



Key statistics :



- > Total production of 5.6 million tonnes, making France the 4th biggest European producer by volume.
- > France exports more than 1 million tonnes of fresh vegetables, but remains highly dependent on imports to supply its market.
- > Balance of trade in 2016:
 - €1.1 bn deficit
 - 890,000 tonne deficit

(*) artichoke, asparagus, celery, cauliflower, broccoli, brussels sprouts, cabbage, chicory, spinach, leek, parsley, strawberry, aubergine, cucumber, gherkin, christophine, zucchini, okra, melon, watermelon, pepper, chili, pumpkin, squash, pumpkin, giraume, tomato, garlic, beetroot, carrot, celery root, shallot, vegetable turnip, onion, radish, salsify, scarzonera, pea beans, shelling beans, green beans, butter beans, leguminous vegetables of tropical origin, but sweet, dry beans, lentils, dry peas.

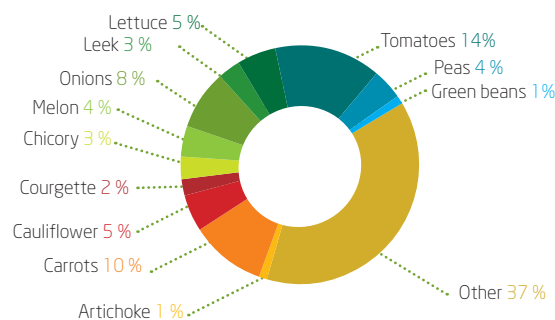
INDUSTRY STRUCTURE

- 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
- Players in the fruit and vegetable industry form part of 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

- > 330,900 farms produce vegetables of which 6000 specialise in vegetable production for industry (2016).
- Total production of 5.6 million tonnes in 2016. 280,000ha are used to grow vegetables.
- However, French vegetable production has been falling for the past 15 years (6.4 million tonnes in 2002), but has been showing signs of stabilising in recent years.
- France produces an incredibly wide variety of vegetables, but the two main crops are tomatoes and carrots, which account for almost 25 % of total crops.

French vegetable production by volume (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 €1.7bn excluding VAT for the entire fruit and vegetable industry, which can be broken down as follows:

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

CONSUMER HABITS

- Fresh vegetable purchases have been climbing very slightly in recent years
- In 2016, French consumers spent €19,900 per 100 households on vegetables to eat at home.
- People still mainly buy fruit and vegetables from large retailers (52% of market share by value), with hypermarkets 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. The vegetable market for out-of-home catering is worth €1.4bn, or 7% of total household fruit and vegetable purchases.
- In 2016, French consumers bought 8.4 tonnes of fresh vegetables to eat at home (including 4th range) per 100 households, which represents an increase of 2% on 2015, as well as a 2% increase on the 2011-15 average.
- In order, the vegetables French consumers buy most are: tomatoes, carrots, melons, lettuce, courgettes, and chicory (all of which but chicory saw purchases increase in 2016).



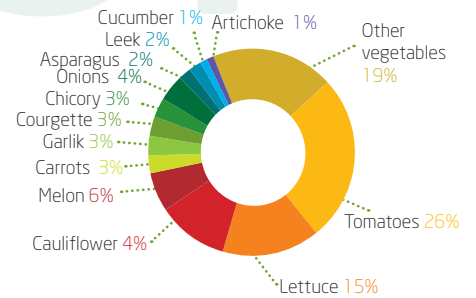
TURNOVER

- At the production stage, 2016 turnover for the fruit and vegetable industry stands at more than €6bn, around €3bn of which is for fresh vegetables.
- 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 for fresh vegetables displays a clear deficit in 2016 :
 - > €635 million
 - > 890.000 tonnes
 - In 2016, France imported 1.9 million tonnes of fresh vegetables, for a value of €2.1 bn. The top vegetable imports are tomatoes, lettuce, melons, courgettes, garlic, onions, cucumbers, carrots, and cauliflowers.
 - In 2016, France exported 1.1 million tonnes of fresh vegetables, for a value of €1.1 bn. The top vegetable exports are tomatoes, lettuce, cauliflowers, melons, carrots, garlic, chicory, courgettes, and onions.
- However, it should be noted that for a great many products, such as tomatoes, a significant percentage of these are re-exports, with France serving as a transit area between Southern (exporter) and Northern (importer) Europe.

Relative export weighting by value (2007-2016 average) of different vegetables



Source : GTA / French Customs

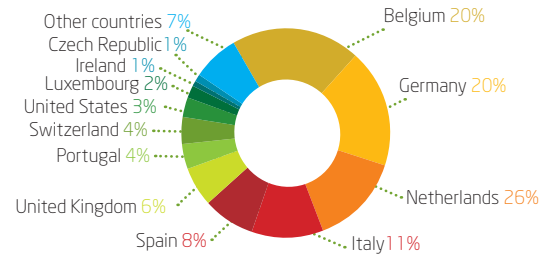
SPOTLIGHT Excellence in export products

- In 2016, France exported 129,000 tonnes of onions and shallots, for a total value of €82 million.

> While the European Union accounts for around 90% of exports by volume, some third countries import significant quantities from France. These include Côte d'Ivoire (4790 tonnes) and Senegal (709 tonnes) in Sub-Saharan Africa, as well as Switzerland (2236 tonnes) and the USA (2342 tonnes).

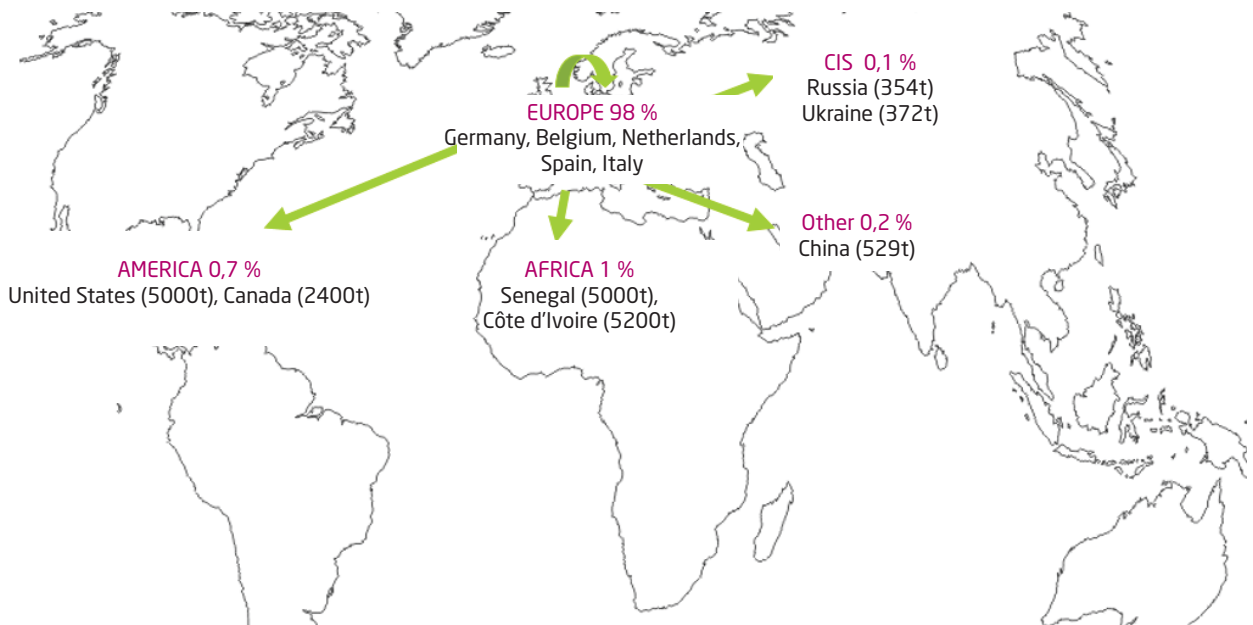
As the unit price is higher in the latter two countries, they constitute major export markets by value.

Relative weighting of different countries by value of onion and shallot exports (2016) :



Source : GTA / French Customs

MAP OF MAIN EXPORT MARKETS (WITH 2016 VOLUMES FOR MAIN COUNTRIES)



Source : French Customs / GTA

