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France

Tomatoes and Products

Tomatoes and Products Semi-Annual

1999

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Report Highlights:

In 1999, French production of tomatoes for the fresh market amounted to 546,410 MT, just below last year's record. Deliveries to processors totalled 372,000 MT, which included 280,000 MT for tomato paste, 29,500 MT for canned whole peeled tomatoes, and 62,500 MT for other tomato products. France is not a market for U.S. tomatoes.

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

According to the most recent estimates from the French Ministry of Agriculture and the tomato processing industry, French production of tomatoes for the fresh market amounted to 546,410 MT in 1999. Deliveries to processors totalled 372,000 MT, which included 280,000 MT for tomato paste, 29,500 MT for canned whole peeled tomatoes, and 62,500 MT for other tomato products.

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 1997, 1998 and 1999 included the following:

		1997	1998	1999
Area Planted (ha)	Greenhouses	2,097	2,163	2,148
	Open Fields	1,660	1,671	1,413
	Total Area	3,757	3,834	3,561
Production (MT)	Greenhouses	421,973	477,206	474,576
	Open Fields	87,282	84,429	71,835
	Total Production	509,255	561,635	546,410
Yields (MT/ha)	Greenhouses	201	221	221
	Open Fields	53	51	51

Total tomato production almost reached last year's record production. But prices were lower than last year from April to August. Branched tomatoes (tomatoes sold in clusters, still on the vine) continued to expand market share and now represent one quarter of French production. Open field production fell by half in 5 years. Greenhouses are still expanding.

It is expected that French tomatoes will increasingly have to compete with Moroccan products, which have benefitted from a cut in EU import taxes since November 15, 1999 and from lower production costs. In 1998, Morocco was France's first supplier of fresh tomatoes.

"Tomates de France", a French cooperative that produces 60 per cent of total national production, is now involved in a national quality agreement, which guarantees environmentally friendly agricultural practices, and special transport and storage conditions.

Tomatoes for processing

Deliveries of fresh tomatoes to processors amounted to the following in 1997, 1998 and 1999 (in MT):

	1997	1998	1999	1999 EU Quota
Tomato Paste	219,530	240,000	280,000	250,822
Canned Whole Peeled Tomatoes	25,525	28,000	29,500	32,502
Other Tomato Products	40,945	46,000	62,500	49,324
Total	286,000	314,000	372,000	332,648

Production of tomatoes for processing reached 372,000 MT in 1999, which is under France's CAP quota (370,000 MT). Good production was due to favorable weather conditions.

In 1998, 290,000 MT of tomatoes were processed by five companies in France:

- Cabanon, French leading tomato processing company.
- Conserves France, subsidiary of Conserve Italia.
- Louis Martin, a family company settled in Vaucluse.
- Ciradour, subsidiary of the Italian group Cirio and the cooperative Vivadour.
- Sip, subsidiary of the Spanish group Agraz.

Section 2: Statistical Tables

1. Fresh Tomatoes

PSD Table						
Country:	France					
Commodity:	Fresh Tomatoes					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		08/1997		08/1998		08/1999
Plnt For Fresh Consump	3757	3757	3834	3834	3709	3561
Plnt For Processing	5503	5503	4961	4961	4900	5600
TOTAL Area Planted	9260	9260	8795	8795	8609	9161
Harv. For Fresh Cons.	3757	3757	3834	3834	3709	3561
Harv. For Processing	5503	5503	4961	4961	4900	5600
TOTAL Area Harvested	9260	9260	8795	8795	8609	9161
Fresh Sale Production	509255	509255	561635	561635	564193	546410
Processing Production	286000	286000	314000	314000	300000	372000
TOTAL Production	795255	795255	875635	875635	864193	918410
TOTAL SUPPLY	795255	795255	875635	875635	864193	918410

The following trade matrices are on a marketing year basis (August/July):

Export Trade Matrix			
Country:	France	Units:	Metric Tons
Commodity:	Tomato, Fresh		
Time period:	MY Aug-Jul		
Exports for	1997		1998
U.S.	0	U.S.	204
Others		Others	
Germany	27489	Germany	37166
Belgium/Lux	13700	Belgium/Lux	11242
Netherlands	8447	Netherlands	9502
Switzerland	5590	Czech Rep.	5782
Italy	5538	Italy	5430
Austria	4899	Austria	5423
UK	3699	UK	4281
Czech Rep.	3462	Switzerland	3411
Spain	1432	Spain	2055
Russia	1415	Poland	1089
Total for Others	75671		85381
Others not listed	4570		6253
Grand Total	80241		91838

Time period:	MY Aug-Jul		
Imports for	1997		1998
U.S.	4	U.S.	0
Others		Others	
Spain	156249	Morocco	178178
Morocco	155128	Spain	153630
Belgium/Lux	25753	Belgium/Lux	24959
Netherlands	19404	Netherlands	15980
Italy	18009	Italy	12666
Tunisia	1209	Israel	2184
Israel	1169	Tunisia	1038
		Germany	577
		Senegal	422
		South Africa	133
Total for Others	376921		389767
Others not listed	973		1016
Grand Total	377898		390783

Import Trade Matrix			
Country:	France	Units:	Metric Tons
Commodity:	Tomato, Fresh		

Following prices are producer prices paid for round tomatoes, 57-67 grade.

Please note that average exchange rates are the following in 1998 and 1999:

1998: 1 USD = 5.90 FF

1999: 1 USD approximately equals 1 Euro and 1 Euro = 6.55957 FF

Prices Table			
Country:	France		
Commodity:	Tomato, Fresh		
Year:	1999		
Prices in (currency)	FF	per	MT
Year	1998	1999	% Change
Jan	N/A	N/A	
Feb	N/A	N/A	
Mar	N/A	7000	
Apr	7620	6910	-9.3%
May	6490	5910	-8.9%
Jun	4060	4190	3.2%
Jul	3510	3380	-3.7%
Aug	3240	3000	-7.4%
Sep	3600	4000	11.1%
Oct	4800	6160	28.3%
Nov	4550	N/A	
Dec	N/A	N/A	

2. Canned Tomatoes

PSD Table						
Country:	France					
Commodity:	Canned Tomatoes					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		08/1997		08/1998		08/1999
Deliv. To Processors	25525	25525	27000	29300	26000	29500
Beginning Stocks	7000	7000	6000	6000	8300	8337
Production	18812	18812	19500	19500	20000	20500
Imports	88023	88023	91000	91651	90000	92000
TOTAL SUPPLY	113835	113835	116500	117151	118300	120837
Exports	6921	6921	8200	8814	8900	9500
Domestic Consumption	100914	100914	100000	100000	101000	101500
Ending Stocks	6000	6000	8300	8337	8400	9837
TOTAL DISTRIBUTION	113835	113835	116500	117151	118300	120837

The following trade matrices are on a marketing year basis (August/July):

Export Trade Matrix			
Country:	France	Units:	Metric Tons
Commodity:	Tomato, Canned		
Time period:	MY Aug/July		
Exports for	1997		1998
U.S.	0	U.S.	0
Others		Others	
Italy	2336	Belgium	3118
Belgium/Lux	2231	Germany	1894
Spain	888	UK	1382
Switzerland	145	Italy	505
Germany	143	Netherlands	498
		Ireland	226
		Switzerland	98
Total for Others	5743		7721
Others not listed	1178		1093
Grand Total	6921		8814

Commodity:	Tomato, Canned		
Time period:	MY Aug/July		
Imports for	1997		1998
U.S.	0	U.S.	0
Others		Others	
Italy	57068	Italy	58312
Spain	27619	Spain	29391
Belgium/Lux	645	Greece	727
Germany	597	Belgium/Lux	684
Greece	575	Germany	547
Portugal	542	Israel	209
Israel	485		
UK	270		
Turkey	155		
Total for Others	87956		89870
Others not listed	67		1781
Grand Total	88023		91651

Import Trade Matrix			
Country:	France	Units:	Metric Tons

3. Tomato Paste

PSD Table						
Country:	France					
Commodity:	Tom. Paste,28-30% TSS Basis					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		08/1997		08/1998		08/1999
Deliv. To Processors	219730	219730	240000	247700	230000	280000
Beginning Stocks	4440	4440	1240	1240	3740	6444
Production	38514	38514	41000	44100	39000	46000
Imports	41111	41111	43000	46229	45000	38000
TOTAL SUPPLY	84065	84065	85240	91569	87740	90444
Exports	7325	7325	6500	5125	7000	6000
Domestic Consumption	75500	75500	75000	80000	75000	78000
Ending Stocks	1240	1240	3740	6444	5740	6444
TOTAL DISTRIBUTION	84065	84065	85240	91569	87740	90444

The following trade matrices are on a marketing year basis (August/July):

Export Trade Matrix			
Country:	France	Units:	Metric Tons
Commodity:	Tomato Paste		
Time period:	MY Aug/July		
Exports for	1997		1998
U.S.	16	U.S.	0
Others		Others	
Italy	2709	Belg/Lux	1287
Belg/Lux	1141	Netherlands	759
Germany	863	Switzerland	575
Switzerland	719	Germany	535
Spain	394	Spain	501
UK	369	UK	382
Netherlands	320	Italy	278
Total for Others	6515		4317
Others not listed	794		808
Grand Total	7325		5125

Time period:	MY Aug/July		
Imports for	1997		1998
U.S.	8	U.S.	0
Others		Others	
Italy	21512	Italy	24377
Portugal	5271	Spain	6229
Greece	5003	Portugal	5847
Spain	4871	Greece	5029
Turkey	1111	Morocco	1821
UK	834	Netherlands	1706
Tunisia	641	UK	477
Morocco	632	Germany	429
Netherlands	627	Turkey	111
Germany	399	Belg/Lux	84
Total for Others	40901		46110
Others not listed	202		119
Grand Total	41111		46229

Import Trade Matrix			
Country:	France	Units:	Metric Tons
Commodity:	Tomato Paste		