



Foreign Agricultural Service

**GAIN Report**

Global Agriculture Information Network

Required Report - public distribution

Date: 5/30/2000

GAIN Report #FR0045

## France

## Tomatoes and Products

## Annual

## 2000

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### Report Highlights:

French tomato production amounted to 909,410 MT in 1999, up slightly from the previous year, including 60 percent tomatoes for the fresh market and 40 percent tomatoes for processing. France is a minor tomato producer in the EU, and a net importer of both fresh and processed tomatoes. There is almost no trade between the United States and France for these products. Shipments of fresh tomatoes from France to the United States are kept low by high U.S. import duties set in 1999 on a number of EU products in response to the European beef hormone ban. Morocco and Spain are France's leading suppliers of fresh tomatoes, while Italy is France's leading supplier of processed tomato products.

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

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## Executive Summary

French tomato production in 1999 amounted to 909,410 MT, including 60 percent tomatoes for the fresh market and 40 percent for processing. France exceeded by 30,000 MT its production quota of fresh tomatoes for processing in 1999, set at 332,648 MT. In 2000, France is expected to exceed again its quota, set at 299,384 MT. France is a minor producer of tomatoes in the EU and a net importer of both fresh and processed tomatoes. Morocco and Spain are France's leading suppliers of fresh tomatoes, with 46 and 38 percent of the market in 1999. Italy is France's leading supplier of processed tomatoes, with 66 percent of the canned tomato market and 52 percent of the tomato paste market in 1999.

## Section I: Situation and Outlook

### Tomatoes for the fresh market

According to the French Ministry of Agriculture and Fisheries, French production of fresh tomatoes in 1998, 1999 and 2000 included the following:

		1998	1999	2000 (partial estimate, April 2000)
Area Planted (ha)	Greenhouses	2,163	2,148	2,101
	Open Fields	1,671	1,413	1,408
	Total Area	3,834	3,561	3,509
Production (MT)	Greenhouses	477,206	474,576	490,173
	Open Fields	84,429	71,835	70,653
	Total Production	561,635	546,410	560,826
Yields (MT/ha)	Greenhouses	221	221	234
	Open Fields	51	51	50

The long-term trends of tomato sales in the past years continued in 1999, with an increasing share of sales in supermarkets, including a growing percentage sold by deep discounters, and expanding sales of branched tomatoes (tomatoes sold in clusters, still on the vine). In 1999, 337,400 MT fresh tomatoes were sold in French retail outlets, including 85 percent in supermarkets (288,800 MT). Supermarket sales included 11 percent sales in deep discounters stores. The four tomato categories purchased by French households in 1999 were round tomatoes (67 percent), branched tomatoes (25 percent), cherry tomatoes (4 percent) and plum tomatoes (4 percent).

France has a significant trade deficit in fresh tomatoes. France's leading suppliers are Morocco (46 percent of total French imports in 1999) and Spain (38 percent). In 2000, Morocco agreed to limit its tomato exports to the EU to 145,676 MT, per the request of Spain. Spain is Morocco's largest competitor in the EU and suffers from the stiff price-competitiveness of Moroccan products in Europe. Since this ceiling is lower than French imports of tomatoes for Morocco in 1999 (183,727 MT), French imports from Morocco are expected to be reduced in 2000.

## Tomatoes for Processing

France is a minor producer of processed tomato products, and the French quota of fresh tomatoes for processing is the smallest in the EU. In 2000, the French quota accounts for 4 percent of the total EU quota. Higher quotas exist for Italy, Greece, Spain and Portugal, with 52, 16, 15 and 13 percent of the EU quota, respectively.

Deliveries of fresh tomatoes to processors in France and EU quotas for France amounted to the following in 1998, 1999, and 2000 (in MT):

	Deliveries 1998	Deliveries 1999	1999 EU Quota	Deliveries 2000	2000 EU Quota
Tomato Paste	248,000	279,000	250,822	250,000	225,740
Canned Whole Peeled Tomatoes	28,000	29,500	32,502	29,000	29,252
Other Tomato Products	51,000	54,500	49,324	51,000	44,392
Total	327,000	363,000	332,648	330,000	299,384

As indicated in the above table, France exceeded its production quota for tomato paste and other products in 1999, and is expected to exceed them again in 2000. Quantities produced above the quotas do not benefit from EU subsidies. According to the EU legislation, tomato processors get subsidies from the EU if they purchase fresh tomatoes at a minimum price that they pay to tomato growers. The processor subsidy and minimum grower price are set each year by the EU Commission. In 1999/00, they amounted to 21.619 Euro/100 kilograms and 8.80 Euros/100 kilograms, respectively.

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

## Section II: Statistical Tables

### PS&D Tables

PSD Table						
Country	France					
Commodity	Fresh Tomatoes				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		08/1998		08/1999		08/2000
Plnt For Fresh Consump	3834	3834	3561	3561	0	3600
Plnt For Processing	4961	5233	5600	5884	0	5500
TOTAL Area Planted	8795	9067	9161	9445	0	9100
Harv. For Fresh Cons.	3834	3834	3561	3561	0	3600
Harv. For Processing	4961	5233	5600	5884	0	5500
TOTAL Area Harvested	8795	9067	9161	9445	0	9100
Fresh Sale Production	561635	561635	546410	546410	0	550000
Processing Production	314000	327000	372000	363000	0	330000
TOTAL Production	875635	888635	918410	909410	0	880000
TOTAL SUPPLY	875635	888635	918410	909410	0	880000

PSD Table						
Country	France					
Commodity	Canned Tomatoes				(MT)(MT, Net Weight)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		08/1998		08/1999		08/2000
Deliv. To Processors	27000	28000	26000	29500	0	29000
Beginning Stocks	6000	6000	8300	9937	8400	10037
Production	19500	21100	20000	21600	0	21000
Imports	91000	91651	90000	90000	0	90000
TOTAL SUPPLY	116500	118751	118300	121537	8400	121037
Exports	8200	8814	8900	10000	0	10000
Domestic Consumption	100000	100000	101000	101500	0	101500
Ending Stocks	8300	9937	8400	10037	0	9537
TOTAL DISTRIBUTION	116500	118751	118300	121537	0	121037

PSD Table						
Country	France					
Commodity	Tom. Paste, 28-30% TSS Basis				(MT)(MT, Net Weight)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		08/1998		08/1999		08/2000
Deliv. To Processors	240000	248000	230000	279000	0	250000
Beginning Stocks	1240	1240	3740	6444	5740	8044
Production	41000	44100	39000	48100	0	43000
Imports	43000	46229	45000	40000	0	41000
TOTAL SUPPLY	85240	91569	87740	94544	5740	92044
Exports	6500	5125	7000	5500	0	4500
Domestic Consumption	75000	80000	75000	81000	0	81000
Ending Stocks	3740	6444	5740	8044	0	6544
TOTAL DISTRIBUTION	85240	91569	87740	94544	0	92044

## Trade Matrices

Fresh tomatoes:

Export Trade Matrix			
Country	France		
Commodity	Fresh Tomatoes		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.	94	U.S.	133
Others		Others	
Germany	30906	Germany	43899
Belgium	14523	Belgium	10359
Netherlands	9780	Netherlands	8199
Italy	6559	Czech Rep.	7267
Switzerland	4784	Italy	5257
UK	4183	Austria	4325
Austria	3737	UK	4195
Czech Rep.	3449	Switzerland	3508
Spain	1807	Spain	3268
Russia	1449	Slovakia	1142
Total for Others	81177		91419
Others not Listed	5309		6981
Grand Total	86580		98533

Import Trade Matrix			
Country	France		
Commodity	Fresh Tomatoes		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	0	U.S.	11
Others		Others	
Morocco	169284	Morocco	183727
Spain	136996	Spain	149623
Belgium	24109	Belgium	26538
Netherlands	16681	Netherlands	16718
Italy	16434	Italy	13540
Israel	1688	Israel	2155
Tunisia	1294	Tunisia	1015
Total for Others	366486		393316
Others not Listed	1657		2086
Grand Total	368143		395413



## Canned whole peeled tomatoes:

Export Trade Matrix			
Country	France		
Commodity	Canned Tomatoes		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	0
Others		Others	
Belgium	2743	Belgium	2846
Italy	1580	UK	1566
Germany	817	Germany	1353
Spain	813	Netherlands	506
UK	519		
Total for Others	6472		6271
Others not Listed	1422		1761
Grand Total	7894		8032

Import Trade Matrix			
Country	France		
Commodity	Canned Tomatoes		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	0	U.S.	0
Others		Others	
Italy	57650	Italy	56181
Spain	29677	Spain	23987
Greece	665	Netherlands	1569
Germany	526	Belgium	658
Israel	432	Germany	464
Belgium	384	Israel	229
Total for Others	89334		83088
Others not Listed	1100		1466
Grand Total	90434		84554

Tomato paste:

Export Trade Matrix			
Country	France		
Commodity	Tom. Paste,28-30% TSS Basis		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	0
Others		Others	
Italy	1849	Netherlands	1778
Belgium	1284	Belgium	1314
Germany	568	Germany	1266
Switzerland	468	UK	649
Spain	448	Switzerland	466
Netherlands	329	Spain	390
UK	289	Cameroon	326
Total for Others	5235		6189
Others not Listed	568		672
Grand Total	5803		6861

Import Trade Matrix			
Country	France		
Commodity	Tom. Paste,28-30% TSS Basis		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	7	U.S.	0
Others		Others	
Italy	22151	Italy	25349
Portugal	6265	Spain	8829
Greece	5240	Portugal	5447
Spain	5226	Greece	4358
Netherlands	1473	UK	1294
Morocco	1095	Netherlands	840
Germany	506	Tunisia	705
Turkey	359	Morocco	666
Tunisia	239	Hungary	437
Total for Others	42554		47925
Others not Listed	861		697
Grand Total	43422		48622