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## France

## Tomatoes and Products

## Semi-Annual

## 2003

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**Report Highlights:**

In 2003, preliminary estimates indicate that France's total tomato production amounted to 892,545 MT, a 10% increase from the abnormally low production level of 2002. French tomato production included 68% for the fresh market and 32% for the processing industry. Deliveries of fresh tomatoes to the processing industry, which had significantly declined in 2002, recovered in 2003 and were close to 2001 levels. However, they remained well below the EU maximum production quota authorized, because of the low profitability of such production in France. France remained a net importer of fresh, canned tomatoes and tomato paste in MY 2002/03. There is no trade between the United States and France.

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Includes Trade Matrix: No  
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## Executive Summary

In 2003, preliminary estimates indicate that France's total tomato production amounted to 892,545 MT, a 10% increase from the abnormally low production level of 2002. French tomato production included 68% for the fresh market and 32% for the processing industry. Deliveries of fresh tomatoes to the processing industry, which had significantly declined in 2002, recovered in 2003 and were close to 2001 levels. However, they remained well below the EU maximum production quota authorized, because of the low profitability of such production in France. France remained a net importer of fresh, canned tomatoes and tomato paste in MY 2002/03. There is no trade between the United States and France.

## Section I: Situation and Outlook

### *Tomatoes for the Fresh Market*

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

		2001	2002	2003
Area Planted (ha)	Greenhouses	2,135	2,158	2,057
	Open Fields	1,293	873	770
	Total Area	3,428	3,031	2,827
Production (MT)	Greenhouses	506,321	512,823	562,856
	Open Fields	62,166	46,464	39,689
	Total Production	568,487	559,287	602,545
Yields (MT/ha)	Greenhouses	237	238	274
	Open Fields	48	53	52

France's largest fresh tomato producing companies are Saveol, with 68,500 MT annual production (<http://www.saveol.com>), Rougeline (50,000 MT, <http://www.rougeline.com>), Sica St Pol de Leon (45,000 MT), Odellis (25,000 MT), Alliance Saveur Soleil (20,000 MT), Polenium (20,000 MT), and Solarenn (18,000 MT).

In early October 2003, the European Union and Morocco reached an agreement which is expected to guarantee greater European market access for Moroccan tomatoes and a liberalization of the Moroccan market for EU grains. According to the agreement, Morocco is now authorized to export up to 175,000 MT of fresh tomatoes to the EU (up from 168,757 MT under the previous agreement) from October to May. An additional quota of 45,000 MT (15,000 MT in 2003 and 10,000 MT in 2004, 2005 and 2006) is also included in the agreement for Moroccan tomatoes exported to the EU from November to May.

French tomato growers were very critical of this trade agreement. The French Federation of fruits and vegetable producers (FNPL) reacted saying that they "don't accept being sacrificed for EU and French political concerns, and questionable commercial interests."

### *Tomatoes for Processing*

In Europe, France is a minor producer of processed tomato products. The quota for France set by the EU under the Common Market Organization (CMO) for fruits and vegetables is 400,000 MT of fresh tomatoes.

Prices are set by the producer organizations (POs) and the processors. Only tomatoes delivered by POs, corresponding to set quality standards, are subsidized by the EU. These subsidies go to POs, which distribute the funds to their members. In France, there are 10 POs and producer groups of tomatoes for processing, and 470 farmers are producing tomatoes for the processing industry. They deliver their production to 25 processing plants. While France's production of fresh tomatoes for the processing industry was traditionally located in southeastern France (Provence-Alpes-Cote d'Azur and Rhone-Alpes), these regions now total only 45% of the production, and southwestern France (Aquitaine and Languedoc-Roussillon) now total 54% of French tomato production for processing.

Deliveries of fresh tomatoes to processors amounted to the following in 2001, 2002, and 2003 (in MT):

	2001	2002	2003
Tomato Paste	247,400	186,500	230,000
Canned Whole Peeled Tomatoes	8,600	9,700	9,000
Other Tomato Products	52,800	51,700	51,000
Total	308,800	247,900	290,000

French tomato production for processing was abnormally low in 2002, due to adverse weather conditions (mainly heavy rains). Despite the increase in 2003, French production of fresh tomatoes for the processing industry remains well below the EU quota of 400,000 MT. This results from the relatively low profitability of this production compared to others: contract prices are not attractive for growers (76 to 83 euros per MT), processing plants are often far from the farms growing tomatoes, and processors are perceived as reluctant to make investments.

Information on the world market for processed tomatoes can be found on the internet website: <http://www.tomate.org>. It 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>. It is both in English and French, 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, French tomato production for processing accounted for 2% of the total AMITOM production.

## Section II: Statistical Tables

PS&amp;Ds

## PSD Table

Country	France				(HA)(MT)		
Commodity	Fresh Tomatoes		2002	Estimate	2003	Forecast	UOM
	2001	Revised Post Estimate	2002	Post Estimate	2003	Post Estimate	
	USDA Official [Old]	[New]	USDA Official [Old]	[New]	USDA Official [Old]	[New]	
Market Year Begin	01/2001		01/2002		01/2003		MM/YYYY
Plnt For Fresh							
Consump	3428	3428	3030	3031	0	3030 (HA)	
Plnt For Processing	3662	3662	3600	3457	0	3400 (HA)	
TOTAL Area Planted	7090	7090	6630	6488	0	6430 (HA)	
Harv. For Fresh Cons.	3428	3428	3030	3031	0	3030 (HA)	
Harv. For Processing	3662	3662	3600	3457	0	3400 (HA)	
TOTAL Area Harvested	7090	7090	6630	6488	0	6430 (HA)	
Fresh Sale Production	568487	568487	561106	559287	0	602545 (MT)	
Processing Production	308790	308790	245680	247900	0	290000 (MT)	
TOTAL Production	877277	877277	806786	807187	0	892545 (MT)	
TOTAL SUPPLY	877277	877277	806786	807187	0	892545 (MT)	

Sources: French MinAg, French tomato processors

## PSD Table

Country	France						
Commodity	Canned Tomatoes		(MT)(MT, Net Weight)				UOM
	2001 USDA Official [Old]	Revised Post Estimate [New]	2002 USDA Official [Old]	Estimate Post Estimate [New]	2003 USDA Official [Old]	Forecast Post Estimate [New]	
Market Year Begin	08/2001		08/2002		08/2003		MM/YYYY
Deliv. To							
Processors	8600	8600	9700	9700	11000	9000	(MT)
Beginning Stocks	8924	8924	8301	8289	7501	4433	(MT, Net Weight)
Production	5900	5900	6700	6700	7500	6200	(MT, Net Weight)
Imports	99551	99537	98500	95150	98000	98000	(MT, Net Weight)
TOTAL SUPPLY	114375	114361	113501	110139	113001	108633	(MT, Net Weight)
Exports	6074	6072	6000	5706	6000	5500	(MT, Net Weight)
Domestic Consumption	100000	100000	100000	100000	100000	99000	(MT, Net Weight)
Ending Stocks	8301	8289	7501	4433	7001	4133	(MT, Net Weight)
TOTAL DISTRIBUTION	114375	114361	113501	110139	113001	108633	(MT, Net Weight)

## PSD Table

Country	France Tom. Paste,28- 30% TSS Basis						
Commodity			(MT)(MT, Net Weight)				UOM
	2001 USDA Official [Old]	Revised Post Estimate [New]	2002 USDA Official [Old]	Estimate Post Estimate [New]	2003 USDA Official [Old]	Forecast Post Estimate [New]	
Market Year Begin	08/2001		08/2002		08/2003		MM/YYYY
Deliv. To							
Processors	247400	247400	186500	186500	150000	230000	(MT)
Beginning Stocks	48139	48139	50975	50171	48075	44525	(MT, Net Weight)
Production	43000	42200	31100	31100	25500	39000	(MT, Net Weight)
Imports	43781	43773	50000	49038	50000	44000	(MT, Net Weight)
TOTAL SUPPLY	134920	134112	132075	130309	123575	127525	(MT, Net Weight)
Exports	3945	3941	4000	5784	4000	5000	(MT, Net Weight)
Domestic Consumption	80000	80000	80000	80000	80000	80000	(MT, Net Weight)
Ending Stocks	50975	50171	48075	44525	39575	42525	(MT, Net Weight)
TOTAL DISTRIBUTION	134920	134112	132075	130309	123575	127525	(MT, Net Weight)

Sources: French tomato processors, Eurostat

## Trade Matrices

Fresh Tomatoes (source: Eurostat)

**Export Trade Matrix**

<b>Country</b>	France		
<b>Commodity</b>	Fresh Tomatoes		
Time Period	Aug/July	Units:	MT
Exports for:	2001		2002
U.S.	0	U.S.	0
Others	Others		
Germany	50402	Germany	31980
UK	17653	Belgium	13111
Belgium	11223	Italy	9293
Czech Rep.	7650	Switzerland	8426
Switzerland	6394	Czech Rep.	7801
Russia	5051	UK	4472
Italy	4874	Russia	4177
Netherlands	4251	Spain	4074
Spain	3621	Netherlands	3301
Austria	2085	Slovakia	1573
Total for Others	113204		88208
Others not Listed	9520		6704
Grand Total	122724		94912

**Import Trade Matrix**

<b>Country</b>	France		
<b>Commodity</b>	Fresh Tomatoes		
Time Period	Aug/July	Units:	MT
Imports for:	2001		2002
U.S.	2	U.S.	4
Others	Others		
Morocco	164649	Spain	166854
Spain	145434	Morocco	154718
Belgium	27959	Belgium	43159
Netherlands	19596	Netherlands	22568
Italy	8823	Germany	5804
Germany	5032	Italy	5607
Israel	3617	Israel	4731
Turkey	1874	Turkey	2768
Tunisia	1758	Tunisia	1913
Senegal	989	Senegal	868
Total for Others	379731		408990
Others not Listed	662		1552
Grand Total	380395		410546

Canned Tomatoes (Source: Eurostat)

**Export Trade Matrix**

<b>Country</b>	France		
<b>Commodity</b>	Canned Tomatoes		
Time Period	Aug/July	Units:	MT
Exports for:	2001		2002
U.S.	0	U.S.	0
Others		Others	
Belgium	2868	Belgium	2877
UK	861	UK	721
Luxemburg	496	Italy	689
Total for Others	4225		4287
Others not Listed	1847		1419
Grand Total	6072		5706

**Import Trade Matrix**

<b>Country</b>	France		
<b>Commodity</b>	Canned Tomatoes		
Time Period	Aug/July	Units:	MT
Imports for:	2001		2002
U.S.	0	U.S.	0
Others		Others	
Italy	60247	Italy	54207
Spain	27929	Spain	29920
Netherlands	5048	Netherlands	4889
Germany	2335	Germany	1757
Portugal	1450	Belgium	1662
Luxemburg	892	Luxemburg	969
Greece	710	Greece	719
Belgium	532	Turkey	370
UK	138	Portugal	339
Turkey	115	UK	259
Total for Others	99396		95091
Others not Listed	141		59
Grand Total	99537		95150

Tomato paste (Source: Eurostat)

**Export Trade Matrix**

<b>Country</b>	France		
<b>Commodity</b>	Tom. Paste,28-30% TSS		
	Basis		
Time Period	Aug/July	Units:	MT
Exports for:	2001		2002
U.S.	5	U.S.	0
Others		Others	
Belgium	1610	Italy	2442
Algeria	678	Belgium	1792
Germany	542	Germany	432
Hungary	460	Hungary	371
Luxemburg	144	UK	107
Portugal	101	Netherlands	82
Total for Others	3535		5226
Others not Listed	401		558
Grand Total	3941		5784

**Import Trade Matrix**

<b>Country</b>	France		
<b>Commodity</b>	Tom. Paste,28-30% TSS		
	Basis		
Time Period	Aug/July	Units:	MT
Imports for:	2001		2002
U.S.	0	U.S.	0
Others		Others	
Italy	21930	Spain	20407
Spain	13404	Italy	16936
Portugal	3800	Portugal	4571
Netherlands	3117	Netherlands	4228
Belgium	538	China	1249
Germany	414	Belgium	374
Greece	332	Turkey	371
Turkey	178	Tunisia	304
		Germany	265
		Greece	217
Total for Others	43713		48922
Others not Listed	60		116
Grand Total	43773		49038

