

France is a net importer of fresh fruit and vegetables

France is no small player when it comes to fruit and vegetables, although it's no superpower like Spain or Italy either. Regarding population, France (67 million) is slightly larger than Italy (62 million) and much larger than Spain (50 million). Spain and Italy produce more fresh vegetables, and considerably more fresh fruit. As producers of fresh vegetables, the productions of France and the Netherlands aren't all that different.

France is an important trade country in fresh vegetables as well, although it isn't a superpower in this field either. Regarding amounts, France is the sixteenth exporter globally (tenth place in value). As an importer of fresh fruit and vegetables, France is in fifth place, and therefore one of the highest ranking countries in this field. France is a net importing country of fresh fruit and vegetables. In 2017, the import surplus for fresh vegetables amounted to more than 0.8 million tonnes, and for fresh fruit this was even 2.3 million tonnes. The import of fresh vegetables has been fairly stable in recent years, at a level of 1.9 million tonnes. The import of fresh fruit is increasing, and was 3.5 million tonnes in 2017. The export of fresh vegetables is stagnating at a level of one million tonnes, and the export of fresh fruit has even decreased somewhat in recent years.

Importance of supermarkets smaller than elsewhere

According to FranceAgriMer (an organisation that's similar to the former Dutch Commodity Boards), France produced approximately 5.2 million tonnes of fresh vegetables and 3.3 million tonnes of fresh fruit in 2016. Apples (1.5 million tonnes), tomatoes (0.83 million tonnes), carrot (0.58 million tonnes) and onions (0.47 million tonnes) are the most important French fruit and vegetable products. Globally, France comes in 26th place as a production country of vegetables. For fruit, France comes 15th. While the majority of fruit and vegetables is sold via supermarkets in the Netherlands, the share of (hyper) supermarkets is slightly less dominant in France, it's just over half. The fresh market still plays its part in France, it's about 15 per cent, and therefore still a sales channel for fresh fruit and vegetables.

About 40 per cent (2.1 million tonnes) of French import of fresh fruit and vegetables comes from Spain. Since 2012, for that matter, there hasn't been much movement in the import from Spain. The product range imported from Spain is very broad. Oranges and tangerines are the most important products. These represent 16 and 11 per cent, respectively, of total import from Spain. Tomatoes, lemons and melons are other important products.

More and more from and through Belgium

The second supplier is Belgium, although it comes at quite a distance with just 14 per cent. In the past ten years, the import from Belgium increased by four per cent on average, from 530,000 tonnes in 2007 to 760,000 tonnes now. Re-export of bananas plays an important part in that increase, but various other products have also been exported from Belgium to France more. Important products are: carrot, tomato, pineapple, apple, kiwi fruit, onion and pear. For most of the important products, re-export plays a somewhat important part.

France is the most important buyer of fresh vegetables from Belgium. For fresh fruit, Germany is just a bit more important. The Netherlands comes third when it comes to Belgian export of fresh fruit and vegetables, for that matter.

Morocco is the third supplier of France. Although there have been some fluctuations, quantities imported from Morocco in 2017 were of record size, at 543,000 tonnes. This concerns tomatoes for just over half. Melons and tangerines are other important products.

Broad range of products from and through the Netherlands

The Netherlands is fourth. The import from the Netherlands has fluctuated quite a bit in recent years. In the past ten years, we've seen roughly between 440 and 500,000 tonnes. In 2017, it was 460,000 tonnes. This concerns a broad range of products. Oranges, onions, grapefruit, bananas and pears are five of the most important, but the share of the top five can't exactly be considered large because it's just 35 per cent. There are a number of growth products: oranges, bananas, avocados, mangoes and limes. These are mostly re-export products. Important products, that have clearly been in a slump recently, are onions, pears and apples.

The import from Italy, the fifth supplier, is also considerable with 356,000 tonnes. Over the years, the import from this country fluctuated between 330 and 360,000 tonnes. Grapes are the most important product with nearly 100,000 tonnes. Bananas, apples, kiwi fruit, fennel, watermelons and pears are the other important products.

After the top five that represents almost 80 per cent of the total French import of fresh fruit and vegetables, Ivory Coast (bananas), Germany, Cameroon (bananas), the UK and Israel follow. In total, about 30 countries supply at least 10,000 tonnes of fresh fruit and vegetables to France.

Concerning product, the two most important ones, bananas and oranges, are proper growth products. The import of the next two, tomatoes and tangerines, has been stable for some years now. Growers among the larger products are carrot, bell pepper, avocado, mango and kaki.

Export stable for years

The French export of fresh fruit and vegetables fluctuated between 2.2 and 2.5 million tonnes in recent years. In 2017, it concerned 2.3 million tonnes. Spain and Belgium are the most important buyers of fresh fruit and vegetables from France as well. Export to both countries increased, although stabilisation has been happening in recent years. Germany, the UK, Italy, the Netherlands and Switzerland are other countries that receive considerable quantities. French export shows a decreasing trend in export to all these countries except Switzerland. The French export statistics don't distinguish between French product and re-export. This is clear for bananas, oranges, tangerines, watermelon and avocados, for instance. These products are grown in France, albeit to a lesser extent, but not in the quantities indicated by French export statistics.

From figures from other countries (particularly Germany) that rely as much as possible on the country of origin when importing, it can be concluded that the French tomato export mostly consists of re-export, particularly in the winter months. In total, 225,000 tonnes of French fruit and vegetables would have been imported last year according to German import statistics, while 315,000 tonnes would have been exported to Germany according to French export figures. Of this 90,000-tonne difference, 50,000 can be explained through re-export of tomatoes to Germany.

Apples make up a quarter of the total

Apples are France's most important export product. The share in the total French export of fresh fruit and vegetables dropped to less than one quarter. Ten years ago, this was still 30 per cent. In the past ten years, 2011 was the record year with nearly 700,000 tonnes. In recent years, French apple export decreased to 524,000 tonnes in 2017. For years, nearly 80 per cent of French apple export has focused on EU countries. Growth can be seen in export to the Gulf states and countries in southeast Asia, although this doesn't concern large quantities, 45 and 32,000 tonnes respectively in 2017. In individual countries, the UK, Spain, Germany and Belgium are the most important buyers. Last year, 31,000 tonnes of French apples were exported to the Netherlands. That is considerably less than in the past.

Last year less than 150,000 tonnes of cauliflower exported

Besides apples, there are a number of other 'traditional' French products that are sold abroad, cauliflower being the most important one. The export of this product isn't as considerable as it was in the past; in 2011 it was almost 180,000 tonnes (1993: 235,000 tonnes), and last year it was 146,000 tonnes. Germany is by far the most important buyer of French cauliflower, followed at a distance by the Netherlands, Belgium and the UK.

Last year, 87,000 tonnes of carrot were exported, this is much less than in the past as well. Nearly half the French export carrot is shipped to Belgium. Many French peas are also sent to the Belgian frozen industry. France is a major exporter of apricots, last year the country exported 56,000 tonnes. This was a fairly regular amount. Globally, only Spain exports more of this product. Most of the French apricots go to Italy and Switzerland. Shallots are also a truly French export product, last year, a record amount of 31,000 tonnes was exported. The Netherlands, with 8,500 tonnes, was the most important buyer. Germany received 8,100 tonnes. Combined, these countries are therefore good for the French shallot exports.

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