967 and is based in Lognes, France. Conforama Holding SA operates as a subsidiary of PPR SA.
- **Habitat** : [www.habitat.fr](http://www.habitat.fr)
- **Casa** : [www.casashops.com](http://www.casashops.com)
- **Maison du monde** : [www.maisondumonde.com](http://www.maisondumonde.com)  
Major and specialized retailers in worldwide home decoration (Mainly African and Asian handicrafts)

- Madura : [ww.madura.com](http://ww.madura.com)
  
- Printemps - [departmentstoreparis.printemps.com](http://departmentstoreparis.printemps.com)  
 Printemps Department Store Paris operates a beauty department store in Paris. It offers women's fashions products, luxury products, such as jewelries, watches, accessories, house ware, and decorative items; and beauty care products, such as make-up, face, and body care, and beauty accessories. In addition, it offers home decoration products, including crystal, porcelain, silverware, and linens; and men's fashion products, such as shirts, ties, suits, and accessories.  
 The company was founded in 1865 and is based in Paris, France.
  
- Devineau - [www.devineau.com](http://www.devineau.com)  
 Manufacturer
  
- Solidar'Monde - [www.solidarmonde.fr](http://www.solidarmonde.fr)  
 Solidar'Monde is a central organization for import and distribution created in 1984 by the Artisans du Monde. It coordinates the importation and distribution of products.
  
- Monoprix - [www.monoprix.fr](http://www.monoprix.fr)  
 Monoprix SA operates as a hypermarket. Monoprix SA operates as a subsidiary of Casino Guichard Perrachon & Cie SA. Based in Boulogne Billancourt.
  
- Carrefour - [www.carrefour.com](http://www.carrefour.com)  
 Carrefour is primarily engaged in retail distribution. It operates a network of hypermarkets, supermarkets, maxi discount stores, convenience stores and cash-and-carry outlets and offers e-commerce services.  
Contact Details for Carrefour in India:  
*Carrefour Head Office,  
 2nd floor, Park Centra, Sector-30, Village Silokhra, Gurgaon - 121001  
 PH: 0124-4752000  
 contact\_india@carrefour.com*
  
- Auchan - [www.groupe-auchan.com](http://www.groupe-auchan.com)  
 Operates hypermarkets and supermarkets that provide a range of products, such as fresh produce, beauty and baby products, and wines; and is involved in developing, marketing, operating, and managing real estate properties, primarily shopping centers. Groupe Auchan SA was founded in 1961 and is based in Croix, France.  
Contact Details for Auchan in India:  
*Auchan New Delhi Liaison Office,  
 101 F-L, 1st Floor, Solitaire Plaza, M.G Road, Gurgaon - 122002  
 PH: 0124-4775300*

### Useful information for finding prospects

#### *Trade associations:*

- European Candle Association - [www.eca-candles.com](http://www.eca-candles.com)
  
- Union of Houseware manufacturers - [www.unitam.fr](http://www.unitam.fr)

- Aid to Artisans - [www.aidtoartisans.org](http://www.aidtoartisans.org)  
International Non-profit Organization for the craft sector
- EFTA - [www.european-fair-trade-association.org](http://www.european-fair-trade-association.org)  
European Fair Trade Organization

*Trade fairs:*

- Maison et Objet - [www.maison-objet.com](http://www.maison-objet.com)  
International fair for home decoration, giftware and tableware, hosted in Paris.
- Amenago - [www.amenago.com](http://www.amenago.com)  
International fair for home furnishing and decoration, hosted in Lille.

*Trade press (More than 60 magazines dedicated to interior decoration and more than 30 Magazines dedicated to gardening )*

- Art & Decoration - [www.art-decoration.fr](http://www.art-decoration.fr)  
Content: decoration, hobby and art  
Publication: monthly
- Cuisines & Bains - [www.cuisinebain.com](http://www.cuisinebain.com)  
Content: kitchen and bathing  
Publication: monthly
- Elle Decoration France - [www.elle.fr/elle/deco](http://www.elle.fr/elle/deco)  
Content: fashion, beauty, interior decoration, home  
Publication: monthly

TV Broadcast (10 to 15 TV broadcast dedicated interior decoration)

- “D&CO” and “Ma Maison est la plus originale “ on M6
- “Côté Maison” and on France 3
- “Question maison” on France 5
- “Teva deco”
- Broadcast with a dedicated section to home decoration  
( eg : “100 % mag” on M6 )

## **WICKERWORK**

### **Market characteristics**

#### **Consumption**

France is one of the biggest markets for wickerwork in the EU. The wickerwork sub-sector is highly dependent on the demographic profile of the population. Ageing of the population correlates with the home decoration sector, including the wickerwork sector, in the sense that it will eventually result in many one-person households in the coming decades. This will be the case in most Western European countries, e.g. by 2050, in France, more than one third of the population will be over 60.

#### **Trade**

France still remains one of the largest importers within the European Union with a value of € 55 million in 2010. The value of imports of wickerwork by the European Union in 2010 was € 472 million.

## CERAMIC HOME DECORATION & ACCESSORIES

### Market characteristics

#### Consumption

In France, apparent consumption in 2010 amounted to approximately € 158 million. French consumption of ceramic home decorations and accessories had increased by 16% on average, annually in the preceding four years.

This is a sign of the increased popularity of ceramic products in France. Ceramic products were the product category that showed the highest growth rate in consumption of all home decoration product categories in France in this period.

Despite this growth in the sales of ceramic products, French consumers stay cautious in these times of economic turmoil and would rather wait until their purchasing power really grows before spending more on home decorations and accessories. As a result the expectations are that there will be marginal growth in the ceramic home decoration and accessories market over the next year.

When France has recovered from the recession, expenditure on ceramic home decoration and accessories is expected to rise again. For now the French will focus on ceramic products that offer a good price-quality ratio. Furthermore, the French market for home decorations and accessories is largely dominated by French 'home' brands, thus levels of expectation in this sense are high on new entrants into the market.

#### Trends

In France, the ageing trend is continuing to affect developments in the market. Not only are older generations more willing to have fine ceramic home decorations and accessories in terms of lifestyle, but one in four people lives in an independent home and 21% own a second house. Hence this group has the time to entertain and the space to store expensive (sets of) statuettes and china. Furthermore, French people are looking for home decorations and accessories with good price-quality ratios.

### Market approach

#### Useful information for finding prospects

##### *Trade Associations:*

- Confédération des Industries Céramiques de France (Confederation of Ceramic Industries of France), (E-mail: [ceramique@wanadoo.fr](mailto:ceramique@wanadoo.fr))

##### *Trade Organizations:*

- [www.solidarmonde.fr/](http://www.solidarmonde.fr/)
- [www.altermundi.com/](http://www.altermundi.com/)
- [www.ccequitable.com/](http://www.ccequitable.com/)

## METAL DECORATIONS

### Market characteristics

#### Consumption

The French market for metal decorations was valued at € 86 million in 2010. France is a big market in terms of consumption. The market saw growth in the up to the beginning of the financial crisis. However, since the beginning of the financial crisis, the French have started postponing most of their non-essential purchases and the growth of the market has reversed.

#### Production

French production of metal decorations represented € 56 million in 2010. France was a major EU producer. In comparison, French production of metal decorations was € 31 million and € 83 million in 2008 and 2009.

#### Trade

French imports of metal decorations were valued at € 56 million in 2010. France was a major EU importer of metal decorations. The share of developing countries in total imports into France in 2010 was 52.5%.

The main suppliers among the developing countries to France in 2010 were:

- China (27.8%)
- India (5.3%)
- Vietnam (2.7%)
- Thailand (1.3%)
- Indonesia (1.1%)

India saw its share fall by 1.1% in total for the period 2006 - 2010. China was the biggest winner amongst the developing countries in terms of share.

#### Trends

The following country-specific trends should be considered:

- There is a development towards verticalisation (retailers also buying directly from exporters from developing countries) and horizontalisation - retailers and brands from other sectors such as fashion, furniture or stationery becoming involved. This is in line with the consumer trend of convenience - consumers are buying a style, do not follow every trend change but want to see the essence in a design.

- Gold and the flashy, materialistic attitude it represents is being replaced by more humble materials such as brass and copper, and we see fresh new innovations lighting, tableware and decorative objects in metalware.
- France is virtually the inventor of the typical 'country' or 'cottage' style, with its nostalgic, vintage and worn look. 'Black' and rusted metalware are an integral part of this mid-market style.
- Wellness is an important factor in French society, and metal decorations providing that benefit will attract the French consumer. A good combination between burning quality, safety and the absence of pollutants is appreciated by the consumers.
- Outdoor activities are strong in France, especially eating outside is a tradition. This promotes metal outdoor and garden accessories.

## Market approach

### Suitable trade channels

The French market can be entered in several ways. The most useful trade channels for you as an exporter in a developing country are importers, wholesalers, buying and selling agents and retail organizations (department stores, chains and hypermarkets).

### Important players

Below are listed some interesting players on the French market for metal decorations.

- **IKEA** - [www.ikea.com/fr/fr](http://www.ikea.com/fr/fr)  
IKEA sells home furnishings. It offers furniture, accessories, and bathrooms and kitchen products through retail stores.  
Contact Details for IKEA in India:  
*IKEA Trading (India) Pvt. Ltd.,  
1st and 2nd floor, Radisson Commercial Plaza, NH8, Mahipalpur, Delhi  
PH: 011-26779381*
- **Conforama** - [www.conforama.fr](http://www.conforama.fr)  
Conforama provides furniture, electric household appliance, and computer retailing services. It offers traditional and contemporary furniture, decorative items, home appliances, and consumer electronics; and textiles and general merchandise. They have stores in France and Europe. The company was founded in 1967 and is based in Lognes, France. Conforama Holding SA operates as a subsidiary of PPR SA.
- **Printemps** - [departmentstoreparis.printemps.com](http://departmentstoreparis.printemps.com)  
Printemps Department Store Paris operates a beauty department store in Paris. It offers women's fashions products, luxury products, such as jewelries, watches, accessories, house ware, and decorative items; and beauty care products, such as make-up, face, and body care, and beauty accessories. In addition, it offers home decoration products, including crystal, porcelain, silverware, and linens; and men's fashion products, such as shirts, ties, suits, and accessories.  
The company was founded in 1865 and is based in Paris, France.
- **Monoprix** - [www.monoprix.fr](http://www.monoprix.fr)

Monoprix SA operates as a hypermarket. Monoprix SA operates as a subsidiary of Casino Guichard Perrachon & Cie SA. Based in Boulogne Billancourt.

- Carrefour- [www.carrefour.com](http://www.carrefour.com)

Carrefour is primarily engaged in retail distribution. It operates a network of hypermarkets, supermarkets, maxi discount stores, convenience stores and cash-and-carry outlets and offers e-commerce services.

Contact Details for Carrefour in India:

*Carrefour Head Office,*

*2nd floor, Park Centra, Sector-30, Village Silokhra, Gurgaon - 121001*

*PH: 0124-4752000*

*contact\_india@carrefour.com*

- Solidar'Monde - [www.solidarmonde.fr](http://www.solidarmonde.fr)

Solidar'Monde is a central organization for import and distribution created in 1984 by the Artisans du Monde. It coordinates the importation and distribution of products.

- Castorama France S.A.S. - [www.castorama.fr](http://www.castorama.fr)

Castorama retails do-it-yourself (DIY) products. The company was founded in 1969 and is based in Templemars, France. Castorama France S.A.S. operates as a subsidiary of Castorama Holding.

### **Finding a suitable trading partner**

There are a number of ways to look for a suitable trading partner in France. You can start by contacting the main trade association(s) and arranging visits and participation at trade fairs, where you can meet your potential partners. There are also a number of general or specific information portals that can be useful. You can also look for information at:

Solidar'Monde - [www.solidarmonde.fr](http://www.solidarmonde.fr)- information on the Fair-Trade handicraft segment in France.

### **Useful information for finding prospects**

*Trade associations:*

- Union of Houseware manufacturers - [www.unitam.fr](http://www.unitam.fr)
- Aid to Artisans - [www.aidtoartisans.org](http://www.aidtoartisans.org)  
International Nonprofit Organization for the craft sector
- EFTA - [www.european-fair-trade-association.org](http://www.european-fair-trade-association.org)  
European Fair Trade Organization

*Trade fairs:*

- Maison et Objet - [www.maison-objet.com](http://www.maison-objet.com)
- Amenago - [www.amenago.com](http://www.amenago.com)

*Trade press:*

- Art & Decoration - [www.art-decoration.fr](http://www.art-decoration.fr)  
Content: decoration, hobby and art  
Publication: monthly
- Cuisines & Bains - [www.cuisinebain.com](http://www.cuisinebain.com)  
Content: kitchen and bathing  
Publication: monthly
- Elle Decoration France - [www.elle.fr/elle/deco](http://www.elle.fr/elle/deco)  
Content: fashion, beauty, interior decoration, home  
Publication: monthly

**HOME FURNITURE**

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# THE DINING AND LIVING ROOM FURNITURE MARKET

## Market characteristics

### Consumption

The French market for dining and living room furniture was valued at approximately € 473 million. France is one of the biggest markets in terms of consumption.

### Production

The French production of dining and living room furniture in 2008 was valued at € 353 million. France was one of the biggest EU producers.

### Trade

The French imports of dining and living room furniture were valued at approximately € 536 million in 2010. The share of imports from the developing countries out of total imports in France in 2010 was approximately 24%. The main suppliers to France from the developing countries in 2009 were:

1. China (9.8%)
2. Indonesia (3.4%)
3. Brazil (3.3%)
4. Vietnam (1.9%)
5. Belarus (1.7%)

### Trends

There are a number of manufacturers that produce a wide range of products, but increasingly manufacturers are specializing in particular market sectors or styles.

France is an interesting market for exporters from developing countries. Traditionally France has had a strong domestic furniture industry, but despite its size this has suffered recently with increasing lower priced imports. However, this is a mature market and sophisticated consumers are looking for interesting imported products.

## Price and price development

Furniture prices in France were below the EU average. In terms of furniture prices, French price levels were similar to those in Denmark and Cyprus. Within each country there are wide variations between prices in different market segments, as well as differences between the same retailers in different countries. The leading retailer IKEA is represented in many EU countries.

This dining and living room furniture example illustrates on the one hand how prices converge in some parts of the Euro zone while there are greater price differences outside this area. Part of the reason could also be different costs of supply. Using IKEA's HEMNES coffee table (dining and living room furniture) the following prices were found around the EU for the same product:

- In the Euro zone, The Netherlands €119; Germany €119; France €119; Spain €119; Portugal €120; Austria €119; Slovakia €119; Belgium €119; Italy €119; Finland €119; Greece and Cyprus (NF).
- Outside the Euro zone, Poland 399.99 PLN (€96); United Kingdom £109 (€132); Hungary 34,990 Ft (€ 123); Czech Republic 2 990 CzK (€ 115); Denmark 799 Dkk (€ 107); Romania (NF); Sweden 1 295 Kr (€ 134). [Exchange rates at 9th June 2010]

## Market Approach

### Suitable trade channels

Furniture distribution in France is dominated by specialists. It is characterized by concentration in large furniture chain stores and household goods stores, which sell furniture next to audio equipment, household equipment and electronics. Within the furniture chains, the 'jeune habitat' with large stores in the out of town shopping centers is rapidly increasing. This trend towards fewer but bigger outlets has an important impact on how exporters from developing countries can access the French furniture market.

There are many furniture agents and distributors in France but their influence is reducing as more retailers buy direct from manufacturers. Some importers specialize in a particular type of furniture, whereas the general importers suffer from growing competition from large retailers.

But still, importers, wholesalers and agents remain the most interesting trade channels for exporters from developing countries. Some of the agents and importers may work on a regional basis.

Furniture agents can be found at:

Federation of Agents - [www.comagent.com](http://www.comagent.com) or from the site [www.netopportunity.com](http://www.netopportunity.com).

# THE WOODEN KITCHEN FURNITURE MARKET

## Market characteristics

### Consumption

The French market for kitchen furniture was valued at € 1.4 billion. France was one of the biggest markets in terms of consumption.

### Production

The French production of kitchen tables, chairs and cabinets was valued at € 24 million. France was one of the mid-sized EU producers.

### Trade

French imports of kitchen tables, chairs and cabinets were valued at € 40 million in 2010. The share of imports from developing countries out of total imports into France in 2009 was 13.4%. The main suppliers from developing countries to France in 2009 were:

- China (6.4%)
- Indonesia (1.8%)
- Brazil (1.5%)
- Tunisia (0.8%)
- Croatia (0.7%)

### Trends

There are a number of manufacturers that produce a wide range of products, but increasingly manufacturers are specializing in particular market sectors or styles. Semi-finished parts are now being imported from Italy, China and Brazil. Component factories are in place but this is less important in France than in other countries.

France is an interesting market for exporters from developing countries. Traditionally France has had a strong domestic furniture industry, but despite its size this has suffered recently with increasing lower priced imports. However, this is a mature market and sophisticated consumers are looking for interesting imported products.

### Price and price development

Furniture prices in France were below the EU average. In terms of furniture prices, French price level was similar to those in Denmark and Cyprus. Within each country there are wide variations between prices in

different market segments, as well as differences between the same retailers in different countries. The leading retailer, **IKEA**, is present in many EU countries.

The following kitchen furniture example illustrates the differences within and outside the Euro zone. Part of the reason could also be different costs of supply. Using **IKEA's** **UTBY** kitchen island (kitchen furniture) the following prices were found around the EU for the same product:

- In the Euro zone, the Netherlands € 163; Germany € 209; France € 230; Spain € 240; Portugal € 231; Austria € 199; Slovakia € 204; Belgium € 200; Italy € 205; Finland € 215; Greece and Cyprus (NF).
- Outside the Euro zone, Poland 729.99 PLN (€ 176); the United Kingdom £ 163 (€ 197); Hungary 49,990 Ft (€ 176); the Czech Republic 4 990 CzK (€ 192); Denmark 1 499 Dkk (€ 202); Romania (NF); Sweden 2 170 Kr (€ 225). ). [Exchange rates at 9th June 2010]

## Market Approach

### Suitable trade channels

Furniture distribution in France is dominated by specialists. It is characterized by concentration in large furniture chain stores and household goods stores, which sell furniture next to audio equipment, household equipment and electronics. Within the furniture chains, the 'jeune habitat' with large stores in the out of town shopping centers is rapidly increasing. This trend towards fewer but bigger outlets has an important impact on how exporters from developing countries can access the French furniture market. There are many furniture agents and distributors in France but their influence is reducing as more retailers buy direct from manufacturers. Some importers specialize in a particular type of furniture, whereas other general importers suffer from growing competition from large retailers. But still, importers, wholesalers and agents remain the most interesting trade channels for exporters from developing countries. Some of the agents and importers may work on a regional basis.

Furniture agents can be found at the Federation of Agents - <http://www.comagent.com> - or from the site <http://www.net-opportunity.com>.

### Important wholesalers and importers

- Cap Meubles - [www.cap-meubles.com](http://www.cap-meubles.com) - deals with a wide range of furniture such as beds, tables, sofas, chairs and kitchen furniture. Its furniture is both contemporary and rustic style.
- Planete Cocoon - [www.planete-cocoon.com](http://www.planete-cocoon.com) - located in Saint Marcel, deals with objects from around the world. It offers modern teak furniture or wrought iron furniture. It has an online shop.

**Buying groups** are important in the furniture sector. Maxiam - [www.maxiam.fr](http://www.maxiam.fr) - is the largest group with 388 outlets, including Les Authentiques, Maxiam, Ambia, Instal, Les Docks du Meuble and Maxiliterie.

The Union Commerciale pour L'Equipeement Mobilier (UCEM) with 211 outlets includes Monsieur Meuble - [www.monsieur-meuble.com](http://www.monsieur-meuble.com) - and Mobiclub - [www.mobiclub.tm.fr](http://www.mobiclub.tm.fr).

Other buying groups were Promotion Européenne Du Meuble - [www.groupe-pem.com](http://www.groupe-pem.com), Mobilier de France - [www.mobilierdefrance.com](http://www.mobilierdefrance.com), Meublena - [www.meublena.fr](http://www.meublena.fr) - are important specialists, Alinéa - [www.alinea.fr](http://www.alinea.fr), Habitat - [www.habitat.net](http://www.habitat.net). The Spanish group KA International - [www.kainternational.com](http://www.kainternational.com) - has 33 outlets.

In the **specialist** segment, IKEA - [www.ikea.com/fr](http://www.ikea.com/fr), Conforama - [www.conforama.fr](http://www.conforama.fr) and Mobilier Européen who own three specialist facias totaling 239 outlets, including Fly - [www.fly.fr](http://www.fly.fr), Atlas - [www.meublesatlas.com](http://www.meublesatlas.com) - and Crozatier - [www.crozatier.com](http://www.crozatier.com) - are the next largest retailers in this category and are represented in almost all out-of-town shopping centers in France.

### **Developing distribution channels**

Mail order is reducing, partly due to a general increase in Internet shopping. Many specialists now also sell online. There is a trend to consumers visiting stores, and then making the actual purchase online, sometimes at the site of the retailer they visited, sometimes not.

In the non-specialist sector, the main players are La Redoute - [www.laredoute.fr](http://www.laredoute.fr), Trois Suisses - [www.3suisses.fr](http://www.3suisses.fr) and Camif - [www.camif.fr](http://www.camif.fr).

More information on distribution channels in France can be found at the sites of the Institute of Furniture Promotion - [www.ipea.fr](http://www.ipea.fr) - and at the French Furniture Retailing Federation - [www.fnaem.fr](http://www.fnaem.fr).

### **Finding a suitable trading partner**

There are a number of ways to look for a suitable trading partner in France. The first place to look would be to contact the main trade association(s), followed by trade fairs, which tend to feature a list of exhibitors, many of whom may be potential partners. In addition to these sources, there are often a number of general or specific information portals that will be useful. The following organizations may be worth looking at:

- The French Furniture portal [www.mobilier.com](http://www.mobilier.com) or [www.ameublement.com](http://www.ameublement.com).
- The French Chamber of Commerce - [www.cci.fr](http://www.cci.fr) - is a good source of general advice.

### **Useful information for finding prospects**

#### *Trade Magazines*

Advertising and publicity in trade magazines can sometimes be an effective means of reaching a small target group. The main furniture trade publications are:

- Le Courier du Meuble et de L'Habitat - [courrierdumeuble@hotmail.com](mailto:courrierdumeuble@hotmail.com) - is the main trade publication for the furniture industry. It is published by Editions du Tigre, which also produces an annual Furniture Review.
- France Ameublement - [www.franceameublement.fr](http://www.franceameublement.fr) - is an annual directory for the furniture industry.

- Home Magazine - [www.homemagazine.fr](http://www.homemagazine.fr).
- Points de Vente is a general retail magazine - [www.pointsdevente.fr](http://www.pointsdevente.fr).

#### *Trade fairs*

- Meuble Paris - [www.meuble-paris.net](http://www.meuble-paris.net)  
The main trade fair for the furniture industry in France takes place in January. Maison & Objet takes place each September.
- Journées d'Octobre - [www.parcepo.fr](http://www.parcepo.fr)  
In Mulhouse
- The Home Furnishing Show - [www.toulouseexpo.com](http://www.toulouseexpo.com)  
This is held in Toulouse in September.
- The Paris Fair - [www.foiredeparis.fr](http://www.foiredeparis.fr)  
Held each May, and organized by [www.comexposium.com](http://www.comexposium.com).

#### *Trade Associations*

- The National Union of Furniture Industries - [www.unifa.org](http://www.unifa.org)
- The Furniture Retailing Federation - [www.fnaem.fr](http://www.fnaem.fr)
- The Institute of Furniture Promotion - [www.ipea.fr](http://www.ipea.fr)
- The Wood and Furniture Technical Centre - [www.ctba.fr](http://www.ctba.fr)
- French Furniture Exporters - [www.thefrenchfurniture.com](http://www.thefrenchfurniture.com)
- VIA - [www.via.fr](http://www.via.fr)  
Promotes French design and creativity as it applies to contemporary living, including furniture.

HOME LIVING AND KITCHEN

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## CERAMIC TABLEWARE AND KITCHENWARE

### Market characteristics

#### Consumption

The French market for ceramic tableware and kitchenware was valued at € 284 million in 2010. France was one of the big markets in terms of consumption. The total kitchenware and tableware market was estimated to be worth € 1.2 - 1.3 billion in 2010.

#### Production

French production of ceramic tableware and kitchenware was valued at € 172 million in 2010. France was one of the largest producers in the EU. In comparison, French production of ceramic tableware and kitchenware was € 174 million and € 182 million in 2009 and 2008.

#### Trade

French imports of ceramic tableware and kitchenware were valued at € 123 million in 2010. France was a big EU importer of ceramic tableware and kitchenware. French imports decreased by 5.1% per annum in the period 2006 - 2010. French imports from developing countries decreased by 4.1% per year for the same period. The share of imports from developing countries in total imports in France in 2009 was 39%, compared to 37.4% in 2005. The main suppliers from developing countries to France in 2009 were:

- China (31.6%)
- Tunisia (2.9%)
- Turkey (1.1%)
- Bangladesh (1%)
- Egypt (0.9%)

Malaysia saw its share decrease by 1.3% in total for the period 2005 - 2009. Thailand's and Turkey's imports also saw decreases of 0.7% and 0.5% in total for the same period, respectively. China was the biggest winner in terms of share; it increased its share of total French imports by almost 5.3%.

#### Trends

The following trends should be considered:

- New housing brands such as **IKEA**, Fly and Alinea are increasing their market shares in the home decoration sector and extending their ranges of ceramic tableware and kitchenware. In the ceramic tableware and kitchenware product group, there is a trend for floral designs in the coming period, with an emphasis on the nature of flowers and minimal shapes in lush colors. It is a way to humanize the clinical urban environment.
- The French have a 'table culture' and spend time enjoying dinner and lunches with friends, so ceramic tableware and kitchenware will continue to be important in France.

- The French understanding of houseware has changed and ceramic tableware and kitchenware is no longer bought as an investment, but more impulsively. The French are more willing to change them frequently to keep up with the latest fashion trends.
- Sales of all tableware products declined. Moreover, under pressure from cheaper imports and strong market competition, ceramic tableware and kitchenware product prices have dropped.
- Traditionally, sales of ceramic tableware are mostly driven by the numbers of new couples and weddings. There is a trend of decline in new families in France which inevitably affects the purchases of tableware and kitchenware negatively.
- Centralized retail chains and franchised stores are increasing their houseware assortment range as the French are becoming more inclined to buy from them.

### **Niches**

- The French market is exceptionally segmented, ranging from the extreme lower-end of functional basics offered by hypermarkets to specialized and niche gift shops in urban centers. The market for Ceramic tableware and kitchenware being so prominent in France is an inviting market, for both mass producers and niche players.
- Environmental awareness is also growing in France, although we tend to see it emphasized less than in other West-European countries. However, clean processes, socially-responsible concepts, and sustainability are increasingly key factors in France.

### **Promising products**

- A strong trend is the expressive trend for combining ethnic elements with contemporary design (e.g. West-African influences). Hand-made looks fit in here, emphasized by unusual, sculptured shapes. Consumers buying expressive articles tend to avoid the cheaply designed products.
- The latest developments on the tableware and kitchenware market bring new opportunities and challenges for exporters from the developing countries: there is a growing market for low-cost, high-volume, Western-designed products. Manufacturers are expected to offer a wide range of good quality products in the low price segment in order to be competitive. Due to lower incomes and decreased purchasing power, consumers are mostly looking for cheaper products, but some of them are reluctant to compromise on quality.
- To be successful you need to be forward-thinking and not just rely on what has always worked. The market trends are changing rapidly and fashionable styles, colors and designs no longer guarantee a promising product. This has resulted in much shorter product life-cycles. Manufacturers from developing countries have to search constantly for new designs and product styles.

## Market Approach

### Suitable trade channels

The French market can be entered in several ways. The most interesting trade channels for exporters in developing countries are importers, wholesalers, buying and selling agents and retail organizations (department stores, chains and hypermarkets).

### Important players

- **IKEA** - [www.ikea.com/fr](http://www.ikea.com/fr)  
IKEA sells home furnishings. It offers furniture, accessories, and bathrooms and kitchen products through retail stores.  
Contact Details for IKEA in India:  
*IKEA Trading (India) Pvt. Ltd.,  
1st and 2nd floor, Radisson Commercial Plaza, NH8, Mahipalpur, Delhi  
PH: 011-26779381*
- **ARC International** - [www.arc-intl.com/Accueil.aspx](http://www.arc-intl.com/Accueil.aspx) - retailer  
Retailer
- **Sabre** - [www.sabre.fr/couverts/natura.htm](http://www.sabre.fr/couverts/natura.htm)  
Manufacturer of cutlery and porcelain
- **Pinault-Printemps-Redoute** - [www.ppr.com](http://www.ppr.com)  
Retailer
- **Conforama** - [www.conforama.fr](http://www.conforama.fr)  
Conforama provides furniture, electric household appliance, and computer retailing services. It offers traditional and contemporary furniture, decorative items, home appliances, and consumer electronics; and textiles and general merchandise. They have stores in France and Europe. The company was founded in 1967 and is based in Lognes, France. Conforama Holding SA operates as a subsidiary of PPR SA.
- **ARC Distribution** - [www.arc-distribution.fr](http://www.arc-distribution.fr)  
Importer / Wholesaler
- **Groupe SEB** - [www.groupeseb.com](http://www.groupeseb.com)  
Umbrella group of brands
- **Printemps** - [departmentstoreparis.printemps.com](http://departmentstoreparis.printemps.com)  
Printemps Department Store Paris operates a beauty department store in Paris. It offers women's fashions products, luxury products, such as jewelries, watches, accessories, house ware, and decorative items; and beauty care products, such as make-up, face, and body care, and beauty accessories. In addition, it offers home decoration products, including crystal, porcelain, silverware, and linens; and men's fashion products, such as shirts, ties, suits, and accessories.  
The company was founded in 1865 and is based in Paris, France.
- **Grands Magasins Galeries Lafayette** - [www.galerieslafayette.com](http://www.galerieslafayette.com)  
Department Store
- **Zara Home** - [www.zarahome.com](http://www.zarahome.com)  
Producer

- **Monoprix - [www.monoprix.fr](http://www.monoprix.fr)**  
 Monoprix SA operates as a hypermarket. Monoprix SA operates as a subsidiary of Casino Guichard Perrachon & Cie SA. Based in Boulogne Billancourt.
- **Tati - [www.tati.fr](http://www.tati.fr)**  
 Variety Store
- **Carrefour - [www.carrefour.com](http://www.carrefour.com)**  
 Carrefour is primarily engaged in retail distribution. It operates a network of hypermarkets, supermarkets, maxi discount stores, convenience stores and cash-and-carry outlets and offers e-commerce services.  
Contact Details for Carrefour in India:  
*Carrefour Head Office,  
 2nd floor, Park Centra, Sector-30, Village Silokhra, Gurgaon - 121001  
 PH: 0124-4752000  
 contact\_india@carrefour.com*
- **Auchan - [www.groupe-auchan.com](http://www.groupe-auchan.com)**  
 Operates hypermarkets and supermarkets that provide a range of products, such as fresh produce, beauty and baby products, and wines; and is involved in developing, marketing, operating, and managing real estate properties, primarily shopping centers. Groupe Auchan SA was founded in 1961 and is based in Croix, France.  
Contact Details for Auchan in India:  
*Auchan New Delhi Liaison Office,  
 101 F-L, 1st Floor, Solitaire Plaza, M.G Road, Gurgaon - 122002  
 PH: 0124-4775300*
- **E-Leclerc - [www.e-leclerc.com](http://www.e-leclerc.com)**  
 Hypermarket
- **MasterCuisine.com - [www.mastercuisine.com](http://www.mastercuisine.com)**  
 Online shop for Kitchenware
- **Solidar'Monde - [www.solidarmonde.fr](http://www.solidarmonde.fr)**  
 Solidar'Monde is a central organization for import and distribution created in 1984 by the Artisans du Monde. It coordinates the importation and distribution of products.
- **Andines - [www.andines.com](http://www.andines.com)**  
 Fair-Trade Importer
- **ASPAL- [www.aspal-artisal.fr](http://www.aspal-artisal.fr)**  
 Fair-Trade Importer
- **Ambianceent Styles - [www.ambianceentstyles.com](http://www.ambianceentstyles.com)**  
 Retailer of home and garden decorative articles
- **Conforama - [www.conforama.fr](http://www.conforama.fr)**  
 Conforama provides furniture, electric household appliance, and computer retailing services. It offers traditional and contemporary furniture, decorative items, home appliances, and consumer electronics; and textiles and general merchandise. They have stores in France and Europe. The company was founded in 1967 and is based in Lognes, France. Conforama Holding SA operates as a subsidiary of PPR SA.
- **Lebon Marche - [www.lebonmarche.fr](http://www.lebonmarche.fr)**  
 Retailer of home and garden decorative articles

## Other importers

- Socadis-cadeaux - [www.socadis-cadeaux.com](http://www.socadis-cadeaux.com)  
Importer of all types of products and decorative articles
- Vincent cadeaux - [www.vincentcadeaux.com](http://www.vincentcadeaux.com)  
Importer of home and garden decorative articles
- Tohubohu - [www.tohubohu.com](http://www.tohubohu.com)  
Importer of gifts, home and garden decorative articles

## Finding a suitable trading partner

There is a number of ways to look for a suitable trading partner in France. The first would be to contact the main trade association(s), followed by trade fairs, which tend to feature a list of exhibitors, many of whom may be potential partners. In addition to these sources, there are often a number of general or specific information portals that will be useful.

You can also look for information at:

- Solidar'Monde - [www.solidarmonde.fr](http://www.solidarmonde.fr)  
Information on the Fair-Trade handicraft segment in France.
- France Wholesalers - [www.francewholesalers.com/frenchsuppliers/Kitchen\\_Utensils/42-0.html](http://www.francewholesalers.com/frenchsuppliers/Kitchen_Utensils/42-0.html)  
List of French wholesalers of kitchenware utensils can be found in this website
- Exim Info - [www.eximinfo.com](http://www.eximinfo.com)  
Select 'Houseware & Kitchenware' on the left side of the screen and then choose 'Directory of 50 French Importers of Houseware, Kitchenware & Tableware'.

## How to approach partners

The most effective ways to develop a business relationship are either to exhibit at one of the main furniture trade fairs, or to make a direct approach to wholesalers or major retailers.

Although you may initiate communication by post or email, it is recommended that there is some personal communication before a trading partner is selected. Personal communication is still the most important form of communication. This can include sending samples, inviting them to see your production facilities, and other meaningful ways of gaining and maintaining their interest.

## Useful information for finding prospects

### *Trade Associations*

- UNITAM - [www.unitam.fr](http://www.unitam.fr)  
Association for the tableware, houseware and related industries
- SYPROCAFS - [www.syprocaf.fr](http://www.syprocaf.fr)  
Business gifts professional union
- Union of houseware manufacturers - [www.unitam.fr](http://www.unitam.fr)
- Confederation of Ceramic Industries of France - [ceramique@wanadoo.fr](mailto:ceramique@wanadoo.fr)

### *Trade Fairs*

- Maison et Objet - [www.maison-objet.com](http://www.maison-objet.com)  
International fair for home decoration, giftware and tableware, hosted in Paris.
- Amenago - [www.amenago.com](http://www.amenago.com)  
International fair for home furnishing and decoration, hosted in Lille.

### *Trade Press*

- Art & Decoration - [www.art-decoration.fr](http://www.art-decoration.fr)  
Content: decoration, hobby and art  
Publication: monthly
- Cuisines & Bains - [www.cuisinebain.com](http://www.cuisinebain.com)  
Content: kitchen and bathing  
Publication: monthly
- Elle Decoration France - [www.elle.fr/elle/deco](http://www.elle.fr/elle/deco)  
Content: fashion, beauty, interior decoration, home  
Publication: monthly

**FASHION JEWELRY**

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## **COSTUME JEWELRY**

### **Market characteristics**

#### **Consumption**

France is the third largest EU market for costume jewelry and was valued at € 421 million in 2010, a 1.2% average annual increase since 2006. This growth rate was below the EU, average of 1.6%.

Costume jewelry volume sales - 33 million pieces in 2010 - rose steadily and increased by 3.7% since 2009. Women are the largest consumers for costume jewelry. The ratio of working women increased from 58.4% to 59.9%, of all French women between 2005 and 2010.

Hypermarkets and clothing chains, good for one third of the market, could keep up during the recession by offering low cost jewelry, mostly imported from China. Jewelry remains an important part in French outfits.

However, costume jewelry is grading up and pieces look more voluminous being abundantly decorated expressing the style of its wearer in a more pronounced way. More materials are being used. In addition to quality glass beads and charms, other popular materials in costume jewelry are crystal-based designs, wooden beads, terracotta beads, shells, bones, enamel, Venetian glass, crystals, leather, rubber, ribbon, silk, plastics, as well as recycled goods such as bottle tops, ring pulls etc.. In fact, material-wise there are no longer restrictions in place if the design is original and of quality.

Most women become more conscious about design and originality, but tend to buy the piece 'they fall in love with' on impulse. The overall look of a piece here is more important than the material.

More involvement of fashion houses in costume jewelry. In addition to the higher quality costume jewelry from the famous brands, there is a stronger involvement of fashion creators in new designs.

Bracelets, neckwear, pendants and bangles (wood/colored plastic) and leather or beaded bracelets remain popular. Other jewelry items that are favored by French younger people includes piercings in upper or lower lips, eyebrow and navel piercings, nose studs in titanium or (plated) stainless steel.

#### ***Do it yourself (DIY) Jewelry***

Along with the desire for unique or personal jewelry and to save money, people create their own jewelry out of laces, strings or chains chokers and personalize them by adding beads, charms, symbols, coins, stones or pendants. International brands, like Trollbeads and Pandora, have been successful in the French market.

The principle jewelry item for men is cufflinks and – less frequently – signet rings. This said, certain men do like wearing jewelry, specifically in the South of France, in which case it tends to be metal necklaces or bracelets, in addition to rings, pendants and bracelets of metal, titanium or stainless steel.

#### **Future demand**

The French costume jewelry is expected to improve in quality and compete more heads on with the lower end of the precious jewelry market, notably silver. Materials resembling silver and gold – such as brass, copper, steel, chrome etc. - are a trend that becomes stronger to the degree that design lead quality items become available.

While these styles are price-wise at the upper end of the spectrum, mostly in the €40 to €60 bracket, they are unique statement items and as such tend to be well-reflected buys as opposed to the majority of costume jewelry, which is bought impulsively at hypermarkets. However the focus on design makes them equally highly desirable.

### Production

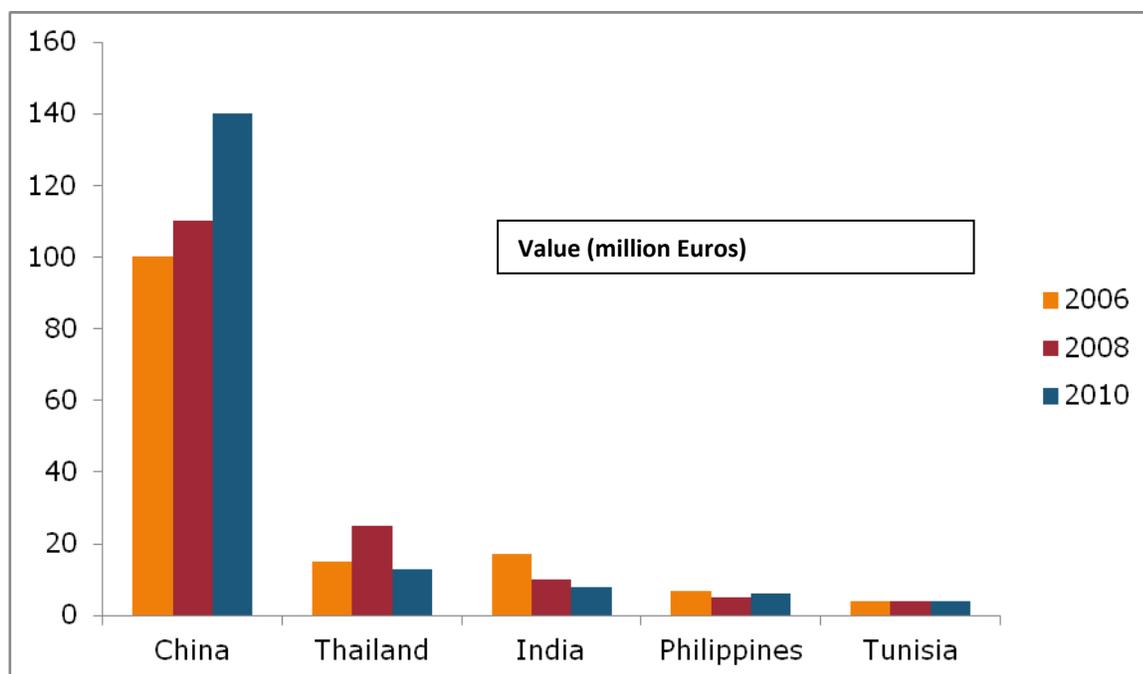
France is the fourth largest EU producer of costume jewelry valued at € 172 million. French production is decreasing by 3.4% per annum since 2006. Higher quality costume jewelry is still made in France. There is a continued innovation in use of materials, new plating techniques, with lower carats of gold or silver, and more fusions with precious metals and stones.

Among the 250 brands, well-known French costume jewelry manufacturers are Nereides, Clio Blue, Agatha, GL Bijoux, Camille & Luci, Reminiscence, Biche de Bere and Murat.

### Imports

Imports from developing countries (value) show good growth. The total French imports of costume jewelry were valued at € 406 million in 2010, a 4.9% annual average increase since 2006 (representing 10.5 thousand tonnes, a 3.1% decrease in volume). Imports from developing countries were valued at €278 million, representing a 3.6% increase over the period, and accounted for 41% of French imports by value.

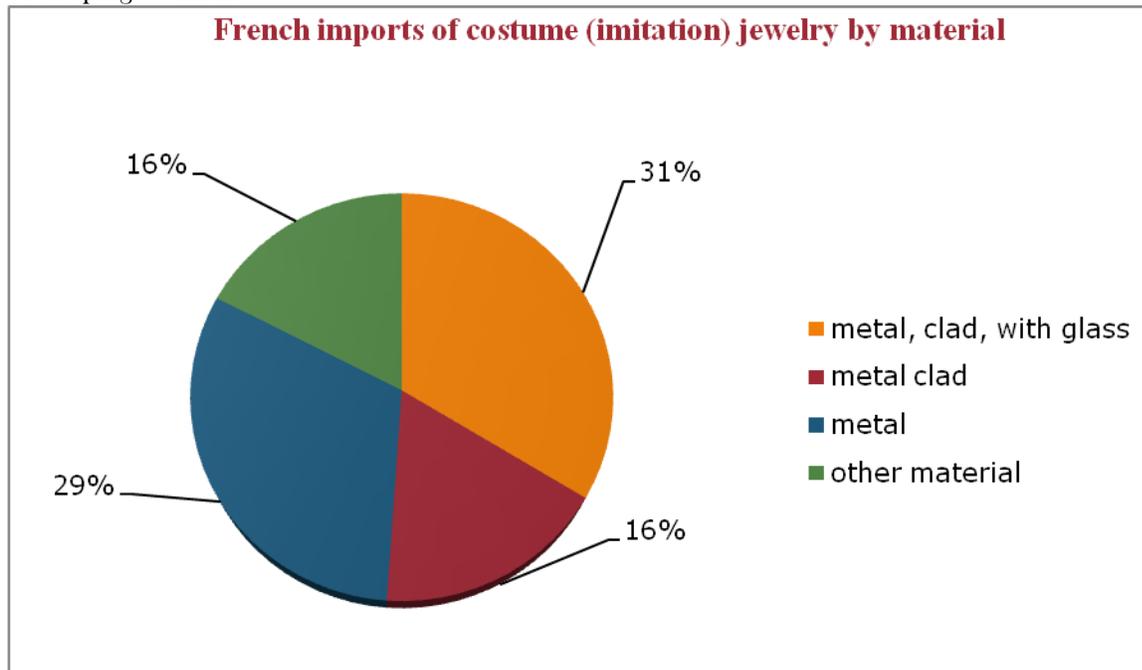
**Top 5 suppliers of costume jewelry from developing countries**



Leading suppliers from developing countries (by volume) were:

1. China (33% of total, +6.1% average annual growth)
2. Thailand (2.1%, -2.3%)
3. India (2.0%, -13.1%)
4. Philippines (1.4%, - 7.1%)
5. Tunisia (0.9%, -2.7%)
6. Indonesia (0.8%, broadly unchanged)
7. Mauritius (0.7%, +7.8%)
8. Costa Rica (0.5%, +22.5%)
9. Brazil (0.4%, -6.1%)
10. Vietnam (0.4%, -11.8%)
11. Morocco (0.3%, -2.2%)
12. Colombia (0.2%, +26.4%)

Imitation jewelry represents a total 92.0% of all costume jewelry imports. Imitation jewelry (base metal), clad wit parts of glass was the largest import sub-group by value (30.8%) and the third largest by volume (2,007 tonnes or 19.1%). This represents a 6.2% year-on-year increase. Around 30% of these imports came from developing countries.



Imitation jewelry of base metal were the second largest sub-group representing 29.1% of imports (+9.3%) and the second largest in volume (2,320 tonnes in 2010), 44% of which stem from developing countries; followed by Imitation jewelry of other material which represented 16.3% of imports (-3.8%), the largest in volume (2,507 tonnes), of which 47% of which came from developing countries.

French imports of cuff links and studs accounted for 1.7% of jewelry imports (value). Hair accessories represented 9.9% and increased in significance by 3.7% year-on-year. The largest sub-group consisted of combs, hair slides of hard rubber or plastic, representing 3.4% of imports by value, 53% of which came from developing countries.

Average import prices from developing countries increased from € 22.41 to € 27.02 per kg., while average intra-EU prices increased from € 32.72 to € 51.19, making intra-EU import prices more than twice as expensive that those of imports from developing countries.

The average retail prices of costume jewelry sold in France increased between 2009 and 2010, from € 14 to € 15.

### **Key opportunities**

Ethnic designs continue to represent interesting possibilities for exporters. These may include plain metal, titanium, plated metal, copper or brass neck chains with beads, stones, shells, large semi-precious stones, wooden 'stones' or with metal bangles. The ethnic style is mostly linked to unique 'designer' jewellery that differentiates itself by its looks.

Other opportunities can be found in niches such as growing markets for pre-teens, men, older people as well as immigrants from Europe, Africa and Asia. Another growing niche market is the tourist market buying jewelry as a souvenir from France, even if it is made elsewhere. France has 80 million visitors annually and a rising number from China and Russia.

Interesting jewelry could be beaded neckwear, charm bracelets, pendants with semiprecious or glass stones, anklets, piercings, handbag charms or hair accessories with flowers or ribbons. The key to success here is to be original and aware of the latest tendencies in French fashion. If you chose to make making imitations, please be aware that the French Customs are very strict on counterfeit jewelry.

Eco-jewelry and fair trade jewelry also represents an exciting sales opportunity.

Online jewelry sales still increases rapidly in France along with the rising number of Internet connections that still lags behind compared to the other large EU countries. Websites are improved and jewelry collections, pieces or parts are well presented online. In this respect, selling online would be a good opportunity for exporters from developing countries.

Jewelry is increasingly linking up with other sectors. This is an opportunity for the development of costume jewelry that is integrated into handbags, belts, footwear (high-heeled or flat sandals with crystals), beauty cases, eyewear, clothing, watches and electronics. There are also opportunities for accessories' such as jewelry boxes or ring holders.

## Market approach

### How to approach the market

The possible trade partners for costume jewelry in France are importers, wholesalers, agents, direct to retailers (e.g. department stores) or to home direct sellers. An importer, wholesaler or agent is well aware of local trade structure/practices and local consumer tastes. They often have strong relationships with local retailers. In practice, the options for exporters of jewelry from the developing world are somewhat restricted, and depend on the supplier's resources and scale of operation. Many larger jewelry buyers have either set up manufacturing facilities of their own in parts of the developing world, or have some form of exclusive relationship with certain suppliers for branded (costume) jewelry collections.

The main trade channels to enter the large and diverse French market are via wholesalers or importers. This is the safest way, especially when you are new to the French market. They often specialize in terms of target group, region, material, specific design or sourcing country and have good local relationships with retailers. If you are large, you could consider selling direct to larger retailers. Some exporters make use of fashion selling agents, which would be useful if you were manufacturing on behalf of a known designer.

A large variety in costume jewelry is made by local artists and is sold at the specialist shops, especially at smaller bijoux shop selling costume and silver jewelry. Here the design and originality is most important.

Good portals for wholesalers and other links to the industry are:

- [www.guidebijoux.com](http://www.guidebijoux.com)
- [www.gemme-fashion.com](http://www.gemme-fashion.com)

In costume jewelry retailing, the specialized jewelers in the city centers (27.2% in 2010) and non-specialized retailers (25.6% in 2010) took up the largest part of the costume and silver jewelry market. Non-specialists include here online sellers, clothing retailers, street markets. The out-of-town shopping centers represented 22.3% of value sales in 2010 (compared to 21.0% in 2009). They have been more successful than the jewelry and accessory chain stores, hypermarkets and department stores that together represented 15.7% (14.7% in 2009).

Jewelry specialist were more actively promoting their collections e.g. as a gift item for special occasions and changed their collections quite frequently. They offered (branded) costume jewelry with beads, stones or charm in fashionable colors.

- Smaller jewelry specialists can be found at a joint group of jewelry specialists - [www.lebijoutierdescreateurs.fr](http://www.lebijoutierdescreateurs.fr) or for some costume jewelry
- [www.guilde-des-orfevres.com](http://www.guilde-des-orfevres.com) (120 jewelers)

Leading retailers are:

- Agatha - [www.agatha.fr](http://www.agatha.fr)
- Claire's Accessories - [www.claire.fr](http://www.claire.fr)

- Accessorize - [www.accessorize.co.uk](http://www.accessorize.co.uk)
- Marc Orian
- Tres'Or
- Pop Bijoux
- Miss Coquines
- Six
- Lollipops
- Le Manège a Bijoux
- Reserve Naturelle
- Moa
- Swarovski
- Bijou Brigitte

The main hypermarkets were:

- Carrefour (194 outlets)
- Auchan (120 outlets)
- Géant (129 outlets)
- LeClerc (96 outlets)

The main clothing chains selling jewelry included:

- Zara - [www.zara.fr](http://www.zara.fr)
- H&M - [www.hm.com/fr](http://www.hm.com/fr)
- Etam - [www.etam.fr](http://www.etam.fr)
- Promod
- Kookaï
- Naf Naf

- Kiabi.

There are a number of specialist players in the ethical sector. These would include:

- Createur éthique - [www.createur-ethique.com](http://www.createur-ethique.com)
- Solidarmonde - [www.solidarmonde.fr](http://www.solidarmonde.fr)
- Max Havelaar - [www.maxhavelaarfrance.org](http://www.maxhavelaarfrance.org)
- Made in ethic - [www.made-in-ethic.com](http://www.made-in-ethic.com).
- ConsoGlobe - [www.consoglobe.com](http://www.consoglobe.com) - features a directory of sustainable products

You need to decide whether to approach this market directly or indirectly. If you make a direct approach, it is recommended that there is some personal communication before a trading relationship commences. Exporters may approach customers in France through direct (e-) mail, personal visits (as follow-up), inviting potential customers to visit you in your country, building a network and visiting international trade fairs.

#### **Other interesting contacts**

Interesting trade fairs include Éclat du Mode - [www.bijorhca.com](http://www.bijorhca.com) - which takes place in Paris in February and September.

The main trade associations are: The National Chamber for Jewellers ([www.boci.org](http://www.boci.org)) and the National Federation of Jewellery and Watchmakers ([www.fnamac.com](http://www.fnamac.com)).

Another important contact is the French Watch, Clock, Jewellery and Silverware Centre ([www.cpdhbjo.com](http://www.cpdhbjo.com)) and the Comité Franc éclat [www.franceclat.fr/](http://www.franceclat.fr/), which both also make research information accessible.

Leading trade press for costume jewelry is Le Bijoutier ([www.le-bijoutierhorloger.com](http://www.le-bijoutierhorloger.com)).

**TEXTILE**

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## CURTAINS

Although domestic production of curtains is significant, French imports from developing countries were among the highest in the EU. Particular opportunities are in lower and middle segments of the market, as French producers of curtains focus on the high-end segment.

### France - a promising outlook for developing countries

- Apparent consumption of curtains in France amounted to € 262 million in 2011, accounting for 34% of total furnishing textiles consumption. In the period 2007-2011, consumption increased by 18% annually. French demand for curtains plays an important role in the EU, accounting for 11% of total EU consumption, being the third largest market together with Italy.
- French production of curtains accounts for 7.3% of the total EU production, and amounted to € 132 million in 2011. French domestic production of curtains increased by 25% annually between 2007 and 2011.
- Curtain imports by France amounted to € 184 million in 2011, accounting for 15% of total EU imports. Between 2007 and 2011, French imports of curtains increased by 6.3% annually, while total EU imports increased by only 2.3%.
- France is the third largest EU importer of curtains from developing countries, with a share of 15% in total EU imports from developing countries. In 2011, developing countries accounted for more than half of total French curtains imports (58%). French imports from developing countries increased by 8.1% annually during the review period.
- China is the leading supplier from the developing countries of curtains to France, accounting for 35% of total imports. Other major developing countries suppliers are India (12%), Tunisia (4.1%), and Turkey (3.8%). French imports from Tunisia and Turkey decreased by 8.8% and 3.7% per annum respectively during the review period, while imports from China and India increased, by 17% and 1.7% annually respectively.
- The average import price of curtains destined to France decreased by 14% annually on average in the period 2007-2011, amounting to € 8,184/tonne in 2011.
- Buyer requirements for curtains and other furnishing textiles are provided in the module on compliance with EU buyer requirements.

### Understanding the market

In 2011, sales of home furnishings showed an increase of 2.7% in value compared to the year before. With a turnover of € 9.6 billion, home furnishing sales have almost reached the pre-crisis level of € 9.7 billion.

After a decrease of the French GDP of 2.7% in 2009, GDP increased again in 2010 and is also expected to grow by approximately 2.0% in both 2011 and 2012. Moreover, France experienced strong growth in early 2011, led by dynamic private consumption and stock-building. However, caution is advised for the coming period.

### *Outlook for developing countries exporters is promising*

In contrast to the demand drivers, the French market for curtains seems to be hardly affected by the economic downturn in the past few years, as demand showed a strong annual growth rate. Developing countries profited from this development, since they increased curtain exports to France in the review period. On the other hand, developing countries exporters face serious competition from domestic producers of

curtains, as these also developed strongly during the review period. Chinese supplies sustained their leading import position, noting a significant increase in the review period.

#### *Preferences for luxury curtains*

French producers are more often focusing on opportunities in niche markets, such as innovative and high-quality textile products, as there is continuing demand for more luxury furnishing textile products. When focusing on the luxury segment as an exporter from a developing country, it is very important to stay aware of the latest trends in design, fashion and colors in this segment.

#### **Market entry**

The most important trade channels for exporters from developing countries of curtains to France are both importers/wholesalers and retailers. Although importers/wholesalers have been the traditional market entry point, retailers have gained ground on importers/wholesalers over the past decade, since this trade channel can offer better prices for retailers and are suitable for developing countries, since the latter export smaller volumes.

An exporter from a developing country aiming to trade with French retailers should be aware of the responsibilities involved in trading with retailers in general.

A common way for exporters from developing countries to approach customers in France is through visiting international trade fairs. Other possibilities for contacting customers, and for follow-up contact, are direct (e-) mail, personal visits, inviting potential customers to visit them in their country, and building a network.

#### **Useful information for finding prospects**

##### *Trade press*

- Maison Française
- Maison Magazine
- [www.cotemaison.fr](http://www.cotemaison.fr)
- Journal du Textile - [www.journaldutextile.com](http://www.journaldutextile.com)

##### *Trade fairs in Paris:*

- Maison 84 Objet - [www.maison-objet.com](http://www.maison-objet.com)
- Who's Next - [www.whosnext.com](http://www.whosnext.com)
- Fatex - [www.fatex.fr](http://www.fatex.fr)

*Trade association:*

- UIT (Union des Industries Textiles) - [www.textile.fr](http://www.textile.fr)
- Chambre syndicale des textiles d'ameublement - [www.forumcsta.com](http://www.forumcsta.com)
- Espace Textile - [www.espacetextile.com](http://www.espacetextile.com)
- French Furniture and Home Furnishing Trade Federation (FNAEM) - [www.fnaem.fr](http://www.fnaem.fr)

*Prospecting databases for French companies of curtains:*

- Europages - [www.europages.com](http://www.europages.com) - online database to search for importers.
- Kompass - [www.kompass.com](http://www.kompass.com) - online database to search for importers.

*Retailers of curtains in France:*

- Calitex - [www.calitex.fr](http://www.calitex.fr)
- Henri Germain - [www.henrigermain.com](http://www.henrigermain.com)
- ADO International - [www.ado-france.com](http://www.ado-france.com)
- RSF - [www.rideaux-services-france.com](http://www.rideaux-services-france.com)
- Stores de France - [www.storesdefrance.com](http://www.storesdefrance.com)

## TABLE LINEN

French domestic production of table linen is decreasing rapidly, and is being replaced by imports; in particular from developing countries. Due to the economic crisis, sustainable cotton products face a dip in sales.

### France – declining production compensated by imports

- Apparent consumption of table linen in France amounted to € 6.5 million in 2011. Over the period 2007-2011, consumption decreased by 6.9% annually on average. French table linen consumption accounted for 14% of total EU consumption in 2011, making it the third largest market.
- In 2011, French table linen production amounted to € 2.5 million, accounting for 1.0% of total EU production. Production of table linen in France decreased by 52% annually on average between 2007 and 2011.
- French table linen imports amounted to € 94 million in 2011. France is the second largest EU importer of table linen, accounting for 20% of total EU imports.
- France is also the second largest EU importer of table linen from developing countries, with a share of 18% in total imports from developing countries. Developing countries accounted for 56% of French table linen imports, which is below the EU average share of 63%. However, French imports from developing countries increased by 4.5% annually during the period 2007 - 2011, while EU average imports from DCs increased by 1.4% only.
- India is the leading supplier from the developing countries of table linen to France, accounting for 17% of total imports in 2011. Other major suppliers from developing countries are China (16%), Tunisia (13%) and Turkey (6.1%).
- The average import price of table linen destined to France decreased by 2.4% annually on average in the period 2007 – 2011, amounting to € 7,662/tonne in 2011.

### Understanding the market

*French domestic production increasingly replaced by imports from developing countries*

Production of table linen in France is decreasing due to price competition from low-cost countries. Developing countries can compete on price due to their low labour costs, which give them a comparative advantage over European manufacturers. While domestic production declined sharply during the review period, French imports from developing countries increased significantly, witnessed by their share in imports growing slightly.

*French preferences for traditional designs in table linen*

Nowadays, French people are increasingly interested in home decoration, and harmonisation of colours and objects. French people like to adapt their home textiles to the seasons. The three main general trends witnessed at Maison et Objet in Paris for 2011/2012 are:

- Un-plugged: slowing down, simplified, local flavour, folklore

- Haute tension: heavy versus light, varying the intensity of light and colours, surprising materials
- Hypnotic: motion, light, 3-D effects, geometry, complex forms, mirror reflections

### **Market entry**

In France, wholesalers, importers and retailers are the most interesting trade channels for exporters from developing countries. Trade in France is mainly concentrated in the Paris area. Therefore there are many regional wholesalers and agents for distributing imports. However, retailers, especially the large ones, increasingly handle their own imports.

A specific tradition in France is that January is 'the white month', in which white refers to household linen. In this month, all shops promote the sales of household linen at low prices, to persuade French people to renew their household linen for the New Year.

The most common way for exporters from developing countries to approach customers in France is through visiting international trade fairs. Other possibilities for contacting customers, and for follow-up contact, are direct (e-)mail, personal visits, inviting potential customers to visit them in their country, and building a network.

#### *Trade fairs:*

- Maison et Objet - [www.maison-objet.com](http://www.maison-objet.com) – home fashion trade fair.
- Heimtextil – [www.heimtextil.de](http://www.heimtextil.de) – international trade fair in Germany.
- Intirio - [www.intirio.be](http://www.intirio.be) – international trade fair in Belgium.

#### *Trade association:*

Union des Industries Textiles - [www.textile.fr](http://www.textile.fr) – contact them for their members

#### *Prospecting databases:*

- Europages – [www.europages.com](http://www.europages.com) – online database to search for importers/wholesalers.
- Mandelnet - [www.mandelnet.com/fashion/index.php?Fo2](http://www.mandelnet.com/fashion/index.php?Fo2) – click on 'Home Textiles' for an overview of prospects.

#### *Retailers of table linen:*

- IKEA - [www.ikea.com/fr](http://www.ikea.com/fr) - interior department store.
- Carré Blanc - [www.carreblanc.com](http://www.carreblanc.com) - specialist in home textiles.
- Linvosges - [www.linvosges.fr](http://www.linvosges.fr) - specialist in home textiles.
- Monoprix - [www.monoprix.fr](http://www.monoprix.fr) – department store, middle segment.
- La Redoute - [www.laredoute.fr](http://www.laredoute.fr)– online home textiles shop.

## BEDSPREAD

The French market for bedspreads is among the largest in the EU and has remained very dependent on imports. France is particularly open to new, high-quality furnishing textile products.

### **France - leading EU importer of bedspreads**

- France is among the largest markets for bedspreads in the EU, with apparent consumption amounting to € 24 million in 2011. In the period 2007-2011, French consumption of bedspreads declined by 3.7% annually. In 2011, bedspreads accounted for 2.9% of the total French furnishing textile market and for 15% of the total EU bedspreads market.
- French bedspread production amounted to € 3.7 million in 2011.
- France is the leading EU importer of bedspreads, accounting for 16% of the total EU imports of bedspreads. In 2011, French imports amounted to € 23 million, showing an annual average decrease of 9.3% in the period 2007- 2011. The decrease in imports has been visible throughout the complete review period.
- France is the second largest EU importer of bedspreads from developing countries, with a share of 15% in total EU imports from developing countries. In 2011, developing countries accounted for 63% of total French bedspread imports, which was slightly lower than the EU average share of 65%. French imports from developing countries decreased by 9.3% annually during the review period.
- The leading suppliers from developing countries of bedspreads in 2011 were India and China, accounting for a share in French imports of 29% and 28% respectively. However, it is interesting to observe that both countries noted a decrease in imports in the period 2007-2011.
- The average import price of bedspreads destined to France decreased by 9.4% annually on average in the period 2007-2011, amounting to € 5,903/tonne in 2011.

### **Understanding the market**

#### *Large market dominated by imports*

Although France is one of the largest markets for bedspreads in the EU, there is only a small domestic production, making the country dependent on imports. Not only is France the largest EU importer of bedspreads, exporters from developing countries are responsible for these supplies to France. Supplies are traditionally dominated by two large developing countries, India and China, but other exporters from developing countries have also emerged during the review period.

#### *Domestic production aims at the high-end segment*

As the lower market segments are increasingly difficult areas for European producers to make a profit on their products, many have shifted to the higher, luxury segment. French producers are renowned worldwide for their innovative and high-quality products, such as new colors, patterns or fabrics. As an exporter from a developing country, this segment can only be interesting if you are able to produce a product that lives up to the requested standard. The lower and middle segments, in contrast, are only interesting for exporters from developing countries if they are able to source the product at a low price.

Exporters from developing countries are recommended to keep up-to-date on the latest trends on the French market in terms of design, fashion and color. A suggestion for finding the latest trends on the French furnishing textiles market are home decoration magazines such as Elle Decoration - [www.elle.fr/elle/deco](http://www.elle.fr/elle/deco) - and Maison Française or Maison Magazine - [www.cotemaison.fr](http://www.cotemaison.fr).

### *Organic cotton*

Besides Germany and the UK, France is the third most important market for organic cotton products in the EU. It is estimated that 610 tonnes of organic cotton products were consumed in 2011. As in Germany, an important sales channel for organic cotton textiles is mail order companies, as a geographically wide range of consumers can be reached without the costs related to running stores dispersed over the whole country. This increasing demand for organic cotton products is an opportunity for producers of organic cotton bedspreads from developing countries.

### **Market entry**

The most common trade channels for exporters from developing countries of bedspreads to France are importers/wholesalers and retailers. Although both trade channels are equally important, retailers have gained ground on importers over the past decade, as this trade channel can offer better prices for retailers as well as superior margins for exporters of bedspreads.

An exporter willing to trade with French retailers should be aware of the responsibilities entailed in trading with retailers in general.

A common way for exporters from developing countries is to approach customers in France through visiting international trade fairs. Other possibilities for contacting customers, and for follow-up contact, are direct (e-)mail, personal visits, inviting potential customers to visit them in their country, and building a network.

#### Trade fairs:

- Maison et Objet - [www.maison-objet.com](http://www.maison-objet.com) - trade fair in Paris.

#### *Trade association:*

- French Furniture and Home Furnishing Trade Federation (FNAEM) - [www.fnaem.fr](http://www.fnaem.fr)

#### *Some interesting players:*

- Crespo - [www.grossiste-crespo.com](http://www.grossiste-crespo.com)
- Vanderschooten - [www.vanderschooten.com](http://www.vanderschooten.com)

#### *Prospecting databases for French companies of bedspreads:*

- Europages - [www.europages.com](http://www.europages.com) - online database to search for importers.
- Kompass - [www.kompass.com](http://www.kompass.com) - online database to search for importers.

- French Wholesalers Directory - [www.francewholesalers.com](http://www.francewholesalers.com)

*Retailers of bedspreads in France are:*

- Ikea - [www.ikea.com/fr](http://www.ikea.com/fr)
- Carré Blanc - [www.carreblanc.com](http://www.carreblanc.com)
- Conforama - [www.conforama.fr](http://www.conforama.fr)
- Yves Delorme - [www.yvesdelorme.com](http://www.yvesdelorme.com)
- Anticoramadeco - [www.anticoramadeco.fr](http://www.anticoramadeco.fr)
- Le Camif - [www.camif.fr](http://www.camif.fr) - mail order company which also sells bedspreads of organic cotton.

## CUSHIONS COVERS

The market for cushion covers in France is relatively easy for developing countries to access as all segments (low to high) are in reach, and it is easy to add value to the product by using different materials, embroidery or prints.

### **Exporters from developing countries have easy access to the French market!**

- As there are no specific data on consumption, production and trade of cushion covers, general data for the French market for furnishing textiles are discussed. When available, the development of the product group 'other furnishing textiles' will be examined, as this group includes cushion covers.
- French apparent consumption of furnishing textiles amounted to € 814 million, noting an average annual increase of 9.0% in the period 2007-2011. The product group 'other furnishing textiles' accounted for a share of 13% in total French apparent consumption and remained stable during the review period.
- In 2011, total imports of furnishing textiles by France amounted to € 651 million, of which 'other furnishing textiles' accounted for 16%.
- The leading supplier from developing countries of 'other furnishing textiles' to France in 2011 was Tunisia, accounting for a share in French imports of 31%, noting an increase in supplies of 39% annually in the period 2007-2011. Other important suppliers from the developing countries are China (with a share in imports of 14%) and India (7.4%).

### **Understanding the market**

#### *Everything goes*

The French market for cushion covers is easy for exporters from developing countries to penetrate, since supplies of the product are directed at the low- and high-end segment. Furthermore, the product allows producers to create a large collection by using different sizes, colors or applications and easily add value to the goods by using different materials, embroidery or prints. Creativity in your designs is recommended.

Although standardized sizes exist for cushion covers, non-standardized sizes are also acceptable on the French market, especially for the high-end segment. If a supplier is able to supply cushion covers including fillings, there is no limitation to the use of non-standardized sizes. In particular when you deal with French retailers, a large collection is preferred, so buyers can choose their product according to existing decorative trends.

#### *Country style is particularly popular:*

Trends for cushion covers are closely related to general home decoration trends. In France, there is a particularly wide demand for 'country style' home decoration, which is also traced back in the designs of cushion covers on the French market. For further trends on the French textile market, you can stay up-to-date by reading interior design magazines, such as *Elle Decoration* - [www.elle.fr/elle/deco](http://www.elle.fr/elle/deco) or *Maison Française* and *Maison Magazine* - [www.cotemaison.fr](http://www.cotemaison.fr).

### *Cost-efficiency through cushion covers:*

Producers of home or furnishing textiles regularly use leftovers of fabrics, which were meant for the production of other goods to produce cushion covers. Cushion covers can be an efficient manner to save costs and reduce the amount of remnants. This development can also be seen in the light of the sustainability trend.

### **Market entry**

Market channels in the French cushion cover market are wide. Cushion covers are sold to many segments, such as supermarkets, specialized home and furnishing textile stores, boutiques, department stores and furniture stores.

Importers/ wholesalers are an important market channel, but in the past decade retailers have become more important in the trade of cushion covers. However, importers/ wholesalers currently still are an equally important trade channel. Furthermore, an exporter willing to trade with French retailers should be aware of the responsibilities entailed in trading with retailers in general. Information on dealing with retailers in the EU can be found in the module on trade structure and channels for furnishing textiles.

A common way for exporters from developing countries is to approach customers in France through visiting international trade fairs. Other possibilities for contacting customers, and for follow-up contact, are direct (e-) mail, personal visits, inviting potential customers to visit them in their country, and building a network.

#### Trade fair:

- Maison & Objet - [www.maison-objet.com](http://www.maison-objet.com) - trade fair in Paris.
- Espace Textile - [www.espacetextile.com](http://www.espacetextile.com) - trade fair in Paris.

#### Trade association:

- French Furniture and Home Furnishing Trade Federation (FNAEM) - [www.fnaem.fr](http://www.fnaem.fr)
- French Textile Industry - [www.textile.fr](http://www.textile.fr)

#### Some interesting players for the French cushion cover market:

- Crespo - [www.grossiste-crespo.com](http://www.grossiste-crespo.com)
- Vanderschooten - [www.vanderschooten.com](http://www.vanderschooten.com)

#### Prospecting databases for French companies of cushion covers:

- Europages - [www.europages.com](http://www.europages.com) - online database to search for importers.
- Kompass - [www.kompass.com](http://www.kompass.com) - online database to search for importers.

#### Retailers of cushion covers in France:

- Calitex - [www.calitex.fr](http://www.calitex.fr)
- Carré Blanc - [www.carreblanc.com](http://www.carreblanc.com)
- Decoritex - [www.decoritex.fr](http://www.decoritex.fr)
- Flamant - [www.flamant.com](http://www.flamant.com)
- SIA - [www.sia-homefashion.com](http://www.sia-homefashion.com)
- La Redoute - [www.laredoute.fr](http://www.laredoute.fr)

**REGULATIONS**

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## LEGAL REQUIREMENTS

Legal requirements are the minimum requirements products marketed in the EU must meet. Products that fail to meet these requirements are not allowed on the EU market.

Always be sure you are well aware of all legal requirements applicable. If you fail to comply with these, you are not allowed to do business in the EU.

EU legislation sets the basis for legal requirements in the EU, but there may be some differences in the implementations into national legislation in the member states. This information is provided in table below, which presents an overview of the legal requirements.

Legislation	Source	Brief Description	Member State Implementation
Chemicals REACH	Regulation (EC) 1907/2006	This relates to chemicals and their safe use for existing and new substances. This new directive replaces 94/27/EEC or 76/769/EEC The same REACH regulation also restricts the use of cadmium. It replaces 91/338/EC and the amending Directive (76/769/EEC). This legislation is especially relevant for costume jewelry that is combined with plastic or artificial material that uses cadmium as plastic pigments, stabilizers, or as a coating.	Automatically applicable in all member states.
Ref: <a href="http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=oj:l:2006:396:0001:0849:en:pdf">http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=oj:l:2006:396:0001:0849:en:pdf</a>			
Product safety	Directive 2001/95/EC	This directive prohibits the placing on the market of products that pose a risk to EU consumers' health and safety caused by dangerous substances or by their safe construction.	Automatically applicable in all member states.
Ref: <a href="http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2002:011:0004:0017:EN:PDF">http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2002:011:0004:0017:EN:PDF</a>			
Nickel in piercings, ornaments and clothing accessories REACH	Regulation (EC) 1907/2006	The EU has set limits for the nickel content in products coming in contact	Automatically applicable in all member states.
Azo dyes in textile and leather articles REACH	Regulation (EC) 1907/2006	The aim is to protect consumers' health and is applicable to all products that may come into direct and prolonged contact with the human skin or oral cavity.	NA
CASE: Safety of children's clothing, including jewelry	Directive 2001/95/EC. European standard EN	Although there is no specific legislation, the European Committee for Standardisation (CEN) has developed a standard	NA

	14682:2007	to consider cords and drawstrings on clothing and jewelry, intended for children up to age 14.	
Cadmium in several products	Regulation (EC) 1907/2006 REACH	This legislation restricts the use of cadmium, which among other uses, are used in PVC coatings or prints for charms or beads to give color.	NA
Wood packaging materials (transport)	Directive 2000/29/EC	The EU sets requirements for wood packaging materials (WPM) such as packing cases, boxes, crates, drums, pallets, box pallets and dunnage (wood used to wedge and support non-wood cargo).	NA
Ref: <a href="http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2000:169:0001:0112:EN:PDF">http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2000:169:0001:0112:EN:PDF</a>			
Packaging and packaging waste	Directive 94/62/EC	This legislation restricts the use of certain heavy metals in packaging, designed to prevent waste, and to reuse, recycle, or other forms of recovery to reduce final disposal of such waste.	NA
Ref: <a href="http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CONSLEG:1994L0062:20050405:EN:PDF">http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CONSLEG:1994L0062:20050405:EN:PDF</a>			

## NON-LEGAL REQUIREMENTS

As the market is becoming more differentiated, buyers' special requirements are increasing. Most of the big players have their own special conditions which you need to follow, if you want to be their partner. Those terms can be related to many aspects of your product, such as (private) labeling, quality, packaging, marking, compliance with specific standards, etc.

The key non-legal requirements are:

- Social requirements have become more important since the media highlighted poor labor practices by some producers. Social requirements can be found in company codes of conduct, management systems and labels.
- Some are based on ISO standards for example the guideline ISO 26000- see <http://www.iso.org>. Social standards are ILO standards, SA 8000 and OHSAS 18000 - on working conditions, quality standards, health and safety, social accountability etc.
- The Ethical Trading Initiative - <http://www.ethicaltrade.org> - is a social code of conduct that tries to guarantee decent working conditions throughout the supply chain. This originated in the UK.

Each label in the non-legal section is generally designed for a particular purpose (e.g. environmental or social) and for particular products. Some labels are recognizable in some countries but not others. You should consider these carefully when making your own market assessments in terms of which may provide you with an added opportunity.

Other requirements such as:

- No other toxic substances than Azo dyes should be used.
- Good quality of components - Consumers do not accept pieces that fall apart in a few weeks and will ask for their money back, leading to a complaint to the importer.
- Buyers' instructions on sizes and colors should be exactly followed by the exporter. A minor discrepancy could damage the perceived product quality.
- The finishing quality is of growing importance for both consumers and buyers.
- Stick to the quality of the first samples. Inferior pieces are likely to be refused. So it would be best to offer counter samples to importers.
- Origin marking - The country of origin should be mentioned, especially when it concerns jewelry supplies to department stores, clothing chains or accessory chains.

**CONCLUSIONS & RECOMMENDATIONS**

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France is on the major export markets for the Indian Handicrafts industry. France has a share of 4.45% of the total exports by the Indian Handicrafts industry. The margins gained by the resellers in France are very high compared to other countries.

## **A/ Very attractive consumption trends in France for home decoration and Home furniture**

### **1) The Demand**

- The Economic crisis and the rise of the real estate market (real estate market has increased by 2.5 times during the last 15 years). As a consequence the French consumer has the tendency on the one hand to adopt a “cocooning” behavior, in order to feel protected from the economic crisis. On the other hand they can’t easily access real estate so they are tenants, whereas they still want to feel at home, and make their living place very cozy.
- The trend of globalization and the huge information on growth of emerging markets has also had a huge impact on the French people. There is a tendency to open up to other cultures. They can easily travel and access information (Low cost airline are booming and the proliferation of digital media are helping the spread of cultural information). As a consequence, French consumers are more attracted by a certain kind exoticism and “zen attitude”.
- French society is changing, and so the consumers’ habits are following that flow of diversity. The general trend is to mix up different styles , different cultures
- India represents an essence of peace and success for the French People. So they want to bring a small part of that essence home in order to fulfill their needs to feel secure and their enthusiasm for exoticism and “zen attitude”.

### **2) The Offer**

- The high level of demand is bringing up new business opportunities and a high Media coverage for this particular field which is booming from 2002 (Around 100 magazines and 15 TV broadcast programs entirely dedicated to home decoration and home furniture )
  - This large business opportunity is generating high level of competition with a huge variety of competitors
- a)** Specialized retailers Asian and African home decoration retailers such as “Maison du monde” or “La Maison Coloniale”. They are looking for products which are original, typical, and have that traditional touch.
  - b)** General home decoration retailers ,having a worldwide section or going on with seasonal trends and keep on changing their offers such as IKEA, Habitat, Conforama. They are targeting products with the best quality – price ratio
  - c)** Retailers having a huge home decoration section such as Printemps or Gallery Lafayette. Those retailers are providing luxury home decoration and high quality product.
  - d)** Hypermarkets such as Auchan, Leclerc, or Carrefour have a small section of interior decoration. The main target is making all products available at the same place. They are adopting a very low cost positioning. But home decoration and furniture are not their main profit margins.
  - e)** Online retailers

### 3) Our recommendation to that particular portion of the handicraft market:

- Build a network with the major specialized magazines.
- Choose the targets amongst the retailers classified as a); b); c) and e) above, as they need to go with the trend and it's vital for them to get diversify their offer to meet their customers' needs. Indian handicrafts can't be ignored by those players.
- d) Kind of retailers (Hypermarkets) are not relevant regarding their positioning for Indian Handicraft
- For small and middle Indian companies, in order to get a significant bargaining power, it's better to first create a strong network and partnership with other small players. That small structure can target mainly the retailers classified as a, d) and e) above
- For bigger companies, we recommend them, to get a strong partnership with any kind of players.

### **B/ An attractive fashion and jewelry market**

France is a very strategic market for the fashion jewelry sector. They have a worldwide recognition for fashion. But there is still a need for diversification.

French consumers have significant access to fashionable goods. But they need to diversify their style. They are ready to mix up their dressing style, but not to be eccentric in terms of colors. Most of them would not wear very ethnic dresses like Saree or Salwar or very ornamental jewelry. But they like to diversify their style, with original colors and accessories such as shawls and fancy jewelry, hairs clips, belts, etc.

Indian companies needs to differentiate their offer. Their products should be original and stand out from the crowd in order to attract consumers and retailers. We also note, that this market is highly competitive, and that the Chinese suppliers are very aggressive in terms of prices.

Our recommendation for this particular sector, for Indian companies, is to stand out from Chinese competitors with better quality products. Also, emphasize their Indian touch on the product, something that the Chinese competitors are unable to match.

### **C/ General recommendation**

- Any company should define the distribution channels that they want to go through.
- France is part of EU, and their norms and requirements for safety standards are very high. So any Indian company who wants to build a partnership and exports their products, needs to provide high quality products.
- Prices should be competitive in order to attract retailers, but Indian companies need to be aware of the final selling price applied by the French retailers and their huge profit margins.
- Customizing product for the French market. Developing a specific design to sell product in France. Any product in that sector needs to have that Indian touch, but can't be sold as it is in India.
- Open exclusive outlets for Indian Handicrafts in prominent locations, like Indian Embassy, VFS (Visa Services), cultural centers, etc.

**ANNEXES**

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## HS CODES

<b>Home Decor</b>		
Candles	34060010	HS Codes Classification of Candles
Wickerwork	94038010	HS Codes Classification of Furniture of wicker work or bamboo
Ceramic Home Decoration & Accessories	691390	Other statuettes and Ornamental ceramic articles
Metal Decorations	87089900	Metal Handicraft Goods
	73259910	Handicraft of aluminium

<b>Home Furniture</b>		
The Dining and Living Room Furniture Market	94038020	Bed room or living room set
The Wooden Kitchen Furniture Market	940340	Wooden Furniture of a Kind Used in the Kitchen

<b>Home Living and Kitchen</b>		
Ceramic Tableware and Kitchenware	691200	Ceramic tableware, kitchenware, other household articles and toilet articles, other than of porcelain or china: Tableware and kitchenware:

<b>Fashion Jewellery</b>		
Costume Jewellery	7117	Imitation jewellery
	711711	Cuff links and studs, of base metal
	711719	Other Imitation jewellery of base metal
	711790	Other Imitation jewellery

<b>Home Textiles</b>		
Curtain	63031100	Curtain ETC, Hand Knitted , Crocheted of Cotton
	63031200	Curtain ETC, Hand Knitted , Crocheted synthetic fibers
	63031900	Curtain ETC, Hand Knitted , Crocheted of other textiles
Table of Linen	63024030	Table Linen of Cotton , Hand Knitted , Crocheted
	63024020	Table Linen of Wool , Hand Knitted , Crocheted
	63024010	Table Linen of Silk , Hand Knitted , Crocheted
	63024040	Table Linen of Man-made Fibers , Hand Knitted , Crocheted
Bedspread	63041100	Bedspread, Knitted or Croched
Cushions Covers	54023990	Cushions Covers & Table Covers

## JOINT VENTURE OPPORTUNITIES

- Conforama - [www.conforama.fr](http://www.conforama.fr)  
Conforama provides furniture, electric household appliance, and computer retailing services. It offers traditional and contemporary furniture, decorative items, home appliances, and consumer electronics; and textiles and general merchandise. They have stores in France and Europe. The company was founded in 1967 and is based in Lognes, France. Conforama Holding SA operates as a subsidiary of PPR SA.
- Castorama France S.A.S. - [www.castorama.fr](http://www.castorama.fr)  
Castorama retails do-it-yourself (DIY) products. The company was founded in 1969 and is based in Templemars, France. Castorama France S.A.S. operates as a subsidiary of Castorama Holding.
- Habitat : [www.habitat.fr](http://www.habitat.fr)  
Habitat Retail Ltd. is a retailer of household furnishings in the UK, France, Germany, Spain, and has franchised outlets in other countries. Founded in 1964 by Terence Coran, it was sold by the IKANO Group, owned by the Kamprad family, in December 2009 to Hilco, a restructuring specialist. On 24 June 2011 all but three UK Habitat stores were being put into administration in a deal to sell the indebted furniture chain, with the brand and the three London stores being sold to Home Retail Group.
- Casa : [www.casashops.com](http://www.casashops.com)  
Casa is European chain of home decoration and furniture. Founded in 1973 in Belgium. In France there have 262 stores (226 branches and 36 franchises)
- Maison du monde : [www.maisondumonde.com](http://www.maisondumonde.com)  
Major specialized retailers in worldwide home decoration (Mainly African and Asian handicrafts). Founded in 1990 by Xavier Marie. They have 250 shops in France and made 340 million Euros of sales in 2011.
- Printemps - [www.departmentstoreparis.printemps.com](http://www.departmentstoreparis.printemps.com)  
Printemps Department Store Paris operates a beauty department store in Paris. It offers women's fashions products, luxury products, such as jewelries, watches, accessories, house ware, and decorative items; and beauty care products, such as make-up, face, and body care, and beauty accessories. In addition, it offers home decoration products, including crystal, porcelain, silverware, and linens; and men's fashion products, such as shirts, ties, suits, and accessories.  
The company was founded in 1865 and is based in Paris, France.
- Grands Magasins Galeries Lafayette - [www.galerieslafayette.com](http://www.galerieslafayette.com)  
The Galeries Lafayette is a French department store company located in Paris. In 2011, Galeries Lafayette recorded earnings of over a million Euros. It is a part of the company Groupe Galeries Lafayette.
- Zara Home - [www.zarahome.com](http://www.zarahome.com)  
Zara home is a chain belonging to Inditex Group, specialized in fashion and decoration.  
In 2011 Zara Home represented 2,3 % of Inditex Group sales.

- Solidar'Monde - [www.solidarmonde.fr](http://www.solidarmonde.fr)  
 Solidar'Monde is a central organization for import and distribution created in 1984 by the Artisans du Monde. It coordinates the importation and distribution of products.
  
- Lebon Marche - [www.lebonmarche.com](http://www.lebonmarche.com)  
 Retailer of home and garden decorative articles  
 Lebon Marché ("the good market") is the name of one of the best known department Store in Paris, France. It is regarded by most historians as the "first department store in the world". The founder was Aristide Boucicaut.
  
- H&M - [www.hm.com/fr](http://www.hm.com/fr)  
 H & M Hennes & Mauritz AB (operating as H&M) is a Swedish multinational retail-clothing company, known for its fast-fashion clothing for men, women, teenagers and children.  
  
 It has over 2,300 stores in 43 countries and as of 2011 employed around 94,000 people. It is ranked the second largest global clothing retailer, just behind Spain-based Inditex (parent company of ZARA), and leads over third largest global clothing retailer, United States based GAP Inc.
  
- Promod - <http://www.promod.fr/>  
 Promod is a brand ready-to-wear managed by Francis-Charles Pollet. Ranked as 99th in the list of Fortune 500 in France in 2011 with 300 M€ of sales.
  
- Kookai - <http://www.kookai.fr/>  
 Kookai is a French fashion label founded in 1983 by Jean-Lou Tepper, Jacques Nataf and Philippe de Hesdin. It has a simple philosophy: "to supply young women with affordable apparel for their wardrobes". Its clothing line is generally characterized by French fashion trends.

## TRADE ASSOCIATION CONTACT

**Handicraft** : List of contacts

### Trade associations:

- European Candle Association - [www.eca-candles.com](http://www.eca-candles.com)  
Heinestr. 169  
D-70597 Stuttgart  
Tel: +49 711 97658-0      +49 711 97658-0  
Fax: +49 711 97658-30  
Email: [info@eca-candles.eu](mailto:info@eca-candles.eu)
- Association European candle makers - <http://europecandles.org/pages/uk/contact-us.php>  
142, Avenue Jules Bordet  
1140 Brussels Belgium  
Tel: +32 2 761 1654 or +32 2 761 1654  
Fax: +32 2 761 1699  
E-mail: [aecm@kelleneurope.com](mailto:aecm@kelleneurope.com)
- Union of Houseware manufacturers - [www.unitam.fr](http://www.unitam.fr)  
39 r Louis Blanc  
92400 COURBEVOIE  
Tel : +331 47 17 64 60
- Aid to Artisans - [www.aidtoartisans.org](http://www.aidtoartisans.org)  
International Non-profit Organization for the craft sector  
Aid to Artisans  
1030 New Britain Avenue, Suite 102  
Hartford, CT 06110 USA  
Tel: (860) 756-5550  
Fax: (860) 756-5558
- EFTA - [www.european-fair-trade-association.org](http://www.european-fair-trade-association.org)  
EFTA Head office  
Kerkewergje 1  
6305 BC Schin of Geul  
The Netherlands  
Tel: +31 43 325 69 17  
Fax: +31 43 325 84 33  
Email: [efeta@antenna.nl](mailto:efeta@antenna.nl)
- Confédération des Industries Céramiques de France  
(Confederation of Ceramic Industries of France), <http://www.cerameurop.com/spip.php?article254>  
144, rue La Boétie  
75008 PARIS  
Tel: +331 58 18 30 40  
Fax: +331 42 66 09 00  
Email: [cicf@ceramique.org](mailto:cicf@ceramique.org)

- The National Union of Furniture Industries - [www.unifa.org](http://www.unifa.org)  
 28 bis avenue Daumesnil  
 75012 Paris  
 Tel : +331 44 68 18 00  
 Fax : +331 44 68 18 16  
 Email: [unifa@mobilier.com](mailto:unifa@mobilier.com)
  
- The Furniture Retailing Federation - [www.fnaem.fr](http://www.fnaem.fr)  
 FNAEM - 59, rue Saint Lazare  
 75009 Paris  
 Tel: +331 42 85 87 55  
 Fax: +331 42 80 68 84
  
- The Institute of Furniture Promotion - [www.ipca.fr](http://www.ipca.fr)  
 37 Av Daumesnil  
 75012 Paris  
 Tel: +331 46 28 21 21
  
- French Furniture Exporters - [www.thefrenchfurniture.com](http://www.thefrenchfurniture.com)  
 Email: [gem@mobilier.com](mailto:gem@mobilier.com)
  
- VIA - [www.via.fr](http://www.via.fr)  
 Promotes French design and creativity as it applies to contemporary living, including furniture.  
 29-35 Avenue Daumesnil  
 75012 Paris  
 Tel: +331 46 28 11 11  
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 E-mail : [via@mobilier.com](mailto:via@mobilier.com)
  
- SYPROCAFS - [www.syprocaf.fr](http://www.syprocaf.fr)  
 Business gifts professional union  
 5 rue Helder  
 75009 Paris  
 Tel: +336 26 95 28 88
  
- UIT (Union des Industries Textiles) - [www.textile.fr](http://www.textile.fr)  
 37-39 rue de Neuilly  
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 Email: [uit@textile.fr](mailto:uit@textile.fr)
  
- Espace Textile - [www.espacetextile.com](http://www.espacetextile.com)  
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