The French market potential for cocoa

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France is located in Western Europe. With a population of around 68 million people, it is one of the most densely populated countries in Europe. France's economy is strong: it ranks as the second largest in the Eurozone, after Germany. France has a very diverse economy. Like other Western countries, the largest share of the economy is dominated by services. France has a GDP (Gross Domestic Product: the market value of all the final goods and services delivered in a specific time period) of €40.8 thousand per capita (per person). This is similar to the EU average.

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1. Country description

France shares borders with Belgium, Luxembourg, Germany, Switzerland, Italy, Monaco, Andorra and Spain. French is the official language, but regional dialects and minority languages also exist. Many French people do not speak any other languages. France is famous for its food and drinks. Eating and drinking are very important in French culture.

France is one of the largest cocoa importers in Europe. France has a large cocoa-processing and chocolate-manufacturing industry. Re-exports of cocoa beans are limited, and most of the beans that are imported are processed in France. The country is also a leading market for speciality chocolates in Europe. French consumers prefer dark chocolates, premium ingredients and high-quality cocoa.

This study focuses primarily on cocoa beans. It also includes cocoa paste, cocoa butter, cocoa powder and chocolate. The HS codes are in the table below.

Table 1: HS codes for bulk cocoa

HS Code	Type
1801	Cocoa beans, whole or broken, raw or roasted
1803	Cocoa paste, whether or not defatted

1804	Cocoa butter, fat and oil
1805	Cocoa powder, not containing added sugar or other sweetening matter
1806	Chocolate and other food preparations containing cocoa

Source: World Customs Organization

2. What makes France an interesting market for cocoa?

France ranks as the fourth-largest importer of cocoa beans in Europe, with a successful domestic cocoa-processing industry. France imports large volumes of cocoa beans and only re-exports limited amounts. Most of the cocoa that France imports stays in the country for manufacturing.

France is among the main European cocoa importers

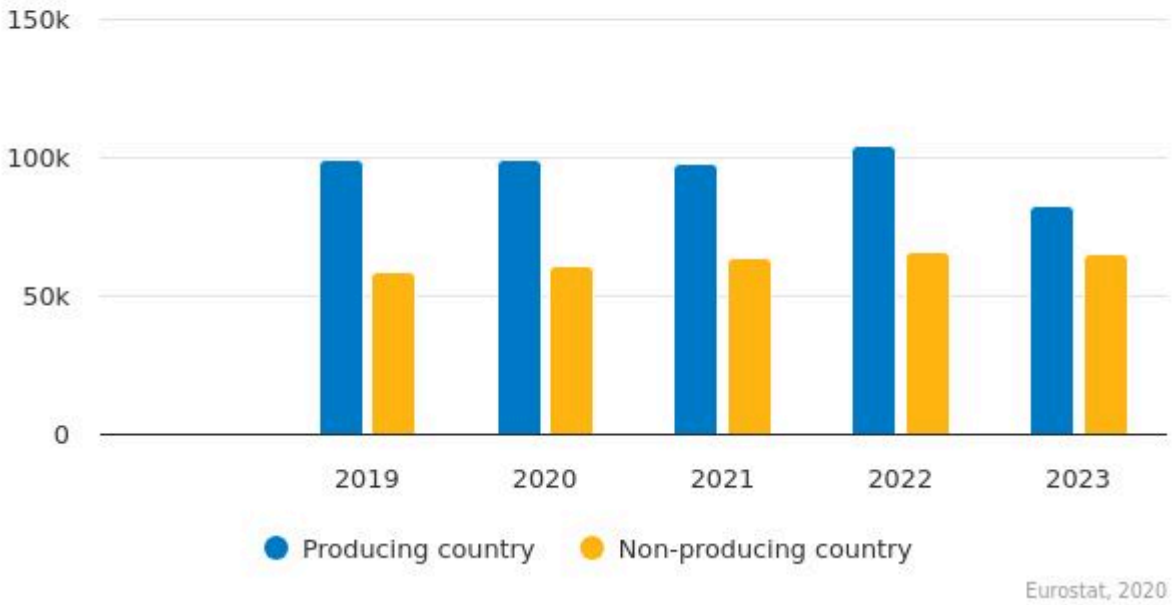
In 2023, France imported 147,000 tonnes of cocoa beans. 82,000 tonnes were imported directly from producing countries, which made France the sixth-largest European importer from producing countries in 2023. The Netherlands was the largest with 881,000 tonnes, followed by Belgium (312,000 tonnes), Germany (185,000 tonnes), Spain (90,000 tonnes) and Italy (89,000 tonnes).

Between 2019 and 2023, overall cocoa bean imports slightly decreased by 2% per year. This mirrors the decrease in overall imports to Europe, which also decreased by 2% per year. A short-term shortage of cocoa was expected because of lower harvests, pest, disease and other issues. Production is expected to increase again in the long term, once the newly planted trees start to produce cocoa, especially in Latin America. For more information about the overall decline in cocoa bean production, read the CBI study What is the demand for cocoa on the European market?

France imported about 56% of its cocoa beans directly from producing countries, mainly the Ivory Coast and Ghana. However, these direct imports have been decreasing by 4% each year between 2019 and 2023. The remaining 44% of France's imports came from other European countries. This percentage increased by 3% per year between 2019 and 2023. Belgium became the main European supplier with nearly 58,000 tonnes of cocoa beans, accounting for 39% of France's total imports.

The ports of Le Havre and Rouen are the main entry points for cocoa beans imported into France, operating as the service cluster HAROPA. This cluster connects these two ports with the port of Paris and handles around 102 million tonnes of maritime and river traffic each year. HAROPA includes two of the largest cocoa market players: Cargill and Barry Callebaut. The HAROPA port is expected to keep growing. They are investing in growth in warehouses and rail and river transport by 2025.

Figure 1: Total cocoa bean imports by France from producing countries and non-producing countries
in tonnes



Source: Eurostat and Trademap, 2024

France ranks as the third-largest European cocoa-grinder

In 2023, the cocoa-grinding industry in France processed around 130,000 tonnes of cocoa beans. This makes France the third-largest cocoa grinder in Europe, behind the Netherlands and Germany. However, France's global share of 2.5% of the cocoa-grinding industry is relatively small compared to that of the Netherlands (12.0%) and Germany (9.0%).

Between 2019 and 2023, cocoa grinding in France declined by an average of 2.5% per year. This decrease was partly caused by the shift towards grinding cocoa beans directly in their countries of origin, such as the Ivory Coast and Ghana. This gives the bean producing companies more direct control over the production chain, while also lowering production costs. It also lets the producing companies target regional markets more effectively.

The cocoa grinding industry is dominated by a few large companies, such as Cargill, Barry Callebaut and Cémoi. Barry Callebaut is closing some of its factories in Europe and cutting staff numbers, including at the Louviers site, as part of its "Next Level" strategy. Since it is the largest cocoa processor, this could reduce overall cocoa imports to France in the coming years.

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

In 2021, France produced a total of 730,000 tonnes of finished and semi-finished cocoa products. It exported about 70% of its production. 85% of these exports went to other European countries, 4% went to Asia, 3% went to the Americas and 3% went to Africa.

In 2023, France ranked as the fourth-largest exporter of chocolate in Europe, exporting 371,000 tonnes. Germany, Belgium and Poland had even higher export volumes of chocolate.

Ferrero, Nestlé, Mars, Mondelēz, Lindt and Cémoi are some of the largest manufacturers of chocolate in France. The entire French chocolate industry includes over 115 chocolate makers, of which 90% are small and medium-sized enterprises (SMEs). 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 person consumption of 5 kg in Europe. However, countries like Germany (11.1 kg), Switzerland (9.7 kg) and Estonia (8.8 kg) have higher chocolate consumption per person in Europe. This is based on information from 2018, so consumption may have changed since then. Over 36% of all chocolate sales in France in 2021 were in the form of chocolate tablets, followed by chocolate spreads (25%) and chocolate bars (15%).

The French chocolate market is predicted to grow at a yearly rate of 1.8%. 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 read the studies in your native language.
- Learn more about the French chocolate market by reading the publications, news and updates from the French Syndicat du Chocolat.
- Access the EU Trade Helpdesk to analyse European and French trade dynamics and develop your export strategy. By selecting France as your reporting country, you can track developments such as the emergence of new suppliers and the decline of established ones.
- See the CBI study Demand for cocoa on the European market for more detailed information on the European cocoa trade.

3. Which cocoa products offer the most opportunities on the French market?

France has a large cocoa importing and processing industry, and a large chocolate market. The key products for exporters to France are bulk cocoa beans, processed cocoa and certified cocoa (Rainforest Alliance and Fairtrade). The niche market of specialty cocoa could be interesting for high-quality bean suppliers. France doesn't import chocolate from producing countries, except for the Ivory Coast.

France is a promising market for bulk cocoa beans

France is a key hub for cocoa beans. France is Europe's fourth-largest importer of cocoa beans overall, and the sixth-largest importer of beans from producing countries. Out of the total 147,000 tonnes that are imported, 123,000 tonnes stay in France for further processing. Three of the world's largest cocoa processors have their headquarters in France: Touton, Cémoi and Sucden.

France has a high demand for cocoa beans from the Ivory Coast and Ghana. In 2023, France imported 40,000 tonnes of cocoa beans from Ghana, which amounted to 49% of all its bean imports from producing countries. 34,000 tonnes came from the Ivory Coast, which amounted to 41% of its imports. No other country represented more than 4% of France's bean imports.

This matches the countries that the largest French companies focus on. Cémoi focuses on sourcing its African cocoa beans from the Ivory Coast, Sucden mainly focuses on the Ivory Coast and Ghana with a smaller presence in Nigeria, and Touton also mainly focuses on the Ivory Coast and Ghana. Smaller companies like Valrhona have projects in the Ivory Coast and Ghana, in addition to smaller places like Madagascar.

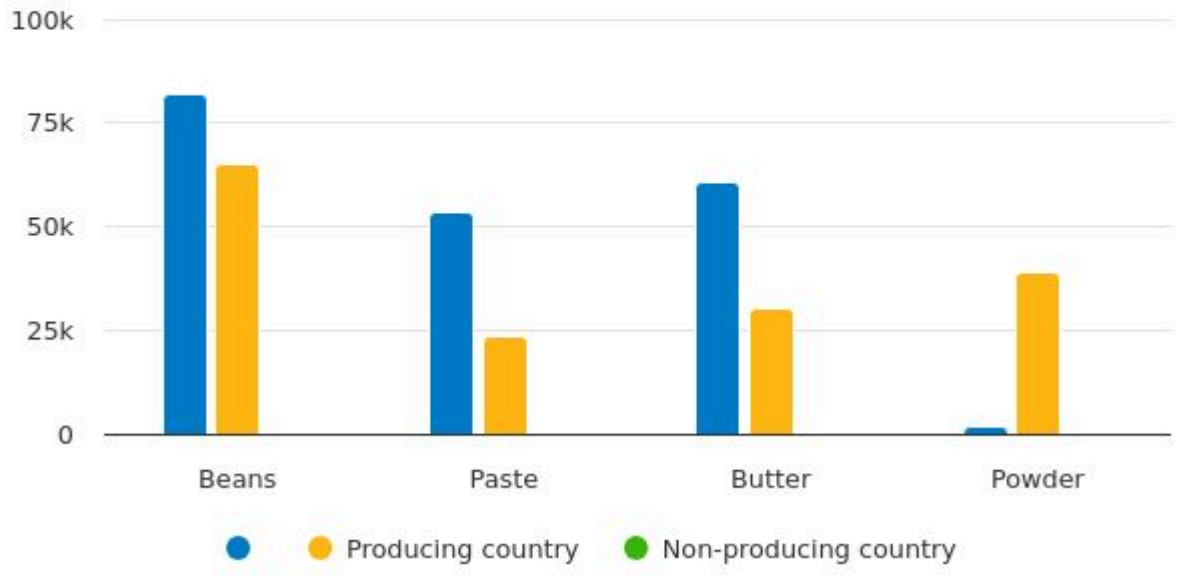
Imports from the Ivory Coast dropped significantly from 2022 to 2023. This was mainly caused by low production during the 2023-2024 season. Low production is also expected in the 2024-2025 harvest, so France will probably import lower volumes from the Ivory Coast and Ghana in 2024 as well. The long-term recovery of these volumes will depend largely on the production levels in these countries. Read the CBI study Entering the French market for cocoa for more information.

France is a key hub for processed cocoa

France is one of the more interesting European countries for cocoa paste and cocoa butter exporters. France is the third-largest importer in Europe of both cocoa paste and cocoa butter. In 2023, France imported 24,000 tonnes of cocoa paste and 31,000 tonnes of cocoa butter from producing countries. This amounted to 15% of all cocoa paste imports and 22% of all cocoa butter imports in Europe. Cocoa paste and cocoa butter imports provide cocoa for both local consumption and potential re-exports to other markets.

France's import volumes of cocoa powder are very small. Cocoa powder imports were less than 2,000 tonnes in 2023. This represented 3% of all cocoa powder imports from producing countries to Europe.

Figure 2: French imports of cocoa beans, cocoa paste, cocoa butter and cocoa powder from producing countries and non-producing countries, 2023
in tonnes



Source: Eurostat and Trademap 2024

France imports chocolate from Ivory Coast

In 2023, France was Europe's third-largest chocolate importer, with 503,000 tonnes. Most of these imports came from non-producing countries (93%). However, France also imported 38,000 tonnes of chocolate from the Ivory Coast and 1,000 tonnes from other producing countries. This represented 29% of all chocolate imports to Europe from producing countries, making France the largest importer of chocolate from producing countries in Europe.

Le Chocolatier Ivorien is an example of a chocolate brand that is produced in the Ivory Coast and sold in France. The brand produces quality chocolate at international standards, with a focus on sustainable development.

Overall, the European import of chocolate from producing countries is still small. Exporters struggle to compete with advanced chocolate manufacturing in Europe. Brands from producing countries must stand out from

European brands, for example through a unique sustainability story.

Read the CBI study Exporting chocolate to Europe for more information.

France is a key country for Rainforest Alliance and Fairtrade cocoa

France ranked as the world's second-largest importer of Rainforest Alliance certified cocoa in 2023. France's total Rainforest Alliance imports reached 198,000 tonnes, accounting for 15% of global Rainforest Alliance sales. Rainforest Alliance does not report whether the imports were beans or derivatives, but calculates the volumes in the equivalent of bean weight. Since France's total bean imports were less than 150,000 tonnes, the 198,000 tonnes of Rainforest Alliance cocoa imports likely include a large share of cocoa paste and cocoa butter imports as well.

The largest French importers and processors are important buyers of certified cocoa. In 2023-2024, Touton imported over 150,000 tonnes of "sustainable" cocoa beans (this means they were certified or part of a sustainability programme). Sucden sourced 11% of its cocoa as Rainforest Alliance or Fairtrade in 2023. Valrhona imported 7% of its cocoa as certified.

France is also an interesting market for Fairtrade certified cocoa, with 36 French brands and 43 international brands selling Fairtrade or Max Havelaar-labelled chocolate products in France. Fairtrade chocolate products are offered by most French retailers, for example 100% of chocolate products sold at Lidl and Intermarché. This makes France attractive for exporters of certified cocoa beans and processed cocoa products.

The demand for certified cocoa is expected to continue to grow. French consumers increasingly buy ethically produced chocolates. This could provide opportunities for suppliers of certified cocoa beans and products.

Organic cocoa is sourced mainly through other European countries

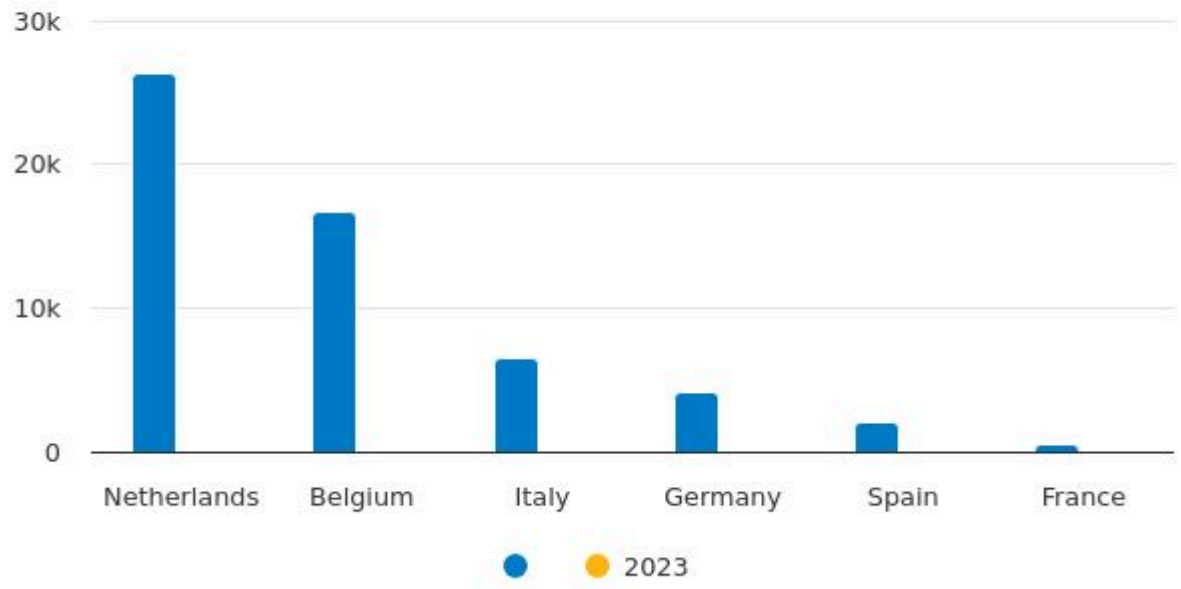
France has a large market for organic products. In 2022, 6.1% of household food consumption was organic. This share decreased slightly in 2020-2022, after increasing steadily the years before that. This decline is partly caused by higher prices and doubts about the organic origins of the products. However, France is still a key organic market in Europe; it ranked third globally in terms of market size in 2021.

The demand for organic chocolate has increased. In 2021, 4.4% of chocolate sold in France was organic. Private label suppliers like Carrefour sell organic chocolate in their supermarkets.

France does not directly import organic cocoa. In 2023, less than 1,000 tonnes of organic cocoa beans were imported from outside the EU. Most organic cocoa arrives via other European countries. The Netherlands and Belgium are the EU's largest organic cocoa importers, importing 77% of all organic cocoa in the EU. For organic cocoa exporters, the ports of Amsterdam and Antwerp are more attractive than French ports.

Figure 3: EU import of organic cocoa beans

in tonnes



Source: TRACES 2024

High-quality cocoa appeals to specialty bean-to-bar chocolate

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 much higher than the European average of 5%.

Large chocolate manufacturers like Cémoi and the Swiss brand Lindt, along with many small and medium-sized chocolate makers, offer a wide range of premium chocolate products in France. 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 highlight the cooperatives they work with. Companies such as Bonnat Chocolatier and Chocolaterie A. Morin are other examples – they emphasise direct trade relationships with their suppliers in producing countries.

Tips:

- See the CBI study Doing business with European buyers of cocoa for more tips on marketing and promotional aspects of your cocoa.
- Before joining a certification programme, check (in consultation with your potential buyer) whether there is enough demand in your target market and whether certification will be cost-effective.
- Find potential business partners in France by checking the lists of Fairtrade certified operators, Rainforest Alliance certified companies and organic chocolate producers.
- Looking 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.

4. Which trends offer opportunities or pose threats on the French cocoa 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 playing an increasingly important role in the French chocolate sector. Industry players are actively involved in sustainability initiatives, while French consumers increasingly value and buy ethically produced chocolate products.

Growing importance of sustainability in French chocolate sector

Sustainable sourcing is becoming a priority in Europe. The EU has launched several initiatives to address sustainability through supply chains. Two key examples are the EU Regulation on Deforestation-free Products (EUDR) and the Corporate Sustainability Due Diligence Directive (CSDDD).

The EUDR promotes the consumption of 'deforestation-free' products and aims to reduce the EU's impact on global deforestation and forest degradation. In December 2024, the European Union postponed the implementation of the EUDR by a year, from 30 December 2024 to 30 December 2025. From that point on, companies need to prove that they are sourcing cocoa that is legal and from deforestation-free production regions. SMEs have an extra 6 months to comply.

The CSDDD ensures that companies identify and address any negative human rights and environmental impacts of their actions. It entered into force in 2024, and companies will need to start complying in 2027. Read more about these and other regulations and directives in the CBI studies Tips on how to become EUDR compliant in cocoa and Tips on how to become more socially responsible in the cocoa sector.

Several large French cocoa industry players take part in global sustainability initiatives. French commodity trader Touton, chocolatier Cémoi and premium chocolate manufacturer Valrhona are members of the International Cocoa Initiative (ICI), which promotes child protection in cocoa-growing communities. These companies also support the Cocoa & Forests Initiative, which aims to stop deforestation and forest degradation linked to cocoa farming.

The French government is also committed to sustainability. It has launched a national strategy to end the import of unsustainable forest and agricultural products by 2030. Driven by the Syndicat du Chocolat, the French Sustainable Cocoa Initiative (IFCD) was launched in 2021. The IFCD aims to make the cocoa sector more sustainable by 2030.

Given this trend, it is becoming crucial for cocoa exporters to promote the sustainable and ethical aspects of the 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

French consumers increasingly care about buying more sustainable products, with 80% of French consumers saying they want to consume more responsibly.

You can see this trend in the retail sales volumes of sustainably produced products. In 2023, the market of ethical or Fairtrade products reached €2.12 billion, which is a 1.8% increase from 2022. Fairtrade certified products in particular saw a 4% increase in 2023, with Fairtrade cocoa sales rising by 15% in value and 7% in volume.
Although the ethical market is growing, this segment remains a niche market in France. Nevertheless, several

well-established French companies are leading the ethical cocoa 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 certified chocolate products are also widely available in France. Rainforest Alliance is an important programme for multinational brands and large retailers operating on the French market. The Carrefour Group is the main French retailer registered on the Rainforest Alliance list of actors in the cocoa supply chain, along with several traders and manufacturers like Cémoi.

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

Demand for organic will increase due to growing health consciousness

Growing health consciousness in France is driving the continuously growing market for organic and sugar-free or gluten-free chocolates. France is the second-largest market for organic foods in Europe. In 2021, the share of organic food in the total French food market was 6.6%, amounting to retail sales of €12.7 billion. France had the highest import value of organic products in Europe. The organic chocolate market is expected to grow in 2021-2026.

Organic chocolate is available across all price ranges, from low-end and private label to premium brands. Examples include the organic private label range of chocolate manufacturers Cémoi and Kaoka.

The sale of higher-quality chocolate products in combination with organic certification is expected to be successful in the coming years. Sales of seasonal chocolate products are expected to remain stable. In 2021, Christmas and Easter accounted for about 26% of total annual sales.

Rising food prices could have a negative impact

In 2024, the price of cocoa increased significantly. Prices rose from US $2,000-3,000 in 2023 to over US $10,000 per tonne in 2024. The price will probably stay well above US $3,000. It is expected to stabilise somewhere between the early 2023 price and the record-high price of 2024.

The price increase was caused mainly by a poor harvest in 2023-2024. Bad weather conditions and El Niño negatively impacted cocoa yields. Droughts, fires and the impact of climate change are reducing the yields. Pests and diseases are destroying cocoa farms.

Production in the Ivory Coast and Ghana suffered the most. The Ivory Coast production decreased by 501,000 tonnes and Ghana production by 204,000 tonnes compared to the previous season. For more information about lower production and higher prices, read the CBI study What is the demand for cocoa on the European market?

As a result of the high price of cocoa, chocolate companies are increasing the price of their chocolate products. The price of chocolate products is expected to increase. Some companies are also reducing the size of their chocolate products. The French government is implementing regulations that require retailers to tell shoppers when companies make their products smaller.

In response to the lower demand for organic products, supermarkets in France have already reduced their organic range. When this trend is combined with inflation and the overall rising food costs, this could reduce the demand for ethical chocolate.

Tips:

- Follow the developments of the French Sustainable Cocoa Initiative (IFCD) that was launched in 2021. More information about the initiative and its commitments are expected to be announced in

2024/2025. These commitments could increase the demand for cocoa that is certified or is part of sustainability programmes. Members of the initiative might want to increase their sustainable sourcing efforts.

See the CBI study Trends for cocoa to learn more about current trends and developments in the European cocoa market.

Long Run Sustainability carried out this study in partnership with Ethos Agriculture on behalf of CBI.

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