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GAIN Report #FR0074

# France

## Fresh Deciduous Fruit

### Annual

### 2000

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**Report Highlights:** French apple and pear production is expected to decrease slightly in MY 2000/01. Consumption is likely to remain stable. After a good year due to a large harvest, despite some losses on the British market but the regain of the Russian market, apple and pear exports are expected to remain stable or decrease slightly in MY 1999/2000 due to the smaller crop and quality problems. Total apple imports into France were down 20 percent in MY 1999/2000 and imports from the U.S. felt sharply, probably due in part to some undercounting. Marketing activities have shown that niche market opportunities exist for U.S. organic apples.

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
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## EXECUTIVE SUMMARY

French apple production in MY 2000/01 is forecast to decrease to 2.09 million MT (MMT). Pear production may decrease to 0.256 MMT. These below-average production figures are due to poor weather conditions that prevailed throughout the flowering and growing periods in the main French fruit production areas.

Apple and pear consumption in MY 1999/00 remained stable.

French apple and pear exports increased significantly in MY 1999/2000 due to a larger crop. France remained the largest EU exporter of apples, mostly to the United Kingdom (U.K.), Spain and Germany. French exports to the United Kingdom decreased slightly because of the boycott of French apples by British retailers and consumers in retaliation against the French embargo on British beef, but increased to most other destinations. French apple exports to Russia almost regained the market losses which followed the Russian economic turmoil of August 1998. Due to the large domestic supply, French imports of apples and pears declined significantly. French imports of U.S. apples also declined but may still be undercounted partly because they are transiting through Belgian and Dutch ports (and being accounted as Belgian and Dutch apples in French Customs data). French apple and pear exports are forecast to remain stagnant in MY 2000/01 due to the smaller domestic crop, some quality problems and because of the strong competition from other EU apple and pear exporters.

Notes: For apples and pears, MY 1999/00 refers to the July 99 to June 00 period.

### Sources:

Data in this report are gathered from the Ministry of Agriculture and Fisheries (MinAg), the French Board for Fruits, Vegetables and Horticulture (ONIFLHOR), the Interprofessional Organization for Fruits and Vegetables (INTERFEL), the Technical Center for Fruits and Vegetables (CTIFL), the French Fruit Producers Association (FNPF) and the French Board for Foreign Trade (CFCE)

Note that the joint annual report published in early summer by French fruit associations has not been released as of early September 2000.

## PRODUCTION

### Apple Production, General

According to latest estimates, the French apple crop for MY 2000/01 is expected to decrease by 3 percent from the previous year. No major frost was reported in the spring and early harvests in southern France were good. Trees, especially of the Gala variety, are loaded with fruits. However, some diseases have been reported as well as many hailstorms in Central France which damaged late crops. This quality problem will lead to a larger share of the crop being of second class quality, with more apples having to be processed or withdrawn from the market.

The major apple varieties grown in France in MY 2000/01 are Golden Delicious (920,000 MT), Gala (262,000 MT), Granny Smith (248,000 MT), Red American varieties (160,000 MT), Braeburn (100,000 MT), Jonagold (50,000 MT), Fuji (45,000 MT) and Elstar (35,000 MT). Areas planted to traditional varieties (summer apples, Golden, Red American, Granny Smith) are declining while area planted to Fuji, Braeburn, Gala, Chanteclerc and Pink Lady are growing.

### Pear Production, General

The MY 2000/01 pear production is estimated to be down by 11 percent, compared to the MY 1999/00 level. Some frost occurred in the spring in the southeast region, leading to some losses. No major disease problems were reported. Production of winter pears and autumn pears are declining.

The major summer pear varieties grown in France in MY 2000/01 are Williams (82,000 MT) and Jules Guyot (63,000 MT). Autumn pears account for 86,000 MT and winter pears account for 20,000 MT.

### Crop Area

French apple production is concentrated in the southern and southwest region of France, which account for 85 percent of the crop. The Provence-Cote d'Azur is the major apple producing region, producing more than 25 percent of the total apple production (on 15 percent of the total apple area). The Loire Valley generally produces about 15 percent of the total apple output (on about 10 percent of the total apple area). Among the producing regions, Limousin is the only one that can supply apples in June and July of the year following the harvest. These apples, which are mostly the Golden Delicious variety, last longer due to the higher altitude of the orchards and can maintain their color and taste until the following summer, if cold stored in a controlled atmosphere. Some Limousin producers have recently petitioned the Ministry of Agriculture for an "Appellation controllee" (controllee certificate of origin) label for Limousin apples, believing it could add value to their production and expand their share of the export market.

According to the Ministry of Agriculture (MinAg), most apple orchards are young, especially in the Loire Valley, where 56 percent of apple trees are less than 10 years old. In France, 47 percent of apple trees are currently less than 10 years old.

The type of apple grown in France has changed since the 1980's, with the trend now towards bi-color varieties. Total area under the Golden Delicious variety has fallen from 60 percent to less than 50 percent over the last ten years. Varieties that have been recently popular include Royal Gala, Elstar, Fuji, Idared, Pink Lady and

Braeburn.

France's southern regions supply more than 80 percent of the pear crop, with the Cote d'Azur Provence region alone providing nearly 40 percent of the crop. Since the mid-1970's, the area of commercial pear orchards in France has declined. The Williams variety covers 31 percent of the total pear area, followed by Jules Guyot with 25 percent. Summer pears comprise about 59 percent of the pear orchard area.

## **CONSUMPTION**

### **Apple Consumption, General**

Apples are the leading fruit consumed in France, with an average annual per capita consumption of 15 KG, far ahead of oranges (11 KG) and bananas (7.5 KG). Each year, on average, 800,000 to 900,000 MT of apples are purchased for domestic consumption, including 100,000 to 120,000 MT for hotel and restaurant use. According to market sources, apple consumption in MY 1999/00 has remained stable. (Note: Fresh consumption data in the apple PS&D take into account stock variations; therefore, they do not always reflect the real consumption level).

The volume of apples processed in France is not precisely known. Some estimates report up to 350,000 MT but more conservative estimates put it at 300 - 310,000 MT. Of this quantity, 100,000 to 150,000 MT are processed as compote, 80,000 MT as apple juice and concentrate, and the remaining amount is used for pastry, frozen apples and various other products.

### **Pear Consumption, General**

French pear consumption remained stable in MY 1999/00. The average per capita consumption in MY 1996/97 was close to 3.3 KG. (Note: Fresh consumption data in the pear PS&D take into account stock variations; therefore, they do not always reflect the real consumption level.)

It is difficult to accurately assess the quantity of pears processed by the food industry. It is probably close to 45,000 MT, of which 25,000 are processed into canned pears, 10,000 MT are distilled for pear brandy, and the rest made into other products.

### **Fresh Deciduous Fruit Utilization Patterns**

According to SECODIP, despite declining popularity, the Golden Delicious variety constitutes 46 percent of total household apple purchases, still ahead of the bi-color varieties that comprise 21 percent of purchases. Other varieties are Red American (17 percent), Granny Smith (10 percent) and Reinette (7 percent). More than 30 percent of apple purchases occur in autumn, 32 percent in winter and 24 percent in the spring.

More than 60 percent of the domestic sales of pears occur in the August to December period. The breakdown of household consumption of pears by major varieties is as follows: Williams, 27 percent; Conference, 15 percent; and Comice, 12 percent.

## **TRADE**

## Apple Trade

France is the largest apple exporter in the EU. In CY 1999, apple exports contributed FF 2.6 billion (USD 416 million with the average exchange rate in CY 1999 of FF 6.15 to one USD) to the French agricultural trade surplus. Apple exports constituted close to 35 percent of all French fresh fruit exports, in value, during CY 1999.

French apple exports in MY 1999/00 increased from MY 1998/99, boosted by a large crop. Exports to Germany almost doubled. On the other hand, French exporters lost some market shares on the British market, due to a boycott of French apple exports initiated by British retailers and consumers, and fueled by media coverage, in retaliation against France's decision to keep an embargo on British beef due to "mad cow" concerns. French exports to Russia almost regained the market share lost after the August 1998 financial turmoil. France exports small sized Golden Delicious apples to Russia.

French apple exports in MY 2000/01 may either remain stagnant or decrease slightly because of the smaller crop, some quality problems mentioned above and acute competition from other EU apple exporters.

France imports fresh apples from the Southern Hemisphere in the winter. The Granny Smith variety is the most often imported variety, with 20 percent of the import volume. However, consumers are now looking for more exotic apples, so imports of previously rare varieties, such as the Cox, are increasing.

After a ten fold increase in apple imports from the U.S. in MY 1998/99, U.S. apple sales in France have returned to a more average level. The previous hike could have been due to U.S. apples being shipped directly to France instead of transiting through Belgium and Holland (see note below). A recent marketing study showed that the export potential for U.S. apples to France is limited, with some good niche opportunities for U.S. grown organic apples (GAIN Report FR0025, 8/04/200).

Note: Some imports of apples reported from Belgium or the Netherlands are in fact apples from the U.S. or the Southern Hemisphere, which are shipped to France through the ports of Rotterdam or Antwerp, making it difficult to fully capture all imports from the United States.

## Pear Trade

France's pear imports exceeded its exports in MY 1999/2000. Imports from the Southern Hemisphere remained at roughly 30 percent of total imports. Southern Hemisphere pears do not compete with domestically grown EU pears.

## MARKETING

### Market Development Opportunities

There is potential for expanding U.S. apple exports to France, particularly in short crop years. French customers are increasingly looking for larger and more flavorful apples of high quality. Expansion would require promotional and marketing activities, which are currently very limited. Note that U.S. apples have found a growing small niche market in France through British retail chains including Marks and Spencer, and Tesco.

French pear imports are usually inversely associated with the size of the domestic crop. However, general demand for imports is rising slowly and French consumers have now developed a taste for Southern Hemisphere varieties. For summer fruits there is strong competition from EU countries, such as Italy and Spain, and consumers lack information about U.S. varieties. Price competitiveness and marketing activities are needed to help U.S. exporters gain market share in France.

## STATISTICAL TABLES

| PSD Table              |              |         |             |         |                      |         |
|------------------------|--------------|---------|-------------|---------|----------------------|---------|
| Country                | France       |         |             |         |                      |         |
| Commodity              | Fresh Apples |         |             |         | (HA)(1000 TREES)(MT) |         |
|                        | Revised      | 1999    | Preliminary | 2000    | Forecast             | 2001    |
|                        | Old          | New     | Old         | New     | Old                  | New     |
| Market Year Begin      |              | 07/1999 |             | 07/2000 |                      | 07/2001 |
| Area Planted           | 61200        | 60400   | 0           | 60200   | 0                    | 60000   |
| Area Harvested         | 54600        | 54140   | 0           | 54000   | 0                    | 53800   |
| Bearing Trees          | 61700        | 61700   | 0           | 61000   | 0                    | 61000   |
| Non-Bearing Trees      | 6000         | 6000    | 0           | 6000    | 0                    | 6000    |
| Total Trees            | 67700        | 67700   | 0           | 67000   | 0                    | 67000   |
| Commercial Production  | 2022000      | 2134400 | 0           | 2100000 | 0                    | 2001500 |
| Non-Comm. Production   | 40000        | 31400   | 0           | 40000   | 0                    | 40000   |
| TOTAL Production       | 2062000      | 2165800 | 0           | 2140000 | 0                    | 2041500 |
| TOTAL Imports          | 90000        | 80300   | 0           | 90000   | 0                    | 100000  |
| TOTAL SUPPLY           | 2152000      | 2246100 | 0           | 2230000 | 0                    | 2141500 |
| Domestic Fresh Consump | 992000       | 990600  | 0           | 990000  | 0                    | 951500  |
| Exports, Fresh Only    | 700000       | 795500  | 0           | 790000  | 0                    | 750000  |
| For Processing         | 310000       | 310000  | 0           | 310000  | 0                    | 310000  |
| Withdrawal From Market | 150000       | 150000  | 0           | 140000  | 0                    | 130000  |
| TOTAL UTILIZATION      | 2152000      | 2246100 | 0           | 2230000 | 0                    | 2141500 |

| Import Trade Matrix |              |         |       |
|---------------------|--------------|---------|-------|
| Country             | France       |         |       |
| Commodity           | Fresh Apples |         |       |
| Time period         | Jul-Jun      | Units:  | MT    |
| Imports for:        | 1998         |         | 1999  |
| U.S.                | 5350         | U.S.    | 241   |
| Others              |              | Others  |       |
| Italy               | 21831        | Belgium | 17961 |

|                   |        |              |       |
|-------------------|--------|--------------|-------|
| Belgium           | 20806  | Netherlands  | 14256 |
| Netherlands       | 14678  | Italy        | 11567 |
| South Africa      | 9433   | South Africa | 9441  |
| Chile             | 9307   | Chile        | 7545  |
| New Zealand       | 8605   | New Zealand  | 7293  |
| Germany           | 5990   | Spain        | 5594  |
| Argentina         | 3349   | Germany      | 2400  |
| Spain             | 2851   | Argentina    | 1223  |
|                   |        |              |       |
| Total for Others  | 96850  |              | 77280 |
| Others not Listed | 2640   |              | 2781  |
| Grand Total       | 104840 |              | 80302 |

|                     |              |                |        |
|---------------------|--------------|----------------|--------|
| Export Trade Matrix |              |                |        |
| Country             | France       |                |        |
| Commodity           | Fresh Apples |                |        |
| Time period         | Jul-Jun      | Units:         | MT     |
| Exports for:        | 1998         |                | 1999   |
| U.S.                |              | U.S.           | 701    |
| Others              |              | Others         |        |
| United Kingdom      | 187952       | United Kingdom | 164644 |
| Spain               | 84460        | Spain          | 121946 |
| Germany             | 67042        | Germany        | 111850 |
| Netherlands         | 58921        | Netherlands    | 97291  |
| Belgium             | 50491        | Belgium        | 31794  |
| Portugal            | 30337        | Finland        | 30176  |
| Finland             | 24436        | Sweden         | 30029  |
| Sweden              | 22258        | Portugal       | 25765  |
| Ireland             | 17559        | Russia         | 21411  |
| Russia              | 10974        | Ireland        | 19534  |
| Total for Others    | 554430       |                | 654440 |
| Others not Listed   | 75960        |                | 140373 |
| Grand Total         | 630390       |                | 795514 |

|           |             |  |  |  |                      |  |
|-----------|-------------|--|--|--|----------------------|--|
| PSD Table |             |  |  |  |                      |  |
| Country   | France      |  |  |  |                      |  |
| Commodity | Fresh Pears |  |  |  | (HA)(1000 TREES)(MT) |  |

|                        | Revised | 1999    | Preliminary | 2000    | Forecast | 2001    |
|------------------------|---------|---------|-------------|---------|----------|---------|
|                        | Old     | New     | Old         | New     | Old      | New     |
| Market Year Begin      |         | 07/1999 |             | 07/2000 |          | 07/2001 |
| Area Planted           | 12900   | 12800   | 0           | 12700   | 0        | 0       |
| Area Harvested         | 12000   | 11900   | 0           | 11800   | 0        | 0       |
| Bearing Trees          | 12900   | 12800   | 0           | 12700   | 0        | 0       |
| Non-Bearing Trees      | 900     | 800     | 0           | 800     | 0        | 0       |
| Total Trees            | 13800   | 13600   | 0           | 13500   | 0        | 0       |
| Commercial Production  | 302000  | 282500  | 0           | 259000  | 0        | 0       |
| Non-Comm. Production   | 5000    | 4900    | 0           | 5000    | 0        | 0       |
| TOTAL Production       | 307000  | 287400  | 0           | 264000  | 0        | 0       |
| TOTAL Imports          | 70000   | 90000   | 0           | 0       | 0        | 0       |
| TOTAL SUPPLY           | 377000  | 377400  | 0           | 264000  | 0        | 0       |
| Domestic Fresh Consump | 227000  | 227000  | 0           | 0       | 0        | 0       |
| Exports, Fresh Only    | 65000   | 51800   | 0           | 0       | 0        | 0       |
| For Processing         | 45000   | 45000   | 0           | 0       | 0        | 0       |
| Withdrawal From Market | 40000   | 40000   | 0           | 0       | 0        | 0       |
| TOTAL UTILIZATION      | 377000  | 363800  | 0           | 0       | 0        | 0       |

| Import Trade Matrix |             |              |       |
|---------------------|-------------|--------------|-------|
| Country             | France      |              |       |
| Commodity           | Fresh Pears |              |       |
| Time period         | Jul-Jun     | Units:       | MT    |
| Imports for:        | 1998        |              | 1999  |
| U.S.                | 64          | U.S.         | 17    |
| Others              |             | Others       |       |
| Italy               | 81939       | Argentina    | 16236 |
| Spain               | 13976       | South Africa | 15926 |
| Israel              | 7429        | Italy        | 14850 |
| Chile               | 7032        | Spain        | 12606 |
| South Africa        | 6061        | Belgium      | 11106 |
| Netherlands         | 546         | Netherlands  | 8446  |
| Argentina           | 292         | Chile        | 5138  |
| Germany             | 212         | Portugal     | 4017  |
| Brazil              | 134         |              |       |
| Morocco             | 123         |              |       |
| Total for Others    | 117744      |              | 88325 |
| Others not Listed   | 583         |              | 1647  |

|             |        |  |       |
|-------------|--------|--|-------|
| Grand Total | 118391 |  | 89989 |
|-------------|--------|--|-------|

|                     |             |                |       |
|---------------------|-------------|----------------|-------|
| Export Trade Matrix |             |                |       |
| Country             | France      |                |       |
| Commodity           | Fresh Pears |                |       |
| Time period         | Jul-Jun     | Units:         | MT    |
| Exports for:        | 1998        |                | 1999  |
| U.S.                |             | U.S.           | 22    |
| Others              |             | Others         |       |
| Germany             | 5222        | Germany        | 13252 |
| United Kingdom      | 4328        | Netherlands    | 9405  |
| Switzerland         | 3904        | United Kingdom | 6499  |
| Netherlands         | 2427        | Belgium        | 4613  |
| Belgium             | 1882        | Italy          | 4599  |
| Spain               | 1075        | Russia         | 2374  |
| Italy               | 743         | Sweden         | 2232  |
| Mauritius           | 137         | Spain          | 1549  |
|                     |             | Ireland        | 1320  |
|                     |             |                |       |
| Total for Others    | 19718       |                | 45843 |
| Others not Listed   | 689         |                | 5921  |
| Grand Total         | 20407       |                | 51786 |