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France

Tree Nuts

Annual

2006

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Report Highlights:

In 2006, French walnut production is expected to be 32,000 MT, slightly down from the unusually high crop of 2005 (33,000 MT). During the first seven months of MY 2005/06, French exports of walnuts increased significantly, as a result of the larger availability and of the reduced competition of U.S. walnuts in Germany, which is France's largest export market.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Annual Report
Paris [FR1]
[FR]

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Executive Summary

In 2006, French walnut production is expected to be 32,000 MT, slightly down from the unusually high crop of 2005 (33,000 MT). During the first seven months of MY 2005/06, French exports of walnuts increased significantly, as a result of the larger than usual crop in 2005 and of the reduced competition of U.S. walnuts in Germany, which is France's largest export market.

Situation and Outlook

French walnut production amounted to 33,000 MT in 2005, including 16,800 MT in South Eastern France (Rhone-Alpes region) and 14,200 MT in South Western France. In both regions, average grades were higher than average, resulting in significantly higher production than the past five-year average (30 percent higher in South Eastern France and 13 percent higher in South Western France).

In 2005, higher domestic production, combined with reduced competition from U.S. nuts on the European market resulted in larger exports. This was especially the case to Germany, which is France's largest export market. As indicated in the trade matrices below, France continues to export in-shell walnuts to Moldova, where walnuts are shelled and re-exported to France.

In 2006, preliminary estimates are for a slight production decrease from 2005, as the drought experienced in June and July is believed to have had a negative impact on the size, and, therefore, average grades of the walnuts.

French importers of U.S. walnuts are:

Fruisec SAS

Terrasson Lavilledieu

Tel: (33-5) 53 51 44 00

Alimentation Fine de France:

Bergerac

Tel: (33-5) 53 74 40 80

Statistical Tables

PS&D Table:

PSD Table

Country	France		Walnuts,		(HA)(1000	
	Inshell		Basis		TREES)(MT)	
Commodity	2004	Revised	2005	Estimate	2006	Forecast
	USDA	Post	USDA	Post	USDA	Post
Market Year	Official [Old] Estimate[New]		Official [Old] Estimate[New]		Official [Old] Estimate[New]	
Begin	10/2004		10/2005		10/2006	
Area Planted	20400	20400	20400	20400	0	20400
Area Harvested	15900	15900	15900	16200	0	16200
Bearing Trees	1600	1600	1600	1600	0	1600
Non-Bearing						
Trees	450	450	450	450	0	450
Total Trees	2050	2050	2050	2050	0	2050
Beginning						
Stocks	0	0	0	0	0	0
Production	25000	26000	30000	33000	0	32000
Imports	16000	13144	14000	14000	0	13000
TOTAL						
SUPPLY	41000	39144	44000	47000	0	45000
Exports	16000	22239	19000	27000	0	26000
Domestic						
Consumption	25000	16905	25000	20000	0	19000
Ending Stocks	0	0	0	0	0	0
TOTAL						
DISTRIBUTION	41000	39144	44000	47000	0	45000

Sources: French Customs, French Ministry of Agriculture

The most recent trade data available are for April 2006. Shelled and In-Shell Trade Data for the first 7 months of MY 04/05 and MY 05/06 (according to French Customs) were the following:

French exports of in-shell walnuts (08023100), MT, product weight:

Countries	Oct 04/April 05	Oct 05/April 06
Total	14314	20714
U.S.	0	0
Germany	3927	6329
Spain	3542	5454
Moldova	2865	3210
Italy	2049	3122

French Imports of in-shell walnuts (08023100), MT, product weight:

Countries	Oct 04/April 05	Oct 05/April 06
Total	254	274
U.S.	52	68
Spain	23	162
Italy	17	12

French exports of shelled walnuts (08023200), MT, product weight:

Countries	Oct 04/April 05	Oct 05/April 06
Total	1941	2097
U.S.	1	0
Germany	690	882
Switzerland	436	385

French imports of shelled walnuts (08023200), MT, product weight:

Countries	Oct 04/April 05	Oct 05/April 06
Total	4932	6652
U.S.	40	42
Moldova	3015	4061
Ukraine	782	1410
India	319	228
Hungary	145	165

Export Trade Matrix

Country	France		
Commodity	Walnuts, Inshell Basis		
Time Period	Oct-April	Units:	MT
Exports for:	2004		2005
U.S.	2	U.S.	0
Others		Others	
Germany	5307	Germany	8093
Spain	3542	Spain	5792
Italy	2049	Italy	3288
Moldova	2865	Moldova	3210
Switzerland	872	Switzerland	1680
		Portugal	801
Total for Others	14635		22864
Others not Listed	3559		2044
Grand Total	18196		24908

Import Trade Matrix

Country	France		
Commodity	Walnuts, Inshell Basis		
Time Period	Oct/April	Units:	MT
Imports for:	2004		2005
U.S.	132	U.S.	152
Others		Others	
Moldova	6030	Moldova	8122
Ukraine	1564	Ukraine	2820
India	638	India	456
China	178	Hungary	330
		Slovakia	326
		China	310
Total for Others	8410		12364
Others not Listed	1576		1062
Grand Total	10118		13578

Source: French Customs