

The Grenoble Walnut Appellation of Origin: Supply Chain and Prospects



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Grenoble Walnut Supply Chain

1927 : First Federation of Grenoble Walnut (Paul de Montal): with growing market demand, producers from the most productive areas (communes) organize to form a larger regional federation.

During the same period, powerful family-owned corporations were buying up walnuts from isolated producers and selling them under their company name.

1936: Grenoble Walnut Congress, St Marcellin: meeting of all industry stakeholders--producers, wholesalers, retailers and agricultural institutions from the regional government office.

17 juin 1938 : government decree recognizing the Grenoble Walnut label of origin (appellation d'origine contrôlée Noix de Grenoble).



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The Grenoble Walnut Industry Today

CING (supply chain committee for Grenoble Walnut): responsible for managing the appellation since its formation in 1968.

Revision of designations rules in 2008: regulatory improvements for the management of quality signs at the European level.

French non-profit regulations (« Law 1901 ») revision in 2008: for Grenoble Walnut, combined organizations responsible for legal protection (intellectual property) and management of the supply chain, including promotion



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Goal of the Grenoble Walnut leadership (CING):

- support and extend the product's reputation for quality and increase its value-added in world markets
- highlight the distinctive features of the Grenoble Walnut to build consumer recognition and loyalty



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Characteristics of the Grenoble Walnut:

- First French «fruit» to obtain an appellation of origin (1938)
- Nuts are sold shelled, dried or fresh.
- 3 traditional varieties covered under the label -
Franquette Mayette Parisienne



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Requirements for Grenoble Walnut producers:

Strict production requirements for quality assurance and commercialization -

- acreage inventory and traceability system in place
- production methods governing varieties, planting density, pruning, irrigation, fertilization, harvest date, drying, storage conditions
- marketing rules for size and quality, packaging, sales calendar

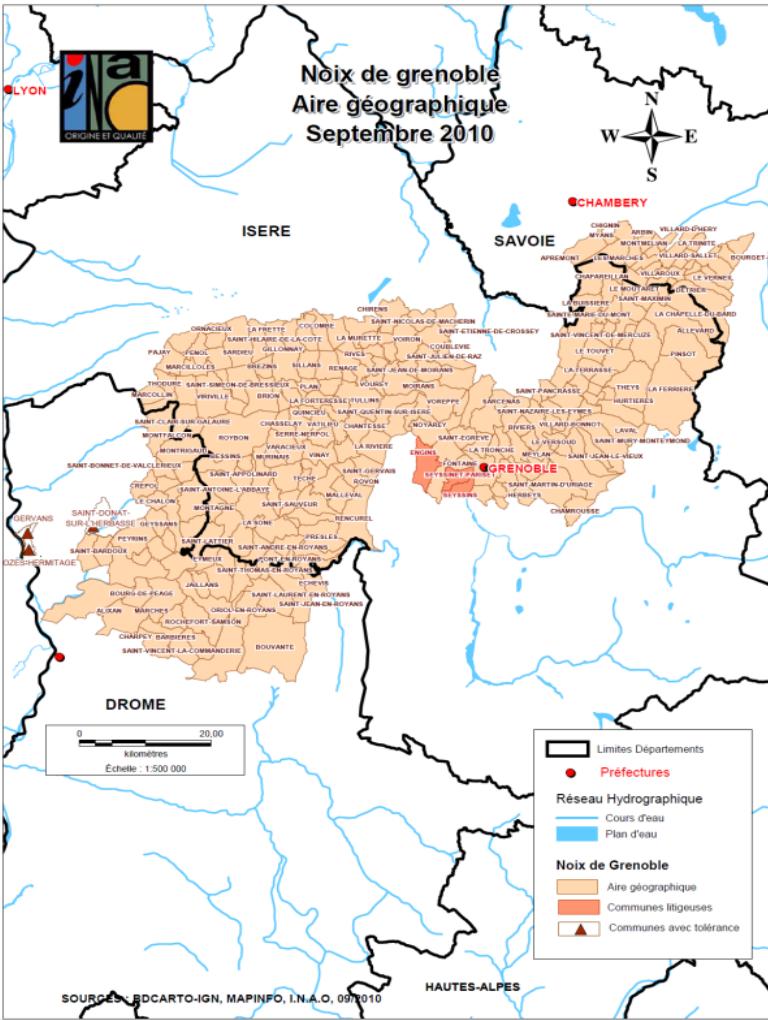
All steps from production to market distribution must be carried out within the geographic region delimited by the appellation.



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Geographical extent of the Grenoble Walnut

A territory of 261 communes located in Isère, Drôme, and Savoie



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More on the Grenoble Walnut

	2008	2012
# of approved producers	1108	980 79% in Isère 21% in Drôme
Surface area of appellation	6936 ha	6740 ha 82% in Isère 18% in Drôme



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Supply Chain

By Type of Sales Entity	2012
Private	16
Cooperative	2
Producer-Distributer	80



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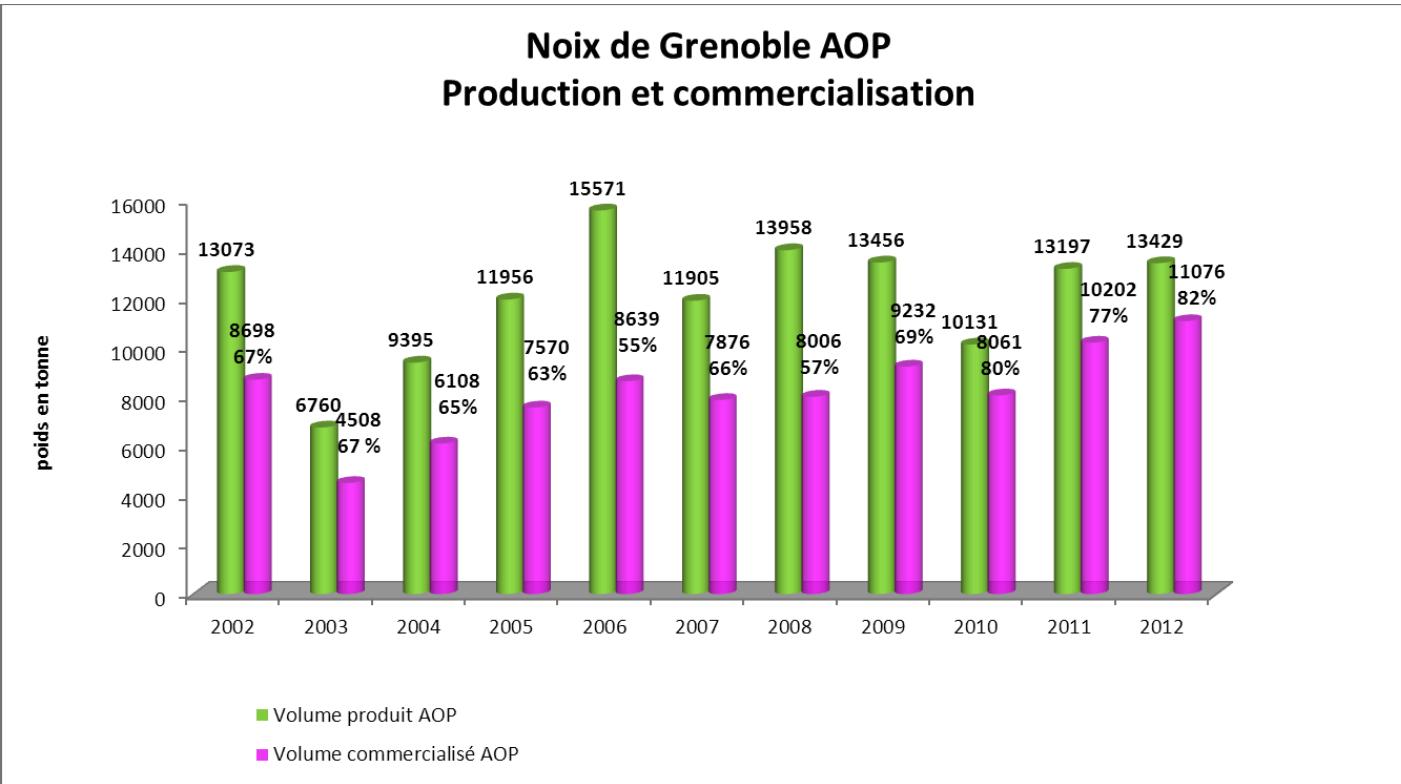
Production vs sales 2012

	In 13,429 T	Out 11,076 T
Private	45%	39%
Cooperatives + Subsidiaries	44%	48%
Producers- Distributors	11%	13%



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Sales Campaign Results from 2002-2012

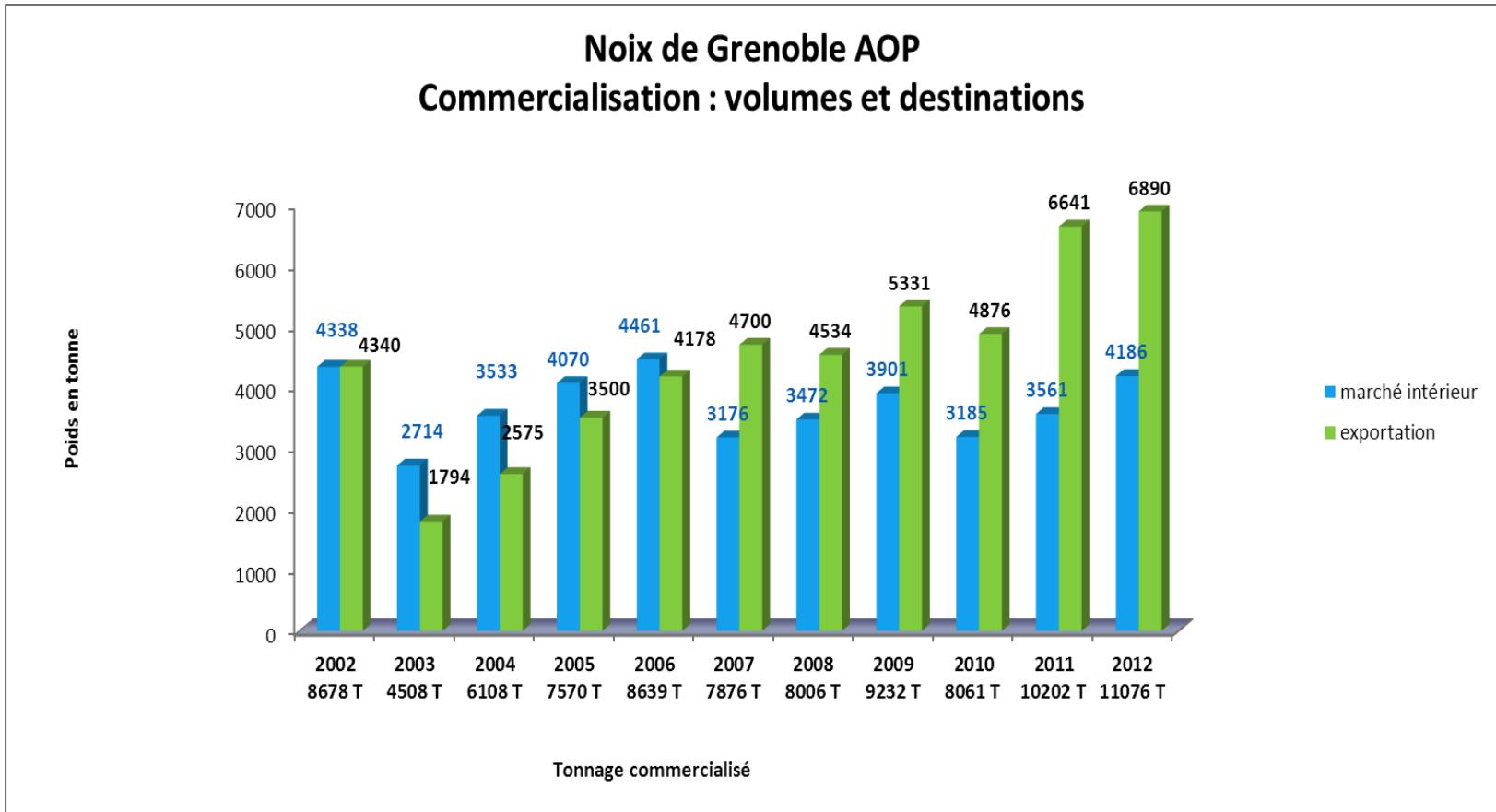


Green- volume produced
Violet- volume sold



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Campaign Results from 2002-2012

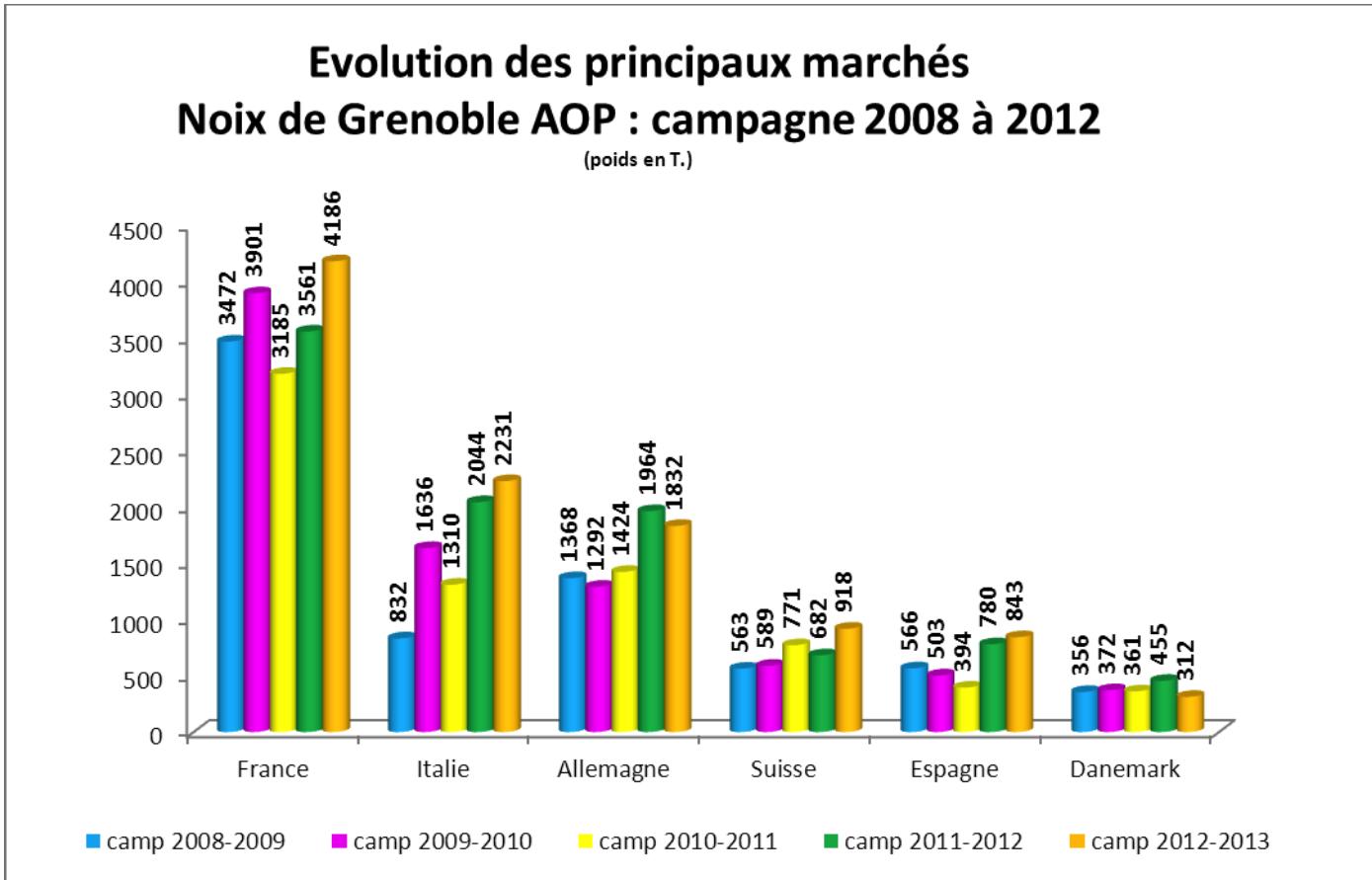


Blue- Volume sold domestically
Green- Volume exported



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Market Shares from 2008 - 2012



Left to right:

France, Italy, Germany, Switzerland,
Spain, Denmark



Thank you!



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