



Foreign Agricultural Service

**GAIN Report**

Global Agriculture Information Network

Required Report - public distribution

Date: 1/31/2003

GAIN Report #FR3005

## France

## Tree Nuts

## Semi-Annual

## 2003

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### Report Highlights:

**French walnut production in 2002 is estimated to have increased to 29,000 MT, mainly due to higher yields in the Grenoble area. As the French harvest included more small-grade walnuts than in the previous years, prices have been lower for French walnuts in MY 2002/03. This is expected to favor French exports to markets where French and U.S. products compete, especially in Europe. Opportunities exist for shelled walnuts packaged for snacking and pieces in bulk for the food processing industry.**

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

Executive Summary .....	1
Situation and Outlook .....	1
Production: .....	1
Consumption .....	1
Trade .....	2
Marketing .....	2
Section II: Statistical Tables .....	3
PS&D Table .....	3
Trade Matrices .....	4

## Executive Summary

French walnut production in 2002 is estimated to have increased to 29,000 MT, mainly due to higher yields in the Grenoble area. As the French harvest included more small-grade walnuts than in the previous years, prices have been lower for French walnuts in MY 2002/03. This is expected to favor French exports on markets where French and U.S. products compete, especially in Europe.

## Situation and Outlook

### Production:

France is the leading European producer of walnuts, with roughly 25 percent of total production in 2001. Although 2002 data are not available, an increase in yields in the Grenoble production area is expected to have increased production from the 2001 level. French walnut production is estimated at 29,000 MT for 2002, up from 27,810 MT in 2001. On average, walnuts harvested in 2002 were of smaller grade than those harvested in 2001. This has led to reduced prices for MY 2002/03.

There are now 2 appellations of origins (AOC) labels for high quality walnuts in France: 1) "noix de Grenoble" dating back to 1938 and 2) "noix du Périgord" which was introduced in 2002. Nuts marketed under these appellations are grown in delimited zones: "Noix de Grenoble" is grown in the southeastern producing regions of France; and "Noix du Périgord" is grown in southwestern France. (See annual report FR2058, dated 8/7/02)

### Consumption

Total walnut consumption in the PS&D includes human consumption and estimated stocks, as separate stock estimates are not available. Walnut consumption in France falls into three categories: snacking and home cooking, by-products (oils), and shelled walnuts used as ingredients in the pastry, bakery and cheese industries.

French households are estimated to purchase approximately 7,000-9,000 MT of in-shell walnuts, (including 2,000 MT of fresh walnuts and 7,000 MT of dried walnuts), and 6,000 MT shelled walnuts per year.

The French per capita consumption of walnuts is 150 grams for in-shell walnuts and 200 grams for shelled walnuts. In-shell walnuts are mainly consumed during the fall (mainly in November and December) and in winter. However, there is no seasonality for shelled walnut consumption.

## **Trade**

France is a net exporter of walnuts, and exports principally to EU member states and Switzerland. French and U.S. walnuts compete in these markets. As indicated in the tables below, France mainly exports in-shell walnuts and principally imports shelled walnuts. In MY 2002/03, French exports of walnuts are expected to increase because of lower relative prices than in the previous year.

## **Marketing**

While the in-shell large grade, high quality and high-priced walnut market segment is dominated by domestically-grown walnuts sold under the origin logos "noix du Périgord" and "noix de Grenoble", the shelled walnut and the walnut pieces market segments offer the best opportunities for U.S. walnuts.

The market for snacking products has increased significantly over the past few years. Developing consumer-oriented packages (small size, easy to open and close) of shelled walnuts as snacks would certainly help increase sales of U.S. shelled walnuts on the French market.

Another marketing opportunity for U.S. walnuts is shelled walnuts or walnut pieces used in bulk by the French food processing industry. For example, there are more and more U.S.-type cookies and pastry (brownies, muffins) sold on the French market and U.S. walnuts may be used as ingredients in these, either in ready-made products or in cooking mixes to prepare at home.

The French leading importers of U.S. walnuts are:

Nideco Halles SA  
12, rue du Poitou, Bat D.7  
94619 Rungis cedex  
tel: (33-1) 41 73 23 70  
fax: (33-1) 45 60 09 07  
[nico@nideco.com](mailto:nico@nideco.com)

SAISOF  
28/31, rue des investisseurs, ZA Ouest Plaine Haute  
91580 Crosne  
tel: (33-1) 69 83 88 30  
fax: (33-1) 69 83 88 18  
[saisof@aol.com](mailto:saisof@aol.com)

## Section II: Statistical Tables

### PS&D Table

PSD Table						
Country	France					
Commodity	Walnuts, Inshell Basis				(HA)(1000 TREES)(MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		10/2001		10/2002		10/2003
Area Planted	19230	19230	19230	19230	19230	19230
Area Harvested	14620	14620	14660	14660	14660	14660
Bearing Trees	1460	1460	1460	1460	1460	1460
Non-Bearing Trees	460	460	460	460	460	460
Total Trees	1920	1920	1920	1920	1920	1920
Beginning Stocks	0	0	0	0	0	0
Production	27810	27810	30000	29000	30000	29000
Imports	13000	12545	12000	12000	12000	12000
TOTAL SUPPLY	40810	40355	42000	41000	42000	41000
Exports	22000	21174	23000	22500	23000	22500
Domestic Consumption	18810	19181	19000	18500	19000	18500
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	40810	40355	42000	41000	42000	41000

Sources: SCEES, French Customs, French walnuts growers

Note: conversion factor used is: 2 MT shelled walnuts = 1 MT in-shell walnuts

## Trade Matrices

Export Trade Matrix			
Country	France		
Commodity	Walnuts, Inshell Basis		
Time period	Oct/Sept	Units:	MT
Exports for:	2000/01		2001/02
U.S.	0	U.S.	0
Others		Others	
Germany	7537	Germany	5714
Spain	5761	Spain	5586
Italy	2299	Italy	2879
Portugal	1752	Switzerland	1617
Switzerland	1472	Portugal	1382
Moldova	1389	Moldova	1355
Belgium	896	Denmark	532
Netherlands	537	Netherlands	387
Total for Others	21643		19452
Others not Listed	1314		1722
Grand Total	22957		21174

Import Trade Matrix			
Country	France		
Commodity	Walnuts, Inshell Basis		
Time period	Oct/Sept	Units:	MT
Imports for:	2000/01		2001/02
U.S.	158	U.S.	194
Others		Others	
Moldova	7337	Moldova	7322
India	1312	India	1738
Hungary	1248	Hungary	780
China	1140	Ukraine	422
Roumania	745	Roumania	300
Poland	249	Poland	296
Ukraine	196	Greece	290
Slovakia	156	China	226
Italy	139		
Total for Others	12522		11374
Others not Listed	609		977
Grand Total	13289		12545

Source: French Customs

Note: conversion factor used is: 2 MT shelled walnuts  
= 1 MT in-shell walnuts

Breakdown of French walnut trade among shelled and in-shell walnuts for MY 2001/02 (conversion factor used is: 2 MT shelled walnuts = 1 MT in-shell walnuts):

French exports of walnuts, 2001/02, in MT, in-shell basis:

	08023100 (in-shell)	08023200 (shelled)	shelled x 2	Total (in-shell basis)
Total	16186	2494	4988	21174
US	0	0	0	0
Germany	3890	912	1824	5714
Spain	5140	223	446	5586
Italy	2721	79	158	2879
Switzerland	501	558	1116	1617
Portugal	1090	146	292	1382
Moldova	1355	0	0	1355
Belgium	467	143	286	753
DK	330	101	202	532
NL	35	176	352	387
Poland	240	53	106	346
Austria	142	14	28	170
UK	153	6	12	165
Roumania	56	0	0	56

French imports of walnuts, 2001/02, in MT, in-shell basis:

	08023100 (in-shell)	08023200 (shelled)	shelled x 2	Total (in-shell basis)
Total	295	6125	12250	12545
US	194	0	0	194
Moldova	0	3661	7322	7322
India	0	869	1738	1738
Hungary	0	390	780	780
Ukraine	0	211	422	422
Roumania	0	150	300	300
Poland	0	148	296	296
Greece	0	145	290	290
China	4	111	222	226
Portugal	0	76	152	152
Slovakia	0	71	142	142
Italy	14	64	128	142
Bulgaria	10	53	106	116
Chile	0	50	100	100