



Foreign Agricultural Service

**GAIN Report**

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**France**

**Dried Fruit**

**Annual**

**2002**

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**Report Highlights:**

**France is a major competition to U.S. prune exports to the EU market (mostly to the United Kingdom, Netherlands, Germany and Italy). U.S. exports of prunes to France are relatively insignificant at about 200 MT per year. Much of prunes consumed in France is mostly from domestic production. For 2001 prune crop, French production is estimated to be 56,000 MT. This represents a substantially high level production after several years of underproduction. To date, weather conditions have been favorable for the 2002 crop, which is expected to be in the range of 45,000-50,000 MT.**

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Includes PSD changes: Yes

Includes Trade Matrix: Yes

Annual Report

Paris [FR1], FR

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## Executive Summary

After several years of underproduction, French prune production rose in 2001 to a record high of 56,000 MT. For 2002 crop, prune production is expected to be about 45,000 - 50,000 MT. France continues to rely on domestic production to meet its needs for prunes. Consequently, French import of prunes is relatively insignificant in normal years.

## Section I: Situation and Outlook

France is a major competition to U.S. prune exports to the EU market (mostly to the United Kingdom, Netherlands, Germany and Italy). The level of U.S. exports of prunes to France is insignificant at about 200 MT per year. The domestic market is dominated by domestically-grown prunes, because the French prune board (BIP) has an aggressive advertizing campaign with i 229,000 during winter months through radio spots.

After four years of below average harvests, due to production limitations set by the French growers themselves (who feared overproduction of more than 50,000 MT) 2001 production rose to 56,000 MT. To date, weather conditions have been favorable for the 2002 crop, which is expected to be about 45,000-50,000 MT.

## Section II: Statistical Tables

PSD Table						
Country	France					
Commodity	Dried Prunes				(HA)(1000 TREES)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		09/2000		09/2001		09/2002
Area Planted	13000	12960	0	12500	0	12500
Area Harvested	11500	11630	0	11500	0	11500
Bearing Trees	1970	2330	0	2300	0	2300
Non-Bearing Trees	280	270	0	200	0	200
Total Trees	2250	2600	0	2500	0	2500
Beginning Stocks	12000	12070	11000	13540	0	24000
Production	41000	39770	0	56000	0	48000
Imports	1000	4466	0	1500	0	1500
<b>TOTAL SUPPLY</b>	<b>54000</b>	<b>56306</b>	<b>11000</b>	<b>71040</b>	<b>0</b>	<b>73500</b>
Exports	18000	12365	0	16000	0	16000
Domestic Consumption	25000	30401	0	31040	0	33000
Ending Stocks	11000	13540	0	24000	0	24500
<b>TOTAL DISTRIBUTION</b>	<b>54000</b>	<b>56306</b>	<b>0</b>	<b>71040</b>	<b>0</b>	<b>73500</b>

Sources: French Customs, French prune growers, French Prune Board, Office of Statistics of the French French Ministry of Agriculture and Fisheries (SCEES).

Export Trade Matrix			
Country	France		
Commodity	Dried Prunes		
Time period	Sept/Aug	Units:	MT
Exports for:	1999		2000
U.S.	0	U.S.	0
Others		Others	
UK	2033	UK	1360
Italy	1763	Germany	1349
Germany	1736	Netherlands	1303
Netherlands	1644	Belgium	1249
Spain	1604	Italy	1233
Belgium	1414	Greece	1108
Greece	1161	Algeria	945
Russia	731	Spain	854
Total for Others	12086		9401
Others not Listed	3302		2964
Grand Total	15388		12365

Source: French Customs

Import Trade Matrix			
Country	France		
Commodity	Dried Prunes		
Time period	Set/Aug	Units:	MT
Imports for:	1999		2000
U.S.	207	U.S.	232
Others		Others	
Italy	535	Spain	1902
Argentina	475	Chile	881
Chile	240	Tunisia	388
Turkey	197	Argentina	373
Spain	102	Serbia	262
		Turkey	239
Total for Others	1549		4045
Others not Listed	185		189
Grand Total	1941		4466

## Section III: Supply, Demand, Policy and Marketing

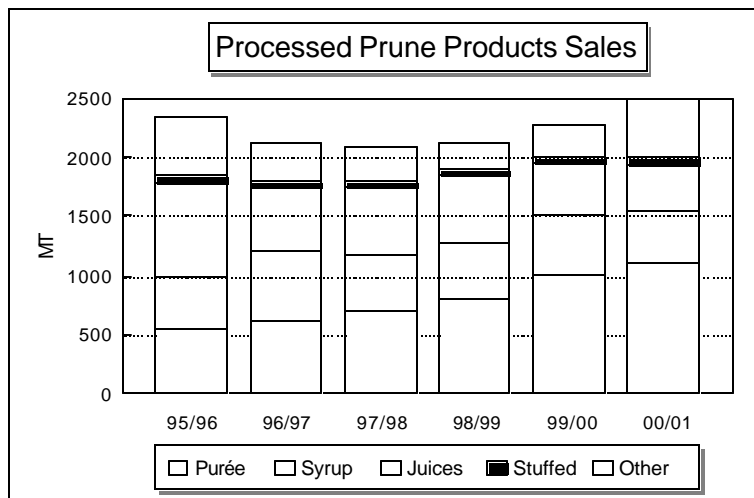
### Production

French prune production for 2001 is estimated to be 56,000 MT, 41 percent higher than in 1999, but in line with the 50,000 to 55,000 MT production range generally accepted as good for the French prune industry. Weather conditions were favorable in 2001, and are expected to be good in 2002 for another average crop.

### Consumption

Prunes are either consumed directly or are processed into food products like juice or ingredients for cookies and yogurts. During the 2000/01 marketing year, about 2,500 MT of prunes were processed into 5,455 MT of processed products, including the following:

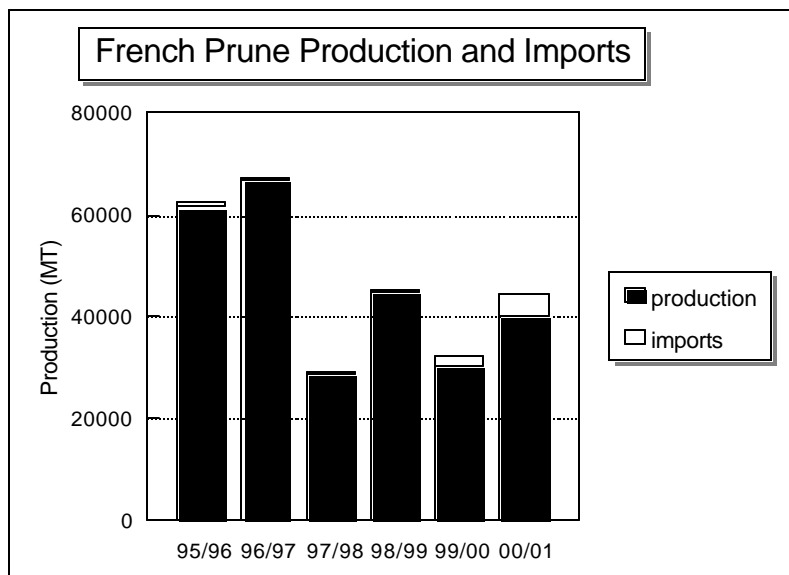
	Raw Prunes Used for Processing (MT)		Final Products Processed from Prunes (MT)	
	1999/2000	2000/01	1999/2000	2000/01
Prune Purée	1,011	1,096	2,191	2,400
Prunes in Syrup	495	451	1,486	1,369
Juices and Concentrates	447	394	1,007	1,036
Stuffed Prunes	53	55	75	78
Other	274	499	319	572
<b>TOTAL</b>	<b>2,280</b>	<b>2,495</b>	<b>5,078</b>	<b>5,455</b>



The opposite graph shows that processed prune product sales have increased since 1997/98, despite relatively low prune production levels over the past few years.

## Trade

France is a net exporter of prunes, and prune imports are insignificant compared to domestic production, as indicated in the graph below.



The French market for U.S. prunes is therefore very limited, but French and U.S. prunes compete for European markets, in countries such as the United Kingdom, Germany, Netherlands, and Italy.

## Stocks

As a result of a higher harvest in 2001, stocks are expected to increase to 24,000 MT by the end of the MY 2001/02, and is expected to stabilize in MY 2002/03.

## Policy

After the 1996 crisis of prune overproduction, French prune growers organized a production limitation system including uprooting. Prune orchards were replanted at a slower rate (50 hectares per year). Since 1997, harvests have been considerably lower, except in 2001, and French prune growers are currently organizing a planting program with a goal of 300 hectares planted per year for two years. This was decided by the entire prune industry, including the producers (97 percent of registered growers organizations), the processors and the traders. The objective is to stabilize the orchards at the level of 14,500 hectares.

## Marketing

In January and February 2002, the French Prune Board (BIP) organized a prune promotion campaign with a \$229,000 budget, including radio spots on national and regional radio stations. These spots highlighted the health benefits of prunes and suggested recipes.