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France

Tomatoes and Products

Annual

2003

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Report Highlights:

In 2002, French production of fresh tomatoes decreased by 8% to 807,187 MT due to adverse weather conditions, 69% for fresh production and 31% for processing. Tomato paste production was significantly affected, with a 28% decline from 2001. In 2003, production is expected to return to 2001 levels. In 2002, French production represented 2% of the Mediterranean Association of Tomato Growers' (AMITOM) production. France is a net importer of fresh tomatoes and tomato products. There is no tomato trade between the United States and France.

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

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Executive Summary

In 2002, French production of fresh tomatoes decreased by 8% to 807,187 MT due to adverse weather conditions, 69% for fresh production and 31% for processing. Tomato paste production was significantly affected, with a 28% decline from 2001. In 2003, production is expected to return to 2001 levels. In 2002, French production represented 2% of the Mediterranean Association of Tomato Growers' (AMITOM) production. France is a net importer of fresh tomatoes and tomato products. There is no tomato trade between the United States and France.

Section I: Situation and Outlook

Tomatoes for the Fresh Market

According to the French Ministry of Agriculture, French production of fresh tomatoes in 2001, 2002 and 2003 is as follows:

		2001	2002	2003 (forecast)
Area Planted (ha)	Greenhouses	2,135	2,158	2,066
	Open Fields	1,293	873	823
	Total Area	3,428	3,031	2,889
Production (MT)	Greenhouses	506,321	512,823	558,260
	Open Fields	62,166	46,464	43,497
	Total Production	568,487	559,287	601,757
Yields (MT/ha)	Greenhouses	237	238	270
	Open Fields	48	53	53

France's largest processors of fresh tomatoes are Saveol with 68,500 MT in annual production.

(<http://www.saveol.com>), Rougeline (<http://www.rougeline.com>), (50,000 MT), Sica St Pol de Léon (45,000 MT), Odelis (25,000 MT), Alliance Saveur Soleil (20,000 MT), Polenium (20,000 MT), and Solarenn (18,000 MT).

Tomatoes for Processing

In Europe, France is a minor producer of processed tomato products. The threshold for France set by the EU under the reformed common market organization (CMO) for fruits and vegetables is 401,500 MT of fresh tomatoes.

There is no longer a minimum price for fresh tomato to be processed. Prices are now set by the producer organizations (PO) and the processors. Only tomatoes supplied by a PO and that meet certain quality standards are subsidized by the EU. These subsidies go to the POs, which distribute the funds to their members.

In France, there are 10 PO processors and producer groups of tomatoes for processing: namely, Camaret, Apto-2, Apaaf, Copatamate, Val Soleil, Audecoop, Sicom, Uniproledi, Maïsadour, and Capel-la Quercynoise. The majority of France's production (80 percent) is grown in southeastern France.

Fresh tomato deliveries to processors by product amounted to the following in 2001, 2002 and 2003 (in MT):

	Deliveries 2001	Deliveries 2002	Deliveries 2003 (forecast)
Tomato Paste	247,400	186,500	n/a
Canned Whole Peeled Tomatoes	8,600	9,700	n/a
Other Tomato Products	52,800	51,700	n/a
Total	308,800	247,900	300,000

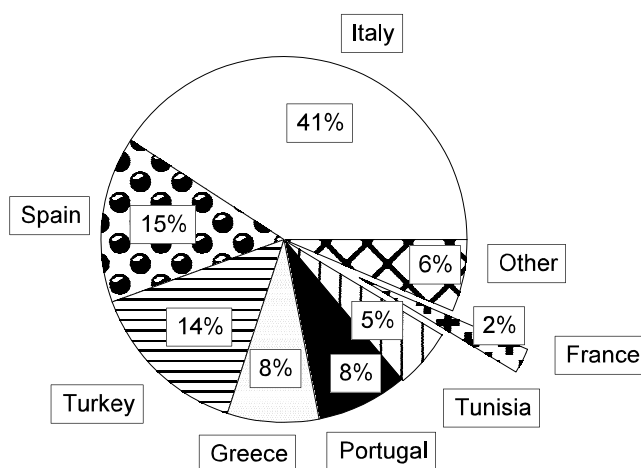
The production of tomato paste is declining, while higher value canned tomato production and other tomato production are increasing.

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 world production, regional organizations for processed tomatoes, and companies processing tomatoes.

Also, France is a member of the Mediterranean Association of Tomato Growers (AMITOM). Their website is: <http://www.amitom.com>. This website is both in French and English, and describes the processed tomato sectors of each member country of AMITOM (EU and North-African countries). It also has press releases with the status of the current production year in each member country. In 2002, preliminary estimates indicate that French tomato production for processing accounted for 2 percent of the total AMITOM production.

2002 AMITOM Production of Tomatoes for Processing

Total AMITOM Production = 10.53 million MT



Section II: Statistical Tables

PS&D Tables

PSD Table						
Country	France					
Commodity	Fresh Tomatoes				(HA)(MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		01/2001		01/2002		01/2003
Plnt For Fresh Consump	0	3428	0	3031	0	3020
Plnt For Processing	0	3662	0	3540	0	3550
TOTAL Area Planted	0	7090	0	6571	0	6570
Harv. For Fresh Cons.	0	3428	0	3031	0	3020
Harv. For Processing	0	3662	0	3540	0	3550
TOTAL Area Harvested	0	7090	0	6571	0	6570
Fresh Sale Production	0	568487	0	559287	0	560000
Processing Production	0	308800	0	247900	0	300000
TOTAL Production	0	877287	0	807187	0	860000
TOTAL SUPPLY	0	877287	0	807187	0	860000

Sources: French Ministry of Agriculture, French tomato industry

PSD Table						
Country	France					
Commodity	Canned Tomatoes				(MT)(MT, Net Weight)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		08/2001		08/2002		08/2003
Deliv. To Processors	8600	8600	8600	9700	0	11000
Beginning Stocks	8484	8924	8000	8301	8000	7501
Production	5900	5900	5900	6700	0	7500
Imports	95000	99551	95000	98500	0	98000
TOTAL SUPPLY	109384	114375	108900	113501	8000	113001
Exports	5500	6074	5500	6000	0	6000
Domestic Consumption	95884	100000	95400	100000	0	100000
Ending Stocks	8000	8301	8000	7501	0	7001
TOTAL DISTRIBUTION	109384	114375	108900	113501	0	113001

Sources: French tomato industry, Eurostat

PSD Table						
Country	France					
Commodity	Tom. Paste,28-30% TSS Basis				(MT)(MT, Net Weight)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		08/2001		08/2002		08/2003
Deliv. To Processors	240000	247400	240000	186500	0	150000
Beginning Stocks	60000	48139	66200	50975	67400	48075
Production	42200	43000	42200	31100	0	25500
Imports	70000	43781	70000	50000	0	50000
TOTAL SUPPLY	172200	134920	178400	132075	67400	123575
Exports	6000	3945	6000	4000	0	4000
Domestic Consumption	100000	80000	105000	80000	0	80000
Ending Stocks	66200	50975	67400	48075	0	39575
TOTAL DISTRIBUTION	172200	134920	178400	132075	0	123575

Sources: French tomato industry, Eurostat

Trade Matrices

Export Trade Matrix			
Country	France		
Commodity	Fresh Tomatoes		
Time period	Aug/July	Units:	MT
Exports for:	2000		2001
U.S.	0	U.S.	0
Others		Others	
Germany	39173	Germany	50403
Belgium	13740	UK	17654
Switzerland	5971	Belgium	11223
UK	5123	Czech Republic	7649
Netherlands	4884	Switzerland	6396
Spain	4274	Russia	5052
Italy	4174	Italy	4875
Czech Republic	4003	Netherlands	4252
Russia	2625	Spain	3623
Poland	2315	Austria	2086
Total for Others	86282		113213
Others not Listed	7663		9533
Grand Total	93945		122746

Source: Eurostat

Import Trade Matrix			
Country	France		
Commodity	Fresh Tomatoes		
Time period	aug/July	Units:	MT
Imports for:	2000		2001
U.S.	0	U.S.	0
Others		Others	
Spain	167938	Morocco	164649
Morocco	158436	Spain	145433
Belgium	24115	Belgium	27960
Netherlands	19134	Netherlands	19596
Italy	12086	Italy	8824
Israel	5114	Germany	5031
Germany	4177	Israel	3617
Turkey	2557		
Total for Others	393557		375110
Others not Listed	3879		5289
Grand Total	397436		380399

Source: Eurostat

Export Trade Matrix			
Country	France		
Commodity	Canned Tomatoes		
Time period	Aug/July	Units:	MT
Exports for:	2000		2001
U.S.	0	U.S.	0
Others		Others	
Belgium	2413	Belgium	2868
UK	781	UK	860
Denmark	712	Luxemburg	497
Total for Others	3906		4225
Others not Listed	1985		1849
Grand Total	5891		6074

Source: Eurostat

Import Trade Matrix			
Country	France		
Commodity	Canned Tomatoes		
Time period	Aug/July	Units:	MT
Imports for:	2000		2001
U.S.	0	U.S.	0
Others		Others	
Italy	52426	Italy	60248
Spain	22726	Spain	27931
Netherlands	5310	Netherlands	5047
Portugal	3231	Germany	2337
Germany	2517	Portugal	1455
Luxemburg	1020		
Total for Others	87230		97018
Others not Listed	2432		2533
Grand Total	89662		99551

Source: Eurostat

Export Trade Matrix			
Country	France		
Commodity	Tom. Paste,28-30% TSS Basis		
Time period	Aug/July	Units:	MT
Exports for:	2000		2001
U.S.	0	U.S.	0
Others		Others	
Algeria	2119	Belgium	1613
Germany	1342	Algeria	678
		Germany	545
Total for Others	3461		2836
Others not Listed	1222		1109
Grand Total	4683		3945

Source: Eurostat

Import Trade Matrix			
Country	France		
Commodity	Tom. Paste,28-30% TSS Basis		
Time period	Aug/July	Units:	MT
Imports for:	2000		2001
U.S.	0	U.S.	0
Others		Others	
Italy	28616	Italy	21931
Spain	11049	Spain	13406
Portugal	5701	Portugal	3801
Netherlands	2197	Netherlands	3117
Greece	1178		
Germany	1069		
Total for Others	49810		42255
Others not Listed	1282		1526
Grand Total	51092		43781

Source: Eurostat