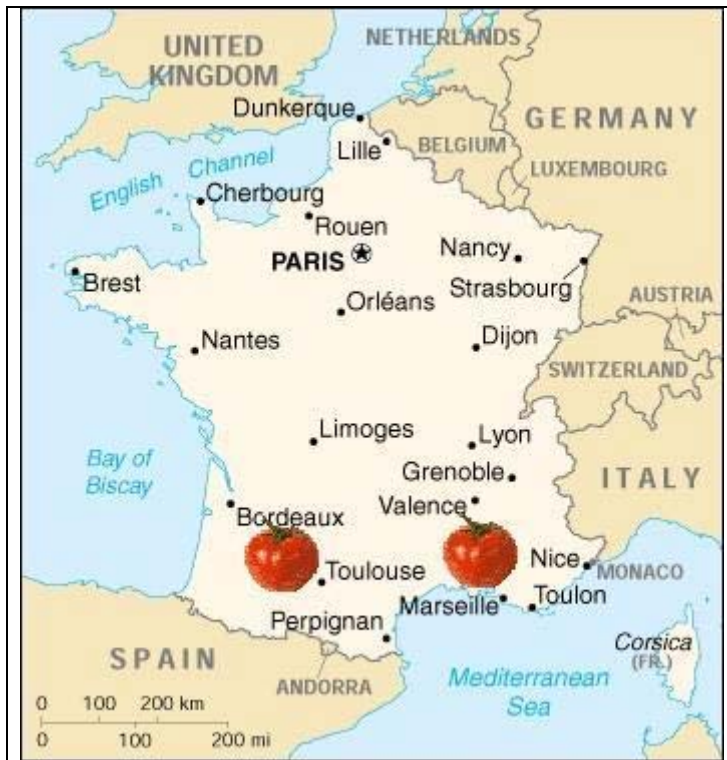


## Tomato processing in France

In the last five years an average of 234 000 tonnes of tomatoes for processing were produced in France; the volume has been continually falling since its peak of 372 000 tonnes in 1999. France represents now only represents 2 % of European production and does not use its EU quota of 400 000 MT.

There are two main regions of production :



- The South-East, with 60 % of French production.

In this region centred on the Mediterranean Basin (Vaucluse, Bouches-du-Rhône, Gard, Sud Drome), with peripheral regions (Drôme, Rhone Valley) and to the West (Hérault), there are two main types of farms growing tomatoes for processing:

- Cereal farms where tomatoes are used as part of crop rotations on about 10% - 20% of total acreage.
- Specialised farms, particularly along the Mediterranean coast, growing several dozens of hectares of tomatoes.

The region is characterised by a Mediterranean climate, with hot and dry summers, a low risk of frost in the spring, and dominating winds (Mistral and Tramontane) limiting the length of rainy periods.

- The South West

The production area is centred on the Lot-et-Garonne and the surrounding Departements (Landes, Dordogne, Gironde, etc...). Production is developing in the cereal plains of the Lot-and-Garonne, as well as in the Landes. Soils are relatively varied. The climate is milder than in the South-East and predominantly Oceanic. Wet periods last longer and harvest takes place later in the season.

About 200 growers cultivate 2 000 hectares of tomatoes. Average yields are 75 to 80 t/ha, with variations to up to 110 to 120 t/ha in new lands along the seaside, down to 65 to 70 t/ha in traditional farms because of limitations due to soil fatigue and crop rotation.

All producers are members of Producers' Organisations which sell the crop for their members and give them technical support. Producer's Organisations are also developing quality assurance labels (ex: Agri-Confiance) enabling growers to guarantee the quality and safety of their crop. Using research results and decision-making tools developed by SONITO, producers' organisations have implemented

Integrated Crop Management methods enabling more respect of the environment and the consumer. IPM crop guides are made available to producers, and field visit and an alert-system enable to limit as much as possible pesticide use. Quality Charters have been implemented in coordination with suppliers (e.g.Plug Seedlings Charter).

The main varieties used are Montego, Promo, Cannery Row, Spunta, Nautico, Pavia, Caladou, Leader and Perfect Peel. Most of the tomatoes are processed into tomato paste, with some volumes going into various types of canned tomatoes, juice or frozen tomatoes. Most tomato processors are also involved in second-stage processing of specialty products : hot or cold sauces, ketchup, etc., and rely largely on imports of tomato paste from various origins to cover their needs.

The relationship between Producers' Organisations and Processors are based on the EU Regulation and of inter-professional agreements negotiated within SONITO. This agreements define the minimum production and payment requirements which are included in the individual contracts. The price is however negotiated freely between the contracting parties: it was in the order of 45 to 50 euros/tonne on average in 2005. Specific clauses can be added to the contract, on top of the minimum requirements negotiated within the inter-professional agreement.

The largest tomato processor, cooperative Le Cabanon, was taken over by Chinese company Chalkis in 2004 which reduced the volume of tomatoes processed annually to about 20 000 MT.

ANNEE	Production totale de tomates	Production de tomates transformées	Evolution du volume transformé	Evolution du volume transformé	Evolution du prix des tomates fraîches
	(1000 tonnes)	(1000 tonnes)	(index 100 en 1978)	(en % AMITOM)	(US\$/100kg bord champ)
1978/79	802	363	100%	6,50%	6,61
1979/80	847	383	106%	5,60%	6,41
1980/81	875	399	110%	5,90%	6,18
1981/82	792	406	112%	6,20%	9,21
1982/83	876	375	103%	5,70%	9,29
1983/84	870	304	84%	3,70%	9,03
1984/85	833	355	98%	3,30%	7,86
1985/86	930	392	108%	4,50%	7,73
1986/87	754	242	67%	4,00%	9,09
1987/88	709	234	64%	3,70%	10,14
1988/89	743	277	76%	4,00%	10,16
1989/90	756	323	89%	3,60%	9,35
1990/91	852	322	89%	3,70%	11,72
1991/92	812	321	88%	3,90%	10,81
1992/93	777	247	68%	3,40%	12,25
1993/94	756	236	65%	3,10%	9,36
1994/95	788	276	76%	3,10%	10,04
1995/96	803	281	77%	3,00%	12,84
1996/97	805	285	79%	2,70%	12,4
1997/98	805	286	79%	3,30%	10,4
1998/99	875	328	90%	3,00%	10,23
99/2000	864	372	102%	3,00%	9,16
2000/01	897	314	86%	2,70%	7,8
2001/02	860	298	82%	2,90%	8,1
2002/03	802	241	66%	2,29%	8
2003/04	825	243	67%	1,97%	8,8
2004/05	809	221	61%	1,53%	9,7
2005/06	630	157	43%	1,20%	10,9
YEAR	Total tomato production	Processing tomato production	Evolution of processed volume % 1978	Evolution of processed volume % AMITOM	Evolution of the fresh tomato price

	EXPORTATION FRANCE / EXPORT FRANCE			IMPORTATION FRANCE / IMPORT FRANCE		
	2002/2003	2001/2002	2000/2001	2002/2003	2001/2002	2000/2001
(tonnes)	Concentré de tomate/Tomato paste (codes 20029031 & 20029039) & (codes 20029041 & 20029049)					
Total EU 15	3 330	2 663	4 213	44 730	42 855	49 609
Total hors UE/Total outside EU	740	1 346	385	2 144	336	446
TOTAL	4 070	4 009	4 598	46 874	43 191	50 056

	Purée de tomate/Tomato puree (<12%) (codes 20029011 & 20029019)					
Total EU 15	1 048	1 197	1 072	30 549	32 208	32 852
Total hors UE/Total outside EU	14	45	12	20	3	0
TOTAL	1 062	1 242	1 084	30 569	32 211	32 852

	Conserves de tomate/Canned tomatoes (codes 20021010 & 20021090)					
Total EU 15	4 731	4 919	4 926	89 184	94 884	81 389
Total hors UE/Total outside EU	869	1 073	624	419	793	413
TOTAL	5 600	5 991	5 550	89 603	95 677	81 802

	Sauces & ketchup/Sauces & ketchup (code 21032000)					
Total EU 15	13 835	14 071	14 962	89 353	90 754	84 036
Total hors UE/Total outside EU	1 865	2 200	3 500	1 257	1 582	1 420
TOTAL	15 700	16 271	18 462	90 610	92 336	85 456

(source: EUROSTAT)