



PROCESSED FRUITS AND VEGETABLES

Industry sheet

Key statistics

The industry represents
35 % of France's total
production of vegetables
20 % of France's total production of fruits



INDUSTRY STRUCTURE

The processed vegetable industry relies on dedicated industry farm production. On the other hand, the processed fruits industry relies on dedicated orchards (ente plums and bigarreaux cherries), or on fruits (apples, apricots, pears, peaches/nectarines, mirabelles and blackcurrants) from fresh produce orchards.

Stakeholders from the processed fruits and vegetables industry are grouped into associations:

- The national cross-industry association for processed fruits and vegetables (Association Nationale Interprofessionnelle des Fruits et Légumes Transformés, ANIFELT) which brings together six specific industries: red beetroot (ADIB), industry bigarreaux cherries, peaches, industry, confit and canned pears (ANIBI), cultivated mushrooms (ANICC), plums (BIP), industry tomatoes (SONITO), 15 canned and frozen green vegetables (UNILET). Each of these industries is organised into short cross-industry organisations, as part of a vertical scheme based on the specialised variety, the direct involvement of economic stakeholders (producers and processors) and pre-season contracts.
- The French interprofessional association of fruit and vegetables for multiple uses (association française interprofessionnelle des fruits et légumes à destinations multiples, AFIDEM), is an associate member of INTERFEL that covers the production of apples, apricots, peaches, pears, mirabelle plums, greengages and blackcurrants to supply processing plants in the market segments for compotes, jams, frozen fruit, fruit juices, liqueurs, alcohols and other uses (fruit preparations, etc.).



PRODUCTION

- There are 6,000 farms specialising in the production of vegetables for industry, and 27,600 farms producing fruit (part of which is destined for processing). The agricultural turnover of the processed fruit and vegetable sector is estimated at €1 billion.
- The canned and frozen vegetable sector is a highly organised sector. It brings together 19 producer groups (4 in Brittany, 6 in Nord-Picardie, 2 in the Centre region and 7 in South-West France) which cover the 15 main vegetables grown in France under contract for industry (canned and frozen): green beans and yellow French beans, peas, carrots, spinach, flageolets, broccoli, cauliflower, salsify, onions, beetroot, turnips, courgettes, celery and celeriac.
- In 2018, the agricultural production of the main fruits and vegetables for industry totalled:
 - 874,000 tonnes of vegetables (excluding corn),
 - 159 000 tonnes of sweetcorn,
 - 196 000 tonnes of tomatoes*,
 - 49 000 tonnes of cultivated mushrooms,
 - 33 000 tonnes of ente plums,
 - 8 000 tonnes of industry bigarreaux cherries*.

Sources : ANIFELT / UNILET - *2017 data for tomatoes and industry bigarreaux cherries



PROCESSING

The processed fruit and vegetables produced supply 1 444 processing units. The sector represents approximately 30,000 direct jobs. Industrial turnover is estimated at €2.9 billion.

The processed vegetable sector (canned and frozen vegetables) is grouped around 23 processing sites (8 in Brittany, 8 in Nord-Picardie-Centre and 7 in the South-West).

Production amounts to 537,000 tonnes (net weight + packaging) of canned vegetables and 378,000 tonnes of frozen vegetables.

The processed fruit sector includes both consumer packaged goods (CPG) such as fruit juices, compotes, jams and preserves, and intermediate goods (IG) such as purees, concentrates, frozen fruit, etc. Generally, French processed fruit companies are very oriented towards consumer goods with strong brands (compotes, jams, etc.). The artisanal network is also very active. Production amounts to 586,000 tonnes in the fruit sector (jam, compote, fruits in syrup, purées, chestnut products).

Apples are by far the leading processed fruits in France. The very dynamic compote segment has dominated this growing sector for the past twenty years or so. There has been a visible increase in lighter and no-added-sugar products. These products accounted for 35% of production in 2016, progressing by 63% between 2011 and 2016.

Sources : ANIFELT / UNILET / AFIDEM



CONSUMPTION

In terms of volume, in 2018 French consumption of canned vegetables was relatively stable in the home compared to 2017, but declined by 1.7% in out-of-home catering.

The consumer market for frozen vegetables is in slight decline: the share of home consumption increased by 1% while the share of volumes purchased from restaurants fell by 1.9%.

Consumption of compotes grew for both children and adults – this segment is driving growth in the fruit and fruit juice category.

Sources : UNILET / AFIDEM



TRADE

The most exported products include peas, green beans, canned and frozen vegetable mixes, jams, compotes, sauerkrauts, mushrooms, prunes and candied cherries.

Imports mainly include 'exotic' products that cannot be produced with France's weather conditions, and fruit and vegetable species that require a large workforce, either during harvesting or industrial preparation.

The products that are most exposed to international competition are canned tomatoes, tomato concentrate, tomato sauce, canned green beans (hand-picked / hand-packed), certain frozen vegetables, and canned mushrooms.

In 2018, France imported 339,200 tonnes (net weight + packaging) of canned vegetables (including sweetcorn) for a total of €381.1 million and exported 358,000 tonnes (net weight + packaging) for a total amount of €339.6 million.

The trade balance in 2018 was positive in volume but negative in value.

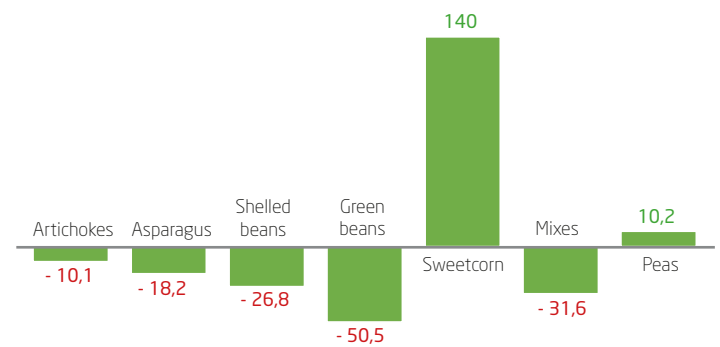
Export volumes were up slightly (+2%), i.e. 5,800 tonnes (net weight + packaging), while import volumes were down 6% (-20,300 tonnes (net weight + packaging)). Only two canned vegetables were surplus: peas and sweetcorn. The shortfall in green beans increased, while that of mixed vegetables was stable.

In 2018, France imported 490,300 tonnes of frozen vegetables for a total of €397.9 million and exported 235,000 tonnes for a total amount of €203.6 million.

The trade balance in 2018 was negative in both volume and value.

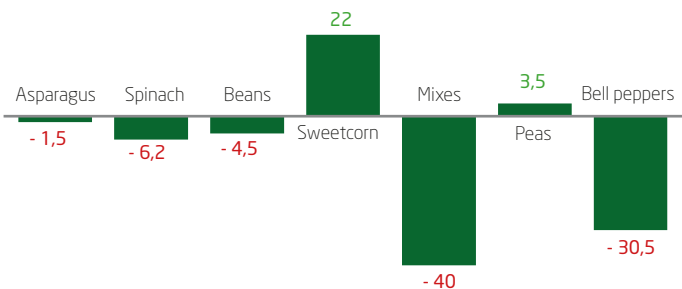
Exports of peas and beans continued to decline, though the shortfall in mixes continued to improve.

Trade balance for canned vegetables in volume in 2018 (thousands of tonnes (net weight + packaging))



Source : UNILET

Trade balance for frozen vegetables in volume in 2018 (thousands of tonnes)



Source : UNILET

As far as fruit is concerned, the trade balance was negative for frozen fruit, fruit in syrup and fruit in juice, but was positive for jams, compotes and purees.

Source : AFIDEM