

COUNTRY MARKET INTELLIGENCE

France Market Intelligence

Market structure, procurement and commercial entry

October 2026

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Reading this report

The data retains its stated period, currency and measurement scope. ExpandOcean Views interpret the commercial implications of each analytical module. Sources are linked beside factual claims. Data cutoff: 16 October 2026.

1 Market structure and commercial context

France combines a large domestic market with the EU single market. INSEE puts population at 69.08 million on 1 January 2026. France recorded €703.6 billion in goods imports on a cost-insurance-freight (CAF) basis in 2025, up 0.7% year on year; exports were €614.7bn free-on-board (FAB), leaving a customs goods balance of -€69.2bn FAB/FAB. CAF and FAB measures are not interchangeable: import totals include freight and insurance to the border, while the trade balance uses FAB on both sides.[1][2]

Buyer discovery must distinguish French importing entities from EU-wide purchasing or distribution organizations. A French buyer may clear goods in another EU member state before onward movement. Duty is paid at the EU external border, not again when goods circulate within the customs union. Target importers, distributors, wholesalers, industrial procurement teams and retail buying organizations by decision authority and operating model.[2][3]

French customs report imports originating in China and Hong Kong at €74.9bn in 2025, 10.8% of third-country imports, with a 5% annual rise. This combined-origin figure is not a standalone China bilateral amount.[1]

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Map the buying entity, not just the country

France is a substantial destination market and a gateway within a customs union, so a lead's registered location alone does not reveal where its purchasing decision, import declaration or inventory sits. Account qualification should record buyer role, intended end market, importer of record, clearance location and onward distribution footprint. Customs flows report origin and trade values, not individual customer demand. That distinction makes buyer mapping and evidence of purchasing authority more useful than a broad France lead count.

2 Macro purchasing power and finance

The latest official indicators show mixed demand. Real GDP was flat quarter on quarter in Q2 2026, after -0.2% in Q1. September consumer prices rose 3.1% year on year; household goods consumption in August fell 0.5% month on month but was 0.8% above August 2025. Household confidence was 86 in September against a long-run reference of 100, and unemployment reached 8.3% in Q2.[4][5]

These readings caution against treating population or GDP as a proxy for easy sell-through. Buyers may scrutinize stock turns, cash conversion and price changes. Quote in euros with clear Incoterms, validity, currency exposure and landed-cost components. Direct importers must consider duty and import VAT financing; distributors may weigh credit and inventory terms. Banque de France's June 2026 baseline projection of 0.5% growth for 2026 is a forecast, not an observed outcome.[6]

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Sell execution confidence before price alone

Flat quarterly GDP, 3.1% annual inflation and softer monthly goods consumption give procurement teams reasons to defend working capital and justify supplier changes. These indicators do not establish that buyers will reject imports; they do change what a credible proposal should demonstrate. Build the case around repeatable landed cost, controllable lead time, traceable specifications and a practical remedy for defects. Discuss finance terms against each buyer's own risk profile rather than infer it from national aggregates.

3 China supply and procurement competition

The French customs authority's 2025 annual analysis shows that imports from China and Hong Kong rose 5% year on year. Increases included clothing (+7%), household appliances (+9%) and aerospace (+36%). Pharmaceutical imports from that combined origin more than doubled from €1.0bn in 2024 to €2.3bn in 2025 (+131%). Computer, electronic and optical imports edged down from €19.9bn to €19.6bn (-1%).[1]

These are French import-side figures, not China's export mirror data, and they do not show a buyer's supplier allocation or margin. Procurement competition includes incumbent EU distributors, established importers, intra-EU wholesalers and direct sourcing. A supplier's case must account for classification, compliance evidence, order flexibility, consistent quality and claims handling as well as factory price. Use trade-fair lists, professional associations, distributor directories and targeted account research to identify decision-makers; verify that prospects actually import or control sourcing. The Commission's Enterprise Europe Network and sector trade fairs provide structured routes to partner discovery.[3]

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Use trade flows as qualification, not forecast

The customs series confirms Chinese-origin supply already competes in France, while mixed product-level movements show why aggregate growth is not a universal sourcing pitch. Import growth measures recorded customs value, not new buyer count, profitability or future demand. Use it to prioritize conversations about existing procurement categories and supplier pain points, then validate order cadence, approved specifications and channel economics with each buying organization.

4 Digital channels and payment

Digital discovery is useful, but conversion is not simply marketplace-led. Eurostat's 2024 enterprise data show web sales represented 4.05% of total enterprise turnover in France; B2B/B2G web sales were 1.96% of turnover. These measures concern

enterprise turnover from web sales, not consumer e-commerce penetration or the share of buyers researching suppliers online.[7] For industrial procurement, online discovery may create a shortlist, while qualification, samples, technical review and negotiated terms require direct engagement.

A practical funnel combines French-language sourcing content, search visibility, sector-specific LinkedIn outreach and concise email evidence packs. Verify the prospect's procurement role and buying process before sending broad catalogs. A CRM should track lead source, response, evaluation stage, requested documentation, quote status, next action and loss reason. Contract, safety and consumer-facing language obligations should be checked for the transaction and product.

Agree payment terms contractually, including currency, milestones, documentary requirements and dispute process. Do not equate consumer card use with B2B settlement practice. If credit is requested, assess the counterparty and set limits rather than treating national payment habits as a credit assessment.

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Make digital outreach a bridge to procurement proof

Eurostat's web-turnover measure in France is a reminder that digital visibility and digitally closed B2B orders are distinct. An effective online prospecting program moves from a relevant French-language message to a verified buying role and a useful evidence exchange covering specification, capacity, quality controls, shipment terms and compliance. Track qualified meetings and quote progression, not impressions alone. Professional purchasing rewards useful proof and consistent follow-up more than an undifferentiated catalog.

5 Industrial and sector demand mechanisms

In 2025, French imports of manufactured goods rose 2.9%, with contributions from aerospace, agri-food and pharmaceuticals; imports of natural hydrocarbons, refined petroleum and automobiles fell.[2] In August 2026 manufacturing output rose 0.3% month on month but remained 0.1% below August 2025. Industrial capacity utilization was 81.7% in Q3 2026.[4]

Industrial procurement is driven by replacement cycles, production uptime, engineering approvals, maintenance and supply continuity. Buyers may require validated specifications, component compatibility, traceability, repeat-order quality and delivery reliability. A first order may follow a supplier approval process rather than represent immediate scale. Retail and distributor buyers assess landed margin, packaging, replenishment and returns; national import totals cannot substitute for local category evidence.

Segment outreach by purchasing mechanism: production and maintenance teams for operational inputs, sourcing and category managers for channel supply, and distributors where local stock or service matters. Ask about buying frequency, onboarding, certification, seasonality and stock policy. Ground proposals in a buyer's documented specification rather than a broad sector label.

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Qualify the purchasing trigger before matching supply

Positive manufactured-import growth in 2025 alongside nearly unchanged year-on-year manufacturing output in August 2026 shows why trade statistics cannot identify the next order. Demand may depend on a plant's utilization, maintenance cycle, approved design or distributor replenishment calendar. Use sector indicators to find conversations, then establish the buyer's actual trigger and qualification sequence. This separates a sourcing project from general interest and avoids unsupported product claims.

6 Import tariffs, taxes and customs

France applies the EU Common Customs Tariff. Duty depends on precise product classification and origin; trade-defence measures or other conditions may also apply. No single country-wide rate is meaningful across products. Before quoting, confirm CN/TARIC code, non-preferential origin, customs value and measures in Access2Markets/My Trade Assistant. Rates and measures vary by tariff line.^{[3][8]}

The importer or its customs representative lodges the import declaration; carriers or other responsible parties lodge the Entry Summary Declaration before arrival. The importer needs an EORI number. Supporting records may include invoice, transport documents, origin evidence, permits and product certificates. Customs may perform documentary or physical checks. Once released for free circulation, goods can move within the customs union without a second import duty.^[3]

French VAT applies to imports. The import VAT base includes goods value and import duty, plus excise where relevant; VAT-registered firms may reclaim eligible input tax. France's standard VAT rate is 20%, with reduced rates for defined categories. Confirm the applicable product rate and importer's registration and accounting position; any exemption or special regime applies only to eligible cases.^{[3][9][13]}

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Make landed-cost ownership explicit

Tariff classification, customs value, importer identity and VAT treatment can change a quote materially, while the Incoterm allocates operational responsibilities and costs. Identify who is importer of record, who provides classification and origin data, who funds duty and import VAT, and who manages customs representation. Show the basis of landed cost rather than a headline unit price. Product-specific verification before quotation lowers the risk of late cost surprises or delivery commitments based on incorrect assumptions.

7 Technical and consumer compliance

EU product rules apply in France; national authorities enforce them. CE marking is mandatory only for product categories covered by harmonised EU rules that require it,

and must not be applied to unrelated products. Manufacturers are responsible for conformity and marking; importers have separate duties. Before market placement identify applicable legislation, assessment route, technical file and declaration. A notified body is involved only where the applicable law requires it.^[10]

The General Product Safety Regulation (EU) 2023/988 has applied since 13 December 2024 to consumer products within its scope, including online offers, alongside specific harmonised legislation. It sets safety, traceability, responsible economic-operator and online information duties. Additional rules may govern chemicals, electrical equipment, batteries, packaging and waste, food-contact materials, cosmetics, toys, machinery or medical devices. Check French competent authorities and national implementation for the product; EU-level rules do not remove national enforcement.^[11]

Make compliance part of supplier discovery. Request test reports tied to the precise model and production site, declarations, material disclosures, labeling artwork, batch traceability and change-control commitments. Verify the scope of any certificate: there is no central EU body issuing blanket CE permission.^[10]

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Treat evidence as a supplier-selection criterion

EU rules set many product obligations in France, but importer responsibilities and national enforcement remain material. A familiar mark on a document does not establish that a particular SKU, configuration or batch complies. The procurement file should map each product to its legislation, evidence, responsible operator and record-retention duties before launch. This makes compliance readiness a qualification criterion and helps prevent a promising deal from stalling over incomplete technical files or inaccurate labeling.

8 Logistics and commercial entry

HAROPA PORT's 2025 figures report 84.7 million tonnes of maritime traffic and 18.2 million tonnes of river traffic across its Seine-axis network, with 12 million square metres of warehouse space.^[12] The port authority describes multimodal services. Port, inland waterway, rail and road combinations should be evaluated against cargo, destination and inventory model; no route is universally suitable.

Goods intended for France may be cleared in France or enter through another EU member state before transit to France.^[2] Route choice affects clearance responsibility, transit, working capital and documentation. Agree delivery place under the selected Incoterm, appointment, insurance, inspection, demurrage responsibility, broker instructions and shortage/damage process. Define lead-time milestones from production readiness through export documents, ocean transit, EU entry and inland delivery rather than using generic "door-to-door" language.

A practical entry sequence is to qualify priority accounts and requirements, provide a focused supplier dossier, agree compliance and sample evaluation, then negotiate a pilot order with explicit acceptance and reorder criteria. Record post-delivery performance: repeat conversion depends on reliable execution as well as first-order price.

ExpandOcean View**Build the route and reorder case around the buyer**

France's port and inland infrastructure creates choices, but reliability depends on the connection to the buyer's warehouse, customs arrangement and replenishment plan. A route attractive at origin may not suit a receiver with narrow delivery windows or limited inventory. Make route assumptions, milestones, handoffs and reorder cadence transparent. Sustained conversion is earned when landed cost and delivery performance remain legible after the first order.

9 References

Measurement note. Customs values are nominal 2025 goods trade values unless another period or basis is specified; they are not company sales or forecasts. Latest 2026 indicators are dated as stated and are not compared with full-year totals. Preserve definitions and bases in subsequent tracking.

For a procurement discussion about France, [contact ExpandOcean](#).

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