



GOING GLOBAL EXPORTING TO FRANCE

A guide for clients





Capital
Paris



Currency
€



GDP 2017
c. €2.5tn¹



GDP per capita for 2018
€38,219²



GDP Growth 2018
1.7%³



Population
65.5m⁴



Unemployment 2018
8.8%⁵



Predicted Economic Growth for 2019
1.3%⁶



Enterprise Ireland Client Exports (2018)
€1.03bn (+9%)⁷



WHY EXPORT TO FRANCE?



France is the 7th largest global economy and the 3rd largest in Europe.⁸ A strong and influential country, it is committed to, and is one of the central drivers of the EU.

At 546,630 sq. km⁹ France is around eight times the size of Ireland¹⁰ and its population of over 65m is similar to that of the UK.¹¹

A member of the G7, France is one of the world's biggest and wealthiest industrial powers. Its stable economy has proven resilient to boom and bust cycles.

Economic growth in the market has been consistent in recent years, on the back of strong exports and steady domestic demand. The 2017 election of President Emmanuel Macron, a pro-European centrist, has been largely welcomed by the French business community.

France is among the leading global industrial economies in the automotive, aerospace and railway sectors, as well as in cosmetics, luxury goods, insurance, pharmaceuticals, telecoms, power generation, defense, agriculture and hospitality. It is also the world's leading tourist destination in terms of visitor numbers each year.¹²

REASONS TO INCLUDE FRANCE IN YOUR EXPORT STRATEGY

France is the **3rd largest European economy**¹³



Paris is a frontrunner to replace London as **Europe's financial hub after Brexit**¹⁴



France is the **2nd largest medical device market in Western Europe**¹⁵



France has a **11% share of European construction industry value**¹⁶



France is the world's **6th largest and Europe's largest agricultural producer**, driving huge demand for agricultural machinery imports¹⁷



GET READY TO DO BUSINESS IN FRANCE

Business culture in France is guided by principles of hierarchy, tradition and attention to detail.

As such, logical reasoning and high levels of analysis are used to guide the culture, which can be seen as slow and procedural. It is different to the “transaction based” markets of the UK, US and the Netherlands. Sales cycles are often longer because French organisations like to go through extensive due diligence before choosing a new supplier. This means “me too” companies are unlikely to succeed in the market. Being part of a local, on-the-ground network is important in the French market. Recruiting an in-market business developer or creating a partnership with a French organisation will improve chances of success.

Travelling and Geography

The French market is geographically close to Ireland, with numerous air routes and sea crossings. Charles de Gaulle Airport in Paris is ranked first for cargo and second by passenger numbers in Europe, while Paris Le Bourget is Europe’s leading business airport.¹⁸ France is also home to some of the world’s busiest cargo ports. The Port of Marseille is the 5th busiest in Europe by cargo tonnage, while the Port of Le Havre ranks 8th.¹⁹

Opportunities are not limited to the capital, from aerospace to pharmaceuticals and agribusiness to online selling, many of France’s world leading industries are powered from outside of Paris. As France has reformed its administrative regions, reducing 22 regions to become 12, Enterprise Ireland has seen an increase in regional competition for FDI - solidifying the opportunities for overseas firms looking to relocate outside of Paris. These locations are accessible through an extensive rail network, ranked 5th in the world.²⁰ In order to seize potential within the regions, Enterprise Ireland will be opening an office in Lyon in 2019, which will provide Irish companies with export assistance into the southern part of the country.

Language

Although there are increasingly more Business-level English speakers in France, it is advised to enquire prior to a meeting if your interlocutor is comfortable communicating in English. If not, hire a professional interpreter. Make sure that documents (e.g. business cards, contracts, marketing material, websites etc.) are translated professionally into French. This will contribute to your credibility as a company committed to doing business in the market.

Routes to market

Commercial agents

An agent is a self-employed individual who acts as an outsourced sales resource for a company. Working with an agent can be less costly than employing a full-time member of staff. Using a native French speaker will help build sales leads more effectively from an early stage.

Partners

A partnership agreement with a local organisation may act as a way of gaining foothold in the market or building sales opportunities in sectors that might be difficult to penetrate as a new entrant.

Distributors

The advantage of a distributor is that they have an extensive list of leads and potential clients, a strong distribution network and facilities to serve large areas.

THINGS TO CONSIDER

Market landscape

Irish companies may face challenges in the French market because of the time and patience needed to manage lengthy sales cycles and due diligence processes. However, if approached correctly, France can be a very significant and lucrative market for innovative, leading-edge Irish companies. Irish companies that are best positioned to win in France tend to have the following attributes:

- A world-class technology, product or service innovation
- A clear, market-specific value proposition
- The commitment to stay the course over lengthy sales cycles
- A budget to travel regularly initially and ultimately to have in-market representation
- The ability to deal with demanding technical and customer servicing requirements
- Language capabilities and resources

Market trends

It is necessary to understand the current market trends for the sectors you will be targeting. If there is an obvious gap in the market, find out why. Learn about the size of your target market, growth rates (historic and projected), main players and segmentation. This is an important step for you to put objectives in place around the revenue you will generate in the market over a specific period.

Target market

When considering the French market, Irish companies must understand how buying decisions are made in the market. It is also important to learn who the relevant decision-makers are within your target client companies. Understanding who is responsible for making buying decisions and the budgets they control will increase your chances of penetrating the market.

Market segmentation

With a population of over 65m²¹, France is a large and diverse market. It is essential to have a clear understanding of the market dynamics of the specific industry sector you are targeting.

Competitors

Before approaching French buyers or decision makers, Irish companies need to research their in-market competitors and thoroughly refine their value proposition to ensure that they offering

something different. French buyers won't disrupt their supply chain just to bring a new provider on board with a broadly similar product or service to one currently being sourced. Before approaching French buyers or decision makers, Irish companies need to research the market opportunity thoroughly and refine their value proposition.

Market research resources

Enterprise Ireland's Market Research Centre offers client companies access to market intelligence in the form of company, sector, market, and country information to explore opportunities and compete in international markets, see <https://www.enterprise-ireland.com/en/Export-Assistance/Market-Research-Centre/>

Business France provides comprehensive and regularly updated information and support for companies trading in the French market, see <https://www.businessfrance.fr/en/home>

Paris Region is the local agency supporting incoming international companies with their development in the Paris area, see <https://investparisregion.com/>

Les Echos is one of the main business information publications in France, see <https://www.lesechos.fr/>

La Tribune is the main economic and financial publication, see <https://www.latribune.fr/>

Usine Nouvelle is the main publication on the tech and industrial sectors in France, see <https://www.usinenouvelle.com/>

Customer service

Prospects in France will expect to see strong customer service. Update your website to accommodate for French enquiries and purchases. Set up a French landing page, with customised information for a French audience. Have a presence on French social media.

Factors such as salary, working hours, opportunities for promotion, work-life balance and working environment are important for employees and failure to meet expectations could negatively affect standards of customer service.

Boots on the ground

French business culture favours some form of regular or permanent presence by a would-be supplier; this could be a sales agent, consultant or even a direct employee, supported from head office in Ireland. Because of the significance of relationship building, it is important to build a strong and visible local presence. Depending on the nature of the business, aiming for in-market representation in the longer term can be important, especially for products and services that require demanding technical and customer support.

KEY GROWTH OPPORTUNITIES IN FRANCE

Financial Services

The French financial sector has experienced significant growth in recent years and employs over 1 million people.²² Among some of its principle draws are its large asset management sector, its skilled financial professionals and the presence of major international players. In fact, five of the Eurozone's top banks are French.²³

In France, 45% of financial institutions are currently engaging in partnerships with Fintech companies.²⁴ This is expected to increase to 90% over the next three to five years. Paris is currently striving to become the EU's financial hub after Brexit, driving competitiveness in the sector.²⁵

Digital Technologies

The digital technology market in France is one of the most vibrant in Europe, benefiting from a strong R&D framework and advanced infrastructure.²⁶ The French Government plans to invest over €9m into digital projects for public services, health and social cohesion systems as part of the 2018-2022 "Big Investment Plan".²⁷

Particularly within tech and digital sectors, the emergence of open innovation departments has been capitalised on by Enterprise Ireland through partnerships with networks such as Paris Region.²⁸ This has afforded clients the opportunity to pitch in front of companies such as Total, Citroën, Orange International and Accenture and has led to discussions between our Irish clients and many large French companies.

Telecommunications

France has been ranked as the number one market in Europe for cheap ultra-high-speed broadband connectivity.²⁹ The French Government's high-speed internet plan aims to ensure 100% nationwide coverage of very high-speed internet by 2022 through combined public and private investment of some €20bn. Priority is being given to business parks for the rollout of fiber-optic connections.³⁰ In July 2017, 92% of the French population had access to 4G internet. With 23 million Wi-Fi hotspots, France has more than any other country in Europe.³¹ Several lucrative Franco-Irish partnerships have been formed over the past year in this area and Enterprise Ireland expects to see continued success in France.

Tourism and TravelTech

With a winning combination of outstanding cultural heritage sites, renowned cuisine, high quality hotels and business venues as well as major cultural and sporting events, France is the world's number one tourist destination. In 2016, 82.6 million international tourists visited mainland France and the French tourism sector generated nearly €160bn in revenue. Tourism accounted for 7.2% of French GDP in 2016, with 1.3 million people employed in the sector.³² The strength of the tourism industry in France makes it a very attractive market for travel technology solutions as well as products and services for the hospitality industry.

MedTech

France has a well-established medical device manufacturing industry dominated by multinationals and a well-developed base of indigenous SMEs as medical sub-suppliers. Their production is focused on diagnostic imaging, orthopedics and prosthetics and other medical devices, particularly hospital furniture. The market was valued at €12.9bn in 2017, and is forecast to grow at a compound annual growth rate (CAGR) of 4.7% to €15.5bn by 2021.³³ Medical device imports supply around 75% of the market and France is the second largest EU importer.³⁴

There are several key trends in this area, most notably: the pro-growth agenda of President Macron's reform programme, increasing life expectancy, healthcare needs of elderly population, more competitive hospital purchasing, initiatives to further develop ambulatory care and telemedicine.

Pharma

France is one of the largest pharmaceutical markets in the world. It is home to Sanofi, one of the world's leading pharmaceutical companies and a base for many other major multinationals, including Pfizer. The market is valued at €33.4bn and is forecast to gradually grow in the years ahead.³⁵ The Government's pro-business agenda and lower corporation tax are increasing market attractiveness among pharmaceutical investors.

There are several key trends in this area. The potential for the generic drugs market growth in France is considerable as the Government expands cost-containment measures and the number of



patent expirations on blockbuster drugs increases. Reimbursement of some over the counter (OTC) medication by insurance companies should stimulate growth of the OTC market, along with the ageing population increasing demand for chronic treatments.

Construction

With a value of €115.1bn, the French construction sector is the third largest European market after Germany and UK.³⁶ This is anticipated to grow to €140.24bn by 2021,³⁷ thanks to robust residential construction activity and increasing financing for civil engineering works.³⁸ Residential is the largest segment of construction industry in France, accounting for 60.5% of the industry's total value.³⁹

According to the FBB (Fédération Française du Bâtiment), French construction activity grew by a volume of 2.3% in 2018.⁴⁰ Dynamism in this sector is driven by increased activity in the domain of residential construction, encouraged by tax exemptions supporting real-estate investment and assisting first time buyers. Renovation activity will remain stable while public construction activity will remain low due to constraints within the public spending budget. Despite this, revenue is growing, and employment is increasing in the sector with 30,000 new construction jobs created in 2018.⁴¹

There are currently opportunities in the construction sector thanks to the roll-out of the largest transport project in Europe, the "Grand Paris" (2015-2030). This strategic urban development plan involves investment of €35mn, the creation of 4 new automated metro lines and the expansion of 2 existing lines in the Paris area representing over 200km of new network. It will also see the construction of 70,000 new homes per year.⁴²

The building of datacenters also represents a key growth opportunity in construction. With 4.2% of French GDP generated from the digital economy, France can expect to build 20 new datacenters by 2020.⁴³ Several datacenter clusters exist throughout the country, primarily in Paris, Marseille, Lyon, Lille and Strasbourg, providing opportunities for colocation in these areas.

Other key growth areas in French construction lie in high tech construction opportunities in BIM and the

building of pharmaceutical plants and a move toward energy efficient construction and green building.

Aerospace

With 13% European market share, France's aeronautic industry, which includes civil, military and space, is third largest European market in the aerospace & defence sector.⁴⁴ Opportunities have been identified in specialised tool manufacturing, geolocalisation components and precision engineering.

Agriculture

France is among the largest agricultural exporters in the world and a major agricultural power in the EU, accounting for 16% of all its agricultural land. 50% of the French territory is agricultural land, while 30% is covered with forests. Agriculture employs close to 1 million people (3.4% of the active population) on 490,000 farms with an average size of 55 hectares.⁴⁵ Agricultural machinery imports are worth €3.5bn in France, which presents huge opportunity for foreign manufacturers.⁴⁶

Cleantech and Renewable Energy

Following on from the United Nations Climate Change Conference in 2015, France witnessed the introduction of new regulatory measures concerning environmental policies. This has already created a range of opportunities for Irish companies in the Cleantech space in smart energy, marine energy, water treatment and smart city.

Key trends in this space include energy digitalization, industry 4.0 and mobility of the future.

Retail

France is Europe's second largest consumer market, offering significant commercial opportunities nationally as well as direct access to the European Single Market.⁴⁷ Both bricks and mortar retailers and online retailers are experiencing continued growth in the French market, with supermarkets registering 2% current value growth to reach €62.1bn in 2018⁴⁸ and internet retailing reaching €41.6bn with 13% current value growth for the same period. Major French multinational food chains (such as Carrefour, E.Leclerc, ITM Enterprises (Les Mousquetaires), Groupe Auchan, Groupe Casino, and Système U.) dominate the retail industry, with hypermarkets selling in almost every retail sector.⁴⁹

LEGAL & TAXATION INFORMATION

Visa requirements

Irish passport holders do not require a visa to enter France but must have a valid passport. For more information on travel to France see the Irish Department of Foreign Affairs website: <https://www.dfa.ie/travel/travel-advice/a-z-list-of-countries/france/>

Customs and Currency information

France is a member of the EU Customs Union and as such Irish companies are not subject to customs duties on goods moving between Ireland and France. More information on the customs union can be found at: <http://trade.ec.europa.eu/tradehelp/eu-customs-union>

The single currency within the Eurozone means that there is no currency risk when exporting to France. This reduces financial management costs to both the exporter and importer, facilitating business and simplifying transactions and record keeping.

Corporate structures

There are three main ways for a foreign company to establish a business in France:

- Establish a French subsidiary
- Open a branch office
- Open a liaison office

More information on incorporating in France can be found at: https://www.businessfrance.fr/Media/Production/INVEST/Invest-DEA/DB%20Business%20livret%201_UK_2017.pdf

France is one of the easiest countries in which to establish a business and only 3.5 days are required, compared with 4.5 in the United Kingdom and 10.5 in Germany.⁵⁰ The guichet-entreprises.fr service encourages business creation in France by enabling anyone to complete the formalities necessary to create their activity (registration, applications

for licences or permits, etc) in one place online. It is the official government website for creating, modifying or closing business activity, set up by the French Ministry for the Economy and Finance. More information can be found at: <https://www.guichet-entreprises.fr/en/>

Intellectual Property (IP)

The Institut National de la Propriété Industrielle (INPI) has a patent database which contains information on French patent applications, utility certificates and supplementary protection certificates (SPCs), as well as European (EP) and international (PCT) patent applications. For more information, see: <https://bases-brevets.inpi.fr/en/home.html>

Contractual terms and conditions

Companies beginning operations in France must ensure all contracts adhere to French law, for legal and commercial reasons.

Employment

French labour law regulations are contained in the Code du Travail (Labour Code). Employment law in France is being modernized and aims to become more pragmatic and flexible with a more open dialogue between employers and employees. More information on French employment law can be found at: <https://www.businessfrance.fr/en/invest-in-France-article-doing-business-guide>

Tax structures

The standard Corporate tax rate which was 33.3% will fall to 25% by 2022. From 2018, a tax rate of 28% applies to the first €500,000 of all company earnings, and 33.33% applies above this threshold. The 33.33% tax rate will be lowered to 31% in 2019. For SMEs, a 15% reduced rate continues to apply.⁵¹ More information can be found at: www.impots.gouv.fr/portail/internationalprofessionnel/corporation-tax-1

HELPING YOU WIN IN FRANCE

Enterprise Ireland assists clients entering new markets with:

Pre-visit support

Prior to engaging with an overseas market, client companies should engage with their Development Advisor (DA) and the Enterprise Ireland Market Research Centre in Dublin to ensure they leverage the full range of possible supports in preparation for engaging with the EI team in the market.

- General market and country level information
- Sector overview
- Validation of the opportunity for your product or service
- Evaluation of your market entry strategy
- Suggested channels to market
- Competitor analysis
- Relevant contacts/suggested itinerary
- Summary of relevant market information resources
- Market Discovery Fund grant support:
<https://www.enterprise-ireland.com/en/funding-supports/Company/Establish-SME-Funding/Market-Discovery-Fund.html>

In-market support

- Introductions to buyers and decision-makers
- Identification of potential partners
- Facilitation of buyer visits to Ireland
- Assistance with product launches/workshops
- Securing reference sites

Mentors

Enterprise Ireland has built up an excellent network of individuals in France who are able to work with Irish client companies on developing their businesses. This includes market and sector specialists, business accelerators and members of Irish business associations.

International trade events programme

Every year Enterprise Ireland organises an extensive programme of events to support your business abroad. These include:

- Inward buyer missions to Ireland
- Group stands at international trade fairs
- Overseas trade missions
- Market study visits to gain knowledge of overseas markets
- Client knowledge events such as seminars and workshops
- Networking events to build and enhance relationships with market contacts.

Further information is available at:

www.enterprise-ireland.com/events

Additional supports

- Recommendations for translation and interpreting services
- Introductions to specialist expertise for legal, recruitment, public relations and taxation requirements

Irish Networks in France

Irish in France:

<https://irishinfrance.wixsite.com/irishinfrance>

Embassy of Ireland, France:

<https://www.dfa.ie/irish-embassy/france/>

IDA Ireland France Office:

<https://www.idaireland.fr/>

Ireland France Chamber of Commerce:

<http://www.franceireland.ie/>

Network Irlande:

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