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France

Fresh Deciduous Fruit

Annual

2002

Approved by:
Besa L. Kotati
U.S. Embassy
Prepared by:
Xavier Audran

Report Highlights:
French apple and pear production is expected to increase in MY 2002/2003. Consumption is likely to remain stable. After a significant decrease in MY 2001/2002 due to to a smaller crop, apple exports, especially to non-EU countries, are expected to increase slightly in MY 2002/2003. Imports from the U.S. remain low due to competition from domestic production and low price competitiveness. Marketing activities have shown that niche market opportunities exist for U.S. organic apples.

Includes PSD changes: Yes
Includes Trade Matrix: No
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Executive Summary

French apple production in MY 2002/03 is forecast to increase slightly to 2.06 million MT (MMT) due to favorable weather conditions, despite some losses in several regions due to hailstorm damage. Pear production is forecast to increase to 0.257 MMT.

Apple and pear consumption in MY 2001/2002 remained stable.

French apple exports decreased significantly in MY 2001/2002 due to a smaller crop. France remained, however, the largest EU exporter of apples, mostly to the United Kingdom (U.K.), Spain and Germany. French pear exports, remained well below the level of pear imports, mostly due to the below-average pear crop in MY 2001/2002. French imports of U.S. apples may still be undercounted because they are often transiting through Belgian and Dutch ports (and being counted as Belgian and Dutch apples in French Customs data). French apple exports are forecast to increase slightly in MY 2002/03 due to the larger crop, but may be disadvantaged by the decrease in the U.S. dollar value. French pear exports are not forecasted to increase sharply due to the average crop.

Marketing activities have shown that niche market opportunities exist for U.S. organic apples.

Notes: For apples and pears, MY 2001/2002 refers to the July 2001 to June 2002 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 usually published in early summer by the French fruit associations had not been released as of early September 2002.

Some French websites on fresh deciduous fruits

The website of the French technical center for fruits and Vegetables: http://www.ctifl.fr
The website of the French fruit producers association: http://www.fnpfruits.com
The website of the French intersector for fruits and vegetables: http://www.interfel.com
The portal of the French fruits and vegetables sector: http://www.fruits-et-legumes.net
The website of the French Ministry of Agriculture: http://www.agriculture.gouv.fr
The website of the Association for Promotion and Information on Fruits and Vegetables: http://www.aprifel.com
The website of the French Board for Fruits and Vegetables: http://www.oniflhor.fr

PRODUCTION

Apple Production, General

According to the latest estimates, the French apple crop for MY 2002/03 is expected to increase by 5 percent from the previous year, despite a slight decrease in area planted . No major frost problems were reported in the spring and flowering was not affected by excess rainfall as in MY 2001/2002, there was finally some hail damage in southern France.

The top apple varieties for MY 2002/03 are Golden Delicious (853,000 MT), Gala (329,000 MT), Granny Smith (204,000 MT), Red American varieties (145,000 MT), Braeburn (100,000 MT), Jonagold (50,000 MT), Fuji (45,000 MT) and Elstar (35,000 MT) . Area planted to traditional varieties (summer apples, Golden, Red American, Granny Smith) is declining while area planted to Fuji, Braeburn, Chanteclerc, Pink Lady, and especially Gala (up 5 percent) is growing.

Pear Production, General

MY 2002/03 pear production is estimated to be down by 4 percent, compared to MY 2001/2002. The lower crop is mainly due to smaller than average summer pears. Winter pears are closer to average quality and size.

The major summer pear varieties grown in France in MY 2002/03 are Williams (82,000 MT) and Jules Guyot (61,000 MT). Autumn pears account for 75,000 MT and winter pears account for 16,000 MT.

Crop Area

French apple production is concentrated in the southern and southwest regions of the country, which account for 85 percent of the crop. 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. 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 gained popularity 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 Provence - Cote d'Azur 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 France's number 1 consumed fruit, 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 2000/01 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 recent 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 2000/2001. The average per capita consumption in MY 2000/2001 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. Apple exports constituted more than to 37 percent of all French fresh fruit exports, in value, during CY 2001.

French apple exports in MY 2001/2002 decreased from MY 2000/2001, due to a smaller crop and the lack of price competitiveness compared to other EU exporters. Exports to Saudi Arabia remained high at close to 15,000 MT, exports to the United Arab Emirates were slightly down to 7,500 MT while exports to Russia (15,000 MT) lost some ground after a large gain in previous MY, due to competition from Italian exporters. Exports to the EU were also down. On the other hand, exports to Algeria went from nil to 26,000 MT in MY 2001/2002.

French apple exports in MY 2002/03 may increase slightly because of the larger crop. On the other hand, they may be disadvantaged by the decrease in the dollar value.

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.

U.S. apple sales in France remain priced out of the market .

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 pear trade has been stable for the past few years. France imported more pears than it exported in MY 2001/2002. France imports summer table pears from Italy, Spain and Belgium to complement the domestic production. Imports from the Southern Hemisphere during the winter remained at roughly 30 percent of total imports. Southern Hemisphere pears do not compete with domestically grown EU pears. France exports table and industry pears. EU countries are the main markets for French 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. Expansion would require promotional and marketing activities, which are currently very limited. Note: U.S. apples had found a growing small niche market in France through British retail chains including Marks and Spencer, and Tesco. However, the closure of all the Marks & Spencer retail outlets in France at the end of 2001 ended this opportunity. A recent marketing study however 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, 8/04/2000).

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.

PSD Table						
Country	France					
Commodity	Fresh Apples				(HA)(1000 TREES)(MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		07/2001		07/2002		07/2003
Area Planted	59100	58100	58100	58100	0	57300
Area Harvested	52900	52000	52000	52000	0	51500
Bearing Trees	59000	59000	58000	58000	0	57000
Non-Bearing Trees	6000	6000	6000	6000	0	6000
Total Trees	65000	65000	64000	64000	0	63000
Commercial Production	2015000	1933600	2100000	2030000	0	2050000
Non-Comm. Production	40000	24200	40000	30000	0	30000
TOTAL Production	2055000	1957800	2140000	2060000	0	2080000
TOTAL Imports	105000	124700	100000	95000	0	90000
TOTAL SUPPLY	2160000	2082500	2240000	2155000	0	2170000
Domestic Fresh Consump	1045000	1066400	1050000	1050000	0	1060000
Exports, Fresh Only	750000	668900	800000	720000	0	720000
For Processing	310000	320000	310000	310000	0	310000
Withdrawal From Market	55000	27200	80000	75000	0	80000
TOTAL UTILIZATION	2160000	2082500	2240000	2155000	0	2170000

PSD Table						
Country	France					
Commodity	Fresh Pears				(HA)(1000 TREES)(MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		07/2001		07/2002		07/2003
Area Planted	12500	11800	12500	11900	0	11600
Area Harvested	11400	10800	11400	10900	0	10500
Bearing Trees	12600	11800	12600	11900	0	11600

Non-Bearing Trees	800	800	800	800	0	800
Total Trees	13400	12600	13400	12700	0	12400
Commercial Production	250000	243600	250000	253000	0	250000
Non-Comm. Production	5000	3400	5000	4000	0	4000
TOTAL Production	255000	247000	255000	257000	0	254000
TOTAL Imports	100000	91600	100000	98000	0	95000
TOTAL SUPPLY	355000	338600	355000	355000	0	349000
Domestic Fresh Consump	265000	245600	265000	255000	0	254500
Exports, Fresh Only	40000	45400	40000	50000	0	45000
For Processing	45000	45000	45000	45000	0	45000
Withdrawal From Market	5000	2600	5000	5000	0	4500
TOTAL UTILIZATION	355000	338600	355000	355000	0	349000