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Tomatoes and Products

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Report Highlights:

In 2005, long-term trends for French tomato production are expected to continue, with production for the fresh market on the rise to almost 632,000 MT, and production for processing on the decline, to approximately 200,000 MT. The decline in supply of French raw material for processing has been accelerated by the purchase of the leading French tomato processing plant by the Chinese company Chalkis. Another impact of such Chinese industrial investment in France is growing imports of tomato paste from China.

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Executive Summary

In 2005, long-term trends for French tomato production are expected to continue, with production for the fresh market on the rise to almost 632,000 MT, and production for processing on the decline, to approximately 200,000 MT. The decline in supply of French raw material for processing has been accelerated by the purchase of the leading French tomato processing plant by the Chinese company Chalkis. Another impact of such Chinese industrial investment in France is growing imports of tomato paste from China.

Situation and Outlook

Tomatoes for the fresh market

According to the French Ministry of Agriculture, Food, Fisheries and Rural Affairs, French production of fresh tomatoes in 2003, 2004 and 2005 is as follows:

		2003	2004	2005 (f)
Area Planted (ha)	Greenhouses	2,057	2,082	2,002
	Open Fields	770	747	788
	Total Area	2,827	2,829	2,790
Production (MT)	Greenhouses	562,856	572,083	589,688
	Open Fields	39,689	42,687	42,146
	Total Production	602,545	614,770	631,834
Yields (MT/ha)	Greenhouses	274	275	295
	Open Fields	52	57	53

France's largest fresh tomato producing companies are Prince de Bretagne (80,000 MT), Saveol (72,000 MT), and Odelis-Rougeline (48,000 MT).

Tomatoes for Processing

In Europe, France is a minor producer of processed tomato products. The quota for France set by the EU under the Common Market Organization (CMO) for fruits and vegetables is 402,000 MT of fresh tomatoes. Deliveries of fresh tomatoes to processors amounted to the following in 2003, 2004, and 2005 :

	2003	2004	2005
Total (MT)	248,950	222,578	200,000
% for tomato paste	75 %	97 %	97 %

In April 2004, 55 percent of France's largest tomato processor, "Conserves de Provence" producer of the brand "Le Cabanon," was bought by the Chinese tomato company Chalkis. Chalkis is a subsidiary of the leading Chinese food company Xinjiang, and the world's second largest tomato processing company. The French cooperative "Le Cabanon" which previously owned 100% of "Conserves de Provence" is keeping the remaining 45 percent of the business.

The agreement signed between Chalkis and Le Cabanon stipulates that Conserves de France will import, process and pack Chinese tomatoes (mainly tomato paste) to sell on the European market. The following trade matrices illustrate the increase in French imports of tomato paste from China in 2003/04 and 2004/05.

While Chalkis initially indicated that it would purchase 60,000 MT of fresh tomatoes produced in France annually, only 25,000 MT are contracted for 2005. This drop from the major processing tomato company in France explains the 20 percent decline in total deliveries of fresh tomatoes for processing indicated in the above table.

Information on the world market for processed tomatoes can be found on the internet website: <http://www.tomate.org>. It includes information in English and French on world production, regional organizations for processed tomatoes, and companies processing tomatoes.

SONITO is the French processed tomato organization: <http://www.sonito.fr> (all in French). SONITO is a member of the Mediterranean Association of Tomato Growers (AMITOM). Their website is: <http://www.amitom.com>. It is both in English and French, and describes the processed tomato sectors of each member country of AMITOM (EU and North African countries). It also has press releases with the status of the current production year in each member country. In 2002, French tomato production for processing accounted for 2 percent of the total AMITOM production.

Statistical Tables

PS&D Tables

PSD Table							
Country	France						
Commodity	Fresh Tomatoes				(HA)(MT)		
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		08/2003		08/2004		08/2005	MM/YYYY
Plnt For Fresh Consump	0	2830	0	2830	0	2790	(HA)
Plnt For Processing	0	3272	0	3112	0	3000	(HA)
TOTAL Area Planted	0	6102	0	5942	0	5790	(HA)
Harv. For Fresh Cons.	0	2830	0	2830	0	2790	(HA)
Harv. For Processing	0	3272	0	3112	0	3000	(HA)
TOTAL Area Harvested	0	6102	0	5942	0	5790	(HA)
Fresh Sale Production	0	576467	0	614770	0	631834	(MT)
Processing Production	0	248950	0	222578	0	200000	(MT)
TOTAL Production	0	825417	0	837348	0	831834	(MT)
TOTAL SUPPLY	0	825417	0	837348	0	831834	(MT)

PSD Table							
Country	France						
Commodity	Tomatoes, Canned				(MT)(MT, Net Weight)		
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		08/2003		08/2004		08/2005	MM/YYYY
Deliv. To Processors	12944	13730	12000	1200	0	1000	(MT)
Beginning Stocks	8836	7078	9984	10625	99934	11425	(MT, Net Weight)
Production	8802	9470	7950	800	0	700	(MT, Net Weight)
Imports	98324	99003	98000	102000	0	100000	(MT, Net Weight)
TOTAL SUPPLY	115962	115551	115934	113425	99934	112125	(MT, Net Weight)
Exports	5978	4926	6000	2000	0	1000	(MT, Net Weight)
Domestic Consumption	100000	100000	10000	100000	0	100000	(MT, Net Weight)
Ending Stocks	9984	10625	99934	11425	0	11125	(MT, Net Weight)
TOTAL DISTRIBUTION	115962	115551	115934	113425	0	112125	(MT, Net Weight)

Sources: French Customs, French MinAg

PSD Table							
Country	France						
Commodity	Tomato Paste, 28-30% TSS Basis				(MT)(MT, Net Weight)		
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		08/2003		08/2004		08/2005	MM/YYYY
Deliv. To Processors	187580	187580	186630	186630	0	180000	(MT)
Beginning Stocks	44998	44998	51776	51776	51876	51876	(MT, Net Weight)
Production	31260	31260	31100	31100	0	30000	(MT, Net Weight)
Imports	58968	58968	54000	54000	0	54000	(MT, Net Weight)
TOTAL SUPPLY	135226	135226	136876	136876	51876	135876	(MT, Net Weight)
Exports	3450	3450	5000	5000	0	5000	(MT, Net Weight)
Domestic Consumption	80000	80000	80000	80000	0	80000	(MT, Net Weight)
Ending Stocks	51776	51776	51876	51876	0	50876	(MT, Net Weight)
TOTAL DISTRIBUTION	135226	135226	136876	136876	0	135876	(MT, Net Weight)

Sources: French Customs, French MinAg

Trade Matrices

Export Trade Matrix			
Country	France		
Commodity	Fresh Tomatoes		
Time Period	Aug/July	Units:	MT
Exports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
Germany	32646	Germany	31695
Belgium	13118	Belgium	14982
Italy	9752	Italy	11865
Switzerland	8372	Czech Republic	7575
Czech Republic	8319	Switzerland	7123
UK	5218	Spain	6069
Spain	4575	UK	4504
Netherlands	4540	Netherlands	3337
Russia	4177	Russia	2980
Slovakia	1593	Austria	1778
Total for Others	92310		91908
Others not Listed	6845		6336
Grand Total	99155		98244

Import Trade Matrix			
Country	France		
Commodity	Fresh Tomatoes		
Time Period	Aug/July	Units:	MT
Imports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
Spain	173750	Morocco	169615
Morocco	154935	Spain	158316
Belgium	49313	Belgium	57008
Netherlands	25062	Netherlands	30678
Italy	6747	Turkey	6259
Israel	4760	Israel	6123
Turkey	2817	Italy	5438
Tunisia	1913	Poland	3426
Poland	1236	Tunisia	1555
Total for Others	420533		438418
Others not Listed	2830		3261
Grand Total	423363		441679

Export Trade Matrix			
Country	France		
Commodity	Tomatoes, Canned		
Time Period	Aug/July	Units:	MT
Exports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
Belgium	2905	Belgium	2618
UK	721	UK	823
Total for Others	3626		3441
Others not Listed	2125		1485
Grand Total	5751		4926

Import Trade Matrix			
Country	France		
Commodity	Tomatoes, Canned		
Time Period	Aug/July	Units:	MT
Imports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
Italy	62941	Italy	67864
Spain	30125	Spain	24910
Belgium	1567	Belgium	1794
		Turkey	1271
		UK	1085
Total for Others	94633		96924
Others not Listed	3204		2079
Grand Total	97837		99003

Export Trade Matrix			
Country	France		
Commodity	Tomato Paste,28-30% TSS Basis		
Time Period	Aug/July	Units:	MT
Exports for:	2002		2003
U.S.	0	U.S.	
Others		Others	
Belgium	1792	Belgium	1749
Germany	432	Germany	847
Total for Others	2224		2596
Others not Listed	3672		866
Grand Total	5896		3462

Import Trade Matrix			
Country	France		
Commodity	Tomato Paste,28-30% TSS Basis		
Time Period	Aug/July	Units:	MT
Imports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
Italy	20982	Italy	24375
Spain	20249	Spain	19836
Portugal	4831	China	7024
China	1249	Portugal	5738
Total for Others	47311		56973
Others not Listed	2308		2115
Grand Total	49619		59088

Partial MY (August-March) French imports of tomato paste		
	2003/04	2004/05
Italy	15613	16619
Spain	12511	17067
China	6321	7122
Portugal	4032	2786
Others	1570	993
Total	40047	44587

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