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France

Fresh Deciduous Fruit

Fresh Deciduous Fruit Annual Report

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Report Highlights: French apple and pear production is expected to remain at average levels in MY 1999/2000. Consumption is likely to remain stable. After a difficult year due to poor harvests, loss of the Russian market and competition from other EU apple and pear exporters, apple and pear exports are expected to increase in MY 1999/2000. U.S. apple exports to France have risen sharply in MY 1998/99, partly because French retailers have shown greater interest in U.S. apples. Marketing activities would be needed to analyse and encourage this trend. French table grapes supply less than half of domestic table grape consumption, and exports are minor.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Executive Summary

French apple production in MY 1999/2000 is forecast to increase to 2.04 million MT (MMT). Pear production may rise to 0.285 MMT. French table grape production in MY 1999 is projected to decrease slightly to 0.107 MMT. These good production figures are due to good weather conditions that prevailed throughout the flowering and growing periods in the main French fruit production areas.

Apple, pear and table grape consumption in MY 1998/99 remained stable.

Despite a large drop in apple exports in MY 1998/99 due to a smaller crop, the loss of the Russian market and increased competition from Italy and Netherlands, France remained the largest EU exporter of apples, mostly to the United Kingdom (U.K.), Spain and Germany. French imports of U.S. apples grew significantly, partly because those apples are shipped directly to France, without transiting Belgian and Dutch ports (and being accounted as Belgian and Dutch apples in customs data). French retailers appears to have a growing interest in U.S. apples. Some marketing activities would be useful to analyse and support this increasing trend.
France's pear imports exceeded exports in MY 1998/99 without any significant changes in the trade pattern. Pear imports from the Southern Hemisphere remained at roughly 30 percent of total imports. Table grape exports in MY 1996 consisted of 20,000 MT, less than 20 percent of total imports, with three fourths of imported table grapes coming from Italy.

Notes: For apples and pears, MY 1998/99 refers to the July 98 to June 99 period. For table grapes, MY 1999 refers to the January 99 to December 99 period.

Source:
Data in this report are gathered from the Ministry of Agriculture and Fisheries (MinAg), the French Board for Fruits, Vegetables and Horticulture (ONIFLHOR), the Interprofessionnal 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 annual report published usually in early summer jointly by the various French fruit associations has not been released by mid-September 1999. Also note that the French Fruit and Vegetable board (ONIFLHOR) was not able to release fruit withdrawal figures for MY 1998/99 due to computer problems.

Production

Apple Production, General

According to latest estimates, the French apple crop for MY 1999/2000 is expected to increase by 15 percent from the previous year. No major frost was reported in the spring and early harvests (July/August 1999) in southern France were good. Trees, especially of the Gala variety, are loaded with fruit. However, some diseases have been reported as well as some hailstorms in Central France. This will lead to a larger share of the crop being of second class quality while more apples from the southern region of France will have to be processed , because of a small frost in mid-April in this region.

The major apple varieties grown in France in MY 1999/2000 are Golden Delicious (880,000 MT), Gala (240,000 MT) Granny Smith (2221,000 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 traditionnal varieties (summer apples, Golden, Red American, Granny Smith) are declining while area planted to Fuji, Braeburn, Chanteclerc and Pink Lady are growing.

Pear Production, General

The MY 1999/2000 pear production is estimated to be up by 16 percent, compared to the MY 1998/99 level. No major frost occured in the spring, leading to good yields. No major disease problems were reported. However, the hike in pear production is mainly due to large summer pear crop, while autumn and winter pear production will be stagnant.

The major summer pear varieties grown in France in MY 1999/2000 are Williams (95,000 MT) and Jules Guyot (70,000 MT). Autumn pears account for 90,000 MT and winter pears account for 20,000 MT.

Table Grape Production, General

The "Total Production" category in the table grape PS&D table pertains to table grapes harvested for the fresh market only and does not include table grapes harvested for processing, such as those used for juice or wine production. Three varieties represent close to 80 percent of the crop: Chasselas (25,000 MT), Muscat (30,000 MT each), followed by Alphonse Lavallee (23,000 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

MinAg for an "Appellation controllee" (controled 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 used to produce 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 more than 59 percent of the pear orchards area.

Current area planted to table grapes is estimated at 13,600 hectares, mostly in the Provence Cote d'Azur region, and has decreased by 60 percent since the end of the 1970's.

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 1998/99 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 290,000 MT but more conservative estimates put it at 270-280,000 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 1998/99. 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.

Table Grape Consumption, General

About 65 percent of the table grapes consumed in France are white varieties. Italia represents 40 percent of the consumption, followed by Chasselas (15 percent). Italia is perceived as an "easy" variety, fitting well with the new consumption patterns of snacking and quick lunches. The main black variety is Muscat (20 percent of the consumption). In MY 1998, The table grape consumption per capita was estimated at 2.4 KG. According to market studies, table grape consumers are often older than the average population and have higher incomes.

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 1998, apple exports contributed FF 2.8 billion (USD 476 million with the average exchange rate in CY 1998 of FF 5.90 to one USD) to the French agricultural trade surplus. Apples exports constituted close to 40 percent of all French fresh fruit exports, in value, during CY 1998.

French apple exports in MY 1998/99 decreased from MY 1997/98, mainly due to a lower crop, intense competition in EU markets (mainly United Kingdom and Germany) from Italian and Dutch apple exporters and the almost complete loss of the Russian export market. The August 98 financial turmoil in Russia cut dramatically French apple exports to the region. Export for the MY 1998 period were only one fourth of exports in MY 1997. There are limited hopes that French apple exports to Russia will resume to their previous volume in the near future.

French apple exports to South-East Asia have also been hit by the recession in this region. However, Gala and bi-colored varieties are increasingly being consumed in some countries such as Japan and Taiwan. Profits from apple exports to Asia are rumored to be large, partly because these markets demand the highest quality.

Hopes are that French apple exports in MY 1999/2000 will increase due to the larger French crop. However, France’s competitors’ apple crops are also forecasted to grow, according to PROGNOFRUIT estimates, which could intensify competition against French apples on the British and German markets.

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. Note that MY 1998/99 apple imports from the U.S. have increased tenfold from the previous year. This hike may be due to U.S. apples being shipped directly to France instead of transiting through Belgium and Holland (see note below), as before, as well as a growing interest shown by French retailers about U.S. apples. So far, lack of marketing activties make difficult a proper analysis of the situation.

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 are expected to exceed 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.

Grape trade

France traditionally imports more table grapes than it produces, with most coming from Italy. However, the size of imports depends on the volume of the French production. As its domestic production of seedless table grapes is very low, France also imports seedless table grapes, most of them of the Italia variety. Muscat and Chasselas varieties are traditionally exported to French speaking countries such as Switzerland and Belgium.

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 insignificant. 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.

With the implementation of the single European Market, the U.S. can now export table grapes to France any time of the year. French consumers seem to have two different preferences for table grapes. They prefer sweet and tasty high quality grapes (with seeds) for dinner (or any full meal), but they also appreciate large seedless grapes for snacks or

quick lunch. Because the French market is not accustomed to American varieties, U.S. exporters need to educate consumers via market promotions and trade shows, as well as keeping prices competitive.

Statistical Tables

Apples

PSD Table						
Country	France					
Commodity	Fresh Apples				(HA)(1000 TREES)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		07/1997		07/1998		07/1999
Area Planted	63600	63600	63000	61100	0	61200
Area Harvested	56100	56100	55500	54500	0	54600
Bearing Trees	62400	62400	61700	60700	0	61700
Non-Bearing Trees	6000	6000	6000	6000	0	6000
Total Trees	68400	68400	67700	66700	0	67700
Commercial Production	1987000	1987000	1780000	1765700	0	2040000
Non-Comm. Production	40000	40000	40000	28200	0	40000
TOTAL Production	2027000	2027000	1820000	1793900	0	2080000
TOTAL Imports	99500	99500	120000	104000	0	90000
TOTAL SUPPLY	2126500	2126500	1940000	1897900	0	2170000
Domestic Fresh Consump	892800	892800	840000	917300	0	940000
Exports, Fresh Only	863200	863200	750000	630600	0	800000
For Processing	290000	290000	300000	300000	0	310000
Withdrawal From Market	80500	80500	50000	50000	0	120000
TOTAL UTILIZATION	2126500	2126500	1940000	1897900	0	2170000

Export Trade Matrix			
Country	France		
Commodity	Fresh Apples		
Time period	July-June	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
United Kingdom	187952		
Spain	84460		
Germany	67042		
Netherlands	58921		

Belgium/Lux	50491		
Portugal	30337		
Finland	24436		
Sweden	22258		
Ireland	17559		
Russia	10974		
Total for Others	554430		0
Others not Listed	75960		
Grand Total	630390		0

Import Trade Matrix			
Country	France		
Commodity	Fresh Apples		
Time period	July-June	Units:	
Imports for:	1998		1999
U.S.	5350	U.S.	
Others		Others	
Italy	21831		
Belgium/Lux	20806		
Netherlands	14678		
South Africa	9433		
Chile	9307		
New Zealand	8605		
Germany	5990		
Argentina	3349		
Spain	2851		
Total for Others	96850		0
Others not Listed	2640		
Grand Total	104840		0

Pears

PSD Table						
Country	France					

Commodity	Fresh Pears				(HA)(1000 TREES)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		07/1997		07/1998		07/1999
Area Planted	14400	14400	13800	12900	0	12900
Area Harvested	13000	13000	12400	12000	0	12000
Bearing Trees	14300	14300	13800	12900	0	12900
Non-Bearing Trees	1500	1500	1500	900	0	900
Total Trees	15800	15800	15300	13800	0	13800
Commercial Production	253800	253800	248000	240600	0	280000
Non-Comm. Production	5000	5000	6000	5500	0	5000
TOTAL Production	258800	258800	254000	246100	0	285000
TOTAL Imports	84000	84000	90000	88000	0	80000
TOTAL SUPPLY	342800	342800	344000	334100	0	365000
Domestic Fresh Consump	180300	180300	219000	229100	0	225000
Exports, Fresh Only	73000	73000	65000	45000	0	75000
For Processing	45000	45000	45000	45000	0	45000
Withdrawal From Market	44500	44500	15000	15000	0	20000
TOTAL UTILIZATION	342800	342800	344000	334100	0	365000

Export Trade Matrix			
Country	France		
Commodity	Fresh Pears		
Time period	July-June	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Germany	11020		
Netherlands	8881		
United Kingdom	6849		
Belgium/Lux	5062		
Italy	2331		
Sweden	1845		
Russia	912		
Ireland	758		

Total for Others	37658		0
Others not Listed	7618		
Grand Total	45276		0

Import Trade Matrix			
Country	France		
Commodity	Fresh Pears		
Time period	July-June	Units:	MT
Imports for:	1998		1999
U.S.	26	U.S.	
Others		Others	
Italy	25494		
Belgium/Lux	13465		
Argentina	13181		
South Africa	12349		
Netherlands	9100		
Spain	8370		
Chile	4976		
Total for Others	86935		0
Others not Listed	1482		
Grand Total	88443		0

Grape

PSD Table						
Country	France					
Commodity	Fresh Table Grapes				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Area Planted	14200	14200	14100	13900	0	13600
Area Harvested	13500	13500	13400	13300	0	13000

Commercial Production	93700	93700	100000	110400	0	100000
Non-Comm. Production	7000	7000	7000	7000	0	7000
TOTAL Production	100700	100700	107000	117400	0	107000
TOTAL Imports	120000	120000	120000	118000	0	120000
TOTAL SUPPLY	220700	220700	227000	235400	0	227000
Domestic Fresh Consump	210700	204200	215000	215000	0	214000
Exports, Fresh Only	10000	16500	12000	20400	0	13000
For Processing	0	0	0	0	0	0
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	220700	220700	227000	235400	0	227000

Export Trade Matrix			
Country	France		
Commodity	Fresh Table Grapes		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Germany	5222		
United Kingdom	4328		
Switzerland	3904		
Netherlands	2427		
Belgium/Lux	1882		
Spain	1075		
Italy	743		
Mauritius	137		
Total for Others	19718		0
Others not Listed	689		
Grand Total	20407		0

Import Trade Matrix			
Country	France		

Commodity	Fresh Table Grapes		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	64	U.S.	
Others		Others	
Italy	81939		
Spain	13976		
Israel	7429		
Chile	7032		
South Africa	6061		
Netherlands	546		
Argentina	292		
Germany	212		
Brazil	134		
Morocco	123		
Total for Others	117744		0
Others not Listed	583		
Grand Total	118391		0

Concentrated Apple Juice

No official data are available for CAJ production. Therefore, PS&Ds figures are estimates calculated from various sources.

PSD Table						
Country	France					
Commodity	Concentrated Apple Juice				(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		07/1997		07/1998		07/1999
Deliv. To Processors	290000	290000	300000	300000	0	310000
Beginning Stocks	0	0	0	0	0	0
Production	16000	16000	0	16000	0	16000
Imports	5000	5000	0	6300	0	6500
TOTAL SUPPLY	21000	21000	0	22300	0	22500

Exports	8500	8500	0	6900	0	7000
Domestic Consumption	12500	12500	0	15400	0	15500
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	21000	21000	0	22300	0	22500

Export Trade Matrix			
Country	France		
Commodity	Concentrated Apple Juice		
Time period	July-June	Units:	MT
Exports for:	1998		1999
U.S.	302	U.S.	
Others		Others	
United Kingdom	2854		
Germany	1006		
Belgium/Lux	852		
Spain	771		
Netherlands	243		
Australia	189		
Italy	49		
Total for Others	5964		0
Others not Listed	644		
Grand Total	6910		0

Import Trade Matrix			
Country	France		
Commodity	Concentrated Apple Juice		
Time period	July-June	Units:	MT
Imports for:	1998		1999
U.S.	9	U.S.	
Others		Others	
Germany	1463		

Austria	1138		
Turkey	931		
Italy	919		
Netherlands	722		
Spain	605		
Hungary	199		
Belgium/Lux	175		
Total for Others	6152		0
Others not Listed	129		
Grand Total	6290		0