

Market Development

MARKET BRIEF ON

DRIED MUSHROOMS

EU OVERVIEW
ITALY
FRANCE
GERMANY
SWITZERLAND

ITC



INTERNATIONAL TRADE CENTRE UNCTAD *W* TO

MARKET BRIEF
ON
DRIED MUSHROOMS

EU OVERVIEW

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INTERNATIONAL TRADE CENTRE UNCTAD / WTO
GENEVA
1997

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M.D FMD / 7.009 5

DRIED MUSHROOMS - EUROPEAN UNION (EU) OVERVIEW

Product description

CN 0712.30 Mushrooms and truffles, dried, whole, cut, sliced, broken or in powder, but not

SITC 056.13 further prepared.

Production

Statistics on the production of dried mushrooms within the EU are not available.

Picking of wild mushrooms is an important seasonal occupation, especially in France, Italy and Spain. However, some countries = national legislation imposes restrictions on the picking of wild mushrooms according to variety, quantity, geographical location etc.

European Union: Imports and exports (V = '000 US\$; Q = Tons)

	1991		1992		1993		1994		1995	
	V	Q	V	Q	V	Q	V	Q	V	Q
Imports	110,690	4,902	100,350	5,184	92,358	8,553	89,286	5,883	94,717	5,624
Exports	43,967	5,918	46,527	4,867	46,455	9,219	48,817	9,346	53,015	9,865

Source: COM TRADE

Italy and France were the principal EU importers in 1995 followed by Germany and the United Kingdom. Other key European importers include Switzerland which ranked after Germany on this scale, and then Poland. Ireland showed the highest increase in imports over the five years, followed by Belgium /Luxembourg, the Netherlands and the United Kingdom (see Annex I and fig. 2).

Main origin of imports (= 000 US\$ 1995)

Total imports 94,717 of which: China 25,001, FYR Macedonia 14,970, France 11,321, Germany 9,480, Turkey 4,949, Pakistan 4,590, Romania 2,440, Bulgaria 2,019, Netherlands 1,926 and Italy 1,849. (See Annex II and fig. 4).

Market characteristics

The EU market for dried mushrooms is divided into two main categories; wild and cultivated. Within these two categories, the mushrooms can either be sun-dried, or mechanically dehydrated (e.g. freeze-dried, air-dried etc.)

The bulk of imported dried wild mushrooms goes to the retail and catering sectors. The strong flavor of dried wild mushrooms, even stronger than that of the fresh product, enriches sauces, stuffings, seasonings etc. Most popular within this category are the Bolet (Boletus edulis) and the Morel (Morchella esculenta).

Dried mushrooms are also channeled into the food processing industry. Dried cultivated mushrooms (sliced, granulated or in powder) are most often used within this industry as raw materials for soups, frozen food and prepared meals (e.g. pizzas). Here, recent state of the art research has allowed scientists to derive different flavors from mushrooms grown under nutrient supplemented conditions. These help to enhance not only soups and gravies, but also products such as caramel flavorings and chicory coffee blends.

Italy, France and Germany are the principal importers of dried mushrooms within the EU (the concentration of consumption in Italy and France is focused in the retail sector, whereas in Germany, the bulk of dried mushrooms is used by the food processing industry). The Netherlands, which boasts a well-developed food industry, is also a fast growing market, as is the United Kingdom.

In general, the demand for dried wild mushrooms in the retail sector is moderately price elastic, and thus causes a decrease in consumption in times where disposable income is limited. In this way, the sharp downturn of value per tonne imported into the EU in 1993 may be contributed to the after effects of the recession that hit Europe in the early nine ties, and the general upturn in imports in 1995 can be explained by preferential exchange rates in the United States (see Fig. 3).

Market access

The EU member states apply the Common Custom Tariff under which imports of dried mushrooms (wild or cultivated), are subject to the following treatment

Rates Applied to Product 071230.00 (mushrooms and truffles)

Product (NC)	Sensitivity	MFN rate (1/1/97)	GSP rate (1/1/97)	GSP rate (1/1/97) graduated	MFN rate (1/1/97)	GSP rate (1/1/97)	GSP rate (1/1/97) graduated
07123000	Very sensitive (15% reduction of MFN rate)	14,9	12,6	13,7	14,4	12,2	13,3

Source: European Commission

Under the Uruguay Round, the duty rates applied will gradually decrease to 12.8% (ad valorem) by 1 July 2000.

Imports of dried mushrooms from ACP countries, OCTs (Overseas Countries and Territories) and Turkey are exempt from duties.

Being a product listed among those appearing in Annex VI of GSP Agricultural regulation (Council Reg. No. 1256/6 of 20 June 1996, Official Journal of the European Communities Series L160), the rates are suspended in their entirety for mushrooms and truffles originating from LDCs (Least Developed Countries) listed in Annex IV and from countries listed in Annex V (Andean group and Central American Common Market Countries), as provided by Art 3 of the above-mentioned regulation.

Under the Renewed Generalized System of Preferences (GSP), a de-preciation mechanism is applied under articles 4 and 5 of the same regulation, according to which Chile, Mexico and Thailand are subject to a 50% reduction of the preferential margin as of 1 January 1997, and to a 100% reduction as of 1 January 1999 for mushroom and truffle products.

For further information, please refer to:

E.C. (European Commission)
For the Attention of Mr. Nizezy
Office L53 04/11
200 Rue de la Loi
B-1049 Brussels
Belgium
Tel: (322) 299 1101
Fax: (322) 299 1047

No mandatory EU regulations exist stipulating quality, sanitation and grading standards for dried mushroom s. Instead, national legislation is applied, and has become in recent years, increasingly stringent Code x 5A-1994 (FAO WHO) acts as a guideline for standards of quality in dried edible fungi.

Distribution channels

Distribution channels differ from country to country depending on the variety of dried mushroom and its end use.

Local production is mostly channelled through local markets and specialized stores. Imports of dried mushrooms are normally dispatched through wholesalers, or direct through specialized importers /packers who then channel them to the retail trade and the catering sector.

In recent years, the increasing concentration of substantial supermarket and hypermarket chains, as well as the increasing power of large multinational enterprises within the food industry, has increased the demand for regular supplies of vast quantities of high quality mushrooms. These large companies tend to buy direct from overseas and through other EU importers and producers.

Prices

Import prices in the EU vary according to the variety, origin, method of processing (sun-dried, hot air dried etc.) and the quality of the product

Among the wild varieties of mushrooms it is generally the Morel (*Morellesculetata*) that commands the highest price, followed by the Cep (*Boletus edulis*). Dried wild mushrooms are significantly more expensive than cultivated ones, although the extent of this varies from country to country.

See the sections on Italy, France, Germany and Switzerland for an individual breakdown of prices in each country.

Pack aging

Dried mushroom s are normally imported in bulk in 5 - 10 kg cartons, and are sealed and protected by inner bags of polyethylene. They are then sorted, in certain cases further processed, and eventually re-packed locally.

Dried mushroom s are mainly sold in transparent polyethylene plastic sachets containing 20-100g for the retailers, and 100 gr. to 1 kg for wholesalers. The use of the mono vacuum forming and composite cans, as well as the more expensive option of PET jars has however become slightly more widespread, providing a more robust physical protection against the crushing and tearing of packaging. The transparency of the packaging is essential, not only so that buyers are able to verify that the product is not crushed or damaged, but also so that they may see what they are buying (thus acting to reassure first time consumers).

According to the EU Packaging Directive 83/189 /EEU, each EU member will have to have introduced a fully operational national recycling scheme that attains a fixed quota, by June 2001. The structure of these national programs is left to the discretion of each country. Leading the way is France and Germany whose schemes demand that all packaging imported or produced in their country bears an eco-friendly symbol. The cost of this is placed upon the importer, and goes towards the collection and recycling of the packaging.

Trade promotion

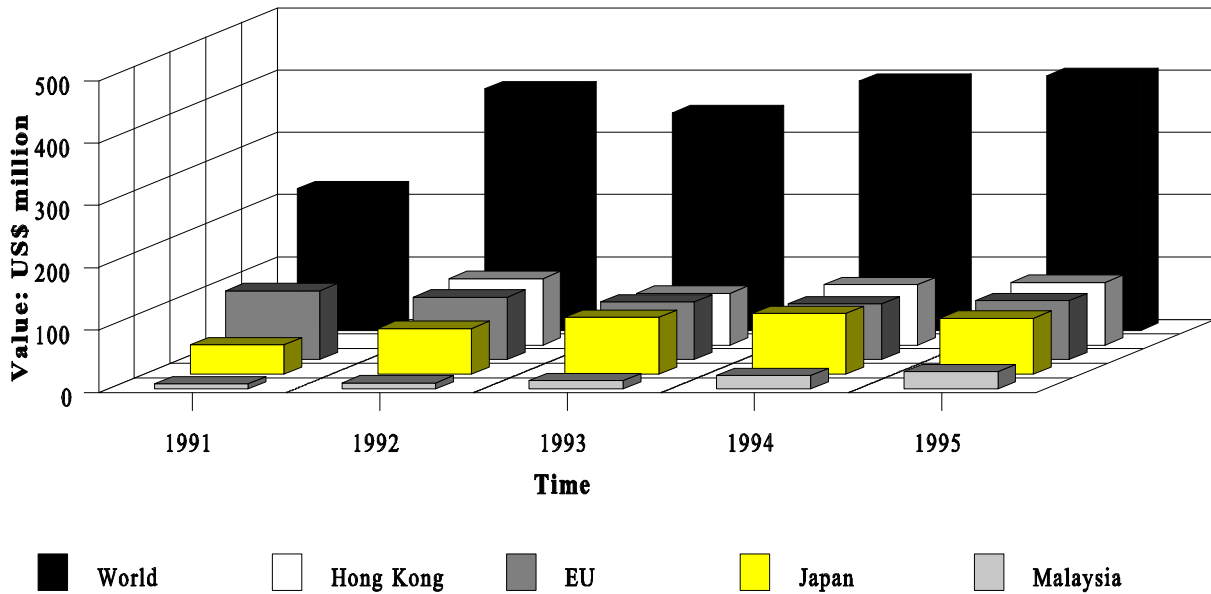
Specialized trade fairs for food products can prove highly useful for establishing trade contacts. These fairs take place in the EU at different times of the year (the most important of these are listed in Annex III).

Market opportunities

As can be seen from fig. 1 (overleaf), the EU is one of the key importers of dried mushroom s in a world market that appears to be expanding. With its level of imports in terms of value relatively stable and increasing in 1995, the trend looks set to continue and further develop.

Figure 1.

Major World Importers of Dried Mushrooms 1991-1995 (V: US\$ million).



	1991	1992	1993	1994	1995
World	227,380	387,898	349,331	399,640	408,755
Hong Kong	*	106,788	83,174	96,939	100,323
EU	110,690	100,350	92,358	89,286	94,417
Japan	47,066	73,297	97,484	97,855	89,881
Malaysia	7,638	9,544	13,110	21,284	27,282

Although the value per tonne of dried mushrooms imported into the EU suffered a slump in 1993, the European market has slowly been improving (See Fig. 3).

Up until 1994 Italy, the largest EU market for dried mushrooms, has shown signs of a decrease in its value /quantity ratio (even though the quantity of dried mushrooms imported has been increasing since 1992 this has been offset by a corresponding value that diminished up until 1994). On the other hand, France, Germany, the United Kingdom and the Netherlands, the next most lucrative markets, have shown promising increases in their value /quantity ratio since 1993 (See Annex I and Fig. 3). See the sections on Italy, France, Germany for an individual breakdown of market opportunities in each country.

An individual breakdown is also given for Switzerland which, although not a member of the European Union, is also a significant consumer of dried mushrooms. Its imports almost equalled that of Germany in 1995, a statistic that is remarkable given Switzerland's small size and relatively small population (see Annex I and fig.2).

Although 95% of the market is dominated by cultivated mushrooms, there remains an enormous potential in the market for wild mushrooms. This presents a great opportunity to many of the developing and least developed countries (LDCs) where an abundance of wild mushrooms can be found and dried at relatively little cost in the sun.

With the increasing level of national legislation applied to picking and selling of wild species of dried edible fungi, the market has become more open to exporters who are able to compete with traditional suppliers in meeting quality requirements and delivery terms.

ANNEX I

EU Imports of Dried Mushroom by Country (V = 000' US\$, Q : Metric Tons)

SITC05613	1991		1992		1993		1994		1995	
	V	Q	V	Q	V	Q	V	Q	V	Q
EU TOTAL	110,690	4,902	100,350	5,184	92,358	8,553	89,286	5,883	94,717	5,624
Italy	48,585	1,332	36,471	1,289	28,149	1,314	27,907	1,733	29,144	1,815
France	22,412	965	22,225	962	22,389	1,484	26,137	1,516	25,183	1,270
Germany	23,346	1,533	24,676	1,613	19,432	1,503	22,006	1,603	20,914	1,230
United Kingdom	4,111	399	4,586	562	12,007	3,573	2,898	306	5,109	271
Netherlands	3,688	239	3,771	178	3,920	225	4,304	260	4,795	233
Austria	2,970	138	3,589	161	2,434	132	1,659	103	3,454	373
Spain	2,070	117	2,272	234	1,546	147	1,751	103	2,178	136
Belgium-Lux	1,114	56	938	79	670	58	851	55	1,923	160
Sweden	1,368	53	1,131	45	792	39	621	32	948	43
Ireland	237	21	230	21	193	16	381	37	566	63
Denmark	414	26	248	16	403	21	458	23	447	22
Greece	81	6	94	9	195	17	239	103	*	*
Finland	165	9	68	6	32	1	30	1	28	1
Portugal	123	3	44	1	191	15	37	1	24	1

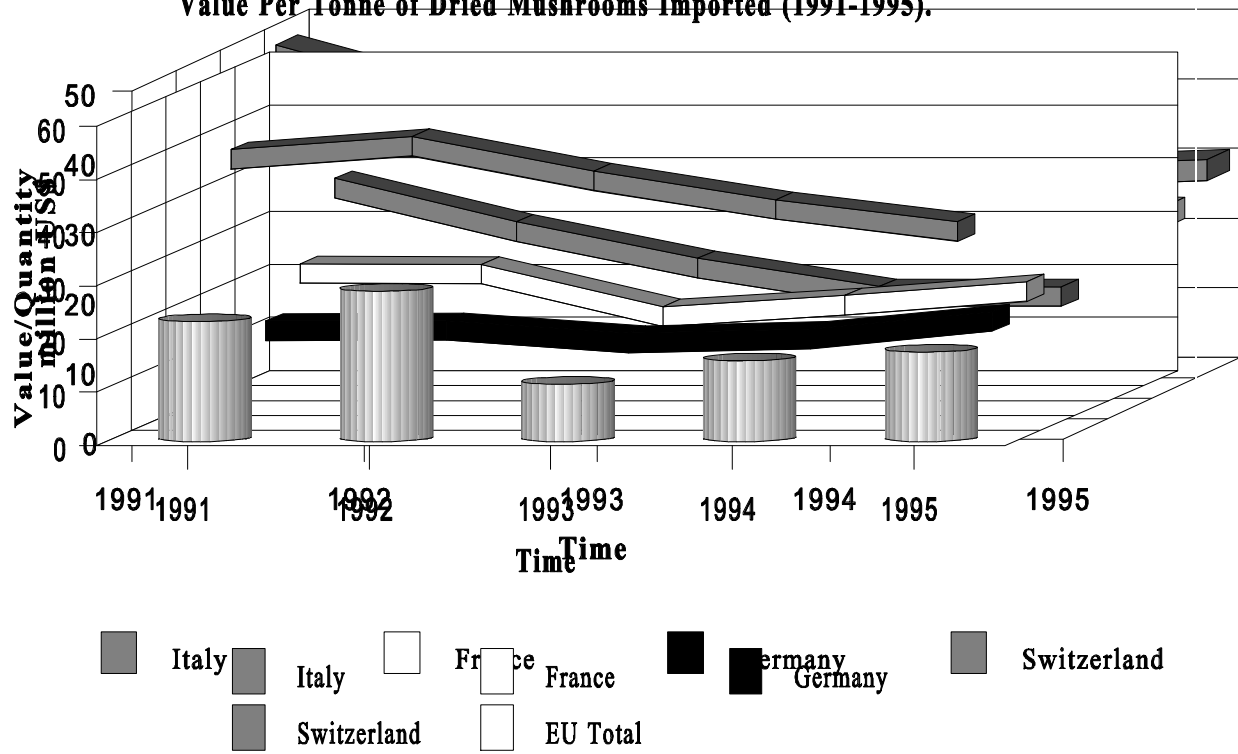
Source: COM TRADE.

Nb. Although not a member state, Switzerland is given for comparative reasons.

Figure 2.

Figure 3.

Imports of Dried Mushrooms 1991-1995 (V: US\$ million).
Value Per Tonne of Dried Mushrooms Imported (1991-1995).



	1991	1992	1993	1994	1995
Italy	48,585	36,471	28,149	27,907	29,144
France	22,412	22,225	22,389	26,137	25,183
Germany	23,346	24,676	19,432	22,006	20,914
Switzerland	22,711	21,867	21,624	22,449	20,866

	1991	1992	1993	1994	1995
Italy	36.48	28.29	21.42	16.10	16.06
France	23.22	23.10	15.09	17.24	19.83
Germany	15.23	15.30	12.93	13.73	17.00
Switzerland	50.35	52.80	46.30	40.90	36.80
EU Total	22.58	28.29	10.80	15.18	16.84

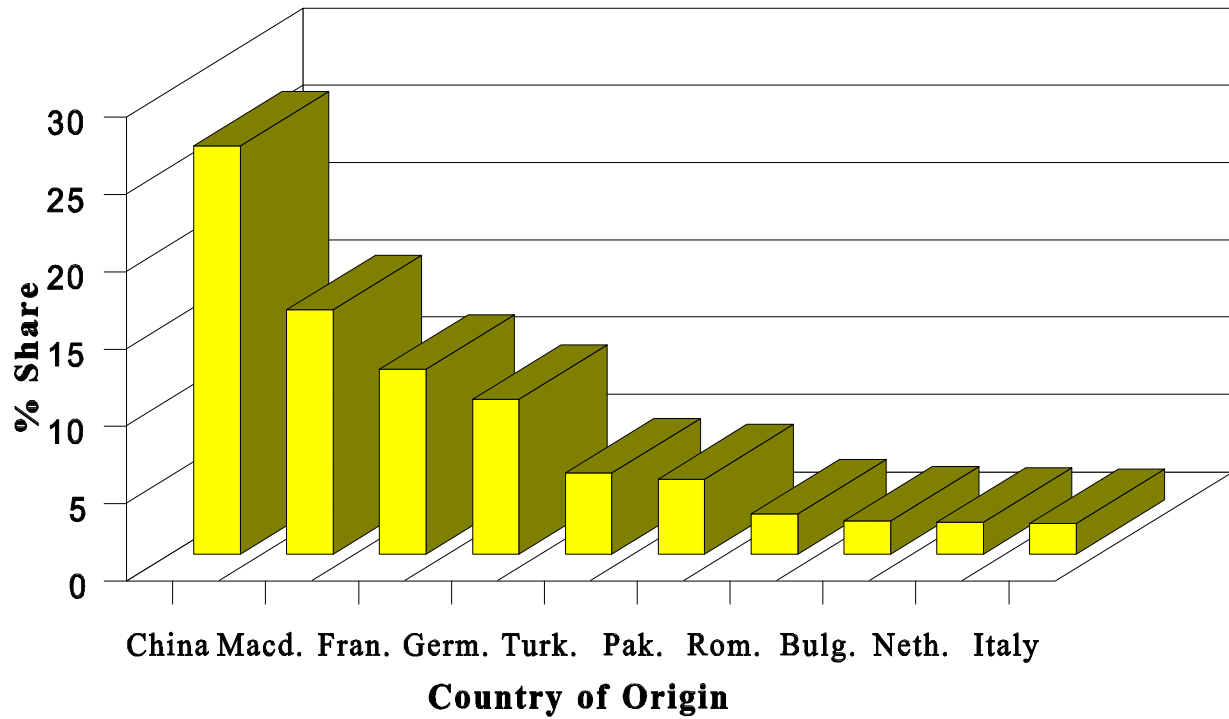
ANNEX II
EU Imports of Dried Mushrooms by Origin
(V = 000' US\$, Q : Metric Tons)

	1991		1992		1993		1994		1995	
SITC 05613	V	Q	V	Q	V	Q	V	Q	V	Q
World	110,690	4,902	100,350	5,184	92,358	8,553	89,286	5,883	94,717	5,624
Intra-EU	23,681	1,040	24,757	1,206	29,221	4,642	21,519	1,535	26,366	1,488
Extra-EU	87,009	3,862	75,593	3,978	63,137	3,911	67,767	4,348	68,351	4,136
Yugoslavia	28,215	806	*	*	*	*	*	*	*	*
China	22,904	1,746	20,559	1,668	28,360	2,381	32,217	2,794	25,001	2,086
TFYR Macedonia	*	*	*	*	6,996	297	8,178	416	14,970	961
France	9,297	373	10,076	512	8,243	428	9,784	465	11,321	541
Germany	8,725	375	7,936	331	7,758	544	8,138	563	9,480	475
Turkey	4,546	65	2,220	37	1,526	27	2,045	23	4,949	59
Pakistan	3,331	50	5,346	62	4,927	77	5,608	67	4,590	52
Romania	2,927	112	2,757	121	2,726	123	1,671	79	2,440	156
Bulgaria	7,579	207	6,734	261	1,923	87	2,374	131	2,019	104
Netherlands	893	86	661	98	935	232	820	222	1,926	250
Italy	1,159	41	1,034	46	860	51	1,133	70	1,849	84
Former USSR	1,367	53	*	*	*	*	*	*	*	*
S.Afr.Cus.UN	2,549	62	2,599	32	2,052	40	1,237	28	888	21
Chile	915	256	898	152	887	128	1,347	165	885	134
Canada	574	5	253	24	227	3	332	3	785	22
USA,FR,USM	972	57	835	59	517	33	744	17	777	10
Ukraine	*	*	*	*	16	2	333	8	754	19
Japan	524	15	342	10	373	21	317	7	710	7
Taiwan (Fr.China)	1,762	88	1,480	86	1,228	60	676	40	657	39
Hong Kong	837	44	614	36	545	45	476	38	601	55
Other	11614	461	36,006	1,649	22,259	3,974	11,856	747	10,115	549

Source : COM TRADE

Figure 4.

Share of EU Imports of Dried Mushrooms by the 10 Main Exporters.



Source: Calculated from 1995 Values in Annex II.

	1995
China	26.40
TFYR Macedonia	15.80
France	11.95
Germany	10.00
Turkey	5.23
Pakistan	4.85
Romania	2.58
Bulgaria	2.13
Netherlands	2.03
Italy	1.95

ANNEX III

Useful addresses

Food and Agricultural Organization of the United Nations (FAO)

Via delle Terme di Caracalla
00100 Rome, Italy
Tel: (39 6) 5225 3807
Fax: (39 6) 5225 4495

List of specialized trade fairs

ALIMENTARIA

(Biennial, even years)
Fira de Barcelona
Av. Reina Maria Cristina
08004 Barcelona, Spain
Tel: (34 3) 233 2000
Fax: (34 3) 233 2001

ANUGA

(Biennial, odd years)
Kölnmesse
Postfach 210760
50532 Cologne, Germany
Tel: (49 221) 8210
Fax: (49 221) 8212 574

EXPO FOOD

(Annual)
Via Londonio 2
20154 Milan, Italy
Tel: (39 2) 349 841
Fax: (39 2) 3360 0493

SIAL

(Biennial, even years)
39, Rue de la Bienfaisance
75008 Paris, France
Tel: (33 1) 4289 4687
Fax: (33 1) 4289 4694

Trade promotion organizations

ITALY

Istituto Nazionale per il Commercio Estero (ICE)

Ufficio Cooperazione
Via Liszt, 21
00144 Rome - EUR
Tel: (39 6) 599 29517
Fax: (39 6) 5964 7378

Istituto Nazionale per il Commercio Estero (ICE)

Servizio Informazioni e Marketing
Corso Magenta, 59
20123 Milan
Tel: (39 2) 480 441
Fax: (39 6) 480 05523

FRANCE

FROMEX - FMA

(Agence Française pour la Promotion des Exportations des Pays les Moins Avancés)

10, Avenue de la

75016 Paris

Tel: (33) 1407 33067

Fax: (33) 1407 339 69

Assists only Least Developed Countries (LDCs)

Other countries can contact

CFCE

(Centre Français du Commerce Extérieur)

10, Avenue de la

75783 Paris

Cedex 16

Tel: (33) 1407 33133

Fax: (33) 1407 339 79

GERMANY

Aussehen - Information (BfAI)

(Federal Foreign Trade Info.)

Department 5

Agrippastrasse 87-93

P.O. Box 100522

50445 Cologne

Tel: (49 221) 20570

Fax: (49 221) 205 7212

PRO TRADE - Deutsche Gesellschaft für Technische

Zusammenarbeit (GTZ) GmbH

(German Agency for Tech. Coop.)

P.O. Box 5180

65726 Eschborn

Tel: (49 619 6) 79 0

Fax: (49 619 6) 79 115

UNITED KINGDOM

DECTA Consulting

St Nicholas House

St Nicholas Road

Sutton

Surrey SM1 1EL

Tel: (44181) 643 3311

Fax: (44181) 643 8030

NETHERLANDS

CBI- Center for the Promotion of Imports from Developing Countries

Trade Promotion Section

Beursplein 37

P.O. Box 30009

3001 DA Rotterdam

Tel: (3110) 201 3434

Fax: (3110) 411 4081

**List of potential importers
(non-exclusive)**

ITALY

Alpes S.P.A

Via St Ivio
1-23018 Morbegno (MO)
Tel: 0342 610 102
Fax: 0342 612 945

C.F. Commerciale

Fungorobica SRL
24060 Casazza, Bergamo
Tel: 035 812515
Fax: 035 812414

Bruschi Borgotaro

Via Caduti Lavoro 5
1-43043 Borgotaro (FR)
Tel: 0525 96430
Fax: 0525 90494

Fruttibosco

Loc. Pèi
1-43050 Tarsogno (pr)
Tel: 0525 89209
Fax: 0525 89292

Francesco Pizzorini SRL

Via Marconi 18A
1-16010 Ponte de Savignone (Ge)
Tel: 010 936857
Fax: 010 936320

Merlini Riccardo S.P.A.

Via dell'Industria, 3
37066 Sommacampagna
Tel: 045 8960355
Fax: 045 8960772

FRANCE

G. Borde SA

Boîte Postale 4
Rue Alexandre Borde
F-43170 Saugues
Tel: (04) 7177 8009
Fax: (04) 7177 6576

Jean Larnaudie SA

Z.A. L'Aiguille
Boîte Postale 12
F-46100 Figeac
Tel: (05) 6550 3333
Fax: (05) 6534 0262

Castaing & Fils (ETS)

Routé de Bayonne
F-40501 Saint-Sever
Tel: (05) 5876 0210
Fax: (05) 5876 1748

ETS Valette

Boîte Postale 15
Saint-Clair
F-46300 Gourdon
Tel: (05) 6541 0602
Fax: (05) 6541 3057

France Alimentaire

202 Bis Rue David Johnson
F-33000 Bordeaux
Tel: (05) 5644 7838
Fax: (05) 5651 0467

GERMANY

Brückner-Werke KG

Wendens tr. 4

D - 20097 Hamburg

Te l: 040 237 0801

Fax: 040 237 0888

(Dehydrated Mushrooms)

Diafood GMBH

Postfach 101928

D - 69009 Heidelberg

Te l: 06221 64210

Fax: 06221 642150

(Dehydrated Mushrooms)

Danner Flz-Delekatessen

Labe rtals tr. 4

D - 93161 Alling/Regensburg

Te l: 09404 2097

Fax: 09404 2096

E.H. Worlee & Co.

Grusonstr. 22

D - 22113 Hamburg

Te l: 040 733 330

Fax: 040 733 3390

(Dehydrated Mushrooms)

Valenzia Karl H. Vogt GMBH & Co. KG.

Industriestrasse 5-7

D - 29556 Suderburg 1

Te l: 05826 8890

Fax: 05826 88989

Wolff & Olsenn (GMBH & Co.)

Sudenh aus Grosse Bäckerstr. 13

D - 20095 Hamburg

Te l: 040 3767 6124

Fax: 040 3767 6100

UNITED KINGDOM

Alivine Co. Ltd.

Unit 2 & 3, 199 Eade Road

London N4 1DN

Te l: 0181 880 2525

Fax: 0181 880 2708

Porter Foods Co. Ltd.

2 Priors, Harrington Close

Bishops Stortford

Hertfordshire CM23 5ED

Te l: 01279 501 711

Fax: 01279 501 727

L=Aquila

13-17 Baron Street

London N1 9HN

Te l: 0171 837 5555

Fax: 0171 278 0309

J L Priestley & Co. Ltd.

Station Road, Heckington

Sleaford, Lincolnshire NG34 9NF

Te l: 01529 460 751

Fax: 01529 460 630

(Dehydrated Mushrooms)

Jal Fine Foods

Unit 19 London Stone Business Estate

Broughton Street

London SW 8 3QR

Te l: 0171 720 9433

Fax: 0171 978 1196

John F. Seyfried & Sons

Mickleton, Chipping Camden

Gloucestershire GL55 6SS

Te l: 01386 438 521

Fax: 01386 438 871

(Dehydrated Mushrooms)

Fle tro Negroni Ltd.

Negroni House
24 New Wharf Road
London N1 9RR
Tel: 0171 837 0426
Fax: 0171 837 0869

Ms pa Ltd.

106 Longwood Gardens
Ilford
Essex IG5 0BB
Tel: 0181 551 3030
Fax: 0184 551 3030

NETHERLANDS**Dalgety Food Ingredients B.V.**

Etnensebaan 10
NL-4814 NN Breda
Tel: 076 525 4000
Fax: 076 525 4200
(Dehydrated Mushrooms)

Scelta Mushrooms B.V.

Oeverkoreweg 19
NL-5927 NW Venlo
Tel: 077 382 0011
Fax: 077 387 2680

Dehyfood Company B.V.

P.O. B. 142
NL-4730 AC Oudebosch
Tel: 0165 315 960
Fax: 0165 315 876
(Dehydrated Mushrooms)

Versteegen Specerijen B.V.

Giesseweg 62
NL-3044 AM Rotterdam
Tel: 010 415 5100
Fax: 010 462 4707

Limax B.V.

Campane 4
NL-5964 FH Hilst
Tel: 077 39 8 3636
Fax: 077 39 8 4765

DRIED MUSH ROOMS - ITALY

Product description

CN 0712.30 Mush rooms and truffles, dried, whole, cut, sliced, broken or in powder, but not
 SITC 056.13 further prepared.

Production

Statistics on the Italian production of dried mushrooms are not available.

Recent regulations on the domestic picking and selling of fresh and conserved mushrooms in Italy, including dehydrated mushrooms are L. 352/93 and A.P.R. 376/95. Further details have been published by the Italian authorities in their Gazette Ufficiale (no. 376, 14 July 1995).

Seasonal picking of wild species for commercial use is a traditional activity, particularly in northern and central Italy. The greater share of this production is consumed fresh and only a small proportion is dried or processed. The Italian market for dried mushrooms depends heavily therefore on imports.

Italy: Imports and exports (V = '000 US\$, Q = Tons)

	1991		1992		1993		1994		1995	
	V	Q	V	Q	V	Q	V	Q	V	Q
Imports	45,585	1,332	36,471	1,289	28,149	1,314	27,907	1,733	29,144	1,815
Exports	4,619	139	4,584	183	3,973	178	4,556	176	4,943	327

Source: COM TRADE

Main origin of imports (= '000 US\$, 1995)

Total imports 29,144, of which: FYR Macedonia 12,467, China 7,464. Other suppliers include Romania 2,213, Bulgaria 1,411, Germany 938, and South Africa 877.

Market characteristics

Mushrooms have always played an important and traditional role in Italian cooking. They are widely used as an ingredient for typical Italian gourmet dishes such as Arisotto or Tagliatelle ai funghi porcini (rice or egg-made pasta with boletus sauce) as well as for sauces and stuffings.

Most of the Italian market consists of the more expensive and highly prized wild varieties as opposed to the readily available and inexpensive fresh cultivated mushrooms. Dried cultivated mushrooms represent only a marginal proportion of the market.

At the retail level, the bulk of Italian imports of dried mushrooms is accounted for by the Cep (Boletus edulis). This mushroom, known as Porcini, is by far the most popular and significant of all dried mushrooms in Italy, and enjoys a higher concentration of consumption in central Italy. Another popular, although much less widely used dried mushroom is the Chanterelle (Cantharellus cibarius). Demand also tends to peak during the colder months (from October to March).

A wide variety of dried wild mushrooms imported into Italy are sent to the food processing industry where they are pickled; popular wild mushrooms used in this way are:

- **Cep** (Boletus edulis)
- **Chanterelle** (Cantharellus cibarius)
- **Golden agaric / Imperial mushroom** (L= Amanita caesarea)
- **Honey mushroom** (Armillaria mellea)
- **Lactarius** (Lactarius deliciosus)

Pickled truffles are also widely consumed, especially in the North of Italy.

Market access

Italy applies the EU Common Custom Tariff (see Dried Mushrooms - EU Overview).

Distribution channels

The Italian market for dried mushrooms is supplied by a large number of small business/firms. Also within this market, there exists a small handful of large producers/distributors among which the firms Bruschi Borgotaro, Merlini and Folci are the most important imports, on the other hand, are dealt with by specialized importers who then pass the product over to wholesalers/packers who sort, clean and pack the mushrooms before distributing them to large retail outlets. A small proportion of dried mushrooms go to the food processing industry.

Prices

The following are indicative prices:

Ceps (*Boletus edulis*) at import price : Lit 30,000 per Kg.

Ceps (*Boletus edulis*) at retail price : Lit 12,000-30,000 per 100 gr.

However, price varies according to the season, as well as the quality of the product (Italians will some times pay more than twice the price for a packet of Porcini labelled as ASuperior®). The type of processing also affects price, for example, hot air-dried Ceps normally have a clearer and more marketable appearance, and can be even more expensive than sun-dried Ceps.

Packaging

The details given in ADried Mushrooms - EU Overview® also apply to Italy.

It should be noted that some regional Italian regulations do not allow different kinds of mushrooms to be sold together in a single packet. According to Italian law, at least half of the package should be transparent, and the products should be sold within 12 months of packing.

Market opportunities

With imports amounting to 1,815 tons, worth US\$29.144 million, Italy was the single largest EU importer of dried mushrooms in 1995, accounting for about 32% of all EU imports by quantity.

After the downturn in imports of dried mushrooms from 1991-1993, the Italian market has slowly begun to stabilize and grow. As the EU slowly moves away from the impact of the economic recession, the demand for gourmet food has slowly been increasing, although price consciousness remains relatively high. In Italy, where traditional cuisine has bred a high level of quality consciousness, prospects appear favorable for exporters with products of a constant high quality.

D R I E D M U S H R O O M S - F R A N C E

Product description

CN 0712.30 Mush rooms and truffles, dried, whole, cut, sliced, broken or in powder, but not
SITC 056.13 further prepared.

Production (Source : (CFC) Confédération Française de la Conserve)

Production of dried wild forest mushrooms represented 488 tons of finished goods in 1996. Out of this, 99% was imported as raw material and then processed in France.

The bulk of dried cultivated mushrooms are grown and processed in France. Domestic statistics for this product however, are not available.

Seasonal picking of wild species for commercial use is a traditional activity, although in recent years it has become significantly restricted by law.

France: Imports and exports (V = 000 US\$; Q = Tons)

	1991		1992		1993		1994		1995		1996
	V	Q	V	Q	V	Q	V	Q	V	Q	Q
Imports	22,412	965	22,225	962	22,389	1,484	26,137	1,516	25,183	1,270	1175
Exports	11,886	355	11,948	399	12,508	468	13,316	1,784	15,298	1,262	1516

Source: COM TRADE and CFC

Main origin of imports (> 000 US\$ 1995)

Total imports 25,183, of which: China 7,335, Turkey 4,224, and Pakistan 3,972. Other suppliers include Germany 1,878, and FYR Macedonia 1,741.

Market characteristics

Mushrooms play a principal part in France's traditional cuisine and are highly popular, from the inexpensive cultivated varieties such as Champignons de Paris (*Agaricus hortensis*), to the more highly priced exotic wild varieties.

The mushrooms marketed in dried form are principally of the wild variety, of these the Cep (*Boletus edulis*) is the most widely consumed, followed by the Morel (*Marchella esculenta*) and the Bolet (from the family *Boletaceae*).

France is also a major consumer and importer of truffles. They are traditionally served with foie gras, or as an accompaniment to meat dishes.

Market access

France applies the EU Common Custom Tariff (see Dried Mushrooms - EU Overview).

Distribution channels

Almost all dried wild mushrooms are imported into France by specialized importers. Here, they are sorted cleaned and packed, and the bulk sent off either directly, or through wholesalers, to the retail sector. The rest is sent off to be processed and used for industrial purposes.

Prices

The prices of wild dehydrated mushrooms (per kilo) are as follows:

- **Morel** (*Marcheilla esculenta*) - FF 800-1000
- **Cep** (*Boletus edulis*) - FF 150-450 (depending on quality)
- **Fairy Ring** (*Marasmius oreades*) - FF 250
- **Horns of Plenty** (*Craterellus cornucopioides*) - FF 300
- **Oyster mushrooms** (*Pleurotus ostreatus*), Wild mushroom, often cultivated - FF 120
- **Bolet** (Species of *Boletaceae*) - FF 60-100

Within this pattern, prices for dried mushrooms may fluctuate significantly depending on the variety, quality, type of processing and origin of the mushroom involved.

Packaging

The details given in AD Dried Mushrooms - EU Overview @ also apply to France.

Any packaged product produced or imported into France must pay towards its own recycling through the use of licence fees to bear the French Eco-Emballage symbol.

Market opportunities

With imports totaling 1,270 metric tons, worth US\$24.183 million, France was the EU's second largest importer of dried mushrooms in 1995, accounting for 26.5% of all EU imports. With exports amounting to the value of US\$15.298 million, France was also the EU's second largest exporter, representing approximately 29% of the EU's total exports.

Although France experienced a comparatively sharp upturn in imports of dried mushrooms in 1994 that slowly decreased in 1995, her overall unit value per tonne imported has been rising steadily since 1993 and looks promising (See Figs. 2 and 3).

The demand for dried mushrooms is expected to remain relatively stable with an increase in demand for dried wild mushrooms. The market remains open to new exporters who are able to compete with traditional suppliers on quality and price.

DRIED MUSH ROOMS - GERMANY

Product description

CN 0712.30 Mush rooms and truffles, dried, whole, cut, sliced, broken or in powder, but not
SITC 056.13 further prepared.

Production

Statistics on German production of dried mushrooms are not available.

Practically all dried mushrooms consumed in Germany are sourced from imports. Local production comes mainly from very small private or local activities lacking significant commercial importance.

Germany: Imports and exports (V = '000 US\$, Q = Tons)

	1991		1992		1993		1994		1995	
	V	Q	V	Q	V	Q	V	Q	V	Q
Imports	23,346	1,533	24,676	1,613	19,432	1,503	22,006	1,603	20,914	1,230
Exports	13,698	627	16,288	742	15,800	736	16,284	866	17,774	771

Source: COM TRADE

Main origin of imports (> 000 US\$, 1995)

Total imports 20,914, of which: China 7,659, France 5,784, FYR Macedonia 736, Chile 702, Turkey 590, and Pakistan, 537.

Market characteristics

The bulk goes to the food processing industry to be made into soups, sauces, ready meals etc. A much smaller quantity goes to the retail and catering sectors.

The most widely consumed dried mushroom s by order of popularity are :

- **Cham pignon Mushroom s** (*Balliota campestris*)- **Air dried**, cultivated mushroom , nearly 100% imported from China
- **Cep** (*Boletus edulis*)- wild mushroom , mainly imported from Eastern Europe countries and P. R. China
- **Butter Mushroom s** (*Boletus luteus*)- wild mushroom , mainly imported from Chile
- **Cham pignon Mushroom s** (*Balliota campestris*)- **Freeze dried**, cultivated mushroom , mainly imported from P. R. China and France .

There are several other varieties of mushroom s imported in smaller quantities offering less commercial importance .

Dried wild mushroom s dominate the retail trade , the most popular of which are the Cep, Butter mushroom , Morel, Chanterelle , and more recently the Shiitake (*Lentinula edodes*). Dried wild mushroom s are also prominent in the catering sector and are in heavy demand by the food industry.

Market access

Germany applies the EU Common Custom Tariff (see Dried Mushroom s - EU Overview).

Distribution channels

The bulk of dried mushroom s is imported and marketed by specialized importers and/or processors, who add value through the sorting, selecting, cutting, sieving and cleaning of the product, thereby bringing the raw material to a tailor-made ingredient to be used by the food manufacturing industry.

Food processing enterprises also import directly, especially from EU suppliers.

The remainder of imported dried mushroom s is sold to the retail sector.

Prices

The prices of the more popular varieties of mushroom s (per kilo) are as follows:

- **Cham pignon mushroom s** (*Balliota campestris*) - cultivated mushroom , **air dried** - D M 15-18
- **Cep** (*Boletus edulis*)- wild mushroom - D M 23-45
- **Butter mushroom s** (*Boletus luteus*)- wild mushroom - D M 8-10
- **Cham pignon mushroom s** (*Balliota campestris*)- **freeze dried** - D M 50-75.

Dried mushroom s are bought in bulk as they are channeled into the food processing industry.

Packaging

The details given in ADRIED Mushrooms - EU Overview also apply to Germany.

Germany already has a well established packaging recycling system. Its Dual System (known for its green dot trademark ADER Grüne Punkt®) requires all retail packaging and distribution to go through the recycling process. The responsibility of this falls on the importer who pays a charge related to the weight of the product imported.

Market opportunities

With imports totaling 1,230 tons, to the value of US\$20.914 million, Germany is the third largest importer of dried mushrooms after Italy and France in 1995 (after having fallen from being the second largest EU importer after Italy in 1992 - see Annex I and fig. 2).

With re-exports amounting to the value of US\$17.774 million, Germany accounted for 35.5% of the EU's total exports of dried mushrooms in 1995 (see Annex II).

Although demand in Germany has fluctuated since 1993, the overall value per tonne of dried mushrooms imported has shown a promising upturn of more than 4% since 1993 (see Fig. 3).

Due to the stringent regulations imposed by German law on sales of both fresh and dried locally grown wild mushrooms, the market continues to depend on imports.

DRIED MUSHROOMS - SWITZERLAND

Product description

CN 0712.30 Mushrooms and truffles, dried, whole, cut, sliced, broken or in powder, but not
SITC 056.13 further prepared.

Production

Domestic production is at a low level and the market depends on imports.

Switzerland: Imports and exports (V = =000 US\$ Q = Tons)

	1991		1992		1993		1994		1995	
	V	Q	V	Q	V	Q	V	Q	V	Q
Imports	22,711	451	21867	414	21,624	467	22,449	560	20,866	567
Exports	1,689	26	4,682	66	2,580	34	2,690	36	2,994	78

Source: COM TRADE

According to annual Swiss foreign trade statistics, imports totalled 516 tonnes in 1996.

Main origin of imports (> 000 US\$ 1995)

Total imports 20,866, of which : Germany 4,447, China 3,831, Pakistan 2,647, Italy 1,201 and Turkey 897.

Market characteristics

Considering the large volume of imports for a relatively small population (5.7 million in 1995), Switzerland has the highest per capita consumption of dried mushrooms in Europe.

Switzerland is the second largest importer of Morels after France, with imports increasing more rapidly than those of other species and totalling approximately 100 tonnes per annum.

(For an individual breakdown of the popularity of different varieties of mushrooms in Switzerland, see the section on Prices).

Market access

The duty rate levied on imports of dried mushrooms into Switzerland is Sw F13.33 per 100 kg.

Under the GSP scheme, Swiss imports from developing countries are duty free, with the exception of China (charged 8.77 and 8.30 respectively). Imports are subject to phytosanitary rules.

Prices

The import prices of dried mushrooms (per kilo) are as follows (in order of popularity):

- **Cep** (*Boletus edulis*) - US\$18-35
- **Morel** (*Marchella esculenta*) - US\$9-12
- **Horns-of-Plenty** (*Craterellus cornucopioides*) - mainly imported from Hungary - US\$10
- **Jew's ear** (*Auricularia auricularia-judae*) - US\$8-10
- **Shiitake** (*Lentinula edodes*) - US\$8-10
- **Chamignon de Paris** (*Agaricus hortensis*) - cultivated mushroom - US\$8-10

Prices vary according to origin, quality, type of processing etc.

Distribution channels

The retail sector uses approximately 50% of dried mushroom imports, mainly derived directly from source. Around 40% of imports go to the catering sector and the food processing industries, with the remaining 10% used by specialized importers or for re-export.

Commercial practices

Orders are generally placed after approval of samples. Contracts stipulate conditions for dyeing, cleaning, grading, packaging, delivery, payments etc. Importers tend to favor suppliers with whom they have long standing business relations.

Pack aging

The details given in AD ried Mush rooms - EU O verview@ also apply to Sw itze rland.

Under the renewed Swiss Environmental Act, retailers and producers are obliged to pay a fee towards the recycling of their packaging.

Mark et opportunities

With imports totaling 567 tons and a value of US\$20.866 million in 1995, Switzerland ranks among the principal European importers of dried mushrooms after Italy, France and Germany and boasts a high and relatively stable level of imports (See fig. 2).

On top of this, Switzerland shows a staggering value per tonne of dried mushrooms imported (VQ = 36.8%, 1995) although this ratio has been steadily decreasing over the 5-year period (See fig. 3). This is accounted for by the steady depreciation of the total value of dried mushrooms as more and more are imported.

Prospects are favorable for new suppliers from developing countries who are able to conform to the strict market requirements.

Trade promotion organizations.

SWITZERLAND

OSEC

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List of importers

(non-exclusive)

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CH 4901 Langenthal

Tel: 063 49 3 414

Fax: 063 49 3 418

Maggi AG

Kemptthal

CH 8310

Tel: 052 354 0111

Fax: 052 354 0456

Demaurex & Cie SA

Zentralverwaltung

6 Av. De la Concorde

CH 1022 Chavannes-près-Renens

Tel: 021 634 9 781

Fax: 021 634 3250

Varistor AG

Sagistrasse 38

CH -5425 Schenkingen

Tel: 056 241 2577

Fax: 056 241 2580

Hirtz Gottfr. AG

Im Schossacker

CH 8600 Dübendorf

Tel: 01 821 1221

Fax: 01 821 129 0

Zaffèrana SA

Comazini 2

CH -6830 Chiasso

Tel: 09 1 683 2744

Fax: 09 1 684 6682

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