

The French market potential for cocoa

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France is among the largest cocoa importers in Europe. France has a large cocoa-processing and chocolate-manufacturing industry. As such, French re-exports of cocoa beans are limited. France is one of the main markets for speciality chocolates in Europe, and French consumers favour dark chocolates, premium ingredients and high-quality cocoa.

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1. Product description

The cocoa tree (*Theobroma cacao*) grows in tropical areas between 15 and 20 degrees latitude north and south of the equator in Africa, Asia and Latin America. Cocoa pods grow directly from the trunk and thicker branches of the tree. After extraction from the pod, cocoa seeds (beans) are fermented and dried or sun dried. A cocoa-producing tree can deliver 7-9 kg of dry beans per year on average.

The three main varieties of the cocoa tree are distinguished by the international cocoa market as follows:

1. *Forastero* is the predominant cocoa variety. It is mainly cultivated in Africa but also in Central and South America. It accounts for around 80% of global cocoa production. *Forastero* grows faster and gives a higher yield than other cocoa varieties. The beans have a strong, earthy flavour. Bulk cocoa beans generally come from *Forastero* trees. Well-known *Forastero* subspecies are *Amelonado* and *Nacional*. *Nacional* trees in Ecuador produce fine flavour cocoa.
2. *Criollo* (original cocoa tree) is mainly grown in Central America, northern South America, the Caribbean and Sri Lanka. *Criollo* makes up around 5% of global cocoa production. The beans have a delicate and sweet flavour. *Criollo* is often mixed with other varieties when making chocolate, since it is scarce and expensive. Fine flavour cocoa beans are produced from *Criollo* cocoa trees. Well-known varieties are *Chua*, *Porcelana* and *Ocumare*.
3. *Trinitario* is mainly cultivated in Central and South America, the Caribbean and Asia. The beans are a hybrid of the *Criollo* and *Forastero* trees. This variety represents around 10-15% of global cocoa production. The beans have a floral, fruity flavour. The cocoa beans from *Trinitario* trees are classified as fine flavour cocoa. There are exceptions, however, as Cameroonian cocoa beans produced from *Trinitario* trees are classified as bulk cocoa beans. Well-known varieties are *Carenero*, *Rio Caribe* and *Sur del Lago*.

The focus of this document is on cocoa beans (whole or broken, raw or roasted), corresponding with HS code 1801. Harmonised System (HS) codes are used to classify products and calculate international trade statistics, such as imports and exports.

Cocoa bean derivatives (cocoa paste, cocoa butter and cocoa powder) are covered in [our study on semi-finished cocoa products in Europe](#).

2. What makes France an interesting market for cocoa?

France ranks as the fourth-largest cocoa importer of Europe. Re-exports of cocoa beans are limited, as France houses a large cocoa-processing and chocolate-manufacturing industry which handles large amounts of cocoa beans.

France is among the main European cocoa importers

France is the fourth-largest importer of cocoa beans in Europe, with nearly 157 thousand tonnes in 2019, at a value of €370 million. Between 2015 and 2019, imports grew by 4.1% annually. France imported about 63% of its cocoa beans directly from producing countries, mainly from Ivory Coast and Ghana. Direct imports from producing countries by France increased by 4.6% between 2015 and 2019. The other 37% of French imports were supplied by other European countries. Belgium was the main supplier, with nearly 52 thousand tonnes of cocoa beans, accounting for 33% of total French imports.

The ports of Le Havre and Rouen provide the main entry point for cocoa beans imported into France, operating as the service cluster [HAROPA](#). This cluster integrates these two ports, plus the port of Paris, and handles around 120 million tonnes of maritime and river traffic annually. [HAROPA includes two of the largest cocoa market players, Cargill and Barry Callebaut.](#)

France ranks as the third-largest European cocoa-grinder

It is estimated that the cocoa-grinding industry in France consumed about [150 thousand tonnes](#) of cocoa beans in 2019. This makes France the third-largest cocoa grinder in Europe, after the Netherlands and Germany. However, with a share of 3.1% of total cocoa grindings worldwide, the market share of France is significantly smaller than that of the Netherlands (12.5%) and Germany (9.2%).

The grinding industry in France had an average annual growth rate of 1.1% between [2016](#) and 2019. The French grinding industry is dominated by a few large companies such as [Cargill](#), [Barry Callebaut](#) and [Cémoi](#).

Despite current growth, grindings are not expected to increase significantly in the future, as multinational companies are increasing their bean grinding activities in the countries of origin, such as [Ivory Coast](#) and [Ghana](#). This gives these companies more direct control of the chain, while also lowering production costs and helping facilitate the targeting of regional markets.

France is among the largest European producers of cocoa products and chocolate

France produced a total of [730 thousand tonnes](#) of finished and semi-finished cocoa products in 2018. About 57% of these products were exported. Out of these exports, 89% were directed to other European countries, 4% were exported to Asia, 3% to the Americas and 3% to Africa.

France also ranks as the sixth-largest exporter of chocolate in Europe, at 279 thousand tonnes (€1.1 billion) in 2019. Germany, Belgium, the Netherlands, Poland and Italy had even higher export volumes of chocolate.

[Ferrero](#), [Nestlé](#), [Mars](#), [Mondelez](#), [Lindt](#) and [Cémoi](#) are among the largest end producers of chocolate in France. The entire French chocolate industry counts over [100](#) chocolate makers, of which 90% are small and medium sized. Examples of chocolate-making companies include [Chocolaterie Abtey](#), [Mazet Confiseur](#), [Révillon Chocolatier](#) and [Valrhona](#).

The French rank sixth in European chocolate consumption

The French consume an average of [7.3 kg](#) of chocolate per person per year, which is higher than the average per capita consumption of 5 kg in Europe. Germany (11.1 kg), Switzerland (9.7 kg) and Estonia (8.8 kg) registered the highest per-capita chocolate consumption in Europe in 2018. Over [35%](#) of all chocolate sales in

2018 in France were in the form of tablets, followed by spreads (24%) and bars (15%).

Total chocolate consumption in France showed a slight decline in recent years. Between 2017 and 2018, the market registered a decline of **1%** in volume. In general, it is expected that the French chocolate market will remain relatively stable in terms of volume, but that the **market will be more and more oriented towards higher-quality products**.

Tips:

- Activate the 'Translation' function of your browser to make the studies available in your native language.
- Learn more about the French chocolate market by reading the publications, news items and updates provided by the French [Syndicat du Chocolat](#).
- Access the [EU Trade Helpdesk](#) to analyse European and French trade dynamics yourself and to build your export strategy. By selecting France as your reporting country, you will be able to follow developments such as the emergence of new suppliers and the decline of established ones.
- See our study of [trade statistics for cocoa](#) for more detailed information about the European trade in cocoa beans.

3. Which trends offer opportunities on the French market?

France is one of the main markets for speciality chocolates in Europe. French consumers prefer dark chocolates and favour premium ingredients and high-quality cocoa, reflecting the strong French gourmet tradition. Sustainability is increasingly important in the French chocolate sector. Industry players are more and more involved in sustainability initiatives, while French consumers increasingly value and buy ethically-produced chocolate products.

French consumers value premium chocolate products

French consumers **highly value premium chocolates**, especially dark chocolate in combination with other premium ingredients, such as fruits and seeds. About **30%** of all chocolate consumed in France is dark chocolate, which is high compared to the **5%** on average for the rest of Europe. In 2019, **36%** of French consumers indicated that the taste of the chocolate is the most important selection criteria when buying chocolate.

Large chocolate manufacturers such as [Cémoi](#) and Swiss brand [Lindt](#) offer a wide assortment of premium chocolate products in France, as do small and medium-sized chocolate makers. In fact, it is said that there are **more gourmet chocolate shops in Paris** than in any other city in the world. Some well-known shops include [La Maison du Chocolat](#), [Michel Cluizel](#), [Patrick Roger](#) and [Alain Ducasse](#).

Within the premium chocolate assortments on offer, there is an increasing focus on cocoa origin. Most high-end brands offer a line of single-origin chocolates. French trading organisations [Alter Eco](#) and [Éthiquable](#), which have fair trade certification, are good examples; their packages make a **reference to origin** and the **cooperatives** they work with. Companies such as [Bonnat Chocolatier](#) and [Chocolaterie A. Morin](#) are other examples – they have also developed direct trade relationships with their suppliers in producing countries.

The sale of higher-quality chocolate products in combination with organic certification is **expected to do especially well in the French market for the coming years**. Sales of seasonal chocolate products are expected to remain stable. In 2018, Christmas and Easter accounted for about **15%** of total annual sales.

Importance of sustainability growing in French chocolate sector

Sustainable sourcing is increasingly important in Europe, where France is one of the frontrunners. Large French cocoa industry players take part in global sustainability initiatives. French commodity trader [Touton](#) and French premium chocolate manufacturer [Valrhona](#) both take part in the [Cocoa Initiative](#), which promotes child protection in cocoa-growing communities. Both companies, as well as French chocolate manufacturer [Cémoi](#), participate in the [Cocoa & Forests Initiative](#), which is committed to ending deforestation and forest degradation caused by cocoa farming.

Besides, [France is one of the European countries](#) that called on the European Union to strengthen environmental and human rights due diligence requirements of companies in the cocoa supply chain. The French government has already launched a [national strategy to stop the import of unsustainable forest and agricultural products by 2030](#).

Given this trend, it is becoming increasingly important for you as an exporter to promote the sustainable and ethical aspects of your production process. You can support these claims with certification. Examples of successful cocoa-exporting companies that provide information on their sustainable production practices and certifications include [CABRUCA](#) (Brazil), [Ecookim](#) (Ivory Coast) and [Grupo CONACADO](#) (Dominican Republic).

French consumers increasingly buy ethically-produced chocolates

The sustainability trend is also reflected in retail sales volumes of sustainably-produced products. About **90%** of all French retailers reported increased sales of sustainable products from 2013 to 2018. The market for fair trade products grew by 22% between 2017 and 2018. The consumption of fair trade-certified chocolate also grew, in part because some large (private label) brands have decided to only sell Fairtrade-certified chocolate, such as the [private label chocolate sold by retailer Monoprix](#).

Although the ethical market is growing, this segment remains a niche market in France. Nevertheless, a number of French established companies are operating on this ethical market, such as [Éthiquable](#), [Alter Eco](#), [Kaoka](#), [Saveurs & Nature](#) and [Artisans du Monde](#). There are two main associations in France for fair trade: the [Commerce Équitable France](#) and [Max Havelaar](#).

Rainforest Alliance/UTZ-certified chocolate products are also widely available in France. [Rainforest Alliance/UTZ](#) is an important label for multinational brands and large retailers operating on the French market. The Carrefour Group is the main French retailer registered on the [list of actors in the cocoa supply chain](#), along with several traders and manufacturers operating in France. French chocolate manufacturer Cémoi also endorses Rainforest Alliance/UTZ certification.

Given the widespread availability of certified chocolates in France, certification can be a key entry requirement for cocoa exporters in most market segments.

Growing interest in healthy and organic food in France

Growing health consciousness in France has resulted in a continuously growing market for organic and sugar and gluten-free chocolates. [France is the second-largest market for organic foods in Europe](#). In 2018, the share of organic food in the total French food market was 4.8%, amounting to retail sales of €9.1 billion. Globally, France registered the largest market growth with over 15% between 2017 and 2018. The popularisation of organic products such as chocolate has been [linked to price accessibility](#).

In 2018, **21%** of French people bought organic chocolate. On the entire chocolate market, the market share of organic chocolate was about **6.6%**. Organic chocolate is available across all price ranges, from low-end and private label to premium. Examples include the organic private label range of chocolate manufacturers [Cémoi](#) and [Kaoka](#). About **12%** of all fair trade chocolate is also organic-certified.

As French consumers have become more conscious about what they eat, there is also a [growing interest in](#)

[vegan chocolate](#), [chocolate without sugar and gluten-free chocolate](#). In 2017, the general offer of gluten-free increased by 31%. Examples of chocolate makers that offer vegan, gluten-free and sugar-free chocolates include [Façon Chocolat](#) and [Cécile Ferrrandi](#). [Karéléa](#) offers sugar-free chocolate bars.

Tips:

- See [our study on trends for cocoa](#) to learn more about current trends and developments on the European market for cocoa and cocoa products.
- See [our study on doing business with European buyers of cocoa](#) for more tips on marketing and promotional aspects of your cocoa.
- Before engaging in a certification programme, make sure to check (in consultation with your potential buyer) that this label has sufficient demand in your target market and whether it will be cost beneficial for your product.
- Find potential business partners in France by checking the lists of [Fairtrade-certified operators](#), [French Rainforest Alliance-certified brands](#), [UTZ-certified cocoa supply chain actors](#) and [organic chocolate producers](#).
- Focus on the certified and good-quality cocoa market in France. You can only access this market if your cocoa and farm are officially accredited by an approved certification body. See the [Entering the French cocoa market study](#) to learn more about quality and certification requirements.
- Want to put premium cocoa on the French market? Try to establish direct trade relationships with smaller traders and chocolate makers. See the section on market segments and trade channels in the [Entering the French cocoa market study](#) for more information.

This study was carried out on behalf of CBI by [ProFound – Advisers In Development](#).

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