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France

Tomatoes and Products

Annual

2001

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Report Highlights:

France is a minor producer of tomatoes, and there is no trade for tomatoes and products between France and the United States. Total French tomato production amounted to 851,801 MT in 2000, including 537,832 MT for the fresh market and 313,969 MT for processing. In 2001, the forecast is for an increase in tomato production for both the fresh and processing markets. This is expected to result from the growing acreage of tomatoes in greenhouses. In addition, the reformed Common Organization of the Market for fruits and vegetables set by the EU increased the production threshold for tomatoes for processing for France from 2000 to 2001.

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

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Executive Summary

Total French tomato production amounted to 851,801 MT in 2000, including 537,832 MT for the fresh market and 313,969 MT for processing. In 2001, the forecast is for a slight increase in both fresh sale production due to the growing percentage of tomatoes grown under greenhouses, which have higher yields than tomatoes grown in open fields, and production for processing, as a result of the increased production threshold for France set by the reformed EU Common Organization of the Market for fruits and vegetables. Deliveries of fresh tomatoes for processing were 313,969 MT in 2000, and are likely to increase to 320,000 MT in 2001.

Section I: Situation and Outlook

Tomatoes for the Fresh Market

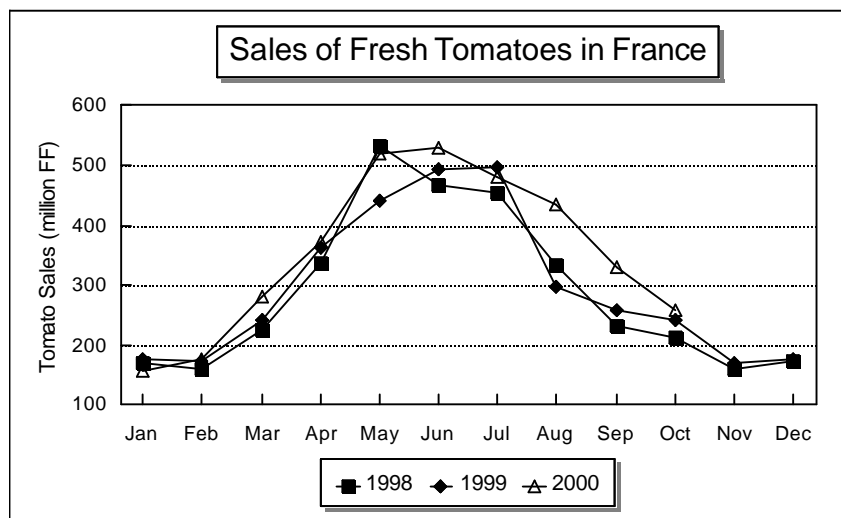
According to the French Ministry of Agriculture and Fisheries, French production of fresh tomatoes in 1998, 1999 and 2000 included the following:

		1999	2000	2001
Area Planted (ha)	Greenhouses	2,148	2,097	2,128
	Open Fields	1,413	1,305	n/a
	Total Area	3,561	3,402	n/a
Production (MT)	Greenhouses	474,576	477,697	498,853
	Open Fields	71,835	60,135	n/a
	Total Production	546,410	537,832	n/a
Yields (MT/ha)	Greenhouses	221	228	234
	Open Fields	51	46	n/a

France's leading tomato producing companies are the following:

Companies	Production 2000 (in MT)	Production 2001 (forecast, in MT)	Number of Producers	Acreage (ha)
SMO (Saveol) http://www.saveol.com	65,000	72,000	120	182
Sica St Pol de Léon	42,000	55,000	130	160
AMS (Rougeline) http://www.rougeline.com	46,000	48,000	75	145
Odelis	24,000	25,000	28	76
Solarenn	16,000	18,000	29	50
Alliance Saveur Soleil	14,000	16,500	31	134

French household consumption amounted to 323,000 MT in 2000, a 4 percent decline from 1999, and sales amounted to FF 4 billion (USD 561 million), up 13 percent from 1999. The average retail price for fresh tomatoes in France was therefore 12.4 FF per kg (1.75 USD/kg). Tomato is French consumers' preferred vegetable. The average per capita consumption amounted to 13 kilograms from 1996 to 1999, and 95 percent of French households purchase tomatoes. The French tomato market in 2000 included a large segment for round tomatoes (62 percent), followed by branched tomatoes (29 percent), long tomatoes (4 percent), and cherry tomatoes (4 percent). In 2000, supermarkets totaled 64 percent of tomato sales, 10 percent were sold at hard discounters and the remainder was sold at street markets and special stores.



Tomato consumption is seasonal, since 60 percent of the purchases traditionally take place from April to August. However, French consumers tend to extend their purchasing season for tomatoes to the fall, as indicated in the opposite graph.

France has a significant trade deficit in fresh tomatoes. France's leading suppliers are Spain and Morocco, which supplied 81 percent of the French market in 2000. Spain replaced Morocco as the leading tomato supplier for France in 2000, because Morocco agreed to limit its tomato exports to the EU to 145,676 MT, per the request of Spain.

Tomatoes for Processing

France is a minor producer of processed tomato products. The EU threshold for France set in 2001 by the EU under the reformed common market organization (CMO) for fruits and vegetables amounted to 401,600 MT, i.e., 5 percent of the total EU threshold for tomatoes for processing. Higher quotas exist for Italy, Greece, Spain and Portugal, with 52, 15, 15 and 13 percent of the EU quota, respectively.

Under the reformed CMO, the minimum price for fresh tomato to be processed is terminated. This price is now set by the producer organization (PO) and the processor. Only tomatoes delivered by a PO and corresponding to some quality standards will get subsidies from the EU. These subsidies will be received by the POs, which will be charged with distributing the funds to their members. Whatever the finished product, the EU subsidy will amount to 34.5 Euros per MT. There are 10 POs and producer groups of tomatoes for processing in France: Camaret, Apto-2, Apaaf, Copatome, Val Soleil, Audecoop, Sicom, Uniproledi, Maisadour, and Capel-la Quercynoise. 80 percent of tomatoes grown for processing are located in southeastern France.

Deliveries of fresh tomatoes to processors in France and EU quotas for France amounted to the following in 1999, 2000 and 2001 (in MT):

	Deliveries 1999	Deliveries 2000	2000 EU Quota	Deliveries 2001	2001 EU Threshold (*)
Tomato Paste	279,216	244,663	225,740	250,000	
Canned Whole Peeled Tomatoes	29,698	23,160	29,252	23,000	
Other Tomato Products	54,591	46,146	44,392	47,000	
Total	363,505	313,969	299,384	320,000	401,600

(*) New wording under the reformed Common Market Organization for fruits and vegetables

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	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		08/1999		08/2000		08/2001
Plnt For Fresh Consump	3561	3561	3402	3402	0	3350
Plnt For Processing	5777	5777	5600	5112	0	5000
TOTAL Area Planted	9338	9338	9002	8514	0	8350
Harv. For Fresh Cons.	3561	3561	3600	3402	0	3350
Harv. For Processing	5777	5777	5600	5112	0	5000
TOTAL Area Harvested	9338	9338	9200	8514	0	8350
Fresh Sale Production	546410	546410	537832	537832	0	540000
Processing Production	375079	363505	370000	313969	0	320000
TOTAL Production	921489	909915	907832	851801	0	860000
TOTAL SUPPLY	921489	909915	907832	851801	0	860000

Sources: French tomato growers, SCEES, French Customs

PSD Table						
Country	France					
Commodity	Canned Tomatoes				(MT)(MT, Net Weight)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		08/1999		08/2000		08/2001
Deliv. To Processors	29500	29698	29000	23160	0	23000
Beginning Stocks	9937	9937	10037	8833	9537	6863
Production	21600	21600	21000	16030	0	16000
Imports	90000	82312	90000	87000	0	85000
TOTAL SUPPLY	121537	113849	121037	111863	9537	107863
Exports	10000	5016	10000	5000	0	5000
Domestic Consumption	101500	100000	101500	100000	0	100000
Ending Stocks	10037	8833	9537	6863	0	2863
TOTAL DISTRIBUTION	121537	113849	121037	111863	0	107863

Sources: French tomato growers, SCEES, French Customs

PSD Table						
Country	France					
Commodity	Tom. Paste,28-30% TSS Basis				(MT)(MT, Net Weight)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		08/1999		08/2000		08/2001
Deliv. To Processors	279000	279216	250000	244663	0	250000
Beginning Stocks	6444	6444	8044	32060	6544	25060
Production	48100	48100	43000	43000	0	44000
Imports	40000	70690	41000	45000	0	45000
TOTAL SUPPLY	94544	125234	92044	120060	6544	114060
Exports	5500	10174	4500	10000	0	10000
Domestic Consumption	81000	83000	81000	85000	0	85000
Ending Stocks	8044	32060	6544	25060	0	19060
TOTAL DISTRIBUTION	94544	125234	92044	120060	0	114060

Sources: French tomato growers, SCEES, French Customs

Trade Matrices

Export Trade Matrix			
Country	France		
Commodity	Fresh Tomatoes		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.	133	U.S.	90
Others		Others	
Germany	43899	Germany	38355
Belgium	10359	Belgium	10528
Netherlands	8199	Switzerland	4959
Czech Rep.	7267	Italy	4541
Italy	5257	Netherlands	4099
Austria	4325	UK	3986
UK	4195	Czech Rep.	3313
Switzerland	3508	Spain	2942
Spain	3268	Luxemburg	1289
Slovakia	1142	Austria	1204
Total for Others	91419		75216
Others not Listed	6981		5847
Grand Total	98533		81153

Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.	11	U.S.	0
Others		Others	
Morocco	183727	Spain	163912
Spain	149623	Morocco	139854
Belgium	26538	Belgium	25002
Netherlands	16718	Netherlands	20629
Italy	13540	Italy	12643
Israel	2155	Israel	4217
Tunisia	1015	Turkey	1818
		Tunisia	1797
Total for Others	393316		369872
Others not Listed	2086		2384
Grand Total	395413		372256

Source: French Customs

Import Trade Matrix			
Country	France		
Commodity	Fresh Tomatoes		

Export Trade Matrix			
Country	France		
Commodity	Canned Tomatoes		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.	0	U.S.	0
Others		Others	
Belgium	2846	Belgium	2286
UK	1566	UK	847
Germany	1353	Netherlands	539
Netherlands	506	Germany	248
		Ireland	166
		Luxemburg	134
Total for Others	6271		4220
Others not Listed	1761		678
Grand Total	8032		4898

Import Trade Matrix			
Country	France		
Commodity	Canned Tomatoes		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.	0	U.S.	0
Others		Others	
Italy	56181	Italy	56117
Spain	23987	Spain	18732
Netherlands	1569	Portugal	3244
Belgium	658	Netherlands	2635
Germany	464	Germany	544
Israel	229	UK	439
		Greece	353
		Belgium	270
		Israel	127
Total for Others	83088		82461
Others not Listed	1466		645
Grand Total	84554		83106

Source: French Customs

Export Trade Matrix			
Country	France		
Commodity	Tom. Paste,28-30% TSS Basis		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.	0	U.S.	0
Others		Others	
Netherlands	1778	Belgium	1562
Belgium	1314	Germany	1309
Germany	1266	Spain	975
UK	649	UK	842
Switzerland	466	Netherlands	321
Spain	390	Cameroon	184
Cameroon	326	Switzerland	143
Total for Others	6189		5336
Others not Listed	672		541
Grand Total	6861		5877

Commodity	Tom. Paste,28-30% TSS Basis		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.	0	U.S.	0
Others		Others	
Italy	25349	Italy	31289
Spain	8829	Spain	13609
Portugal	5447	Portugal	6238
Greece	4358	Greece	2235
UK	1294	Netherlands	965
Netherlands	840	UK	333
Tunisia	705	Tunisia	267
Morocco	666	Belgium	241
Hungary	437	Turkey	152
		Germany	135
Total for Others	47925		55464
Others not Listed	697		405
Grand Total	48622		55869

Source: French Customs

Import Trade Matrix			
Country	France		