EU MARKET BRIEF 2005

Edible nuts

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The EU in brief

The European Union (EU) is the current name for the former European Community. Since 1 January 1995 the EU has consisted of 15 member states. Ten new countries joined the EU in May 2004. They are the Czech Republic, Estonia, the Slovak Republic, Cyprus, Latvia, Lithuania, Malta, Slovenia, Poland and Hungary. Negotiations are in progress with a number of other candidate member states.

The most important aspect of the process of unification (of the former EC countries) to affect trade is the harmonisation of rules in the EU countries. As the unification allows free movement of capital, goods, services and people, the internal borders have been removed.
A precondition for this free movement is uniformity in the rules and regulations concerning locally produced or imported products. Although the European Union is already a fact, not all regulations have yet been harmonised. Work is in progress in the fields of environmental pollution, health, safety, quality and education. For more information about these topics, visit CBI's AccessGuide at http://www.cbi.nl/accessguide

On 1 January 1999, the Euro became the legal currency within eleven EU member states: Austria, Belgium, Finland, France, Germany, Italy, Ireland, Luxembourg, The Netherlands, Spain, and Portugal. Greece became the 12th member state to adopt the Euro on January 1, 2001.

Overview 25 EU countries, 2004	
Population	456.3 million
Area	3,976,372 km²
Density	116 people per km²
Languages	20 (excl. dialects)
GDP/capita	€ 22,300
Currencies	Euro €, UK£, DKr., SKr., PLN.,
	EEK., CZK., HUF., SKK., LTL.,
	LVL., SIT., CYP., MTL.
Exchange rate (May 2005)	€ 1 = US$ 1.29

Source: http://europa.eu.int/comm/mediatheque/multimedia/select/maps_en.html

Centre for the Promotion of
Imports from developing countries

Summary

This CBI EU market brief aims to provide developing-country exporters of edible nuts with product-specific and detailed market information related to gaining access to the EU markets. By focusing on the EU market for one product or sub-product group, the Market Briefs provide additional in-depth information, complementary to the more general information and data provided in CBI EU Market Surveys, which cover several product groups at the same time. The CBI EU Market Surveys 'Food Ingredients for Industrial Use' and 'Organic Food Products', both of which also covers edible nuts, can be downloaded from http://www.cbi.nl

This CBI market brief consists of the following parts:
1. General product description
2. Market description (consumption, production and trade in the EU)
3. Distribution channels
4. Prices and margins
5. Market access requirements
6. International business practice and sales promotion
7. Interesting organisations and Internet sites

The following highlights are, among others, discussed in this market brief:
- The consumption of edible nuts, especially luxury nuts, has shown an upward trend in the EU in recent years. The most important trends are nuts as a healthy and/or organic snack or meat substitute and convenience nuts products.
- In 2004, total production of nuts amounted to 653 thousand tonnes. Major edible nut products grown within the EU are almonds, walnuts, chestnuts and hazelnuts.
- Total imports of edible nuts by EU member countries amounted to € 3.5 billion / 1.7 million tonnes in 2004, representing a total increase of 15 percent in value and 4 percent in volume since 2002.
- Germany was the leading EU importer of edible nuts in 2004, accounting for almost a quarter of the total import value, followed by Spain (14%), The Netherlands (12%), Italy (11%), France (10%), the UK (8%) and Belgium (6%).

1 General product description

There are two segments for edible nuts: groundnuts (peanuts) and luxury (tree) nuts. The most important types of the latter for the European trade are almonds, hazelnuts, pistachios, coconuts, cashew nuts, walnuts and para- or Brazil nuts. In comparison with the United States, the EU market of edible nuts is relatively mature. Nuts are consumed as snacks as well as in dishes.

This market brief covers edible nuts, which are classified under the following HS codes:

HS code	EDIBLE NUTS
1202 10 90	groundnuts (in shell)
1202 20 00	groundnuts (shelled)
2008 11 92 / 96	roasted groundnuts
0801 11	desiccated coconuts
0801 19	fresh coconuts
0801 21 / 22	Brazil nuts (para nuts / amazonia nuts)
0801 31 / 32	cashew nuts
0802 11 10 / 12 10	almonds, bitter
0802 11 90 / 12 90	almonds, sweet
0802 21 / 22	hazelnuts
0802 31 / 32	walnuts
0802 40	chestnuts

0802 50	pistachios
0802 90 20	areca, cola and pecan nuts
0802 90 50	pine nuts
0802 90 60	macadamia (Australian) nuts
0802 90 85	other nuts
0813 50 31 / 39	mixtures of edible nuts

FAO's Compendium on Post-harvest Operations provides very useful information for growers and exporters of coconuts and groundnuts, concerning post-harvest treatment, export requirements, pest control and many more relevant issues. An overview of the products and the relevant topics is available at http://www.fao.org/inpho/content/compend/toc_main.htm

Please also refer to http://www.tis-gdv.de/tis_e/ware/inhaltx.htm, which provides detailed technical information on product properties, packaging and transport for cashew nuts, peanuts, hazelnuts, coconuts, almonds, chestnuts, Brazil nuts, pistachios and walnuts.

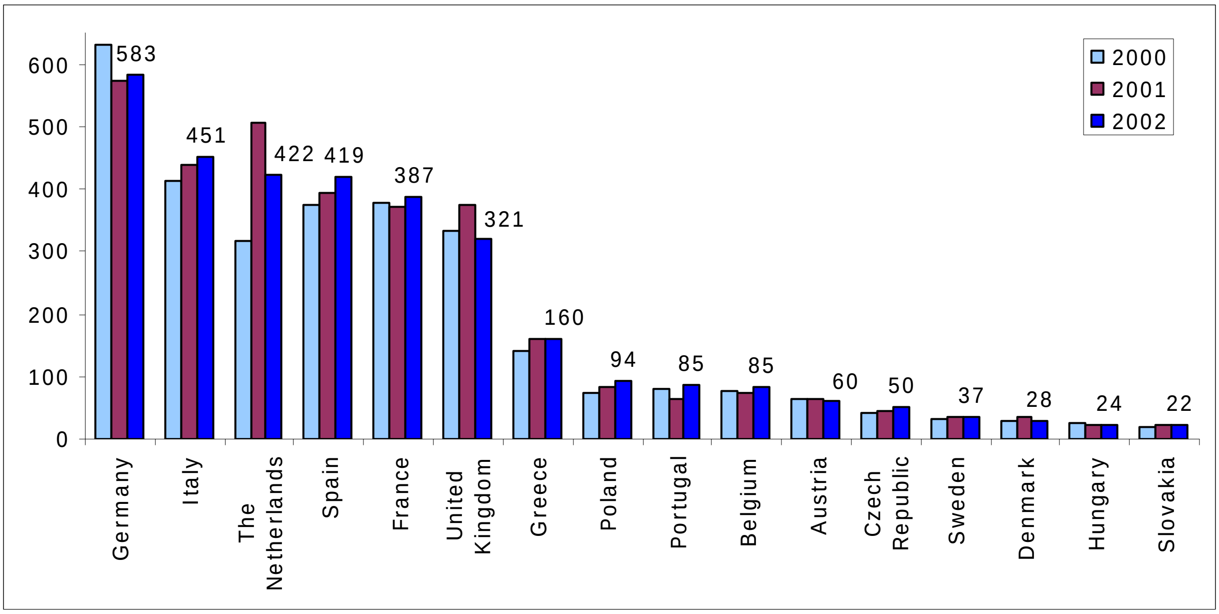
2 Market description

2.1 Consumption, production and trade

Consumption

The total EU-25 market for edible nuts (including groundnuts) increased from 3.1 million tonnes in 2000 to 3.3 million tonnes in 2002. Based on recent import data, which have shown a persistently increasing trend over the years, appears likely stated that consumption of edible nuts in the EU will continue to increase.

Figure 2.1 Consumption of edible nuts in the EU member states, 2000-2002 1,000 tonnes



Source: FAO (2005)

Germany, Italy, The Netherlands and Spain are the leading nut consuming countries. The increased domestic supply of nuts in The Netherlands in 2001 is mainly caused by the increased imports of groundnuts. The Netherlands is a major re-exporter of groundnuts. As a consequence, import figures may vary from year to year. Total EU demand of groundnuts (shelled as well as in shell) was almost 1.3 million tonnes in 2002, of which The Netherlands, the UK, Germany and France accounted for more than 75 percent.

A large variety of edible nuts is used in the ***German*** industrial sector. Substantial amounts of nuts are used as an ingredient for a whole range of chocolate products. Germany is also a leading EU producer of marzipan, which has almond paste as the main component. Nuts are also popular as a snack, particularly during the year-end holiday season. Groundnuts are the most popular nut product used in the snack industry, although competition from other nuts and snacks is increasing. To satisfy domestic demand, Germany imports significant amounts of edible nuts from mainly the USA, The Netherlands and Turkey.

Italy is also one of the leading nut consuming EU member states. Domestic almond consumption in Italy fluctuates between 25 thousand and 28 thousand tonnes annually. Italian hazelnut consumption is fairly stable. Hazelnuts are mainly used by the confectionery industry as an ingredient for chocolate products. Walnut consumption (mainly in shell) is traditionally concentrated during the Christmas season, although sales have recently expanded through the springtime. The sales of shelled walnuts have increased sharply in recent years. Walnuts in shell are mainly consumed at the end of main meals, while shelled walnuts are either consumed directly as a snack or used in the confectionery industry.

The increased domestic supply of nuts in ***The Netherlands***, as displayed in Figure 2.1, is mainly caused by the increased imports of groundnuts (also known as peanuts) through The Netherlands as Rotterdam's port has cold storage facilities available where the peanuts can be stored for aflatoxin testing.

Moreover, The Netherlands is a major consumer of groundnuts. The industrial use of groundnuts is estimated at about 80 thousand tonnes annually (Dutch Peanut Council). In The Netherlands, groundnuts are consumed in many different ways, for example as a seasoned snack, as peanut butter, in sauces and in chocolate bars. Walnuts, cashew nuts and pistachios are mostly consumed as snacks, although relatively small shares are used as ingredients for the confectionery industry. For example, (Italian) pistachio ice cream is very popular among Netherlands consumers. Although relatively unknown until a few years ago, macadamia nuts are becoming increasingly popular, which is also reflected by the increased imports (a thousand tonnes in 2004). Almonds and hazelnuts are mostly used in the food industry (about 80 to 90 percent), almonds as almond paste and hazelnuts as sandwich spread and in chocolate bars.

Nuts are traditional ingredients in the Mediterranean cuisine, which is also reflected in a general upward trend in ***Spanish*** nut consumption. The Mediterranean cuisine is being heavily promoted as a particularly healthy diet. As a result of the increased health awareness, edible nut consumption has grown in Spain over the past several years. Walnuts, groundnuts and almonds are the leading products, followed by pistachios and hazelnuts. About 70 to 80 percent of the almond consumption is used in the confectionery industry – particularly in the nougat industry – while the rest is mostly consumed as snacks. The confectionery and chocolate industries take up about 60 to 70 percent of domestic hazelnut consumption. Hazelnuts are also used for snacks and often sold in snack packs.

France is a leading EU consumer of edible nuts, particularly of walnuts. Walnut consumption uses include snacking and home cooking, by-products consumption, such as walnut oil, and shelled walnuts used as ingredients in the pastry, bakery and cheese industries for example. The French market for snacking products has increased significantly over the past few years. In-shell walnuts are mainly consumed during the fall (mainly in November and December) and in winter, while shelled walnuts are popular throughout the year.

Compared to other EU member countries, the ***United Kingdom*** is an average consumer of edible nuts, with groundnuts being the most popular item. The highly developed taste for Indian and other Asian cuisine in the UK has stimulated the demand for groundnuts and other nuts, as ingredients in ethnic dishes and sauces. As in other EU member countries, British consumers show a clear preference for shelled nuts. However, during the Christmas period, in-shell nuts are popular, being a traditional Christmas food product.

In order to increase the UK market, leading nut suppliers have turned to new product development. New flavours and coatings for peanuts are being introduced and manufacturers are attempting to position these products as premium peanut lines. Examples are honey-roasted nuts and organic nuts.

Greece is one of the world's leading consumers of edible nuts. About one third of its total consumption consists of almonds. A large part of the almonds is used in the confectionery industry, mainly for the production of ice cream and chocolate products. In general, strong consumption of edible nuts starts in October, peaks in December and January, and declines in April and May.

☞ For on global (statistical) reviews for a number of nuts (though for members only), please refer to http://www.treenuts.org

Production

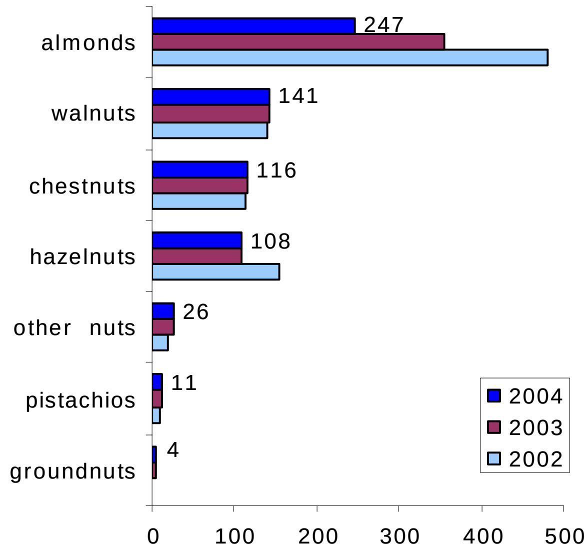
EU countries produce substantial quantities of edible nuts. The southern EU countries bordering the Mediterranean produce almonds, relatively small quantities of hazelnuts, chestnuts, and walnuts and very small quantities of pistachios. In 2004, total production of nuts amounted to 653 thousand tonnes, representing a decrease of 30 percent since 2002.

Table 2.1 Production of edible nuts in the EU, 2002-2004, tonnes

	2002	2003	2004
Total nuts	**923,016**	**761,675**	**652,835**
Italy	293,226	247,710	246,500
Spain	365,986	253,702	151,422
Greece	82,041	78,571	79,000
Portugal	74,478	75,798	69,125
France	56,646	43,980	51,800
Germany	16,900	16,900	16,900
Austria	13,914	20,338	13,500
Hungary	4,424	8,800	8,800
Czech Republic	4,036	4,100	4,100
Cyprus	3,645	4,105	4,005
Slovakia	3,000	3,000	3,000
Slovenia	2,470	2,433	2,433
Poland	1,600	1,600	1,600
Belgium	500	500	500
Luxembourg	150	138	150

Source: FAO (2005)

Figure 2.1 Production of edible nuts in the EU, 2002-2004, 1,000 tonnes



Source: FAO (2005)

This decrease is mainly caused by an exceptionally low almond production in 2004, decreasing by about 50 percent since 2002. Nevertheless, almonds remain the leading edible nut product grown in the EU, accounting for almost 40 percent of total nut production in 2004. The EU produces relatively small amounts of groundnuts, only about 3.9 thousand tonnes in 2004, almost entirely produced by Greece (2,000 tonnes) and Cyprus (1,750 tonnes).

Italy and Spain were by far the leading EU nut producers, together accounting for more than 60 percent of total EU nut production in 2004.

In 2004, ***Italy*** was the leading EU producer of edible nuts with a total of 246.5 thousand tonnes, representing a decrease of 16 percent compared to 2002. Almonds and hazelnuts are the leading product groups grown in Italy, although production between 2002 and 2004 declined mainly due to adverse weather. The Italian hazelnut industry suffers from increasingly strong competition from Turkish producers, both domestically and on the export market. The major producing regions of edible nuts are Campania, Apulia, Latium and Piedmont.

Table 2.2 Production of edible nuts in Italy, 2002-2004, in tonnes

	2002	2003	2004
Total nuts	**293,226**	**247,710**	**246,500**
Of which:			
Almonds	104,891	91,382	91,000
Hazelnuts	119,458	86,828	86,000
Chestnuts	50,000	50,000	50,000
Walnuts	15,000	15,000	15,000
Pistachios	1,877	2,500	2,500
Other nuts	*2,000*	*2,000*	*2,000*

Source: FAO (2005)

In 2004, ***Spain*** was the second leading EU producer of edible nuts, with almonds being, by far, the largest cultivated product group. As from 2002, Spanish almond production decreased by a staggering 68 percent, reaching 95.6 thousand tonnes in 2004. Almond production takes place mainly in region bordering the Mediterranean, particularly in Andalucia and Valencia. Other important production areas are Murcia, Castilla-La Mancha, Aragon, the Balearic Islands and Catalonia. The last region, Catalonia, is also the leading production area for hazelnuts, accounting for more than 90 percent of the total area planted. Hazelnuts are the second leading nut product cultivated in Spain.

Table 2.3 Production of edible nuts in Spain, 2002-2004, in tonnes

	2002	2003	2004
Total nuts	**365,986**	**253,702**	**151,422**
Of which:			
Almonds	299,200	197,300	95,600
Walnuts	20,605	22,462	22,000
Hazelnuts	26,552	14,343	14,225
Chestnuts	9,510	9,510	9,510
Groundnuts	119	87	87
Other nuts	*10,000*	*10,000*	*10,000*

Source: FAO (2005)

Greece represents the third leading EU producer of edible nuts. In 2004, total edible nut production amounted to 79 thousand tonnes, representing a decrease of 4 percent since

2002. Greece is the EU's leading groundnut as well as pistachio producer, with an annual production of 2 thousand tonnes and 8.5 thousand tonnes respectively. Pistachio harvest for the 2004/05 season is predicted to reach 9.5 thousand tonnes.

Table 2.4 Production of edible nuts in Greece, 2002-2004, in tonnes

	2002	2003	2004
Total nuts	**82,041**	**78,571**	**79,000**
Of which:			
Almonds	37,349	33,899	34,000
Walnuts	19,692	19,672	20,000
Chestnuts	12,000	12,000	12,000
Pistachios	8,500	8,500	8,500
Hazelnuts	2,500	2,500	2,500
Groundnuts	2,000	2,000	2,000

Source: FAO (2005)

France is also one of the leading EU producers of edible nuts, with total production amounting to 52 thousand tonnes in 2004. In the same year, walnut production amounted to 30 thousand tonnes, recovering from the low level in 2003, when it was affected by severe drought. France is the foremost EU producer of walnuts, with production mainly based in the south-western and south-eastern regions of France. A major walnut producer based in south-eastern France is Verocel.

Table 2.5 Production of edible nuts in France, 2002-2004, in tonnes

	2002	2003	2004
Total nuts	**56,646**	**43,980**	**51,800**
Of which:			
Walnuts	33,211	23,352	30,000
Chestnuts	11,223	10,118	11,000
Almonds	6,800	6,800	6,800
Hazelnuts	5,412	3,710	4,000

Source: FAO (2005)

Germany does not produce large amounts of edible nuts; only walnuts are produced on a relatively small scale, compared to the leading EU producing countries. In 2004, total German walnut production amounted to almost 17 thousand tonnes. This amount has remained fairly stable over the past few years.

The ***United Kingdom*** and ***The Netherlands*** do not grow edible nuts.

Imports

Total imports of edible nuts by EU member countries amounted to € 3.5 billion / 1.7 million tonnes in 2004, representing a total increase of 15 percent in value and 4 percent in volume since 2002.

Table 2.6 Imports of edible nuts by EU member countries, 2002-2004

	Import values (in € million) 2002	2003	2004	Total change 2002/04	Import volumes (in thousand tonnes) 2002	2003	2004	Total change 2002/04
Total EU-25	3,036	3,043	3,497	+15%	1,595	1,627	1,653	+4%
Intra-EU	954	1,040	1,194	+25%	425	448	486	+14%
Extra-EU	2,082	2,003	2,303	+11%	1,170	1,178	1,167	-0.2%
Of which into:								
Germany	733	661	788	+7%	326	300	295	-10%
Spain	314	357	485	+55%	167	187	214	+28%
The Netherlands	400	418	414	+3%	313	318	318	+2%
Italy	331	370	383	+16%	148	160	146	-2%
France	334	322	344	+3%	148	141	145	-1%
United Kingdom	250	254	296	+18%	161	178	182	+13%
Belgium	187	178	197	+6%	81	84	85	+6%
Greece	78	86	97	+25%	36	42	45	+27%
Luxembourg	69	57	74	+7%	16	11	16	+4%
Poland	58	54	69	+19%	50	50	49	-1%
Austria	57	56	67	+18%	23	22	24	+3%
Denmark	42	46	55	+32%	18	20	21	+14%
Sweden	32	33	42	+31%	13	14	15	+9%
Czech Republic	35	36	41	+17%	25	25	25	-2%
Portugal	27	28	30	+13%	16	17	15	-7%
Slovakia	15	17	30	+98%	12	14	16	+37%
Hungary	20	17	20	+2%	14	15	12	-12%
Lithuania	11	12	14	+23%	7	8	7	+5%
Other	*43*	*42*	*50*	*+15%*	*20*	*20*	*21*	*+7%*

Source: Eurostat (2005)

Germany was the leading EU importer of edible nuts in 2004, accounting for almost a quarter of the total import value, followed by Spain (14%), The Netherlands (12%), Italy (11%), France (10%), the UK (8%), Belgium (6%) and Greece (3%). The USA represents the leading supplier of edible nuts to these EU member states.

Table 2.7 Leading suppliers to the top-7 EU importers of edible nuts, 2004, imports in € 1,000, share in % of imported value

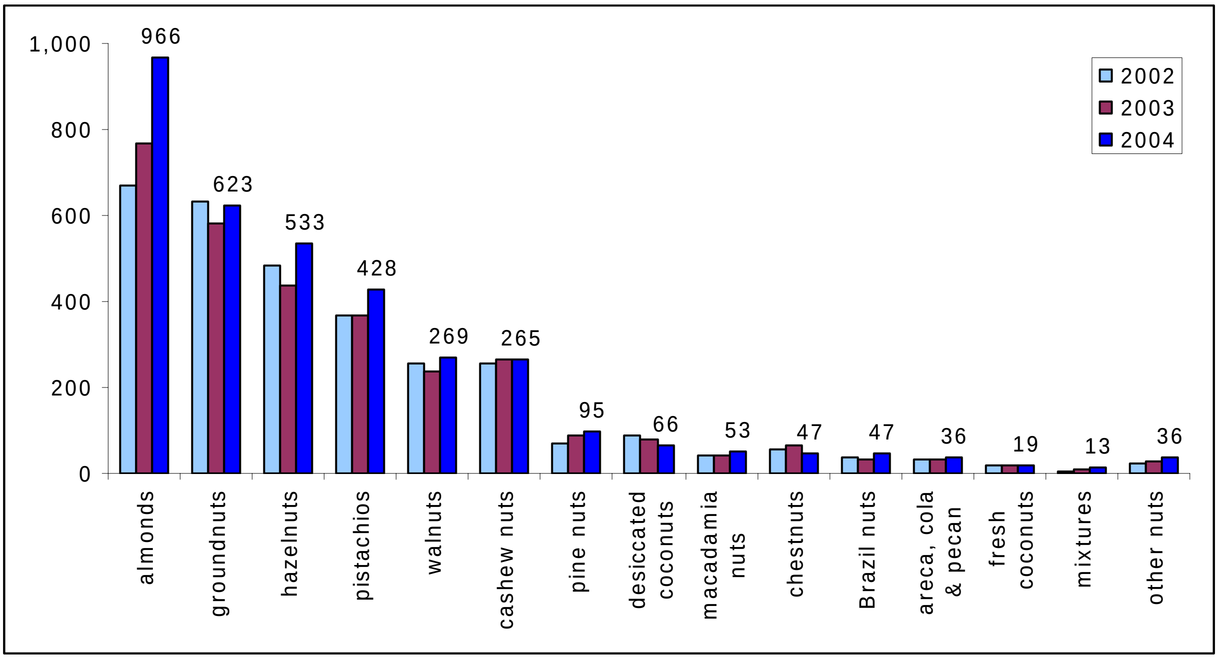
Importing EU country:	Import value:	Leading suppliers in 2004:
Germany	787,929	USA (25%), The Netherl. (16%), %), Turkey (14%), Spain (10%)
Spain	485,365	USA (49%), Iran (19%), China (5%), Turkey (4%), France (4%)
The Netherl.	414,214	USA (21%), Argentina (16%), China (13%), India (11%), Vietnam (7%)
Italy	383,054	USA (30%), Turkey (25%), Spain (11%), Germany (5%), Iran (3%)
France	344,441	USA (25%), The Netherlands (14%), Spain (13%), Germany (10%)
UK	296,132	USA (20%), India (16%), Italy (10%), China (9%), Vietnam (6%)
Greece	97,281	USA (29%), Turkey (13%), China (10%), India (7%), Germany (7%)
Total EU	***3,496,870***	***USA (27%), Turkey (10%), The Netherlands (8%), Spain (7%), Germany (6%), Iran (5%), China (5%)***

Source: Eurostat (2005)

Almonds are, by far, the leading edible nut products imported by EU member countries, accounting for almost 30 percent of the total import value in 2004. Between 2002 and 2004, almond imports increased by 44 percent in value and 17 percent in volume, amounting to € 966 million / 257 thousand tonnes in 2004.

Other important products are groundnuts, accounting for 18 percent of total edible nut import value in 2004, hazelnuts (15%), pistachios (12%), walnuts (9%) and cashew nuts (8%). The most noticeable increases occurred in the imports of hazelnuts, pistachios, pine nuts and mixtures of nuts.

Figure 2.3 Imports of edible nuts by EU member countries, by product group, 2002-2004, € million



Source: Eurostat (2005)

In 2004, developing countries supplied 37 percent of the total imported value of edible nuts. Leading developing country suppliers are Turkey, India, China, Iran, Argentina, Vietnam, South Africa, and Brazil.

Table 2.8 Leading developing country suppliers of edible nuts, 2004, supplies in € 1,000, share in % of supply

Edible nut:	Import from DCs	Leading DC suppliers in 2004:
almonds	16,876	Morocco (34%), Chile (28%), Tunisia (11%), China (10%)
groundnuts	307,125	China (41%), Argentina (33%), India (8%), Brazil (7%), Egypt (3%)
hazelnuts	342,365	Turkey (95%), Georgia (3%)
pistachios	178,603	Iran (97%), Turkey (2%), India (1%)
walnuts	59,133	Moldova (33%), Chile (28%), India (21%), China (15%)
cashew nuts	191,889	India (61%), Vietnam (30%), Brazil (6%)
pine nuts	49,514	China (53%), Turkey (29%), Pakistan (17%)
desicc. coconuts	51,545	Philippines (46%), Indonesia (24%), Sri Lanka (21%)
macadamia nuts	17,554	South Africa (43%), China (20%), Guatemala (18%), Malawi (7%)
chestnuts	4,946	Turkey (71%), China (23%), Chile (4 %)
Brazil nuts	33,036	Bolivia (78%), Brazil (14%), Peru (4%), Chile (4%)
areca/cola/pecan	5,065	South Africa (70%), Côte d'Ivoire (6%), India (5%), Pakistan (4%)
fresh coconuts	10,519	Dominican Rep. (28%), Côte d'Ivoire (22%), Sri Lanka (20%)
mixtures	82	Lebanon (26%), Philippines (26%), Turkey (18%)
other nuts	9,230	China (67%), South Africa (11%), Malawi (6%)

Total	***1,277,482***	***Turkey (27%), Iran (14%), China (14%), India (12%), Argentina (8%), Vietnam (5%)***

DC: developing countries
Source: Eurostat (2005)

Exports
Between 2002 and 2004, edible nut exports by EU member countries increased by 10 percent in value and by 12 percent in volume, amounting to almost € 1.3 billion / 533 thousand tonnes in 2004.

Spain – a producer of large amounts of edible nuts – is the leading EU exporter of edible nuts in terms of value. The Netherlands is the leading EU exporter in terms of volume, although this mainly concerns re-exports of imported edible nuts. Most of the EU exports was directed to other EU member countries, revealing the large volumes of re-exported edible nuts. Only 13 percent of the total 2004 export value was destined for countries outside the EU.

Leading EU exporters and destinations of edible nuts (share in EU value exports, 2004)	
EU exporters	→ Spain (21%), The Netherlands (18%), Italy (17%), Germany (13%), Belgium (8%)
Destinations	→ Germany (25%), France (13%), Italy (7%), Spain (6%), UK (6%), The Neth. (6%)

2.2 Characteristics & prospects

Market segments
The market for nuts in Germany, United Kingdom, Spain, Italy, The Netherlands and some Scandinavian countries is expected to polarise between cheap, often private label products and premium products. The latter category includes pecan nuts, macadamia nuts and "new", exotic nuts like the tropical almond, almondette, oyster nut, souari nut, butter nut, heart nut, quandong nut, pili nut, paradise nut, litchi nut, bread nut, jojoba nut or Chilean wild nut.

The major end-users of nuts are:
- <u>The bakeries and breakfast cereal industry</u>. These industries use almonds, hazelnuts, walnuts and pecan nuts in the production of biscuits, cereals, and muesli. Bakeries tend to buy more convenient products, like shelled, pre-cut, slivered or similarly pre-processed nuts. Hence, processors and packers increasingly make mixes that are more multi-functional for bakeries.
- <u>Confectionery industry</u>. Confectioners are the largest industrial users of edible nuts. This is particularly the case for chocolate confectionery industry. Future growth in chocolate confectionery sales is being sought in special occasions (St. Valentine's Day, Easter or Christmas) and in special or attractively packed chocolates for young people, e.g. chocolate for kids or chocolate, as extra nourishment, after sports. Moreover, manufacturers are increasingly launching 'light', 'low-fat' and 'vitamin enriched' varieties of chocolate. The addition of nuts to a chocolate bar improves its health value and therefore its appeal to consumers, as is the case with health bars, muesli bars or multi-fruit bars.
- And <u>other food industries</u>. Several other food industries utilise ingredients in one way or another. These include the pet-food, the ice-cream, the baby-food and the liquor industries. The use of nuts for these industries varies from peanuts to hazelnuts, almonds, cashews etc.

Trends
Consumption of edible nuts has shown an upward trend in the EU in recent years and, as a result, imports of walnuts and cashews nuts have shown an increase. In recent years, suppliers of fast food and snacks have benefited from people's increasing tendency to eat snacks, so the savoury snack market has grown significantly. This development

stimulated the market for groundnuts and, even more, for luxury nuts. Luxury nuts have grown in popularity in all sectors and, in the consumer market, nut packers have successfully marketed newly developed mixtures. They are either eaten as such, or processed in chocolate, candy bars, snacks, or in breakfast cereal mixtures. Luxury nuts are also increasingly used as an ingredient in exotic dishes (e.g. Chinese chicken with cashew nuts).

Nearly 90 percent of all nut and almond new product introductions continue to be in the four main categories: bakery, confectionery, snacks and desserts. Overall, 839 new products, including nut products, were introduced. Of all new nut introductions, 52 percent included almonds and peanuts (Cracker, 2003).

Nuts are also used in recipes for salads, especially combined with pine nuts, walnuts, almonds, pepitas, and other seeds or with (bread)croutons. New varieties of salad dressings used in French, Italian, Asian and Mexican cuisine are enjoyed. This has given the grinder and processor an opportunity to introduce ready-to-use "salad kits" consisting of nuts, seeds and dried fruit. These ready-to-use kits and nut oils used for stir-fry meals have become very popular.

More consumers also recognise the health value of luxury nuts. Their high nutrition and protein level is another factor, which is expected to increase the demand for luxury nuts. Macadamia nuts, for example, contain 11 minerals, including magnesium, and are cholesterol-free. As a result of outbreaks of bovine spongiform encephalopathy (BSE), and foot and mouth disease as well as consumer concerns about high dioxin and polychlorinated biphenyl levels in North Sea and Baltic Sea fish, Europeans are eating less meat and fish. Nuts have good prospects in the EU market as an alternative source of protein. Therefore, food export opportunities are expected in this market.

Subsequently, the following *consumption trends* can briefly be noted:
- Nuts as a healthy snack or meat substitute;
- Organic nuts or otherwise sustainably produced nuts;
- Nuts sold as a convenience product;
- Internationalisation and the introduction of ‘new’ exotic nuts;
- Offering a concept: "How to use these nuts…".

3 Distribution channels

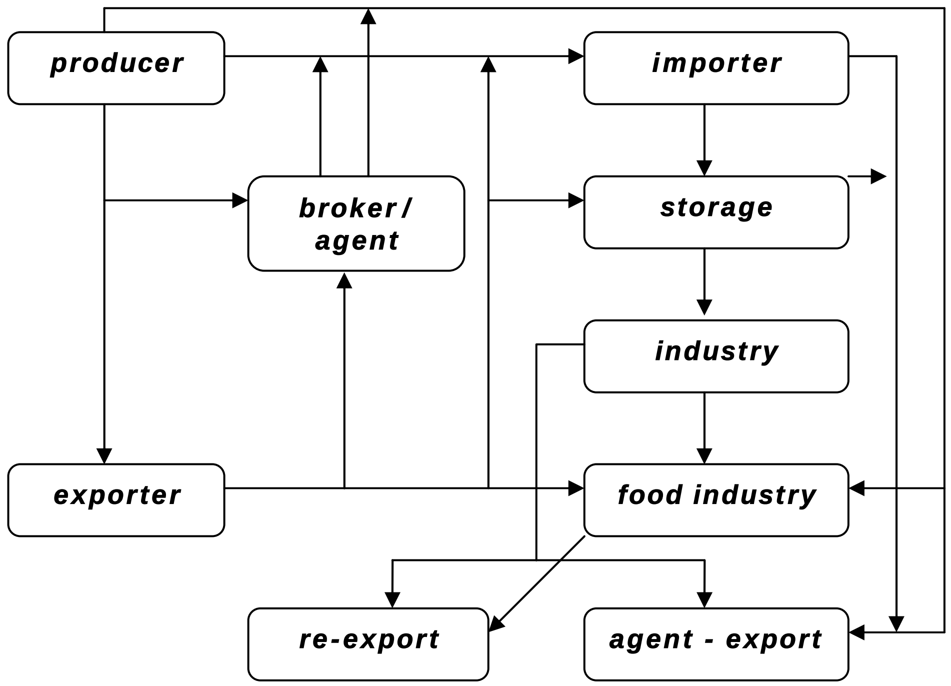
Large packers and processors are increasingly buying edible nuts directly from producers and exporters in the countries of origin, although purchasing through importers is still important. On the other hand, leading processors of peanuts usually import directly and, from time to time, use the services of a specialised importer who may, for instance, have special knowledge of the Chinese peanut trade. The major industries, which use edible nuts in many different forms, are those manufacturing breakfast cereals/muesli, confectionery, chocolate, bakery products, ice cream, desserts, health foods etc.

The most interesting distribution channels for developing-country exporters of edible nuts are importers/traders. Importers not only have experience and knowledge of the international market, they also have strong relationships with suppliers and buyers all over the world. Particularly in the case of speciality and off-season products, co-operation with a European importer is advised. His role in relation to the industry and supermarket will be more specialised i.e. as quality controller, but also as logistics service provider.

Because prices on the nuts market fluctuate considerably, the importer/trader serves as the risk-taking party for the industry/supermarkets. Moreover, importers do not only focus on the demand of the home market. Because of their favourable, geographical location, many EU importers export imported products to all other European countries. A

European importer sometimes contacts a local agent in the country of origin for a neutral indication of supply and price setting.

Figure 3.1 Most common distribution channels for edible nuts



Rotterdam (The Netherlands) is the main trading centre for the EU food ingredients trade, including edible nuts. The Netherlands has a considerable number of intermediaries supplying not only the domestic market, but also other EU countries. Rotterdam is strategically located to serve continental EU countries. From here, distribution takes place by vessel, inland barge or truck to storage facilities and customers.

Leading EU companies involved in the edible nut business are:
- Daarnhouwer & Co. BV (http://www.daarnhouwer.com)
- Catz International (http://www.catz.nl)
- Ludwig (http://www.trumpf-schokoladefabrik.de)
- Kraft Foods (http://www.kraftfoods.de)
- KP Nuts (http://www.kpnuts.com)
- Borges (http://www.borges.es)
- Bahlsen (http://www.bahlsen.de)
- Nestlé (http://www.nestle.com)
- Danone (http://www.danone.com)

Groundnuts are usually imported by specialised importers and processors, which are often members of the Dutch Peanut Council (http://www.dutchpeanut.nl). There is no set pattern as a company may act as a broker one day and as an importer the next. However, the leading processors like Calvé (http://www.calve.nl) and Douwe Egberts (http://www.douwe-egberts.com) are usually direct importers, although they may use the service of specialised importers. No other country in Europe uses groundnuts in so many different ways as The Netherlands. Apart from nuts as a seasoned snack, they are used for peanut butter (Calvé) or for sauces and chocolate.

4 Prices and margins

4.1 Price developments

Domestic and import/export prices of edible nuts vary according to a number of factors, such as the type of product, its origin and the level of supply available on the global market. Because of the big variations in availability caused by changeable harvests, weather conditions or disasters, changes in supply have a much larger effect on price levels than changes in demand. Most edible nuts have only one harvest per year and most products can be kept in dehydrated form for longer periods. Other factors which have a significant effect on prices are the exchange rate of the dollar; quality; grade; presentation (whole, shelled, pitted, broken etc.) and the method of drying/processing which has been used prior to export.

The major origin country for a particular product often determines the basic reference price for that product worldwide. For example, the USA is the reference for groundnuts, Iran for pistachios, India and Brazil for cashew nuts, Turkey for hazelnuts and Sri Lanka for coconut. Furthermore, prices are set on a global level and speculation based on forecasts for the coming harvest can cause rapid changes in prices. On the other hand, a drop in supply of one type of nut does not necessarily mean a price increase, if substitution by another type of nut is possible, which is often the case. Sometimes manufacturers switch to using more almonds instead of hazelnuts, when the hazelnut prices increase as a result of a shortage in supply.

Indications of the average annual producer prices of some main product groups are given in Table 4.1, whereas Table 4.2 provides prices of some of the main traded edible nuts at a fixed moment.

Table 4.1 Average producer prices of various edible nuts in Italy, Spain, Greece and France, 2001-2002, €/kg

Edible nuts	Italy		Spain		Greece		France	
	2001	2002	2001	2002	2001	2002	2001	2002
Almonds	0.63	0.61	0.67	0.69	1.16	1.30	1.00	0.78
Chestnuts	1.33	1.28	0.60	0.62	1.82	2.32	0.37	0.29
Groundnuts in shell	0.88	0.93	0.72	0.74	0.97	1.03	-	-
Hazelnuts	1.21	1.16	1.25	0.95	2.04	2.46	1.23	1.21
Pistachios	1.33	1.28	-	-	4.20	5.64	-	-
Walnuts	1.81	1.86	1.69	1.29	1.56	1.85	1.73	1.35
Other nuts	*1.00*	*0.96*	*1.75*	*1.79*	-	-	-	-

Source: FAO (2005)

Table 4.2 Highest and lowest prices for edible nuts, up to 21 February 2005, US$ / £ per metric tonnes

	2005 high	2005 low		2005 high	2005 low
Hazelnut kernels			**Walnuts**		
Turkey Levants, ex store UK duty paid (£)			*India, duty paid ex store UK (£)*		
* Standard 1	5,600	4,400	* Light halves	3,575	2,900
* Standard 2	5,400	4,200	* Light broken	2,650	2,175
* Fair average quality	4,000	4,000	* Light amber halves	2,575	2,175
			* Light amber broken	2,300	1,900
Almonds			**Pistachios**		
* 23/25 US Non Pareil	7,700	7,700	* Iran, 28/30 (raw in	6,800	6,400

select cif European Main Ports (US$/mt)			shell) - RPPC brand fot Hamburg (US$/mt)		
* US Standard sheller run cif European Main Ports (US$/mt)	7,000	6,100	* Iran, 20/22 (raw in shell) - RPPC brand fot Hamburg (US$/mt)	7,550	7,000

cif: *Cost, Insurance & Freight.* This means that the exporter pays for the freight and the insurance.
Source: The Public Ledger (March 2005)

The *margins* charged by different intermediaries in the edible nut trade are influenced by many different factors. These include the type of edible nut, the current and expected future harvest situation, the availability or number of sources for the particular product, the level of demand and the trend in prices. All these factors make it extremely difficult to provide information on typical margins in the trade. The following represents very rough guidelines on the mark-up added to the buying price by each type of trader:

- Agent/broker: 1-3 percent
- Importer/trader: 5-10 percent
- Processor/packer: 15-25 percent, which includes packing but may be much higher depending on the costs of marketing (e.g. for a consumer retail brand)
- Retailer: 30-40 percent (excl. VAT).

4.2 Sources of price information

In general, exporters should receive regular information from a local agent. The best up-to-date price information on edible nuts can be obtained from the weekly *Public Ledger*. Also, major brokers and traders publish regular market reports to advise their customers about supply, demand and price developments.

It is essential that the exporter obtains regular information on prices and market trends. An on-line computer connection to all countries, through the Internet, makes it possible to follow the latest news and find the best offers on a daily basis.

Source of price information	Internet site
The Public Ledger	http://www.public-ledger.com
Foodnews magazine	http://www.agra-net.com/
World Bank, Commodity Price Data, Pink Sheets	http://www.worldbank.org/prospects
Agribusiness online	http://www.agribusinessonline.com/prices/
CommodityIndia.com	http://www.commodityindia.com/
Agricultural Prices Monthly (USDA)	http://usda.mannlib.cornell.edu/reports/nassr/price/pap-bb/
AMS, USDA, Peanut reports	http://www.ams.usda.gov/fv/mncs/peanut.htm
MANDI: Indicative Market Prices (by traders)	http://www.infobanc.com/mandi.htm
StatPub	http://www.statpub.com/

5 Market access requirements

In CBI's AccessGuide, you will find a complete overview and analysis of requirements that are applicable when exporting to the EU member states. You can find relevant information on standards, developments and market trends concerning environmental, consumer health and safety and social issues.

ⓘ *For more information, please refer to http://www.cbi.nl/accessguide.*

5.1 Legislative requirements

When exporting edible nuts to the European Union, the following legislative requirements are relevant:
1) General Food Law
2) Marketing standards
3) Aflatoxin levels
4) MRL's

Please note that in contrast to the issues described in the following sections, these regulations are mandatory and an exporter must comply with these regulations in order to be allowed to sell the products on the European market. More information on these issues is also provided in Chapter 9 of the CBI EU Market Survey 'Food Ingredients for Industrial Use.

General Food Law
In 2002, regulation EC 178/2002 has been adopted, laying down the general principles and requirements of food legislation, establishing the European Food Safety Authority and laying down procedures in matters of food safety. The regulation is commonly known as the General Food Law, and also includes provisions on the traceability of food (art. 18). The core aspects of the General Food Law have taken force in January 2005. For more information, please refer to AccessGuide or the following link: http://www.europa.eu.int/comm/food/index_en.html

Marketing standards
The marketing standards for quality and labelling of fresh produce are laid down in basic regulation EC 2200/96 (of 28 October 1996), in the framework of the Common Agricultural Policy (CAP). Products which do not comply with these standards are barred from the market. Edible nut products, which are subject to the quality standards as laid down in the above-mentioned regulation, are hazelnuts (in shell) and walnuts (in shell).

Edible nuts subject to EC Marketing Standards:	
Hazelnuts (in shell)	http://europa.eu.int/smartapi/cgi/sga_doc?smartapi!celexapi!prod!CELEXnumdoc&lg=EN&numdoc=32002R1284&model=guicheti
Walnuts (in shell)	http://europa.eu.int/smartapi/cgi/sga_doc?smartapi!celexapi!prod!CELEXnumdoc&lg=EN&numdoc=32001R0175&model=guicheti

Furthermore, the Economic Commission for Europe of the United Nations (UN/ECE) has established standards for the marketing and quality control of a number of nut products including cashews, hazelnuts, pine nuts, pistachios, almonds, and walnuts. These standards are in line with the demands of EU countries and can be downloaded from http://www.unece.org/trade/agr/welcome.htm

Aflatoxin levels
Excessive levels of aflatoxin in edible nuts can have serious consequences for human and animal health. Regulation (EC) 466/2001 sets the maximum levels for these kinds of contaminants in foodstuffs. The particular Directive specifying the sampling methods and methods of analysis for the official control of the aflatoxin levels in edible nuts is Directive 98/53/EC, amended by Directive 2004/43/EC. For the integral text of the Regulation and Directives mentioned above, please refer to http://europa.eu.int/eur-lex/lex/en/index.htm

Moreover, a guidance document for competent authorities regarding the control of aflatoxins has been compiled; it can be found at:

http://www.europa.eu.int/comm/food/food/chemicalsafety/contaminants/aflatoxin_guidance_en.pdf

MRLs

Imports of edible nuts to the EU have to comply with the legislation for Maximum Residue Limits (MRLs) of a large number of pesticides. The maximum limits for pesticide residues in and on certain products of plant origin, including edible nuts, are laid down in directive 90/642/EEC. For a comprehensive overview of the approved levels of pesticides, please refer to the box with useful Internet links.

Useful Internet sites	
CBI's AccessGuide	http://www.cbi.nl/accessguide
EU pesticide residues legislation	http://europa.eu.int/comm/food/plant/protection/pesticides/index_en.htm
FAOSTAT	http://faostat.fao.org/faostat/collections?subset=FoodQuality

5.2 Other market requirements

Environmental, social, health and safety issues are becoming increasingly important on the EU market. Please refer to the CBI AccessGuide and the following CBI EU market surveys for more information on these issues:
- Exporting to the EU, Your guide to trade-related information, 2003
- CBI EU Market Survey Food Ingredients for Industrial Use
- CBI EU Market Survey Organic Food Products

ILO and SA8000

In order to formulate the definition of employees' rights, the ILO (international labour organisation) is the UN specialised agency which seeks the promotion of social justice and internationally recognized human and labour rights. The ILO has installed Conventions and Recommendations setting minimum standards of basic labour rights.

SA8000 is one of the best-known voluntary global standards to ensure social accountability. SA8000 includes standards in the form of a "Code of Conduct" which defines what is considered social accountability, as well as requirements for a management system which ensures the implementation of these standards in business policy.

For more information, also refer to:
ⓘ ILO and SA8000: http://www.ilo.org

ISO 14001

The purpose of the ISO 14001 standard is to enable the international recognition of an individual company's environmental management system. Although voluntary, customer pressure is resulting in the ISO 14001 environmental management standard becoming a *de facto* requirement for being able to compete in many regions of the global marketplace.

For more information, also refer to:
ⓘ ISO14001: http://www.iso.org

Organic production

EU standards for organic food production and labelling are laid down in regulation EEC 2092/91. This regulation and subsequent amendments establish the main principles for organic production at farm level and the rules that must be followed for the processing, sale and import of organic products from third (non-EU) countries. For more information on organic production, please refer to the CBI EU Market Survey "Organic Food Products" or to http://www.cbi.nl/accessguide or http://www.skal.com

HACCP
The need for good quality management is gaining increasing importance. The Hazard Analysis Critical Control Point (HACCP) system is applicable to companies that process, treat, pack, transport, distribute or trade foodstuffs. At present the legislation as laid down in Directive 93/43/EEC applies to producers within the EU, although European importers may in turn require it from their non-EU producers. In addition, as from 1 January 2006, a new Regulation (EC) 852/2004 will come into force that will make HACCP also obligatory for developing country exporters dealing with EU member states.

ISO 9000
The International Organisation for Standardisation (ISO) developed the ISO 9000 series for quality management and assurance of the production process. The ISO 9000 standards represent an international consensus on the essential features of a quality system. Producers who have obtained an ISO 9000 series certificate possess an important asset. It is a major selling point when doing business in the highly competitive EU market. For more information, please refer to http://www.iso.org or to the CBI AccessGuide.

5.3 Packaging, marking & labelling

Packaging
There are no important statutory obligations specifically for the packaging of dried fruit and edible nuts; the type of packaging used varies considerably according to the product and its country of origin. Above all, the exporter must comply with the wishes of the importer, who knows the demands of his buyers better than any other. The required packaging and labelling will always be specified in the contract between the exporter and the importer. The exporter must observe the following general rules:

- Packaging material must be strong enough to protect the product during transportation.
- Make sure to use the correct (amount) of CO_2 when vacuum-sealing the nuts. EU importers often complain of bad vacuum packaging, caused by insufficient CO_2.
- Packaging should ensure that no contamination, mould growth etc. can take place.
- Excessive packaging must be avoided - this increases cost and is less environmentally friendly.
- Investigate thoroughly and use materials that are as environmentally friendly as possible; try to reduce the use of PVC, Chlorine, Cadmium and CFCs.
- If different sorts of packaging materials must be used, these must be separable.
- Supply information on materials and the quantity of packaging materials.

Vacuum-packing and/or nitrogen-flushing are essential for the bulk packaging and export of most nuts, except pecan nuts and almonds, which can be packed dry and loosely in boxes. Nuts prone to rancidity, infestation and mould development need flushing with nitrogen or a mixture of nitrogen and carbon dioxide to ensure that contamination does not occur. The effectiveness of the packaging in preserving the (good) quality of the nuts depends on very clean packaging conditions, an absolute minimum of delay between shelling and packaging, and the completely airtight sealing of the packages.

Typical packages for edible nuts are given in the following table.

Product	Export packing	Typical sizes/kg
Almonds (shelled)	Export cartons or bales	10/12.5/20/25/50
Almonds (in shell)	Sacks	25 – 100
Cashew nuts	Sealed tins (nitrogen-flushed)	10 – 20
Groundnuts (shelled)	Bales	50
Groundnuts (in shell)	Jute bags or bales	25/45/50

Hazelnuts (shelled)	Bales	12.5 – 50
Hazelnuts (in shell)	Bales	25
Macadamias	Sacks or tins	10 – 20
Paranuts (shelled)	Sealed tins (nitrogen- flushed)	10 – 20
Pecan nuts (shelled)	Export cartons	10 – 20
Walnuts (shelled)	Bales	10/12.5/20/25/50
Walnuts (in shell)	Sacks or bales	25 – 100
Other shelled nuts	Cartons or sealed containers	10 – 20

Wood packaging material
In case edible nuts are packaged in wood material, the requirement on wood packaging material will be applicable. The EU has set new phytosanitary measures for all wooden packaging material that is used with the import of goods into the EU from third countries.

CBI's AccessGuide provides information on regulations concerning packaging methods, wood packaging and labelling

ⓘ CBI AccessGuide*: http://www.accessguide.nl*

Labelling
Labels on the packaging of bulk edible nuts should include the following information:
- Name, address (code) of the packer/exporter;
- Name of the product, variety and type;
- Country of origin (optional production area);
- Crop year;
- Size (if sized);
- Net weight;
- Lot identification/batch number;
- Buyer's reference (specification or purchase order number code);
- Storage conditions (where necessary).

5.4 Tariffs and quota

The common import tariffs for most edible nuts range between 0 and 6 percent. Only roasted groundnuts are subject to higher tariffs, around 12 percent. An up-to-date list of import tariffs can be downloaded at http://www.douane.nl/taric-nl or http://export-help.cec.eu.int

Product group	Conventional tariff	Tariff for DCs
Edible nuts (0801-0802, 081350 31/39)	0-5.6	0-4.2
Roasted groundnuts	11.2-12.0	0-8.4

6 International business practices and sales promotion

International business practices
The *customary methods of payment* and conditions within the sector for edible nuts are comparable to other products in the food ingredients sector. The most commonly used terms in the food ingredients are documents against payments (D/P) and payments in advance. Most export shipments are partly pre-paid before the ingredients are shipped. Because collections from customers are more difficult overseas, it is recommended to obtain a minimum of 50 percent in advance. Once on-going business and trust is established, exporters should grant their foreign customers standard payment terms. Although complicated and costly for the importer, the use of Letters of Credit is not uncommon in the trade of edible nuts. The different payment methods and risks attached to them are extensively described in *'CBI's Export Planner'*, which can be downloaded from http://www.cbi.nl.

Delivery terms should be based on the INCOTERMS 2000 issued by the International Chamber of Commerce (ICC). For full details on the Incoterms, please check CBI's Export Planner or visit the ICC's website: http://www.iccwbo.org/index_incoterms.asp. The most commonly used trade term is FOB (Free on Board). Under this term, the seller quotes a price for goods that includes the cost of loading at the port of departure. The buyer arranges for transportation and insurance. Other trade terms used are CFR (Cost and Freight), DDP (Delivered Duty Paid) and CIF (Cost, Insurance, Freight).

Because edible nuts are usually transported as bulked goods, the recommended *mode of transport* is by ocean cargo. Standard 20 ft or 40 ft reefer containers are used. More information on packaging etc. can be found under 'prices & margins' and 'market access requirements.'

Sales promotion

Trade fairs serve as an important promotional tool for targeting importers and producers. Relevant international trade fairs for producers/exporters of edible nuts are:

Trade fairs	What?	Where?	When?	More information
Alimentaria	International food and beverages exhibition.	Barcelona, Spain	biennial, 6-10 March, 2006	http://www.alimentaria.com
Anuga	Leading trade fair for world-wide food and beverage.	Cologne, Germany	biennial, 8-12 October 2005	http://www.koelnmesse.de
BioFach	Organic and natural products.	Nuremberg, Germany	annual, 16-19 February 2006	http://www.biofach.de
IFE	International food and drink exhibition.	London, UK	biennial, 2007	http://www.ife.co.uk
FI Europe	Food products, product development and quality.	Paris, France	biennial, 29 Nov-1 Dec 2005	http://www.fi-events.com
Natural Products Europe	Natural products.	London, UK	annual, 9-10 April 2006	http://www.naturalproducts.co.uk/
SIAL	Trade exhibition for the food industry.	Paris, France	biennial, 22-26 October 2006	http://www.sial.fr

Other interesting events can be found at:

- UC Fruit & Nut Calendar: http://rics.ucdavis.edu/fnric2/calendar.shtml
- International Tree Nut Council: http://www.treenuts.org/index.php?seccion=events&pagina=events or http://www.treenuts.org/index.php?seccion=congresses&pagina=congresses)

For additional information on trade fair participation, please refer to CBI's interactive tool *"Your Expo Coach,"* CBI's Handbook "*Your show master - a guide for selection, preparation and participation in trade fairs.*" and the CBI manual "*Your image builder*".

Trade journals serve as an important information source to obtain up-to-date information on developments in your sector. The most relevant magazines for the edible nut sector are:

Magazine	More information
International Food Ingredients	http://www.ifi-online.com/
Foodnews	http://www.agra-net.com/
Food Engineering & Ingredients	http://www.rbi-nl.com/feionline/index.asp
NutWeekly	http://www.klinkenberggroup.com/
The Peanut Farmer	http://www.peanutfarmer.com/
Almond Avenue	http://www.almondgrower.com/
CommodityIndia.com, Latest News Headlines	http://www.commodityindia.com
Peanut Grower	http://www.peanutgrower.com

☞ Other methods of sales promotion include company brochures and product specifications, visits to potential trade partners in the EU, company stationery and promotion by Internet. For more information, please refer to the following CBI publications: 'Your Image Builder' and CBI EU market survey 'Food Ingredients for Industrial Use'.

7 Interesting organisations and Internet sites

For more interesting links, please also refer to the CBI EU Market Survey 'Preserved Fruit and Vegetables' and to Linkplaza on CBI's website at http://www.cbi.nl

Product-specific information	**Internet site**
CENTA, The Combined Edible Nut Trade Association	http://www.centa.uk.com
Dutch Peanut Council	http://www.dutchpeanut.nl
European Project FRUIT & VEG	http://www.fruitveg.com/uk
FAO's Compendium on Post-harvest Operations (groundnuts and coconuts)	http://www.fao.org/inpho/content/compend/toc_main.htm
Transport Information Service	http://www.tis-gdv.de/tis_e/ware/inhaltx.htm
International Tree Nut Council – information on treenuts	http://www.treenuts.org
Infoagro.com – edible nut information	http://www.infoagro.com/frutas/eng.asp

Organisations related to the food ingredients sector in general	**Internet site**
CIAA: Confederation of the Food and Drink Industries of the EU	http://www.ciaa.be
EUFIC European Food Information Council	http://www.eufic.org
Food Info Net	http://www.foodinfonet.com
Foreign Agricultural Service US Mission to the European Union	http://www.useu.be/agri/Fruit-Veg.html
IFOAM - International Federation of Organic Agriculture Movements	http://www.ifoam.org
UNCTAD - Commodities Market Information	http://www.unctad.org/infocomm/anglais/indexen.htm

Other organisations	**Internet site**
Codex Alimentarius	http://www.codexalimentarius.net
Eurostat Statistics Database	http://europa.eu.int/comm/eurostat
European Normalisation Committee	http://www.cenorm.be
European Union On-line	http://europa.eu.int
International Chamber of Commerce	http://www.iccwbo.org
International Trade Organisation	http://www.intracen.org http://www.p-maps.org
ISO	http://www.iso.org
Market access data base of the EU	http://mkaccdb.eu.int
WHO World Health Organization	http://www.who.org
WTO, technical barriers to trade	http://www.wto.org/english/tratop_e/tbt_e/tbt_e.htm

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