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World Market for Baby Corn

RAP Market Information Bulletin No. 5

INTRODUCTION

Baby corn is used primarily in Asian cuisine, and consumption of this product is highest in Asia. Thailand dominates world trade in both fresh and canned product, having earned an estimated US\$31.2 million from the export of 36,600 metric tons (MTs) of baby corn in 1993. However, both production and markets have expanded so that now baby corn is produced commercially in Africa and Latin America and imported into Europe and North America in fresh form. Although baby corn is a niche product and considered a specialty item outside of Asia, its addition to product lines has boosted the sales of certain producers, especially those in Africa.

PRODUCTION

Baby corn is almost always sweet corn, harvested just as it has begun to develop. Specialized cultivars of sweet corn are employed for its production, although one can produce baby corn from standard varieties as well. Growing, harvesting, and preparing baby corn for export requires a great amount of hand labor because successful production requires a high level of attention and is not well suited to mechanical agricultural techniques. Thus, successful production of baby corn for export has been limited to regions with plentiful and inexpensive labor.

Production of baby corn varies by region but generally is divided into either production that is focused on baby corn alone, or production that is based on baby corn but also yields a secondary crop of other corn products. Thai production usually falls into the latter category; Thai growers harvest the highest-quality ears in immature form and sell them as baby corn. Lesser-quality ears are allowed to mature and are then sold mainly as animal feed.

Currently, research is being undertaken to lessen the amount of labor required for baby corn production. Plant geneticists are developing silkless cultivars of sweet corn, which will drastically reduce labor costs because removing the silk from baby corn is one of the most timeconsuming processes involved in its production. Industry sources also report that Thailand, which is currently facing rising labor costs, has been removing silk by means of forced-air machinery.

Statistical information on baby corn production is limited because many producing countries either do not report baby corn production or include it within the sweet corn category. However, Thailand, which is estimated to account for 80 percent of the world's trade in baby corn, does publish its production statistics. In 1990 (the latest year for which production statistics are available), Thailand produced 116,600 MTs of baby corn. These figures indicate steady and sustained growth since 1983, when Thailand's production reached only 47,000 MTs. Furthermore, an estimated 1993 production of 124,600 MTs indicates that this upward trend is continuing.

EXPORTS

Countries known to export baby corn include Thailand, Sri Lanka, Taiwan, China, Zimbabwe, Zambia, Indonesia, South Africa, Nicaragua, Costa Rica, Guatemala, and Honduras. Thailand,

however, is the only nation to detail baby corn exports in its official trade statistics. In 1993, Thailand exported to 22 nations 2,100 MTs of fresh baby corn, worth approximately US\$1 million (see Table 1). Export volume was slightly higher than in the previous year, but value was 47 percent lower because of decreased exports to the United Kingdom.

Thailand exported 76 percent of its fresh baby corn to neighboring Malaysia in 1993, but for only 18 percent of exported value. The United Kingdom accounted for 40 percent of export value that year, followed by Japan at 21 percent. No other importing nation accounted for more than 3 percent of total fresh volume or value in 1993.

Thai exports of canned baby corn in 1993 totaled 34,600 MTs, worth approximately US\$30 million. The United States was Thailand's largest import market for canned product, accounting for about 40 percent of volume and value. Japan, Germany, Canada,

Australia, the United Kingdom, and Hong Kong accounted for an additional 40 percent of total volume and value that year.

MARKETS

North America

Almost no fresh baby corn is available in the **United States** through retail establishments such as supermarkets. What little is imported is sold to high-end restaurants, which prefer product to remain unshucked. According to industry sources, Costa Rica is the largest supplier of fresh product to the United States, although product is also sourced from California, Mexico, Guatemala, and Honduras. The average wholesale price for Costa Rican product is about US\$13.00 per 100-count box year round. Costa Rican product quality is reportedly less dependable during the rainy season (June through October).

The United States imports canned baby corn almost exclusively from Thailand and, as noted above, is Thailand's largest market for the product. In 1993, canned imports from Thailand totaled 14,310 MTs (US\$12 million). Thailand supplies canned product in a variety of pack sizes, but six 1.5-kilogram tins per carton is the industry standard for sale to both processors and the food-service industry. (For an example of typical packaging sizes, weights, and prices, see Table 2.) Importers report that the 1994 landed price for this product fluctuated between US\$15 and US\$17 per carton, with little seasonal variance. Smaller tins are sold at the retail level in grocery stores and supermarkets.

Baby corn preserved in brine and packed in glass jars is more expensive than canned product but generally is of higher quality. Although product is available directly from Thailand in this form, at least one U.S. processing firm purchases canned product, then rebrines and packs it in glass jars. Baby corn in glass jars is a specialty item found mostly in gourmet supermarkets. Restaurants and other food industry consumers do not purchase baby corn in glass because it is less efficiently stored, prone to damage, and more costly than canned product.

Individually quick frozen (IQF) baby corn, which is used most often as an ingredient for prepared foods, has possibly the smallest U.S. market relative to other processed baby corn because of its high price (approximately US\$1.00 per pound).

Europe

European countries import more fresh baby corn than does the United States. African countries—Zimbabwe, Zambia, and Kenya—and Thailand and Sri Lanka send fresh baby corn to Europe. Product is imported both in loose and pre-packed form, though the latter is more prevalent.

The **United Kingdom** is the largest European market for fresh baby corn. Unlike in the United States, where restaurants are the primary consumer of fresh product, fresh baby corn is generally available to retail consumers in the United Kingdom. Supermarkets are estimated to purchase between 8 MTs and 10 MTs a week of fresh product. According to Thai export statistics, the United Kingdom imported 238 MTs (US\$408,000) of fresh product from Thailand in 1993, less than one-third of the amount it imported in 1992. Many U.K. importers have close ties with producers in Zimbabwe, Zambia, Kenya, and Sri Lanka, and these countries have eroded Thailand's market

share. Thai export statistics for canned product show that the United Kingdom imported 1,170 MTs of canned product, worth US\$1 million in 1993.

Importer selling prices for 1994, published by the Market News Service of the International Trade Centre, show supplies to the United Kingdom arrived year round from Thailand last year in prepackaged and loose form, with prepack shipments more frequently quoted. Prepacked product generally sold for between £4.00 per kilogram and £5.00 per kilogram. The highest prices occurred during the summer, from mid-June through mid-August, when prices averaged £4.76 per kilogram of prepacked product. For loose baby corn, the low price in 1994 was £2.40 per kilogram, and the high, £3.48 per kilogram (see Table 3).

Continental Europe imports only about one-fourth the volume of fresh Thai baby corn the United Kingdom does, according to Thai export statistics. Retail outlets import an estimated 5 MTs a week from all sources. Other than the United Kingdom, **Denmark** was the largest direct European importer of fresh Thai baby corn in 1993, importing 57 MTs, worth US\$96,500. The **Netherlands** imports baby corn from Asia and Africa and re-exports product to northern Europe, as well as the Middle East. Dutch imports of fresh product from Thailand dropped from 15.5 MTs (US\$34,000) in 1992 to 2.4 MTs (US\$3,400) in 1993. The Market News Service's Dutch importer selling prices for 1994 indicate that prepacked Thai product sold for about F14.00 per kilogram year round last year, while prices for prepacked Zambian baby corn ranged between F11.00 per kilogram and F12.30 per kilogram from January through July. The Netherlands imported 532 MTs of canned product (US\$519,000) from Thailand in 1993.

Germany imported only 1.1 MTs of fresh product (US\$3,400) in 1993, a significant drop from 1992 fresh imports of 40 MTs (US\$62,000). In terms of canned Thai product, Germany imported 2,800 MTs (US\$2.2 million) in 1993. **France's** imports of fresh Thai baby corn dropped from 5.7 MTs to 0.9 MTs between 1992 and 1993. French imports of canned Thai product totaled 791 MTs (US\$815,000) in 1993.

The Middle East

Many Middle Eastern nations have relatively large numbers of Asians among their population, accounting for imports of traditionally Asian foods. Nonetheless, Thai export statistics indicate no direct imports of fresh baby corn in 1993 by any countries in the region except Bahrain. However, much of the baby corn that Middle Eastern countries import from the Netherlands is of Thai, as well as African, origin. Middle Eastern importers generally receive product in prepacked form, as do European importers. (For information on European packaging standards, see "Export Grades and Standards," below.)

Thai export statistics show no imports of fresh product by the **United Arab Emirates** in 1993, and less than 1 MT 1992. In 1994, however, Market News Service importer selling prices showed that prepacked fresh product from Thailand sold year round in the United Arab Emirates for between D16.00 per kilogram and D20.00 per kilogram, with prices higher during the second half of the year. In 1993, the United Arab Emirates imported from Thailand 41.8 MTs of canned product, worth US\$40,300.

Bahrain imported 1.1 MTs of fresh Thai baby corn, worth US\$574, in 1993. ITC price reports for 1994 show that Thai fresh product sold year round in Bahrain last year for generally between D2.00 per kilogram and D2.25 per kilogram, but dropped to a low of D.90 per kilogram in December. Prices for Australian and Jordanian supplies were also reported for 1994, but less frequently. Bahrain imported 9.1 MTs of canned Thai baby corn in 1993, worth US\$11,100.

Thai export statistics show that **Qatar** imported 2.2 MTs of canned Thai baby corn, worth US\$2,500, in 1993 but imported no fresh product. Importer selling prices for Dutch product from the Netherlands in the country generally varied between R47.50 per kilogram and R64.50 per kilogram.

Thailand reported no exports of fresh baby corn to **Kuwait** in 1993. ITC price reports from 1994 show that supplies from the Netherlands entered Kuwait year round last year, with prices ranging from D1.25 per kilogram to D3.80 per kilogram (generally between D2.00 and D2.50 per kilogram). Thai exports to Kuwait were reported for four weeks in the last half of 1994, with prices from D2.20 per kilogram to D4.50 per kilogram.

Saudi Arabia imported no fresh product from Thailand in 1993. Conversely, Saudi Arabia was the

largest Middle Eastern importer of canned Thai baby corn in 1993, bringing in 98 MTs, worth US\$84,600. In 1994, ITC importer selling prices showed fresh product from the Netherlands entering in August and October and selling for between R20.00 per kilogram and R26.65 per kilogram.

Asia

In 1993, **Japan** was the second largest volume market for fresh Thai baby corn in Asia, after neighboring Malaysia, with imports totaling 136 MTs (US\$213,000). Japan also imported 3,338 MTs of canned Thai product (US\$4.2 million) that year. In addition, industry sources report that Japan imports the majority of canned Taiwanese baby corn exports.

In 1993, **Hong Kong** imported from Thailand 6 MTs of fresh baby corn, worth US\$13,000. In terms of canned Thai product, Hong Kong imported 1,235 MTs (US\$1 million) that same year. In 1993, **Singapore** imported only 1 MT of fresh baby corn from Thailand, far less than the 8.3 MTs it imported the previous year. Also in 1993, Singapore brought in 943 MTs of canned Thai product, worth US\$740,000. **South Korea** imported 541 MTs of canned Thai baby corn in 1993, valued at US\$441,000.

EXPORT GRADES AND STANDARDS

In **Europe**, importers prefer fresh baby corn to be completely free of wrapper leaves and silk, and laid neatly in clear plastic trays that are aligned next to each other so as to create a relatively level surface. Each layer must have the cob tips pointing in the same direction. Baby corn is usually shipped to Europe prepacked in either 250-gram, PVC-overwrapped trays and shipped eight trays per 2-kilogram carton, or in 6-ounce trays with six trays per carton. Labels must include the country of origin, the words "baby corn" if the contents are not visible, the date of packing, and the weight.

The United Nations organization Codex Alimentarius publishes international standards for a wide variety of products, including fruits and vegetables. For Codex's standard for fresh baby corn, see Table 4.

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