



Sector

Fruit

• 2018, february

Key statistic:



- > Total production: 2.8 million tonnes
 - > 44th biggest European producer by volume
- France exports almost 1.3 million tonnes of fresh fruit, but remains highly dependent on imports to supply its market
- Déficit de €2,9 milliards d'euros
 - 2.15 million tonnes deficit

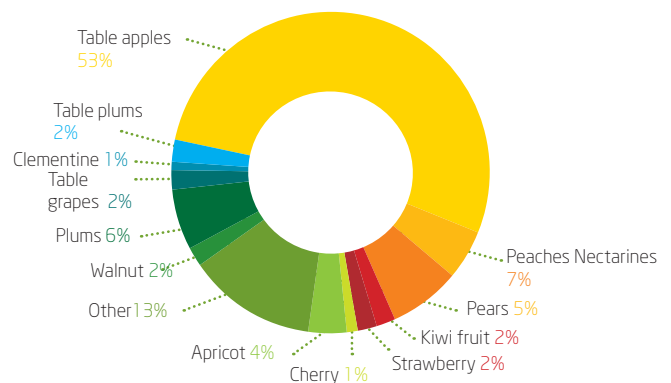
INDUSTRY STRUCTURE

- Fruit and vegetables are used in two separate industries: fresh and processed. These industries are made up of various professions: from producers to distributors and retailers, and including processing companies, delivery companies, and wholesalers, etc. The processed fruit and vegetable industry is supplied by dedicated industrial farm production.
- in the fruit and vegetable industry form part of two professional bodies: Interfel, the fresh fruit and vegetable industry body, and Anifelt, the national association for processed fruit and vegetables.
- Producers can join Producer Organisations (PO), which are the only way to receive the subsidies available as part of the common market organisation for fruit and vegetables (excluding potatoes). Around 300 POs exist in France.

PRODUCTION

- 27,600 farms produce fruit.
- Total production in 2016 of 2.8 million tonnes, making France the 4th biggest European producer by volume. A little more than 170,000ha are used for vegetable crops.
- French fruit production has been falling for the past 15 years (3.4 million tonnes in 2002), but has been showing signs of stabilising in recent years.
- France produces an incredibly wide variety of fruit, but the main crops by far are apples, followed by peaches and nectarines.

French fruit production by volume in 2016



Source : Agreste

SALES (ALL FRUIT AND VEGETABLES)

- At the production stage, turnover for the fruit and vegetable industry stands at more than €6bn, around €700m of which are sold for processing.
- At the shipping stage, producers, private shipping companies, and cooperatives sell fruit and vegetables of a value in excess of €7bn, mainly sold to wholesalers and supermarket purchasing departments, as well as market traders. The bulk stage includes imported products, for an estimated value of €5.7bn.
- Downstream of the industry, turnover from retail (supermarkets, markets, specialist stores, direct sales) stands at around €17bn excluding VAT for the entire fruit and vegetable industry.

Source: CTIFL (diagram showing fresh fruit and vegetable retail, excluding bananas and potatoes, in €bn excl. VAT. - 2016)

CONSUMER HABITS

- Fresh fruit purchases have been climbing in recent years.
- In 2016, and to eat at home, French households bought 8.5 tonnes of fresh fruit per 100 households, an increase of 1.4% on 2015, and 0.4% up on the 2011-2015 average. By value, these purchases generated €20,300 per 100 households.
- People still mainly buy fruit and vegetables from large retailers (52% of market share by value), with supermarkets losing some of their market share (34%) to supermarkets (18%). Other outlets are generally becoming more popular (specialist stores with 12%, local stores with 6%), with the exception of markets, which nevertheless still account for 12% of market share by value.
- In order, the fruits that French people buy the most are apples, bananas, clementines, oranges, and peaches and nectarines.



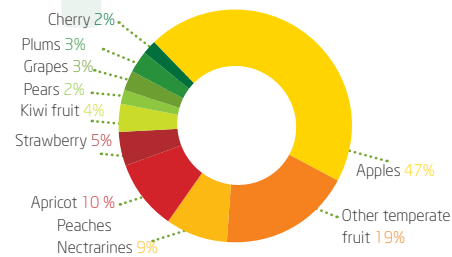
TURNOVER

- At the production stage, 2016 turnover for the fruit and vegetable industry stands at more than €6bn, around €3.2bn of which is generated by fresh fruit.
- Downstream of the industry, retail turnover stands at €17bn (supermarkets, markets, specialist stores, direct sales) for the entire fresh fruit and vegetable industry.
- Turnover for out-of-home catering from fruit and vegetables is estimated at €1.4bn.

TRADE

- France's balance of trade displayed a clear deficit in 2016:
 - €2.9bn
 - €2.15 million tonnes
- In 2016, France imported 3.4 million tonnes of fruit, for a value of €4.5bn. The most imported fruits are strawberries (13 %), table grapes (11 %), peaches and nectarines (11 %), pears (8 %) and apples (8 %).
- In 2016, France exported 1.3 million tonnes of fruit, for a total value of €1.6bn. The most exported fruits are apples (47 %), apricots (10 %) and peaches and nectarines (9 %).

Relative weighting of different countries by value of apple exports (2016)

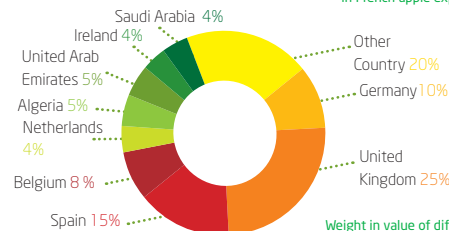


Source : GTA / French customs

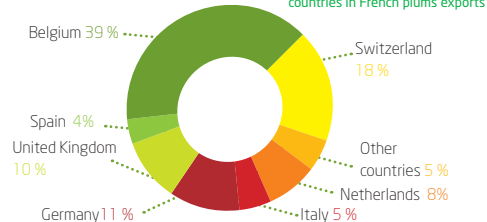
SPOTLIGHT Excellence in exports products

- In 2016 France exported 575,000 tonnes of apples for a total value of €536 million. By volume, this accounted for 7 % of the world's exports of fresh apples and 16% of the European Union's. Export is a major destination for French apples, accounting for 38 % of French production in 2016.
- French operators have proven able to increase the value of their table apple exports through a major increase in varieties (Pink Lady, Ariane), strong brands (Blue Whale, Sud de France), high-end market positioning, and a strong presence in valuable markets.
- In 2016 France exported 12,700 tonnes of plums for a total value of €22.5 million. By volume, this accounted for 2 % of the world's exports of fresh plums and 4 % of the European Union's. France was the world's 11th biggest exporter of plums by volume. French plum exports accounted for 26 % of French production. Main customers by value: Belgium, Switzerland, Germany. France exported 19,800 tonnes of kiwi fruit for a total value of €29.7 million. By volume, this accounted for 1,2 % of the world's exports of fresh kiwi fruit and 2 % of the European Union's. In 2016, France was the world's 9th biggest exporter of kiwi fruit by volume. Export is a major destination for French kiwi fruit, accounting for 30% of French production in 2016. French operators have proven able to increase the value of their exports through the development of certified production (PGI and Label Rouge Kiwi de l'Adour), new segments (early varieties, yellow varieties, hardy kiwi) and well-known brands (Oscar range of kiwi fruit), The French kiwi fruit export sector is highly structured and organised, with firms that implement the latest techniques to meet demand as closely as possible: methods for growing, harvesting, storage, packing.

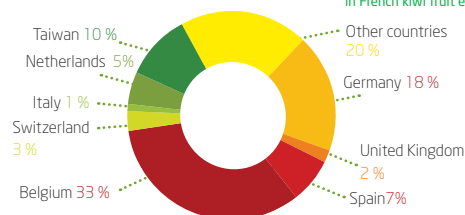
Weight in value of different countries in French apple exports



Weight in value of different countries in French plums exports



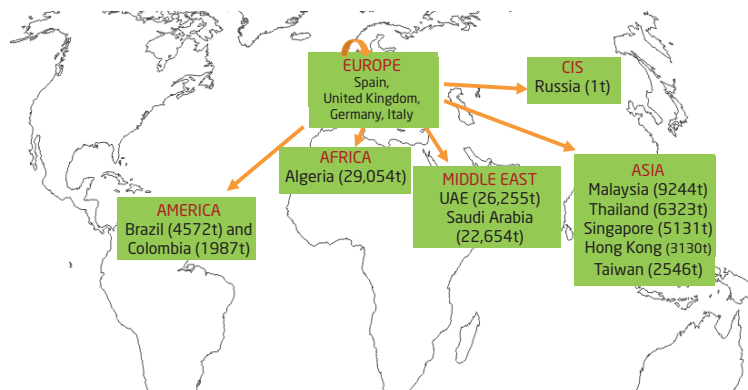
Weight in value of different countries in French kiwi fruit exports



Source : GTA / French Customs

MAP OF MAIN EXPORT MARKETS : DESTINATIONS FOR FRENCH FRESH FRUIT EXPORTS IN 2016

(WITH VOLUMES FOR MAIN COUNTRIES)



Source : GTA