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1978/79 Processed Cherry Production in France and Italy Drops, Following Improved Output in 1977/78

France

Fresh cherry production in 1978 is expected to rebound to 91,900 tons¹, 56 percent above the short crop of the previous year, but still below the past 5-year average of 99,840 tons. Blooming occurred under excellent conditions, but cool and damp weather in May cut final production. Output of the Biganeau Napoleon variety used for processing is placed at 17,000-18,000 tons, which although close to the normal yield, does not meet French processors' needs. Imported brined cherries, mostly from Italy, will make up the difference.

French glace cherry production in 1977/78, originally placed at 9,000 tons because of the short fresh cherry crop that year, actually reached 11,800 tons following unexpectedly high imports of fresh and brined cherries from Italy². Production in 1978/79 is placed at 9,000 tons, almost one-fourth below last year's. This drop in output is a result of the short fresh cherry crop this year, coupled with anticipated lower availabilities from Italy. Other sources, such as Spain and Yugoslavia, will not be able to compensate for the reduction in Italian supplies.

French exports of glace cherries in 1977/78 are placed at 9,500 tons, slightly lower than 1976/77 shipments. Although exports to the United States continued to fall during the 1977/78 season, reaching a record low of 50 tons, shipments to West Germany and the United Kingdom rose by 16 percent and 11 percent, respectively, over the past 5-year averages. In view of expected lower production of glace cherries in 1978, French exports are forecast at 7,500 tons during the 1978/79 season.

Although growers and processors have not yet reached an official agreement on a minimum producer price for this season, June prices to growers were over 5.00 ff/kg (49.5 cents/lb), compared with 3.20-3.80 ff/kg (29.4-34.9 cents/lb) last year.

Italy

Fresh cherry production in 1978 is expected to fall by almost one-fifth from that of the previous year to 115,000 tons—the smallest crop in 20 years. Excessive rains in the spring, particularly during blossoming in April and May, hindered pollination and caused above average amounts of fruit droppage and splitting. In addition to the effects of unfavorable weather, older trees produced lower than average yields. Although output in Piedmont and Emula-Romagna is expected to be higher than last year's, production in Campania is expected to fall by 40 percent from the 1977 level.

Brined cherry production in 1977/78 reached 14,100 tons, almost one-fifth above the previous year's. This estimate includes cherries purchased by integrated Franco-Italian companies, which in the past had been outside normal commercial channels and thereby not recorded in previous production data. Output in 1978/79 is placed at 5,000 tons, almost two-thirds below last year's level. The decline in fresh cherry production, especially that used for brining, and resultant high prices caused the reduction in brined cherry output. Quality is lower than usual, due to the high incidence of split and rotten fruit; and briners have also tended to mix fruit of different qualities.

Italian briners imported about 300 tons of brined cherries from Yugoslavia in 1977/78 in order to meet increased demand from domestic and foreign users.

¹All tons are metric. ²1977/78 brined cherry imports totaled 5,200 tons, of which 85 percent were from Italy.

Imports are expected to double this season.

Exports of brined cherries in 1977/78 in order to meet increased demand from domestic and foreign users. Imports are expected to double this season.

Exports of brined cherries in 1977/78 in order to meet 11,500 tons, up 7 percent from the previous season's. Shipments during the first 9 months of the 1977/78 season totaled 10,111 tons, 15 percent above those of the same period in 1976/77. While sales to Canada and Japan dropped sharply, exports to France, traditionally the largest buyer, more than doubled while sales to the United Kingdom increased by almost one-third. Exports during the current season are forecast at 3,200 tons.

The European Community pays exporters of brined cherries (without stem or pit) 4 U.A. per 100 kilograms

(2.4 cents/lb) to all markets other than Canada and the United States. Prices to briners during the current season have been the highest ever recorded. Imperiale and Corvina varieties, those most used by briners, cost 1,400 lire/kg (73.9 cents/lb) (including commission charges and transportation costs) compared to 500 lire/kg (25.6 cents/lb) a year ago.³ The high prices are attributed to the increased purchases, and to the small fresh cherry supply. Although the costs of plastic drums remained at last year's level, labor costs increased sharply from those of a year ago, thereby causing overall processing costs to rise.

June f.o.b. export prices for the new crop, first class brined cherries, were more than twice the level of prices last year, a reflection of the short crop and strong demand this season.

³Opening prices were 1,500-1,700 lire/kg (79.2-89.7 cents/lb) before dropping in mid-June.

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FRESH, BRINED, and GLACE CHERRY PRODUCTION: FRANCE and ITALY, 1974/75-1978/79
(Metric tons)

Item and Country	1974/75	1975/76	1976/77	1977/78	1978/79
<u>FRESH (Total Crop)</u>					
France	124,300	89,200	121,800	58,900	91,900
Italy	139,000	190,400	156,300	141,200	115,000
Total Fresh	263,300	279,600	278,100	200,100	206,900
<u>BRINED</u>					
Italy	10,700	12,000	12,000	14,100	5,000
<u>GLACE</u>					
France:					
From domestic cherries	8,865	3,700	6,300	6,600	6,000
From imported brined cherries	4,435	5,300	4,400	5,200	3,000
Total Production	13,300	9,000	10,700	11,800	9,000

SOURCE: Attache report.
August 1978

Commodity Programs. FAS, USDA

PROCESSED CHERRIES: EXPORTS FROM ITALY and FRANCE^{1/}, 1974/75-1978/79
(Metric tons)

Item and Country of Destination	1974/75	1975/76	1976/77	1977/78	1978/79
BRINED CHERRIES (ITALY) 2/					
Australia	819	173	1,291	3/	3/
Canada	90	2,404	1,306	3/	3/
France	1,476	6,252	2,750	3/	3/
Japan	---	306	1,014	3/	3/
South Africa	559	268	682	3/	3/
United Kingdom	1,258	2,607	1,957	3/	3/
United States	---	---	---	3/	3/
Other	1,462	2,204	1,657	3/	3/
Total	5,664	14,214	10,657	^{4/} 11,500	^{4/} 3,200
GLACE CHERRIES (FRANCE) 4/					
Germany, Fed. Rep.	1,440	1,310	1,605	1,700	3/
United Kingdom	3,205	3,470	4,940	5,000	3/
United States	880	485	315	50	3/
Other	2,635	2,235	2,890	2,750	3/
Total	8,160	7,500	9,750	9,500	7,500

---Denotes not available, unknown, or not applicable.

^{1/} Year beginning June 1 in Italy, July 1 in France. ^{2/} Official foreign trade of Italy.

^{3/} Data not available. ^{4/} Attache estimate.

SOURCE: Contained within footnotes.

ITALIAN BRINED CHERRIES: AVERAGE F.O.B. PRICES^{1/}
1973-1978

Type	1973	1974	1975	1976	1977	1978
Brined cherries, Class I						
lire/kg.	660	895	455	720	1,125	3,000
\$US/lb. ....	.51	.63	.33	.39	.58	1.58
Brined cherries, Class II						
lire/kg.	630	865	430	660	950	2,500
\$US/lb. ....	.49	.61	.31	.36	.49	1.32
Brined cherries, Class III						
lire/kg.	535	700	350	580	850	1,750
\$US/lb. ....	.42	.49	.25	.31	.44	.92

^{1/} Naples mid-June quotation, converted to U.S. dollars based on the exchange rate at the end of June of each year.

SOURCE: U.S. Agricultural Attache Report.