EU MARKET SURVEY 2002

PRESERVED FRUIT & VEGETABLES IN CONSUMER & CATERING PACKS

VOLUME II

CENTRE FOR THE PROMOTION OF IMPORTS FROM DEVELOPING COUNTRIES

EU MARKET SURVEY 2002

PRESERVED FRUIT & VEGETABLES IN CONSUMER & CATERING PACKS

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Update of EU Market Survey Preserved Fruit & Vegetables in Consumer & Catering Packs (2001).

Photo courtesy:

ProFound

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REPORT SUMMARY

This survey profiles the EU market for preserved fruit and vegetables in consumer and catering packs. The emphasis of the survey lies on those products, which are of importance to developing country suppliers. The major national markets within the EU for those products are highlighted. The survey includes contact details of importers, trade associations, and other relevant organisations. Furthermore, statistical market information on consumption, production and trade, and information on trade structure and prices and margins is provided.

As an exporter you need this information in order to formulate your own market and product strategies. To assist you with this, CBI has developed a matching EU Strategic Marketing Guide ‘Preserved Fruit and Vegetables in Consumer & Catering Packs’. It offers a practical handbook for exporters engaged, or wishing to engage, in exporting preserved fruit and vegetables in consumer & catering packs to the European Union. It aims to facilitate exporters in formulating their own markets and product strategies, through the provision of practical information and a methodology of analysis and ready-to-fill-in frameworks.

As mentioned above, statistical market information on consumption, production and trade, and information on trade structure and prices and margins, which is required for the ready-to-fill-in frameworks, can be found in this EU Market Survey.

Market research
This EU Market Survey and the EU Strategic Marketing Guide serve as a basis for further market research: after you have read this survey and then filled in the frameworks in the strategic marketing guide, it is important to further research your target markets, sales channels and potential customers.

Market research depends on secondary data (data that have been compiled and published earlier) and primary data (information that you collect yourself). An example of secondary data is this EU Market Survey. Primary data are needed when secondary data fall short of your needs, for example when researching your specific type of consumer about the acceptance of your specific product. Sources of information are, among others, (statistical) databanks, newspapers and magazines, market reports, (annual) reports from branch associations, but also shops in target countries, products or catalogues from your competitors, and conversations with suppliers, specialists, colleagues and even competitors. After you have received/collected your information, you should analyse it. In order to judge the attractiveness of the market, sales channel or customer you should use/develop a classification or score system.

For more detailed information on market research reference is made to CBI’s Export Planner (2000).

Product groups
The preserved fruit and vegetables discussed in this survey fall in the following categories:
- canned fruit & vegetables
- dried fruit
- jam and marmalade
- preserved mushrooms & truffles
- candied fruit

This is not the complete list of preserved fruit and vegetables, as other product groups such as frozen fruit & vegetables and dried vegetables, are mainly used by the industrial sector for further processing (see CBI EU Market Survey ‘Preserved Fruit and Vegetables for Industrial Use’).

Consumption
The latest information available shows that, in 1997, total EU consumption of dried fruit in the retail sector amounted to 451 thousand tonnes, representing a decrease of 3 percent since 1992. The major EU markets for dried fruit are France, Germany, Spain and the United Kingdom. Sultanas are the most popular dried fruit in the EU, followed by other raisins, dates, prunes, apricots and figs.

Exact figures on the total consumption of canned fruit and vegetables in the EU are not available. Nevertheless, information shows that canned fruit is consumed in relatively small proportions of total canned food when compared to canned vegetables. In spite of canned food’s old-fashioned image of being processed, compared to fresh and frozen foods, canned vegetables are relatively more popular among young consumers. France, Germany, and the United Kingdom are the main EU markets for both canned fruit and canned vegetables.

In 2000, the consumption of jam and preserves in the EU amounted to almost 500 thousand tonnes, which represented an average per capita consumption of 1.34 kg per year. Sweden has by far the highest per capita consumption, amounting to almost 4 kg in 2000, while Germany is the main EU market in terms of total volume sales.

Germany is the biggest consumer market of fresh and preserved mushrooms in the EU, while Belgium has the highest per capita consumption. In France, however, the market for preserved mushrooms is particularly high and the main part of the national mushroom production is used by the processing industry. In the United Kingdom, on the other hand, fresh mushroom consumption accounts for 90 percent of the market.

Trends which have an impact on the demand for food products and, consequently, on the demand for preserved fruit and vegetables include: increasing preference for safe and healthy food, more fruit and vegetable consumption (contain vitamins and natural oxidants), increasing interest in organic products, more convenience meals (ready meals), interest in exotic and ethnic food and 'grazing' (i.e. eating more snacks in between the usual meals).

Production
The only two countries in the EU supplying notable volumes of dried fruit are Greece (raisins) and France (prunes). The Netherlands is the leading supplier of fresh mushrooms, whereas canned fruit is mostly produced in southern European countries. France is the leading producer of canned vegetables, generating almost 1.3 million units of 850 ml in 2000, followed by The Netherlands (453 thousand, Spain (341 thousand) and Italy (251 thousand). Greece, on the other hand, was the leading producing country of canned fruit, with production amounting to 454 thousand units of 850 ml in 2000, followed by Spain (341 thousand), France (259 thousand) and Italy (202 thousand).
In 2000, the production of jam, marmalade and jelly in the EU was estimated at 648 thousand tonnes. The three leading producers, Germany, the United Kingdom and France, accounted for about two thirds of total EU jam production in 2000.

Imports
In 2000, 4.7 million tonnes of preserved fruit and vegetables in consumer and catering packs were imported into the EU, representing a value of almost US$ 4.8 billion (€ 5.3 billion) of which 37 percent came from extra-EU sources. Germany is the major market for preserved fruit and vegetables accounting for 26 percent of total imports by EU member countries (in terms of value) in 2000, followed by the United Kingdom (17%) and France (16%).

Canned vegetables were by far the leading imported product category, accounting for 40 percent of imports by EU member countries (in terms of value) in 2000. Other important categories were, in descending order, canned fruit (29%), dried fruit (16%), jam (7%), preserved mushrooms (6%) and candied fruit (1%).

While imports (in US$ value) of jam and canned, dried and candied fruit and preserved mushrooms decreased steadily between 1998 and 2000, the imports (in US$ value) of canned vegetables and preserved mushrooms increased between 1998 and 1999, but decreased between 1999 and 2000.

The share of developing countries in imports (in value) by EU member countries of preserved fruit and vegetables in consumer and catering packs amounted to some 30 percent in 2000. Leading developing country suppliers are Turkey (canned fruit & vegetables, dried fruit, jam), China (canned fruit & vegetables, preserved mushrooms, candied fruit), Thailand (canned fruit & vegetables, candied fruit) and South Africa (canned fruit, dried fruit), Peru (canned vegetables) and Morocco (canned vegetables).

Exports
In 2000, the EU exported almost 4.3 million tonnes of preserved fruit and vegetables in consumer and catering packs, representing a value of US$ 4.3 billion.
The leading exported product group was canned vegetables accounting for 48 percent of total exports in terms of value in 2000, followed by canned fruit (26%), jam (11%), preserved mushrooms (7%), dried fruit (7%) and candied fruit (1%).

Trade structure
Preserved fruit and vegetables in consumer and catering packs can reach their final destination by passing through different trade channels. The selection of the trade channel and the trade partner depends on the product and services to be delivered by the potential trade partner.

The following major business partners can be distinguished for exporters of most preserved fruit and vegetables: agents, importers, retail organisations (supermarkets) and packers.

Trade fairs and, increasingly, the Internet are valuable sources for finding trading partners in the EU.
In Appendix 6 of this survey, contact details of trade fair organisers are listed, while in Appendix 11 contact details of EU importers of preserved fruit and vegetables in consumer and catering packs are listed.

Opportunities for exporters
Leading products from developing countries are canned pineapples (Thailand) and canned asparagus (Peru, China). However, it very difficult to export processed products in consumer & catering packs to the EU. Most of the trade channels traditionally import raw materials/semi-processed products, which are further processed and packaged in consumer or catering packs by European industry. Therefore, opportunities seem limited. There may be opportunities on the EU market for preserved fruit and vegetables in consumer and catering packs, but only if exporters in developing countries can offer a high-quality, attractive product at a competitive price.

The organic market is particularly interesting for growers in developing countries, since much of their food production is already organic or can easily be changed to organic. Moreover, the adopting of an approved HACCP system, or working following a similar principle of quality control, will be a very positive argument in export business. It should be noted that importers sometimes require exporters to work with HACCP. Another positive argument in export business is that the raw materials used by processors and/or exporters of preserved fruit and vegetables are produced according to the standards on Good Agricultural Practice developed by the Euro-Retailer Produce Working Group (EurepGap).

Please also refer to the EU Strategic Marketing Guide ‘Preserved Fruit and Vegetables in Consumer and Catering Packs’, which aims to provide exporters in developing countries with practical information for approaching the European market. The marketing guide describes the requirements for access to the European market (quality and packaging requirements, trade-related environmental measures and tariffs and quota). Furthermore, information on terms of trade and trade promotion is included.

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1 PRODUCT CHARACTERISTICS

1.1 Product groups

Fruit and vegetables are harvest-dependent seasonal products, available only during certain periods of the year, and have a limited storage life. Therefore, they are often preserved in order to be able to supply fruit and vegetables throughout the year. Preservation refers to any kind of treatment to increase the storage life.

This report deals with preserved fruit and vegetables in consumer and catering packs. Fruit and vegetables in consumer packs are sold to the retail sector, whereas fruit and vegetables in catering packs are sold to hotels, restaurants and bars, but also to the institutional sector (nursing homes, hospitals and homes for the elderly). A separate CBI Market Survey covers ‘Preserved Fruit and Vegetables for Industrial Use’.

In this market survey, the following five product groups can be distinguished:

Dried fruit
Fruit, which usually consists of more than 80 percent of water, is dried or dehydrated in order to stop the multiplication of micro-organisms (yeast, moulds and bacteria). These organisms obtain the necessary water and nutrients for the growth from the fruit in which they grow. By drying or dehydrating fruit, water is removed from the food and from the bacterial cells, thus ending their multiplication.

Dried fruit can be divided into vine fruit and tree fruit. The best-known vine fruit species are raisins, sultanas and currants, whereas apples, apricots, bananas, dates, figs, papayas, peaches, pears and prunes are the most important tree-fruit species.
Dried fruit in consumer or catering packs is mainly consumed as a snack.

Dried vegetables are mainly used in the food-processing industry and are covered in the CBI Market Survey ‘Preserved Fruit and Vegetables for Industrial Use.’

Canned fruit and vegetables
To ensure sufficient storage life for fruit and vegetable preserves, micro-organisms (yeast, moulds and bacteria) have to be inactivated. In fruit products, due to their natural acidity, only yeast and moulds will develop. Simple pasteurisation (heating to approx. 90º C) is sufficient for preservation of fruit products.
In vegetables, where there is a lack of natural acidity, bacteria (including dangerous pathogenic bacteria) can also develop. To inactivate bacteria, sterilisation (heating to at least 121º C) is required.
Vegetable products can also be preserved as 'pickles', through acidification, creating non-favourable conditions for the growth of bacteria by means of addition of vinegar or acetic acid.

The most popular pickles are based on gherkins, cocktail onions, carrots, sweet peppers and celery. Canned vegetables mainly consist of tomatoes, and of different kinds of beans, peas, carrots, etc. Please note that in the trade figures we have not included canned tomatoes, as they are not very interesting for growers in developing countries. The main canned fruit species are pineapples, peaches, apricots and fruit mixes.
Other interesting canned fruit species are of lychees, mandarins and other citrus fruits. Please note that in trade statistics for canned vegetables (vegetables preserves sterilised in a closed recipient) usually vegetables preserved in glass jars are also included.

Jam
These products are preserved by sugar. The principle of this technology is to add sugar in a quantity that is necessary to augment the osmotic pressure of the product’s liquid phase at a level, which will prevent micro-organisms from developing. In practice, however, water is usually partially removed (through boiling) from the product to be preserved, with the objective of obtaining a higher sugar concentration. Sugar generally assures food preservation in concentrations of more than 60 percent of the total volume of a finished product.

The most common kind of jam has strawberries as a basis. Marmalade has citrus fruit as a basis, but is preserved in the same way as jam.

Fruit jelly, fruit or nut puree, and fruit or nut pastes (being cooked preparations, whether or not containing sugar or other sweetening matter) are also included in this product group.

In the remaining part of the survey, this product group will be referred to as jam.

Preserved mushrooms and truffles
Preserved mushrooms and truffles are divided into the following groups:
- mushrooms preserved in vinegar or acetic acid;
- mushrooms and truffles otherwise preserved (e.g. sterilised)

Candied fruit
This product group includes vegetables, fruit, nuts, fruit peel and other parts of plants, preserved by sugar (drained, glacé or crystallised).

Fruit juices are not included in this survey. They are not very interesting for producers in developing countries because of the high transportation costs compared to fruit juice concentrates. Fruit juice is usually concentrated by evaporating water to decrease transport and storage costs, as well as to maintain optimum quality. In the country of destination, fruit juice concentrates are reprocessed into juice or other fruit products. The EU Market Survey ‘Preserved Fruit and Vegetables for Industrial Use’ discusses this product group.

1.2 Customs/statistical product classification

On January 1, 1988 a unified coding system was introduced to harmonise the trading classification systems used worldwide and to allow for improved international comparability of foreign trade statistics. This system, the Harmonised System (HS), is based on a ten-digit product classification. The World Customs Organisation (WCO) is introducing alterations to the HS and these have been included in the combined nomenclature as of January 1, 2002.

The preserved fruit and vegetables discussed in this survey are covered by Chapters 8 and 20 of the Harmonised System. Not all of the product groups covered by these chapters deal with preserved fruit and vegetables in consumer and catering packs.
Products groups covering fresh fruit and vegetables are left out and so are groups specifically dealing with preserved fruit and vegetables for industrial use. However, some of the groups included in the survey may cover both fruit and vegetables in consumer and catering packs and those for industrial use.
Appendix 1 provides a detailed list of HS codes (and corresponding product names) of the product groups covered by this survey.

2 INTRODUCTION TO THE EU MARKET

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. Negotiations are in progress with a number of candidate member states, many of which already have extensive trade and co-operation agreements with the EU.

According to the first demographic estimates for 2001, published on January 11, 2002 by Eurostat, the population of the EU on 1 January 2002 was expected to total 379.4 million. While the pace of population growth in the EU has slowed greatly in the last 30 years, the increase of 0.4% in 2001 was slightly higher than the figure in recent years. Total GDP in 2000 equalled US$ 7,856.6 billion (€ 8,827.6 billion) at current prices, while the average GDP per capita (at current exchange rates) amounted to US$ 20,759 (€ 23,325) in 2000 (OECD, 2002).

The most important aspect of the process of unification (of the former EC countries) which affects 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. Goods produced or imported into one member state can be moved around between the other member states without restrictions. 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, the regulations have not yet all been harmonised. Work is in progress on uniform regulations in the fields of environmental pollution, health, safety, quality and education.

On January 1, 2002 the euro (€) became the legal currency used in 12 EU member states. It had already been in use since 1 January 1999, by banks as legal currency in eleven EU member states: Austria, Belgium, Finland, France, Germany, Italy, Ireland, Luxembourg, The Netherlands, Spain, and Portugal. Greece joined the Economic and Monetary Union (EMU) on 1 January 2001.

The most recent Eurostat trade statistics quoted in this survey are from the year 2000. In 1998, the European Currency Unit (ECU) was still used as a monetary instrument by financial institutions to simplify financial procedures. On 1 January 1999, statistical and contractual values in ECU were converted into euros on a 1:1 exchange rate. The € / US$ exchange rate currently (August 2002) stands at around US$ 0.98 for one euro.

The US$ is the basic currency unit used to indicate value in this market survey. The Eurostat trade statistics are based on the € values and transferred into US$ with the exchange rates presented below.

Trade figures quoted in this survey must be interpreted and used with extreme caution. The collection of data regarding trade flows has become more difficult since the establishment of the single market on 1 January 1993. Until that date, trade was registered by means of compulsory Customs procedures at border crossings, but, since the removal of the intra-EU borders, this is no longer the case. Statistical bodies like Eurostat cannot now depend on the automatic generation of trade figures. In the case of intra-EU trade, statistical reporting is only compulsory for exporting and importing firms whose trade exceeds a certain annual value. The threshold varies considerably from country to country, but it is typically about € 100,000. As a consequence, although figures for trade between the EU and the rest of the world are accurately represented, trade within the EU is generally underestimated.

This survey focuses on four national markets within the EU (in addition to The Netherlands), which play an important role for developing country suppliers of preserved fruit and vegetables in consumer and catering packs. These are Germany, Belgium,

Exchange rates of EU currencies in US$

Country	Currency	1997	1998	1999	2000	2001	Aug. 2002
European Union	ECU	1.13	1.12	-	-		-
	€	-	-	1.06	0.92	0.89	0.98
Denmark	DKr	0.15	0.15	0.13	0.12	0.12	0.13
Sweden	SKr	0.13	0.13	0.12	0.11	0.10	0.11
United Kingdom	GB£	1.64	1.66	1.62	1.51	1.45	1.53

Source: CBS Statline (September 2002)

France and the United Kingdom. Germany, with a population size of around 82 million, is by far the largest consumer market within the EU. The German consumer is becoming increasingly aware of healthy foods and has shifted more and more to organic food products. Hamburg, along with Rotterdam, Marseilles and London, is one of the world's keys trading places. Belgium has an important transit port in Antwerp. This port is also strategically important for France and Germany. France has a significant population of ethnic minorities, especially from former colonies in North Africa. The increase in the purchasing power of these minorities along with the changing eating habits of the French has resulted in an increase in the demand for ethnic food. The same applies to the United Kingdom, which has large groups of ethnic minorities from Asia, in particular from India and Pakistan. France and the United Kingdom have a large consumer market, each with a population size of almost 60 million.

3 CONSUMPTION

3.1 Market size

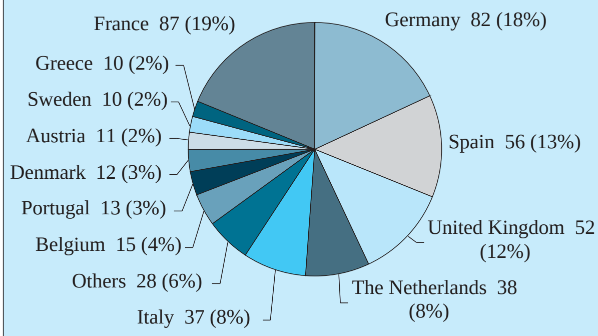
The European Union market

Dried fruit
The major EU retail markets for dried fruit are France, Germany, Spain and the United Kingdom. Other smaller but still significant markets are The Netherlands and Italy. Figure 3.1 shows the latest figures available on dried fruit consumption in the EU retail sector. Between 1992 and 1997 the total EU retail market for dried fruit decreased by 3 percent to 451,000 tonnes.

The demand for dried fruit is positively influenced by increased usage as an ingredient in the food industry, as well as by increased consumer interest in lesser-known tropical products and the general preference of consumers to eat more ready-to-eat healthy snacks, muesli and processed food. Considering the imports of dried fruit, sultanas are the most popular (mainly for industrial use) dried fruit in the EU, accounting for more than a quarter of total imports by EU member countries of dried fruit. Sultanas, other raisins, dates, prunes, apricots and figs are the major imported dried fruit species. Demand for tropical dried fruit, such as papaya, mango, pineapple and guava is small but developing.

Average consumption and the popularity of dried fruit varies from region to region within the EU. In 1997, total average per capita consumption of dried fruit (at retail level) in the EU was 1.2 kg. Figure 3.2 shows consumption per capita (at retail level) of EU countries.

Figure 3.1 Consumption of dried fruit in the EU retail sector, 1997 thousand tonnes / % of total EU consumption

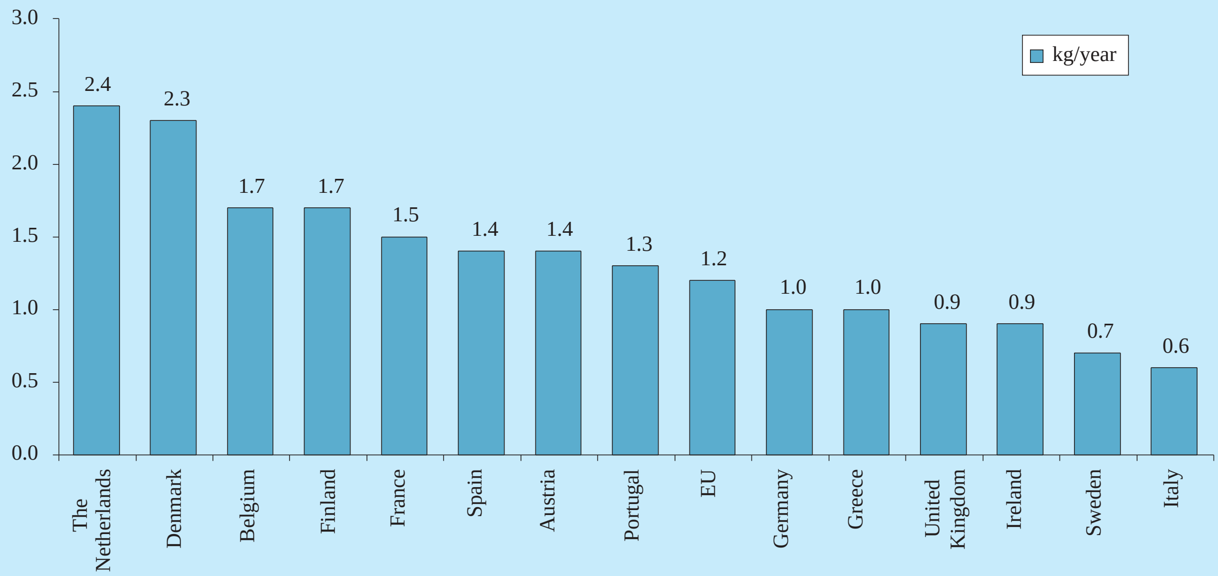


Source: Euromonitor/ CBI Market Survey 'Dried Fruit and Edible Nuts' (May 1999)

The Netherlands had the highest per capita consumption of 2.4 kg, followed by Denmark with 2.3 kg. Dried fruit was far less popular in Sweden and Italy, which showed a per capita consumption of 0.7 kg and 0.6 kg respectively.

Canned fruit and vegetables
Canned food has suffered from an old-fashioned image of being processed, when compared to alternative fresh, frozen and chilled foods. In spite of this image, canned vegetables are relatively more popular among young consumers. In most EU member countries, vegetables constitute the largest sector of the canned food market in volume terms, whereas canned fruit

Figure 3.2 Per capita consumption of dried fruit at retail level in the EU, 1997, kilogram per year

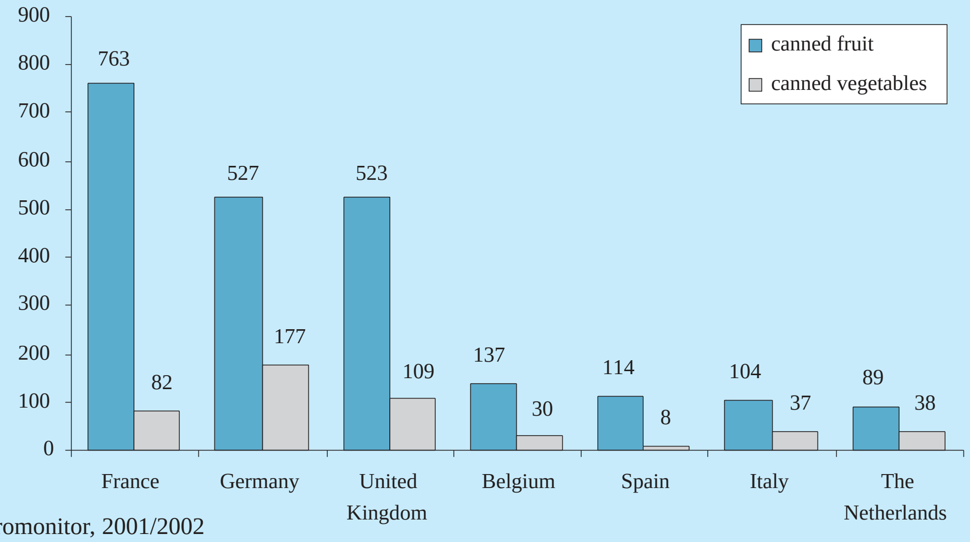


Source: Euromonitor/ CBI Market Survey 'Dried Fruit and Edible Nuts' (May 1999)

takes up a relatively small share of total canned food consumption. In Spain, canned vegetables as well as canned fruit are consumed in relatively small proportions of total canned food. France has a high volume consumption of canned vegetables, but a relatively low consumption of canned fruit.
The canned fruit market in Europe is broadly divided between own-brand labels (retailers' own brands), which account for between 30 percent and 60 percent of sales in the major markets, and brands which are led by Del Monte (15-20 percent of European sales), Libbys (5%) and Dole (4%).

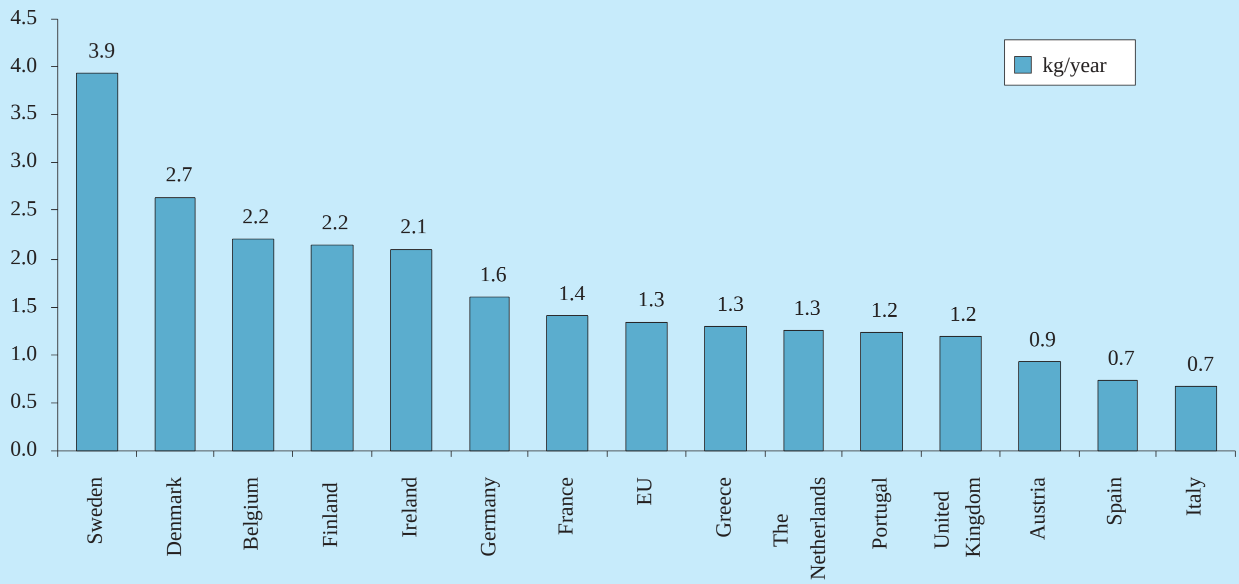
The market for canned vegetables is more fragmented and is led by Hak and Bonduelle.
The data in Figure 3.3 should be viewed with caution, since the definition of canned vegetables differs per country (e.g. whether or not including pickles, tomatoes, etc.). However, Figure 3.3 does give an indication of the canned fruit and vegetables consumption levels in a number of the EU member countries. These consumption figures do not include canned tomato consumption.

Figure 3.3 Consumption of canned fruit and vegetables (excluding canned tomatoes) in the EU, 2000, thousand tonnes



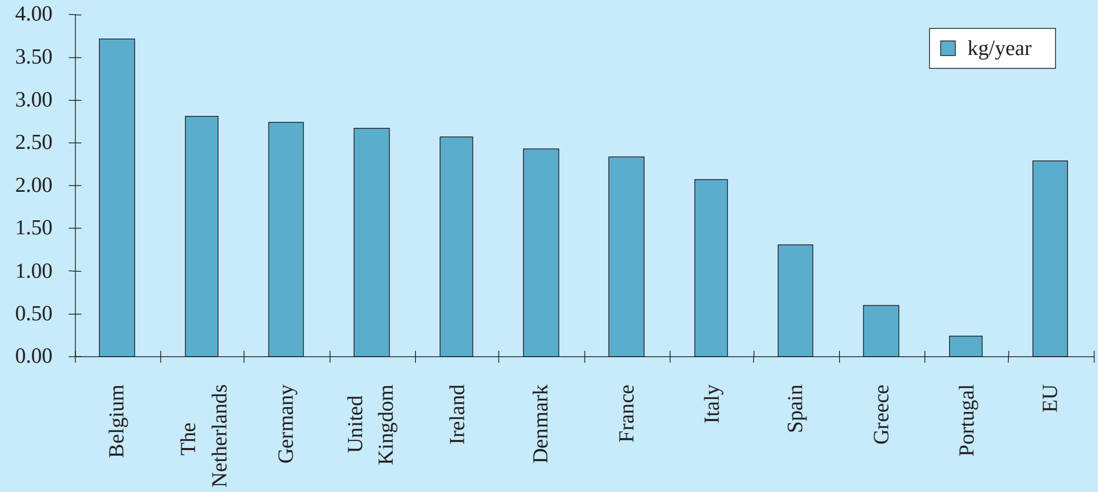
Source: Euromonitor, 2001/2002

Figure 3.4 Per capita consumption of jam and preserves in the EU, 2000



Source: Euromonitor 'Consumer Europe', 2001/2002

Figure 3.5 **Total (preserved and fresh) mushroom consumption per capita, 1994, kilogram per year**



Source: Le Bulletin de la Fédération Nationale de syndicats agricoles de cultivateurs de champignons, July -September 1996

Jam
In 2000, the consumption of jam and preserves in the EU amounted to almost 500 tonnes, which represented an average per capita consumption of 1.34 kg per year. In terms of volume sales, the major EU consumption market for jam is Germany, accounting for a market share of 25 percent in 2000. However, Sweden has the highest per capita consumption of jam within the EU, amounting to almost 4 kg in 2000.

Preserved mushrooms
The statistical information of the organisation in question is currently only for internal use. The figures presented in Figure 3.5 provide the latest information available on the consumption of mushrooms (preserved and fresh) throughout the EU.

The per capita consumption of mushrooms (preserved and fresh) in Europe varies considerably. The Belgians eat by far the most. Mushrooms are less popular in Southern European countries, such as Spain, Portugal and Greece.
According to the Netherlands Horticulture Commodity Board, fresh mushroom consumption by Netherlands households averages 2.5 kg a year. In 1999, preserved mushroom consumption amounted to 9.3 million units (each 450 gr.) of which 2.8 million units in cans and 6.5 million units in glass jars.
In the mid-nineties, the consumption of preserved mushrooms in France amounted to some 140 million units of 850 ml. In 1999, German consumption of preserved mushrooms amounted to some 2.5 units per household.

In France the main share of mushroom production is used by the processing industry, while in the United Kingdom the fresh mushroom market accounts for 90 percent of the total market.

The Netherlands

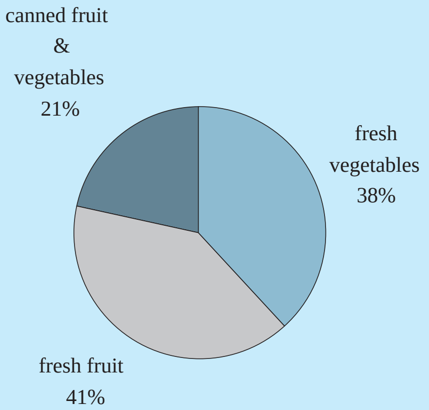
Dried fruit
At retail level, the consumption of dried fruit in The Netherlands amounts to around 40,000 tonnes. Dried fruit sales have been fairly constant since 1990. Raisins/sultanas are the most popular dried fruit in The Netherlands, representing 70 percent of the total consumption. Other popular dried fruit are, in descending order of importance, currants, prunes, apricots and mixtures of dried fruit. However, The Netherlands Dried Fruit Trade Association estimates that only 5 percent of raisins and currants is used in consumer or catering packs, while the major part is consumed by the food industry. Prunes and apricots are examples of dried fruit, which are mostly supplied in consumer and catering packs.
Consumer research by PGF (the Commodity Board for Fruits and Vegetables) has indicated that one fifth of Dutch people never buy dried fruit. Of those who do, 75 percent buy raisins, 60 percent buy currants and 25 percent buy apricots, prunes and tutti frutti.
Only 10 percent of consumers buy dates, 8 percent buy figs and a very small group of people buys other dried fruit.
The per capita consumption of dried fruit in The Netherlands was 2.4 kg in 1997, which was high compared to other EU countries.

Canned fruit and vegetables
The share of canned (including vegetables in glass jars) vegetable consumption in The Netherlands was 14 percent of total vegetables consumption in 1998, whereas almost three-quarters of vegetables consumed were fresh. The share of canned vegetables has declined slightly in the last few years. Pulses, green beans and green peas are the canned vegetables most consumed in The Netherlands, representing nearly half of canned

vegetable consumption. Own brands dominate the supply of canned vegetables in The Netherlands, followed by the brands HAK and Bonduelle. In 1999, 60 percent of these vegetables was packed in cans, while the rest was packed in glass jars. The Dutch market for canned fruit is very fragmented. Own labels account for about one third of the market and the leading brand Del Monte for only about 15 percent. Other brands, such as Dole and Holiday account for less than 10 percent.

Between 1997 and 2000, Netherlands consumption of canned fruit and vegetables increased by 14 percent, amounting to € 640 million in 2000. During this period, the share of canned fruit and vegetables in total fruit and vegetable sales has remained stable at 21 percent

Figure 3.6 Consumption of fruit and vegetables in The Netherlands, 2000
% of total value sales



Source: Netherlands Horticulture Commodity Board, 2000

Jam
In 2000, jam and preserves consumption in The Netherlands amounted to 22,000 tonnes, representing a per capita consumption of almost 1.5 kg (Euromonitor 2002). Total jam consumption has increased by 7 percent since 1998. Hero is the undisputed leader in The Netherlands jam market largely due to the strength of its Betuwe brand. In terms of volume, Hero, represented by its brands Hero, Betuwe and Classica, held a market share of 35 percent in 1997. The next best leader in the jam market was Conflix, represented by Materne and Grand Mère, and holding a market share of 20 percent.

Preserved mushrooms
In 1994, the per capita consumption of preserved and fresh mushrooms was estimated at 2.8 kg in The Netherlands. This was the second highest per capita consumption in the EU. Between 1994 and 1999, the average consumption of fresh mushrooms amounted to around 2.5 kg. In 1999, the sales of preserved mushrooms amounted to some US$ 6 million. In terms of cans and glass jars sold, the consumption remained stable. Sales of mushrooms in glass jars are increasing. The ratio cans to glass jars is around 30:70.

Germany

Dried fruit
Within the EU, Germany has by far the largest population size of around 82 million inhabitants in 1999. The per capita consumption of 1 kg per year in 1997 was low compared to other EU countries. Although sales of dried fruit in the German retail market declined from 90,000 tonnes in 1993 to 82,000 tonnes in 1997, it is still the second biggest market after France. German households traditionally bake pies, cakes or healthy pastries using dried fruit and are likely to continue to do so.

Canned fruit and vegetables
Total consumption of canned fruit and vegetables in Germany was 704,000 tonnes in 2000: 527,000 tonnes of canned vegetables and 177,000 tonnes of canned fruit. Canned vegetables accounted for over 40 percent of total canned food consumption in terms of volume in 2000, while fruit accounted for 11 percent. Green peas mixes with carrot, green beans and corn are the most popular canned vegetables. Bonduelle is the leading supplier of canned vegetables, although the share of own brands is increasing. In 1996 the share of own brands represented only 26 percent of total sales of canned vegetables, whereas by 1998 own brand sales accounted for 45 percent of total sales. In Germany, the share of vegetable preserves sold in cans is decreasing. In 1998 this share accounted for 70 percent of total sales, compared to 80 percent in 1995.
The market for canned fruit is overwhelmingly in the hands of retailers' own labels, which control around 75 percent of sales. Other brands are Del Monte and Libbys with market shares somewhere between 10 and 15 percent.

Jam
Jam and preserves consumption in Germany amounted to 131 thousand tonnes in 2000, which represented a per capita consumption of 1.6 kg. German consumption has shown a steady increase since 1995, when consumption of jam amounted to 125 thousand tonnes. Schwartau is the market leader in sweet spreads in Germany, although retailers' own brands are steadily increasing their share of retail sales.

Preserved mushrooms
The per capita consumption of mushrooms (fresh and preserved) in Germany was estimated at 2.7 kg in 1994, just above the EU average of 2.5 kg. This consumption figure includes preserved as well as fresh mushrooms.

Belgium

Dried fruit
Belgium is a relatively small market for dried fruit and does not play a key role as a European trader for distribution to other EU markets. In 1997, the per capita consumption of dried fruit was 1.7 kg and consumption in the retail sector was 15,000 tonnes, accounting for nearly 4 percent of the total EU retail market for dried fruit.

Canned fruit and vegetables
Consumption of canned vegetables amounted to around 137 thousand tonnes in 2000, representing a steady increase by 10 percent since 1995. A mixture of green peas and carrots represents the most popular canned vegetables in Belgium, followed by green beans peas and white beans. About two thirds of the canned vegetable segment is in fact packed in cans, while the rest is packed in glass jars. In general, vegetables packed in glass are more expensive than vegetables in cans. Bonduelle and the ANCO group are the most important suppliers of canned vegetables in Belgium. Bonduelle is represented by the brands Marie-Thumas and Star (regional brand), while HAK and Rena represent the ANCO group.

Belgian canned fruit consumption amounted to 30 thousand tonnes in 2000, representing a small increase compared to previous years.

Jam
Consumption of jam and preserves in Belgium amounted to 22.7 thousand tonnes in 2000, representing a per capita consumption of 2.2 kg. Jam consumption in Belgium shows a regular annual growth of around 500 tonnes. Own labels account for over 60 percent of jam sales in Belgium. The leading jam brands are Belsy, Effi, Betuve and Materne while secondary brands are Nelson's, Hero and Winny.

Preserved mushrooms
Belgium has the highest per capita consumption of preserved and fresh mushrooms in the EU. In 1994, consumption amounted to 3.7 kg.

France

Dried fruit
France is one of the largest EU retail markets for dried fruit, in particular for the traditional range of dried fruit (raisins, dates, prunes, figs and apricots).
Different kinds of tropical fruit like papayas, pineapples and bananas are being used in muesli.
In 1997, the per capita consumption of dried fruit was 1.5 kg. France's share in the total EU retail market for dried fruit in 1997 was 19 percent. In terms of volume, consumption amounted to 87,000 tonnes, which represented a 7 percent consumption increase compared to 1995.

Canned fruit and vegetables
Total consumption of canned fruit and vegetables in France amounted to 845,000 tonnes in 2000: 763 thousand tonnes of canned vegetables and 82 thousand tonnes of canned fruit. Canned vegetables accounted for over half of total canned food consumption in terms of volume, while fruit accounted for only 6 percent.
The most popular canned vegetables in France are green beans, followed by green peas with carrots, green peas and corn. In 1998, private labels lead the canned vegetable market in France, accounting for more than half of total sales, followed by the brand labels D'Aucy and Bonduelle. Retailers' own labels hold the largest market share in the French canned fruit market, followed by St Mamet.

Jam
French jam and preserves sales amounted to almost 85 thousand tonnes in 2000, with a per capita jam consumption of 1.7 kg. Total jam sales have increased in the past few years, up from 75.4 tonnes in 1997. Andros leads the jam market in France and during the past decade has extended its share from 29 percent to 38 percent. The second major player in the French jam market is Materne Fruiborg.

Preserved mushrooms
In 1994, the per capita consumption of fresh and preserved mushrooms in France amounted to 2.3 kg, which was around the EU average per capita consumption.

United Kingdom

Dried fruit
In 1997, the United Kingdom's share in the EU retail market for dried fruit was 12%, representing 52,000 tonnes. Since 1995, consumption has decreased by 9 percent. Despite this decrease in retail consumption, the United Kingdom is still a sizeable market for dried fruit. The per capita consumption of dried fruit amounted to 0.9 kg in 1997, which was below EU average.

Canned fruit and vegetables
In 2000, total consumption of canned fruit and vegetables in the United Kingdom amounted to 632 thousand: 523 thousand tonnes of canned vegetables and 109 thousand tonnes of canned fruit. Canned vegetables represented almost 40 percent of total canned food consumption in terms of volume, while fruit represented 8 percent. Pulses maintain a strong position due to the enduring popularity of baked beans, despite declines in value share as a consequence

of a price busting “beans war” in the mid-1990s. Less than 1 percent of canned vegetable sales is packed in glass in the United Kingdom. In 1998, Tesco dominated the market for canned vegetable sales, accounting for 20 percent of total sales, followed by Sainsbury (18%) and Asda (13%).

Jam

In 2000, jam and preserves consumption in the United Kingdom amounted to nearly 71 thousand tonnes, representing a per capita consumption of 1.2 kg. Total sales of jam and preserves have declined since 1995, when volume sales amounted to 75 tonnes. Robertson’s is the leading jam brand in the United Kingdom, followed by Hartley’s and Bonne Maman.

Preserved mushrooms

The per capita consumption of preserved and fresh mushrooms in the United Kingdom amounted to 2.6 kg in 1994, which was above EU average.

3.2 Market segmentation

As most of the trade in preserved fruit and vegetables in consumer and catering packs is business-to business-trade, only limited information on market segmentation is available, particularly for the catering sector.

Dried fruit

Two groups of end-users of dried fruit can be distinguished: the retail and catering sector, and the food processing industry. In The Netherlands, the former group consumes relatively large amounts of figs and dates, while the food industry in particular consumes raisins/sultanas and currants. However, the relative usage of dried fruit is changing in favour of the industrial sector.

Dried fruit is used as an ingredient in bakery products (cakes, bread, pies, pancakes), meals (rice dishes, salads, main meal dishes, puddings) and desserts or is eaten as a snack. The snack market in the EU is growing, with each individual country having its own favourite snack. Dates and figs are well known and easily available throughout the year. Other well-known dried fruits are sultanas, raisins and apricots.

Canned fruit and vegetables

Although the image of canned food is considered old-fashioned, canned vegetables are more popular among younger consumers. The packaging in glass jars instead of metal cans is still gaining popularity in the EU, partly because fruit and vegetables in glass are totally visible and stand for a quality product. The share of glass as a packaging material is particularly high in The Netherlands (60% in 1999), however in Germany and Belgium the use of glass jars is gaining popularity (each around 30%).

Table 3.1 End use of dried fruit in The Netherlands, 1997 market share in percent

Product	Retail/ catering sector	Industrial Sector
Raisins/sultanas	5	95
Currants	5	95
Prunes	60	40
Apricots	50	50
Figs	85	15
Dates	85	15
Bananas	85	15
Tutti frutti	85	15

Source: CBI Market Survey ‘Dried Fruit and Edible Nuts’ (May 1999)

The canned vegetable sector is very fragmented. Nevertheless, canned green beans, peas with carrots and peas are very popular in almost every single EU member country. HAK and Bonduelle are the most important A brands in The Netherlands, Belgium and in Germany. Bonduelle is a French brand, and is, as such, mainly imported from France.
The EU market for canned fruit is largely dominated by own brands, followed by brands, which are led by Del Monte. Considering the imports of canned fruit, canned pineapples, peaches and mixtures are popular canned fruit in the EU.

Jam

Jam is mostly used as a sandwich filling.
Sweet sandwich filling (and jam in particular) is very popular amongst children. In general, jam consumption in EU is gradually decreasing since bread consumption is decreasing and other sandwich fillings are entering the market. Strawberry jam is by far the most popular jam in the EU, accounting for approximately half of total consumption, followed by apricot (25%), and cherry (15%). Among tropical fruits, pineapple is the most preferred, while other fruits (such as mango, passion fruit, and guava) are gaining in popularity. Products similar to jam, although usually with added flavour and colour (which are not allowed in jam) are also used in bakery products like cakes, pies and cookies, and as fillings in the dairy industry and ice-cream industry.

Preserved mushrooms

Preserved mushrooms ready for consumption are supplied in plastic packs and buckets (2-10 kg) to restaurants and pizzerias. These mushrooms are normally supplied by national mushroom growers and not by foreign growers.

3.3 Consumption patterns and trends

The population in Western Europe is still growing and will continue to grow until about 20 years from now. It is estimated that, thereafter, Western Europe will start to show a declining population size. However, already now the composition of the population is changing. It shows a rapidly growing number of elderly people combined with a decreasing number of young people. We also see a family ‘dilution’; family households are getting smaller because people are having fewer children. Moreover, the number of single households in Western Europe is substantial and still increasing, making these people a highly significant consumer group for food suppliers.
Prosperity in the EU has increased over years, and eating behaviour is related to income and life style. Despite this increase in prosperity, the food market in the EU is highly competitive, since consumers are not going to eat more, but will only, at the very most, switch to other products.

Recent research into consumer behaviour shows that today’s consumer has the following preferences concerning food and nutrition:

Safe food
Food products should be safe and eating them should not result in any danger or risk to health.

Health food
Health food refers to food products which are low in fat and have limited sugar and salt content; this includes functional foods, which have specific health promoting properties and food products with added vitamins and minerals or bacteria supporting the intestinal function (see CBI Market Survey ‘Health Foods’).

Organic food
Since European consumers have experienced several food scares, many people are concerned about the safety of food, as well as the effects of intensive farming on the countryside as well as on the environment in general. These factors, combined with the increasing awareness of the importance of diet and nutrition, have intensified interest in organic foods, which are grown according to principles laid down in Directive EC 2092/91 (see Section 1.1.3 of the EU Strategic Marketing Guide ‘Preserved Fruit and Vegetables in Consumer & Catering Packs’).
Simply said it means that products are grown without the use of artificial (chemical) fertilisers and pesticides. The demand for organic food is booming in several EU member countries which can offer interesting market opportunities for exporters in developing countries, where often the major part of agricultural produce is anyway organic although not certified (‘organic by default’). Certification by an EU accredited certifying body (including regular inspections) is necessary.
Organic products still only account for a small share of the total food consumption, although the market for organic products experiences strong growth rates.
For more information on organic food, please refer to the separate CBI EU Market Survey “Organic Food Products.”

Fruit and vegetables
There is a growing interest in the consumption of fruit and vegetables in the West European food market. This is caused by the fact that fruit and vegetables contain vitamins and natural antioxidants, which are supposed to have properties, which help prevent heart diseases and cancer.

Environment-consciousness
Food production, especially primary growing, should be environment-friendly (organic, see above). Waste, including packaging waste, should be avoided or at least reduced. In the scope of the increasing environment-consciousness in the EU, a group of leading European food retailers launched the EurepGap Protocol in 1999. The objective of EurepGap (Euro-Retailer Produce Working Group for Good Agricultural Practice) is to raise standards for the production of fresh fruit and vegetables by promoting food safety, the sustainable use of natural resources and increased environment-friendly production. For more information on the Eurep Group and EurepGap Protocol, please refer to *www.eurep.org*

Convenience
European people (including women) are working more and more in jobs outside their home and have busy social lives. Moreover, the number of single households increases. As a result, less time is left for the preparation of a full meal. Therefore, West European consumers have a growing need for convenience meals, spurring the demand for peeled potatoes, canned soup, preserved vegetables, prefried fries, fish sticks, pizza, frozen pastry, ready meals (frozen, chilled or shelf-stable). The catering sector now also uses semi-processed fruit and vegetables.

'Grazing'
The modern consumer does not confine himself to the traditional three meals a day (breakfast, lunch and dinner), but is eating smaller bites at more frequent intervals: ready-to-eat products or products requiring very little ultimate preparation: take-out foods, hamburgers, mini-pizzas, instant soups, filled croissants, candy bars, muesli bars, cheese sticks and fruit yoghurts.

Tracking and tracing
As a result of several food scares (BSE, dioxine) consumers increasingly pose questions on the production process and demand open, honest,

and informative labelling. This has resulted in a discussion in the fruit and vegetable processing industry about "tracking and tracing". With the help of good chain management and control within the chain, end-users are able to supervise all kinds of aspects of fresh fruit and vegetables and products derived from them, such as plant material, growth, harvest, storage, distribution and processing. The fruit and vegetable processing industry is increasingly paying attention to chain management and labelling systems, through which products can be traced back to the producer.

Tracking and tracing is becoming even more important in production (i.e. growing and processing) of organic products, where fully documented tractability is required from the raw material to the final product, to ensure the organic character of the product. In the near future, EU food legislation is expected to require full tractability for all food products (EU regulation (EC) 178/2002).

Internationalisation

As the world is increasingly turning into a global village, culinary traditions from other continents tend to be more widely accepted by European consumers, increasing the demand for ethnic and exotic ingredients. This development is also stimulated by the steady population growth of ethnic minority groups, which have significantly increased their purchasing power over the last years. Many products containing exotic fruits (like fruit juice drinks, jams, ice cream) are manufactured by European food industries from ingredients that are imported as semi-manufactured products (fruit juice concentrate).

Key Consumption Trends to 2010

- Greater demand for convenience
- More diversity of choice
- Growth of demand for ethnic and exotic ingredients
- Increased demand for organic products
- More ready cooked, take-out foods
- High growth in private label products
- Polarisation of markets (premium and budget)
- Demand for open, honest, and informative labelling

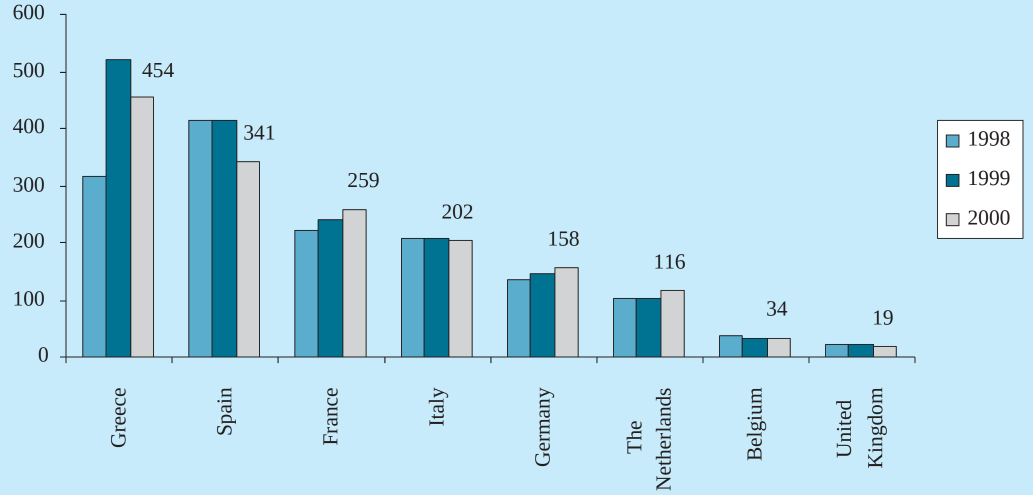
Source: Food Marketing, October 1999

4 PRODUCTION

Dried fruit
There are only a few countries in the EU supplying significant amounts of dried fruit. Greece is a major producer of currants and raisins. The 2000/01 raisin crop is estimated at 29,000 tons, an increase of 29 percent on the previous year. The 2001/02 production level is expected to increase slightly. France is the second largest producer of prunes in the world, after the United States. French prune production in 2000/01 is estimated to have increased by 41 percent at 41,000 tons, compared to the abnormally small 1999/2000 crop. Although production is expected to increase significantly in 2000/2001, it is still likely to be below the 52,000-55,000 ton potential. Spain is the only date producing EU member country, with production fluctuating around 7,000 tonnes (FAO 2002).

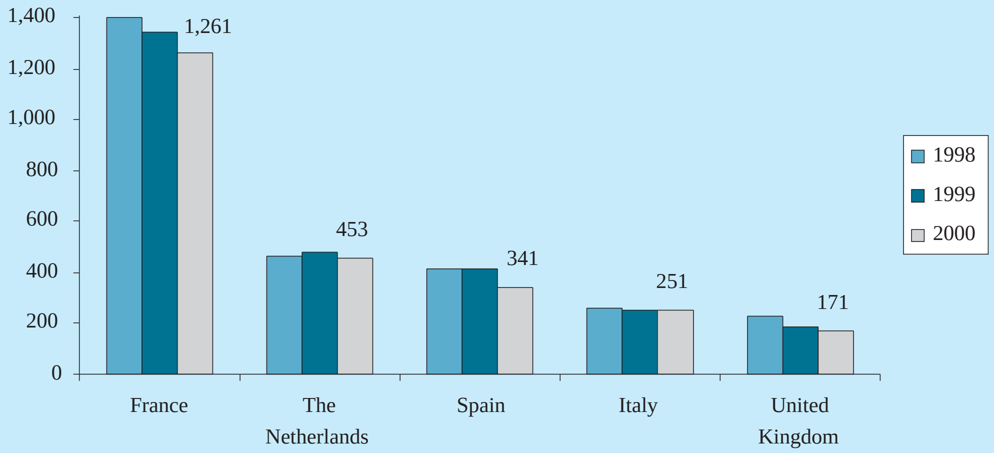
Canned fruit
Southern European countries are the leading producers of canned fruit in the EU. In descending order, Greece, Spain, France and Italy were the leading producers in 2000. Since 1989, Greece has increased its production of canned fruit substantially. However, in 1997 Greek

Figure 4.1 Production of canned fruit in the EU*, 1998-2000, millions of 850 ml units



* EU, excluding Denmark, Finland, Ireland, Portugal, Luxembourg and Sweden
Source: OEITFL, 2002

Figure 4.2 Production of canned vegetables (excluding baked beans) in the EU*, 1998-2000, millions of 850 ml units



* EU, excluding Denmark, Greece, Portugal, Luxembourg, Austria and Sweden
Source: OEITFL, 2002

production declined considerably, although it recovered again in 1998. Between 1999 and 2000, production in Spain decreased by 18 percent, amounting to 341 million units of 850 ml in 2000. Between 1998 and 2000, production in Germany, France and The Netherlands showed a steady increase.

Canned vegetables

Frozen vegetables, with an estimated total EU production of 2 million tonnes, have become a fierce competitor of canned vegetables. In 2000, total EU production of canned vegetables amounted to over 2.4 billion units of 850 ml, representing a decrease by 9 percent since 1998. It should be noted, however, that German, Belgian and Irish production of canned vegetables is not included in these figures. France is by far the largest producer, accounting for more than half of total European production of canned vegetables. The Netherlands, Italy and Spain are other important producers, each producing between 250 and 450 million units. The production of canned vegetables in Belgium and Germany is small compared to other EU countries, amounting to 143 million and 95 million units of 850 ml respectively in 1997. More recent data on Belgian and German production is not available.

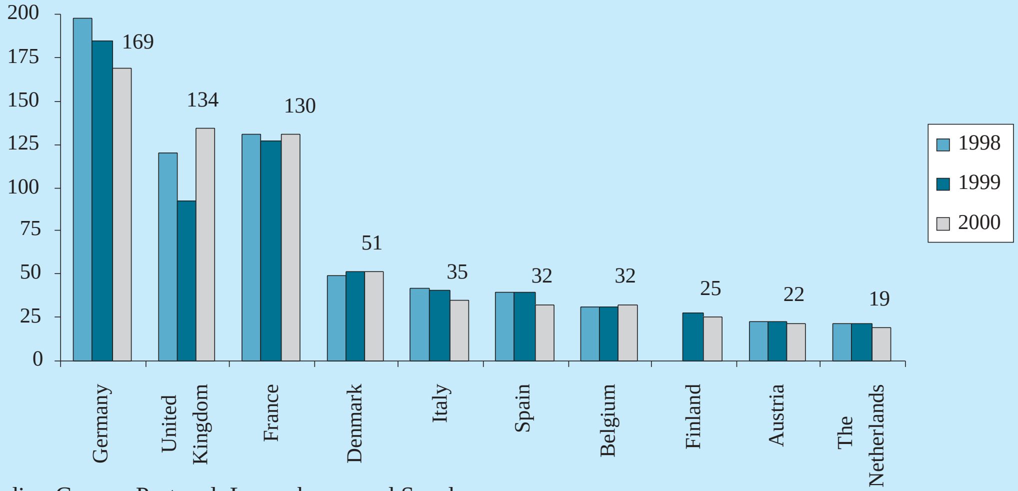
Jam

In 2000, the production of jam, marmalade and jelly in the EU was estimated at 648,000 tonnes. The jam production has been more or less stable for the past ten years. Germany is the leading producer. The three leading producers, Germany, the United Kingdom and France, accounted for about two thirds of total EU jam production in 2000.

Preserved mushrooms

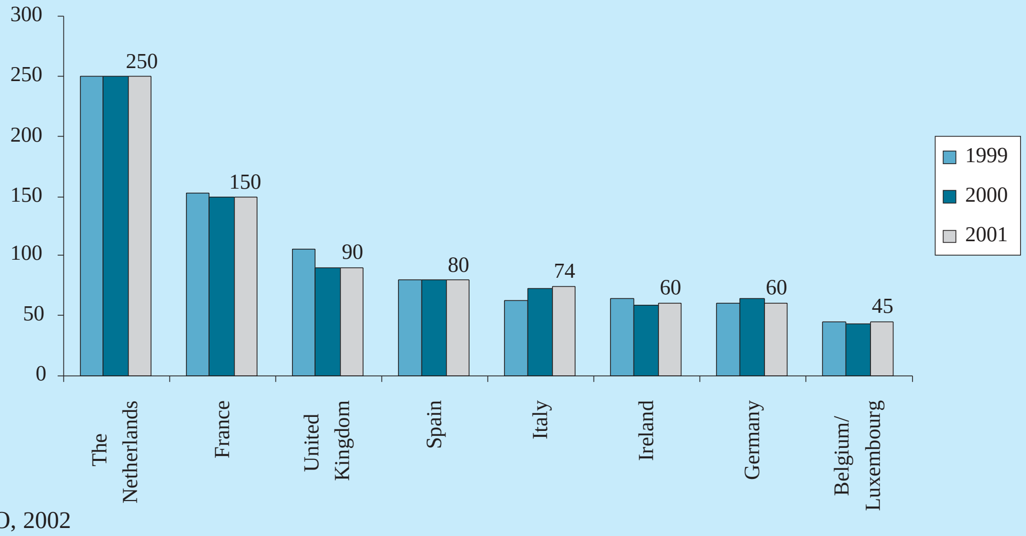
No figures are available for the production of preserved mushrooms. In 2001, total EU production of fresh mushrooms amounted to 821 thousand tonnes.
The Netherlands and France are the main producers of fresh mushrooms in the EU, producing 250 thousand tonnes 150 thousand tonnes respectively.
The United Kingdom, Spain and Italy also produce considerable amounts.

Figure 4.3 Production of jam, marmalade and jelly in the EU*, 1998-2000 thousand tonnes



* EU, excluding Greece, Portugal, Luxembourg and Sweden
note: production level of Finland in 1998 is not available.
Source: OEITFL 2002

Figure 4.4 Production of fresh mushrooms in the EU, 1999-2001 thousands tonnes



Source: FAO, 2002

5 IMPORTS

As was already mentioned in Section 1.2, the preserved fruit and vegetables discussed in this survey are covered by Chapters 8 and 20 of the Harmonised System.
Not all of the product groups covered by these chapters deal with preserved fruit and vegetables in consumer and catering packs. Products groups covering fresh fruit and vegetables are left out and so are groups specifically dealing with preserved fruit and vegetables for industrial use. However, some of the groups included in the survey may cover preserved fruit and vegetables both in consumer & catering packs and for industrial use.

5.1 Total imports

Between 1998 and 2000, imports of preserved fruit and vegetables in consumer and catering packs by EU member countries decreased by 14 percent in terms of value, amounting to US$ 4.8 billion in 2000. In terms of volume, imports increased by 6 percent between 1998 and 1999, but decreased afterwards by 3 percent, amounting to over 4.7 million tonnes in 2000.

However, it should be noted that, although the US$ is the basic currency unit used to indicate the imported values, Eurostat trade statistics are expressed in € and transferred into US$. Hence the developments in the imported values are also influenced by the € / US$ exchange rate The decline of imported value in € is less pronounced than in US$. In this chapter, only the fluctuations in the imported value in terms of US$ will be analysed, unless it is specifically stated otherwise. For more information about the exchange rate, please refer to Chapter 2 of this survey. Please also refer to Appendix 2 for detailed trade statistics (including the € values) of the EU and of the major national trade markets within the EU.

Germany was the leading importer, accounting for 26 percent of imports by EU member countries (in terms of value) in 2000, followed by the United Kingdom (17%) and France (16%).

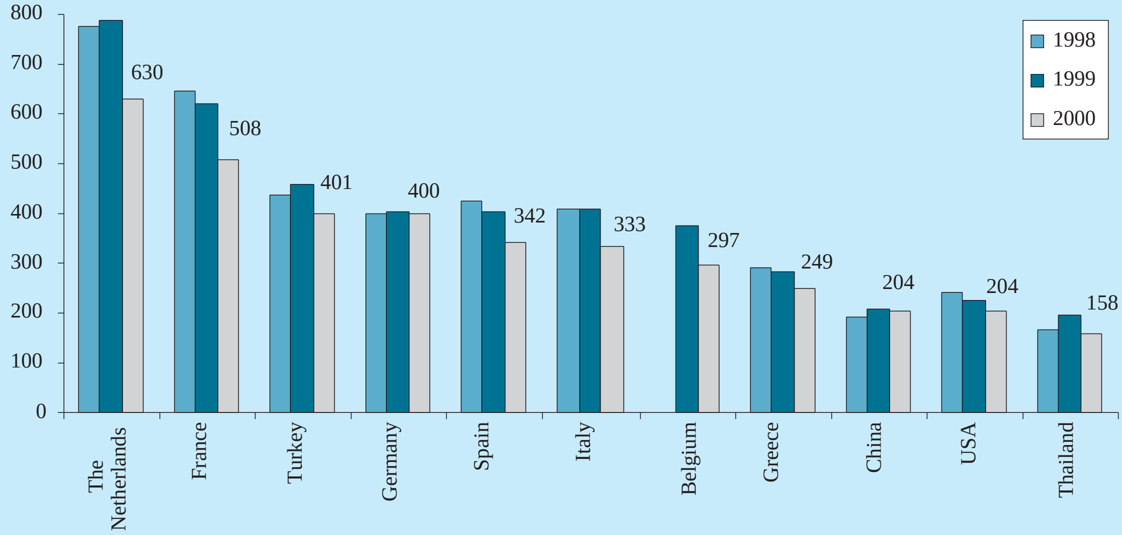
The Netherlands was the leading supplier to the EU, accounting for 13 percent of the imported value in 2000. Supplies of preserved fruit and vegetables from many countries to the EU declined considerably between 1998 and 2000. In the latter year, about 37 percent of the total value imported by EU member countries was supplied by extra-EU countries.

Germany

Germany was the leading EU importer of preserved fruit and vegetables for consumer and catering packs, with imports amounting to US$ 1.2 billion or 1.4 million tonnes in 2000. Between 1998 and 2000, imports decreased by 19 percent in value, but remained more or less stable in terms of volume.

Canned vegetables and canned fruit accounted for two-thirds of total German imports. During the survey period, every single imported product group decreased in terms of value, although canned vegetables and preserved mushrooms showed a small increase between 1998 and 1999.

Figure 5.1 Leading suppliers of preserved fruit and vegetables in consumer & catering packs to the EU, 1998-2000 US$ million



Source: Eurostat, 2001

Table 5.1 **Imports by EU member countries of preserved fruit and vegetables in consumer & catering packs, 1998-2000**
US$ million / € million / thousand tonnes

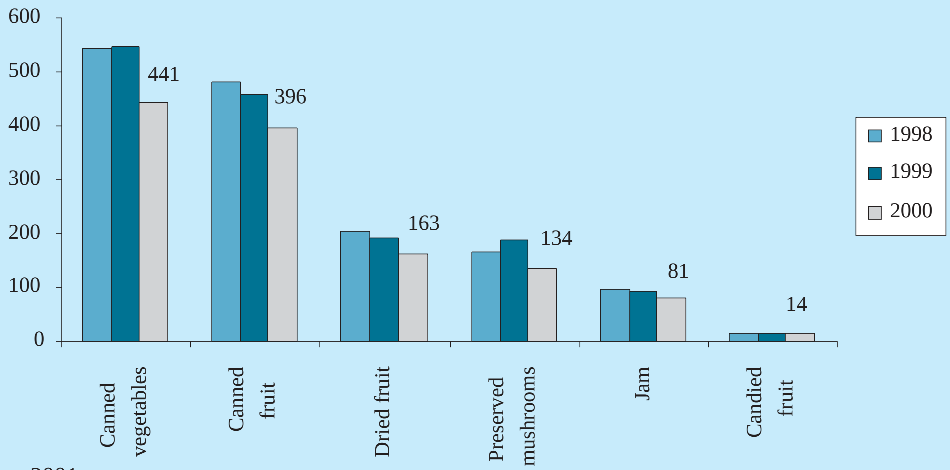
	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	5,630	4,638	5,576	5,260	4,910	4,814	5,233	4,747
Extra-EU	1,972	1,607	2,012	1,898	1,729	1,791	1,946	1,752
Germany	1,509	1,441	1,492	1,407	1,473	1,229	1,336	1,418
United Kingdom	1,030	761	1,005	948	876	832	905	741
France	878	678	849	801	691	755	821	705
The Netherlands	511	464	535	505	515	442	480	483
Italy	435	325	413	390	326	374	406	354
Belgium	n.a	n.a.	350	330	304	310	337	300
Spain	265	181	281	265	197	288	313	232
Sweden	157	110	160	151	115	139	152	114
Austria	119	97	117	110	103	102	111	99
Denmark	113	90	107	101	86	97	105	95
Ireland	62	43	67	63	46	67	73	49
Portugal	68	66	69	65	67	61	66	64
Finland	67	46	65	62	46	54	58	44
Greece	56	37	45	43	52	41	45	35
Luxembourg	n.a.	n.a.	21	19	11	24	26	14
Belgium & Luxembourg	360	299	-	-	-	-	-	-

n.a.: not available
Source: Eurostat, 2001

The Netherlands supplied a relatively large share of German imports, compared to the situation at EU level. Hungary was the 11th leading supplier to Germany while at EU level it was only the 19th leading supplier.
The extra-EU countries were responsible for 35 percent of the total imported value of preserved fruit and vegetables for consumer and catering packs into Germany.

The leading suppliers of preserved fruit and vegetables in consumer & catering packs to Germany (share of total year 2000 imports in terms of value)
→ The Netherlands (24%), France (12%), Turkey (9%), Italy (9%), Greece (6%), Belgium (6%), China (6%), Spain (4%), Thailand (3%), USA (3%), Hungary (2%), Austria (2%), South Africa (2%).

Figure 5.2 **Imports of preserved fruit and vegetables in consumer & catering packs into Germany, 1998-2000**
US$ million



Source: Eurostat, 2001

United Kingdom

The United Kingdom was the second leading EU importer of preserved fruit and vegetables in consumer and catering packs, accounting for US$ 832 million in 2000. Just like in Germany, imports in terms of value decreased by 19 percent after 1998. Imports in terms of volume increased by 15 percent between 1998 and 1999, but decreased afterwards by the same percentage, amounting to 741 thousand tonnes in 2000.

The leading three product groups imported into the United Kingdom, i.e. canned vegetables, canned fruit and dried fruit, decreased considerably in terms of value between 1998 and 2000. Compared to other leading markets, dried fruit and candied fruit were relatively more important in the United Kingdom, while preserved mushrooms were relatively less important.

The leading supplier to the United Kingdom was Italy. The USA was an important trading partner of the United Kingdom and occupied a relatively more important position in UK imports than in EU overall imports. Israel and India were also relatively more important suppliers to the United Kingdom than to the EU as whole. In 2000, 40 percent of the total value imported into the United Kingdom originated in extra-EU countries.

The leading suppliers of preserved fruit and vegetables in consumer & catering packs to the United Kingdom (share of total year 2000 imports in terms of value)
→ Italy (12%), France (11%), Turkey (11%), USA (8%), The Netherlands (8%), Germany (8%), Greece (7%), Belgium (5%), Spain (5%), Thailand (3%), South Africa (2%), Israel (2%), India (2%).

France

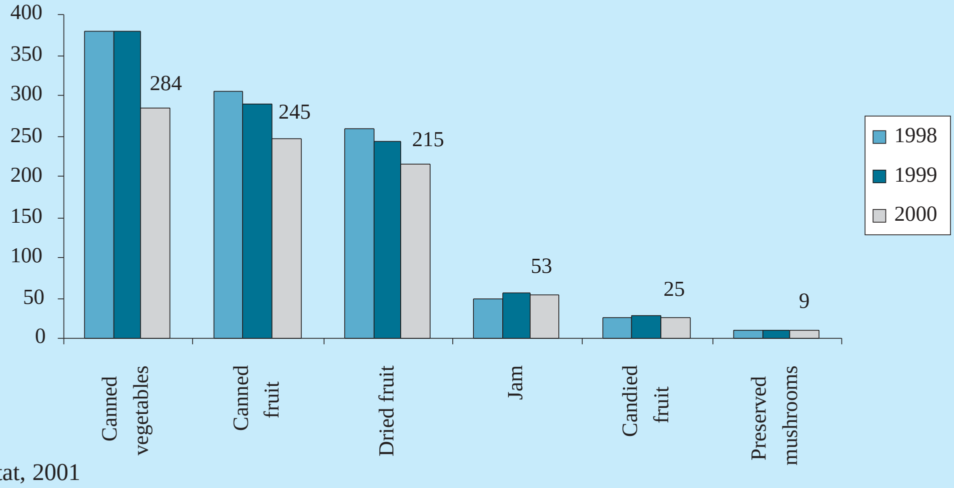
France was the third leading EU importer of preserved fruit and vegetables in consumer and catering packs, with imports amounting to US$ 755 million or 705 thousand tonnes in 2000. Between 1998 and 2000, French imports decreased by 14 percent in terms of value, but increased by 4 percent in terms of volume.

In 2000, the shares of the different products groups in total French imports were more or less comparable to the EU average.

Spain and The Netherlands were the leading suppliers to France, together accounting for some 30 percent of the total imported value in 2000. North African countries like Morocco, Tunisia and Algeria were relatively important suppliers to the French market. In 2000, countries outside the EU supplied 36 percent of the total value imported into France.

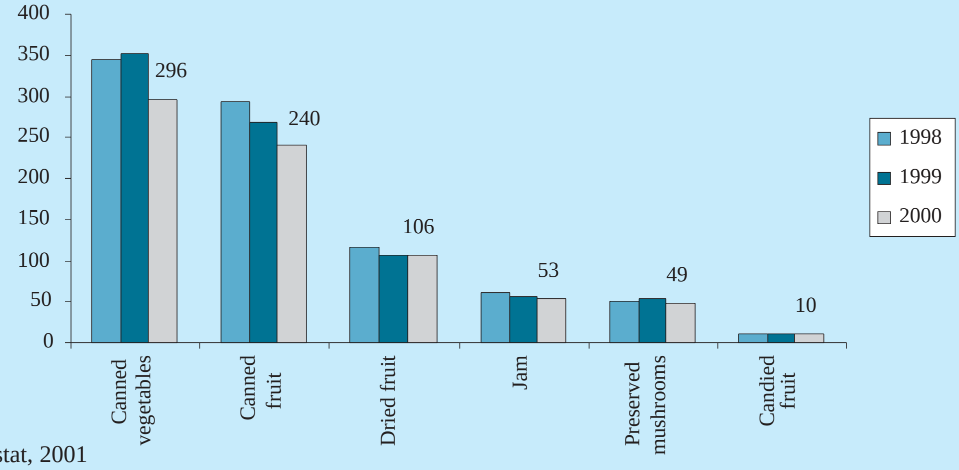
The leading suppliers of preserved fruit and vegetables in consumer & catering packs to France (share of total year 2000 imports in terms of value)
→ Spain (15%), The Netherlands (14%), Germany (12%), Italy (9%), Belgium (9%), Morocco (7%), Turkey (6%), Greece (3%), Tunisia (3%), United Kingdom (2%), Thailand (2%), Peru (2%).

Figure 5.3 Imports of preserved fruit and vegetables in consumer & catering packs into the United Kingdom, 1998-2000 US$ million



Source: Eurostat, 2001

Figure 5.4 **Imports of preserved fruit and vegetables in consumer & catering packs into France, 1998-2000**
US$ million



Source: Eurostat, 2001

The Netherlands

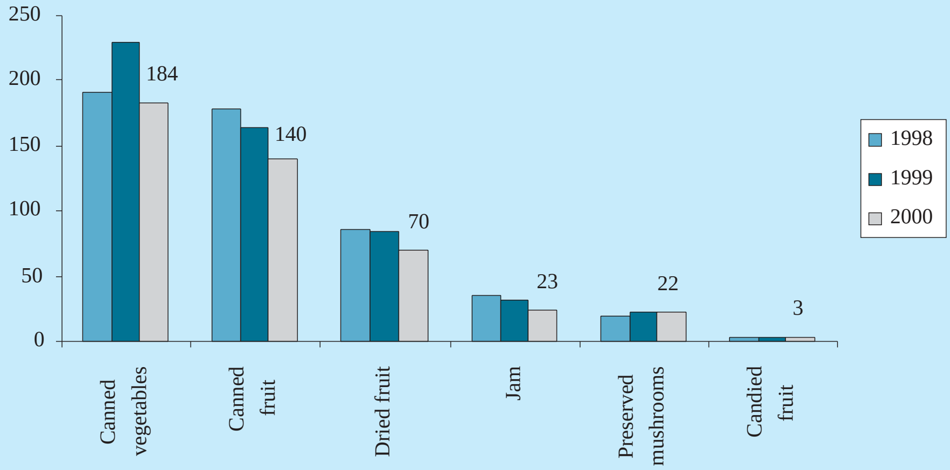
The Netherlands was among the leading EU importers of preserved fruit and vegetables in consumer and catering packs, accounting for US$ 440 million or 483 thousand tonnes in 2000. After increasing by 5 percent in value and by 11 percent in volume between 1998 and 1999, imports decreased afterwards by 17 percent in value and by 6 percent in volume between 1999 and 2000.

Despite a substantial decrease in value between 1999 and 2000, canned vegetables remained the leading product group imported into The Netherlands.
In 2000, this product group accounted for 42 percent of the total imported value of preserved fruit and vegetables in consumer & catering packs, followed by canned fruit (32%), dried fruit (16%), jam (5%), preserved mushrooms (5%) and candied fruit (1%).

Belgium and Germany were the leading suppliers to The Netherlands and occupied a relatively more important position in Netherlands' imports than in EU overall imports. This was also the case for the other leading suppliers, like Turkey, China and Thailand.
In 2000, about 55 percent of the total imported value was supplied from extra-EU countries.

The leading suppliers of preserved fruit and vegetables in consumer & catering packs to The Netherlands (share of total year 2000 imports in terms of value)
→ Belgium (17%), Germany (16%), Turkey (12%), China (10%), Thailand (8%), USA (4%), France (3%), Costa Rica (3%), Greece (3%), South Africa (2%), Italy (2%), Spain (2%), India (2%), Ecuador (2%).

Figure 5.5 **Imports of preserved fruit and vegetables in consumer & catering packs into The Netherlands, 1998-2000**
US$ million



Source: Eurostat, 2001

Belgium

In 2000, Belgian imports of preserved fruit and vegetables in consumer and catering packs amounted to US$ 310 million or 300 thousand tonnes. Compared to the preceding year, this represented a decrease by 11 percent in value and by 2 percent in volume.

Almost half of the imports of preserved fruit and vegetables for consumer and catering packs into Belgium consisted of canned vegetables, which was relatively substantial compared to the EU average. Jam was relatively more imported in Belgium, while dried fruit was relatively less imported.

France was by far the leading supplier of preserved fruit and vegetables in consumer & catering packs and had a far more dominant position in Belgium than in the other major EU markets. Kenya was among Belgium's leading suppliers and occupied a relatively more important position in Belgian imports than in EU overall imports. More than 20 percent of the total imported value of preserved fruit and vegetables in consumer and catering packs was supplied by extra-EU countries.

The leading suppliers of preserved fruit and vegetables in consumer & catering packs to Belgium (share of total year 2000 imports in terms of value)
→ France (31%), The Netherlands (26%), Germany (10%), Turkey (5%), Spain (4%), Italy (3%), USA (3%), Greece (3%), United Kingdom (2%), South Africa (2%), Kenya (2%), Morocco (2%).

5.2 Imports by product group

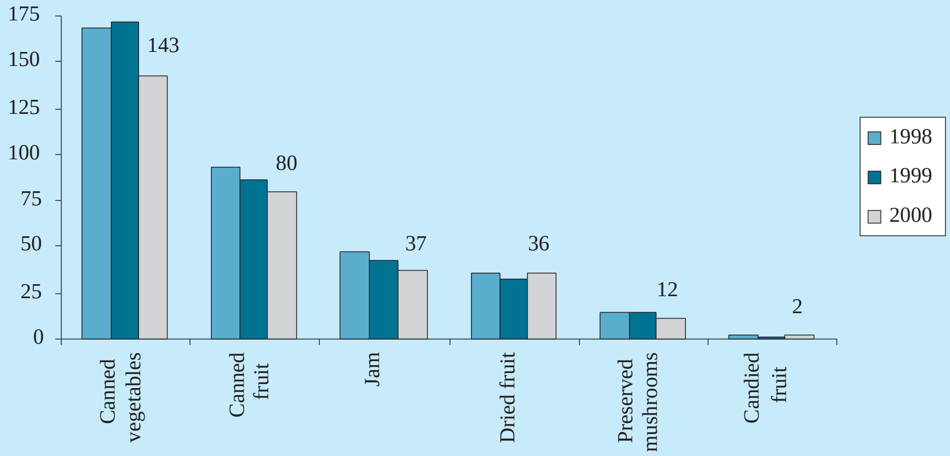
Figure 5.7 presents an overview of imports by EU member countries of preserved fruit and vegetables in consumer & catering packs by product group. Canned vegetables and canned fruit were the leading imported product groups, accounting for 70 percent of total imported value in 2000.

Canned vegetables

In 2000, this product group accounted for 40 percent of the imports by EU member countries of preserved fruit and vegetables in consumer and catering packs in terms of value. In the same year, total imports of canned vegetables amounted to US$ 1.9 billion or 2 million tonnes, representing a decrease of 16 percent in value and 8 percent in volume compared to the preceding year.

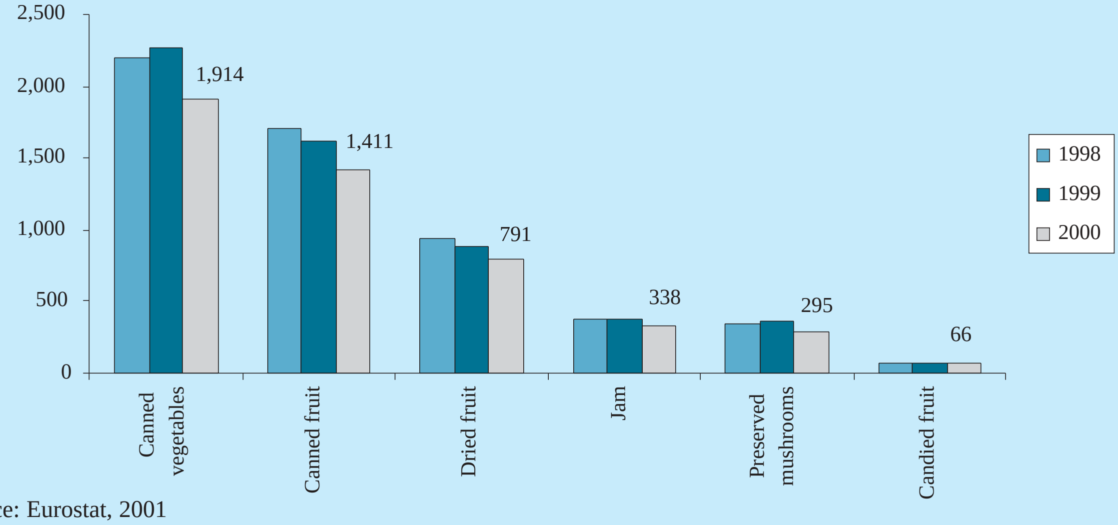
In 2000, Germany was the leading importer of canned vegetables, accounting for 23 percent of the imported value by EU member countries, followed by France (15%), the United Kingdom (15%) and The Netherlands (10%).

Figure 5.6 Imports of preserved fruit and vegetables in consumer & catering packs into Belgium, 1998-2000
US$ million



Note: trade data covering 1998 include imports into both Belgium and Luxembourg. Luxembourg's share comprised about 3 percent of the imports.
Source: Eurostat, 2001

Figure 5.7 Imports by EU member countries of preserved fruit and vegetables in consumer and catering packs, 1998-2000 US$ million



Source: Eurostat, 2001

Table 5.2 Imports by EU member countries of canned vegetables, 1998-2000 US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	2,194,623	1,970,044	2,268,698	2,140,281	2,211,450	1,914,088	2,080,530	2,031,773
Extra-EU	538,961	457,894	633,165	597,325	576,505	545,869	593,336	543,466
Germany	543,815	619,509	545,672	514,785	633,401	441,243	479,612	580,643
France	345,022	291,131	353,152	333,162	305,526	296,315	322,082	304,322
United Kingdom	380,520	296,454	378,607	357,176	400,535	284,450	309,185	282,831
The Netherlands	190,496	175,729	229,436	216,449	229,090	183,683	199,655	194,135
Spain	144,383	98,105	157,397	148,488	107,505	171,581	186,501	131,440
Italy	198,929	146,040	191,187	180,365	156,364	169,877	184,649	168,652
Belgium	n.a.	n.a.	171,732	162,011	171,488	142,835	155,255	157,598
Sweden	64,585	47,523	64,714	61,051	51,058	59,714	64,907	53,894
Denmark	51,276	47,540	51,824	48,891	48,234	45,735	49,712	53,125
Austria	38,950	32,383	41,014	38,692	41,576	34,760	37,783	36,903
Ireland	25,915	18,769	31,189	29,424	20,383	33,719	36,651	21,704
Portugal	17,661	21,309	17,535	16,542	22,334	15,952	17,339	19,934
Greece	10,816	8,973	12,351	11,652	9,298	12,217	13,279	11,340
Luxembourg	n.a.	n.a.	10,853	10,239	6,637	11,213	12,188	7,273
Finland	14,486	8,854	12,046	11,364	8,021	10,798	11,737	7,979
Belgium & Luxembourg	167,774	157,725	-	-	-	-	-	-

Source: Eurostat, 2001

In 2000, canned potatoes accounted for 19 percent of total canned vegetable imports (in value), followed by asparagus (12%), olives (12%), sweet corn (9%), beans (9%) and cucumbers & gherkins (6%). The Netherlands and France were the leading suppliers of canned vegetables, together supplying 30 percent of total canned vegetable imports (in value) by EU member countries.

The leading suppliers (share of total year 2000 imports in terms of value) of:

potatoes → The Netherlands (31%), Belgium (24%), Germany (15%), France (9%), UK (6%)
asparagus → China (35%), Peru (34%), The Netherlands (16%), Germany (8%), Spain (5%)
olives → Spain (37%), Greece (26%), Morocco (21%), Turkey (7%), Italy (2%), France (2%)
sweet corn → France (44%), USA (10%), Hungary (9%), Thailand (8%), The Netherlands (8%)
beans → Italy (20%), France (19%), The Netherlands (14%), Belgium (10%), UK (8%), Kenya (6%)
cucumbers & gherkins → Turkey (26%), Germany (21%), The Netherlands (18%), Belgium (10%), Hungary (7%)

Canned fruit

In 2000, this product group accounted for 29 percent of the imported value by EU member countries of preserved fruit and vegetables in consumer and catering packs. Between 1998 and 2000, the imported value decreased by 18 percent, amounting to US$ 1.4 billion in 2000. In terms of volume, imports increased by 4 percent, reaching 1.7 million tonnes in 2000.

Pineapples, citrus fruit, peaches and mixtures played the major role within this product group, accounting for almost two-thirds of total imports.

The leading suppliers (share of total year 2000 imports in terms of value) of:

pineapples → Thailand (37%), Kenya (14%), The Netherlands (12%), Indonesia (10%), Philippines (9%)
citrus fruit → Spain (35%), Israel (16%) Turkey (12%, China (10%), The Netherlands (6%)
peaches → Greece (52%), Spain (13%), Germany (10%), Italy (9%), South Africa (5%), France (3%)
mixtures → Italy (30%), Germany (19%), South Africa (7%), The Netherlands (7%), France (6%)

Table 5.3 Imports by EU member countries of canned fruit, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	1,710,252	1,594,888	1,621,998	1,530,187	1,593,204	1,410,533	1,533,188	1,651,751
Extra-EU	678,792	676,546	637,019	600,961	671,500	551,567	599,529	710,846
Germany	479,921	506,936	457,882	431,964	505,985	395,970	430,402	528,985
United Kingdom	306,021	258,461	289,790	273,387	262,036	244,918	266,215	257,524
France	292,417	242,830	268,130	252,953	238,227	240,299	261,195	244,848
The Netherlands	178,868	186,773	163,560	154,302	187,249	140,179	152,368	197,520
Italy	107,579	97,919	88,247	83,252	89,756	81,576	88,670	101,713
Belgium	n.a.	n.a.	86,546	81,647	78,119	80,161	87,132	82,961
Spain	66,079	51,775	74,823	70,588	60,679	64,923	70,568	66,638
Austria	44,679	45,794	42,306	39,911	41,498	37,382	40,633	43,086
Sweden	38,079	29,848	42,472	40,068	33,696	34,469	37,466	30,460
Finland	28,205	23,916	29,531	27,859	25,508	21,505	23,375	23,871
Denmark	18,940	17,064	20,591	19,425	18,382	18,971	20,621	20,868
Portugal	23,059	27,493	23,911	22,558	26,673	17,497	19,019	23,910
Greece	16,735	10,870	14,286	13,477	9,955	15,187	16,508	13,842
Ireland	16,696	12,438	16,998	16,036	13,841	14,411	15,664	13,613
Luxembourg	n.a.	n.a.	2,950	2,783	1,600	3,102	3,372	1,912
Belgium & Luxembourg	92,990	82,771	-	-	-	-	-	-

Source: Eurostat, 2001

Dried fruit

This product group accounted for almost 16 percent of 2000 value imports by EU member countries of preserved fruit and vegetables in consumer & catering packs. Between 1998 and 2000, dried fruit imports by EU member countries decreased by about 16 percent in value and 4 percent in volume, amounting to US$ 790 million or 541 thousand tonnes in 2000.

The leading importer of dried fruit was the United Kingdom, accounting for 27 percent of imports by EU member countries in 2000. Other leading EU importers were Germany (21%), France (13%), Italy (9%) and The Netherlands (9%).

Sultanas, other dried grapes, dates, prunes, apricots and figs played the major role within this product group, together accounting for nearly 85 percent of total imports.

The leading suppliers (share of total year 2000 imports in terms of value) of:

- sultanas → Turkey (71%), Greece (5%), Iran (5%), South Africa (4%), USA (4%)
- other grapes → USA (59%), Turkey (13%), South Africa (6%), Chile (5%), The Netherlands (3%)
- dates → Tunisia (44%), Algeria (13%), France (13%), Israel (12%), USA (5%), Iran (4%)
- prunes → USA (59%), France (16%), Chile (7%), Argentina (5%), The Netherlands (3%)
- apricots → Turkey (81%), France (8%), The Netherlands (2%), Germany (2%)
- figs → Turkey (81%), Greece (5%), France (3%), The Netherlands (2%), Germany (2%)

Table 5.4 Imports of dried fruit by EU member countries, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	936,883	561,401	879,245	829,476	550,340	791,380	860,196	540,926
Extra-EU	686,958	417,764	649,180	612,434	410,677	598,120	650,130	417,096
United Kingdom	259,920	164,791	243,939	230,131	158,918	215,171	233,882	152,579
Germany	204,627	121,043	192,323	181,437	125,372	163,048	177,226	117,241
France	117,463	62,800	106,846	100,798	62,067	106,159	115,390	65,899
Italy	82,169	45,347	78,876	74,411	45,899	72,941	79,284	45,084
The Netherlands	85,632	59,141	84,612	79,823	59,113	70,259	76,368	53,911
Belgium	n.a.	n.a.	32,996	31,128	22,180	36,304	39,461	26,245
Spain	35,538	20,708	33,915	31,995	20,699	35,002	38,046	22,611
Sweden	24,535	11,712	25,691	24,237	11,548	20,743	22,547	10,443
Denmark	23,687	13,868	21,407	20,195	11,364	20,238	21,998	12,187
Austria	23,408	12,767	19,792	18,672	11,534	16,209	17,619	10,118
Finland	13,029	6,658	13,465	12,703	6,612	10,352	11,252	5,356
Ireland	11,424	7,893	9,311	8,784	6,602	10,176	11,061	8,431
Portugal	7,586	4,834	7,601	7,171	5,200	7,539	8,195	6,089
Greece	12,338	7,414	6,665	6,288	2,735	5,504	5,983	4,209
Luxembourg	n.a.	n.a.	1,805	1,703	497	1,742	1,894	523
Belgium & Luxembourg	35,542	22,425	-	-	-	-	-	-

Source: Eurostat, 2001

Jam

This product group accounted for 7 percent of imports by EU member countries of preserved fruit and vegetables in consumer & catering packs.
Between 1998 and 2000, jam imports by EU member countries decreased by 9 percent in value, but increased by 4 percent in volume, amounting to US$ 338 million or 256 thousand tonnes in 2000.

The leading importer of jam was Germany, accounting for 24 percent of value imports by EU member countries in 2000. German imports, however, decreased considerably between 1998 and 2000.

In 2000, France was the leading supplier of jam to the EU, accounting for 22 percent of value imports by EU member countries, followed by The Netherlands (15%), Belgium (15%), Germany (14%) and Denmark (8%).

Preserved mushrooms

This product group accounted for 6 percent of imports by EU member countries of preserved fruit and vegetables in consumer and catering packs.
In 2000, imports amounted to US$ 295 million (236 thousand tonnes), representing a decrease of 19 percent in value and 7 percent in volume compared to the preceding year.

Germany was the leading importer of preserved mushrooms for industrial use, accounting for almost half of value imports by EU member countries in 2000. Other leading EU importers were France (17%), Italy (9%) and The Netherlands (7%).

The leading supplier of preserved mushrooms for industrial use was, by far, The Netherlands accounting for 45 percent of imports by EU member countries, followed by China (17%), France (12%) and Spain (11%).

Candied fruit

This product group accounted for less than 1 percent of imports by EU member countries of preserved fruit and vegetables for industrial use, amounting to US$ 66 million or 30 tonnes in 2000. The United Kingdom and Germany were the leading importers, together accounting for almost 60 percent of imports by EU member countries. Leading suppliers were France, Italy and The Netherlands, together accounting for 70 percent of the total imported value by EU member countries in 2000. Only 13 percent of value imports was supplied extra-EU.

Table 5.5 Imports by EU member countries of jam, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	371,592	245,765	370,749	349,763	248,192	337,634	366,993	255,995
Extra-EU	13,915	11,228	17,407	16,422	13,907	16,304	17,722	12,673
Germany	97,263	72,196	92,756	87,506	73,567	81,275	88,342	68,973
United Kingdom	47,955	24,714	55,488	52,347	28,382	53,417	58,062	32,737
France	60,888	46,667	56,219	53,037	47,823	53,259	57,890	50,841
Belgium	n.a.	n.a.	42,663	40,248	23,247	37,048	40,270	24,077
The Netherlands	34,623	23,554	32,582	30,738	23,246	23,235	25,255	18,955
Italy	19,844	17,903	22,894	21,598	11,785	20,621	22,414	13,942
Spain	14,948	8,039	12,985	12,250	7,508	12,952	14,078	9,575
Sweden	13,584	8,054	11,947	11,271	7,224	11,362	12,350	7,987
Portugal	9,115	5,316	8,293	7,824	5,042	9,064	9,852	6,504
Ireland	5,988	3,320	7,926	7,477	4,707	7,924	8,613	4,310
Austria	5,910	3,349	8,112	7,653	5,940	6,942	7,546	5,611
Luxembourg	n.a.	n.a.	4,038	3,809	1,686	6,580	7,152	3,772
Finland	5,033	2,433	5,964	5,626	3,122	6,266	6,811	3,435
Greece	5,863	2,317	4,913	4,635	2,143	4,015	4,364	2,086
Denmark	3,603	2,109	3,970	3,745	2,770	3,672	3,991	3,190
Belgium & Luxembourg	46,980	25,794	-	-	-	-	-	-

Source: Eurostat, 2001

Table 5.6	Imports of preserved mushrooms by EU member countries, 1998-2000 US$ thousand / € thousand / tonnes							
	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	342,898	236,627	363,423	342,852	254,007	294,567	320,181	236,236
Extra-EU	46,785	40,808	68,003	64,154	53,110	70,036	76,126	64,637
Germany	166,207	113,038	187,884	177,249	127,202	133,933	145,579	114,250
France	50,746	31,356	53,110	50,104	34,127	49,249	53,531	35,162
Italy	23,361	16,563	28,669	27,046	20,728	26,022	28,285	23,542
The Netherlands	18,543	17,718	21,639	20,414	15,033	21,795	23,690	17,509
Sweden	15,885	12,401	14,691	13,859	11,058	12,618	13,715	10,561
Belgium	n.a.	n.a.	14,092	13,294	8,974	11,672	12,687	8,366
Portugal	9,314	6,315	10,895	10,278	7,164	9,567	10,399	7,018
United Kingdom	9,230	6,163	10,124	9,551	14,806	9,495	10,321	5,129
Denmark	14,747	9,538	7,505	7,080	5,075	6,561	7,131	4,816
Finland	4,899	3,512	3,717	3,507	2,744	3,905	4,245	3,298
Greece	8,808	6,973	5,513	5,201	4,293	3,592	3,904	3,012
Austria	3,575	1,985	3,391	3,199	1,867	3,108	3,378	1,877
Spain	2,035	1,252	944	891	367	1,650	1,793	981
Luxembourg	n.a.	n.a.	884	834	447	1,198	1,302	649
Ireland	594	257	367	346	122	201	219	66
Belgium & Luxembourg	14,956	9,556	-	-	-	-	-	-

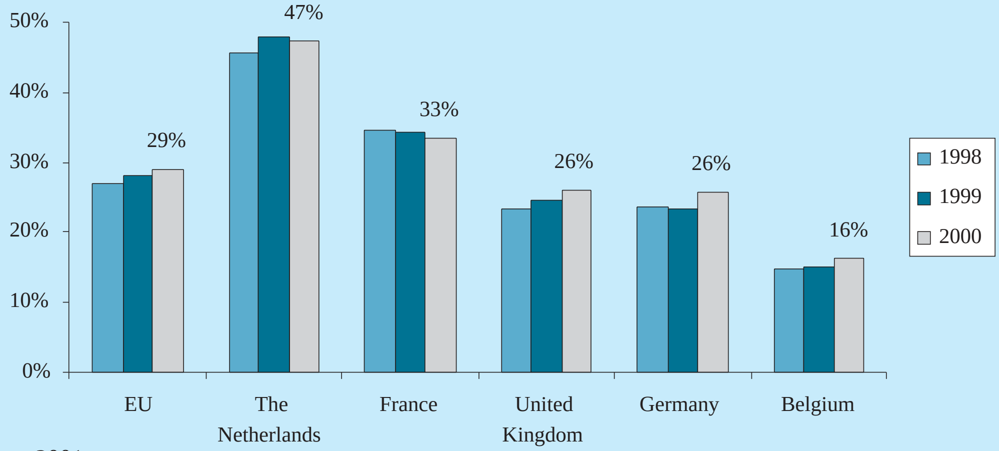
Source: Eurostat, 2001

5.3 The role of the developing countries

In 2000, imports of preserved fruit & vegetables in consumer & catering packs originating in developing countries amounted to US$ 1.4 billion or 1.4 million tonnes, representing a decrease of 9 percent in value, but an increase of 11 percent in volume, compared to 1998. The 9 percent decrease was less substantial than the 14 percent decrease in total EU imports, which resulted in a larger share of value imports from developing countries.

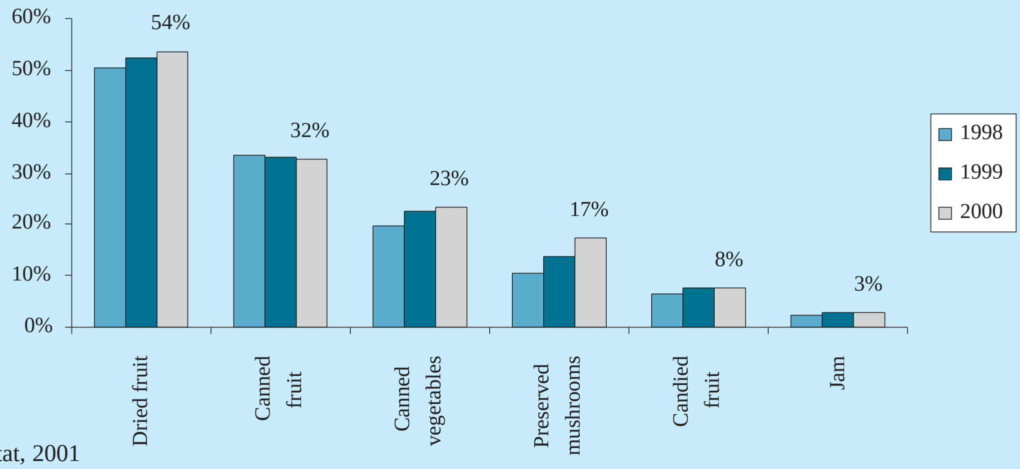
Although developing countries have a high share in EU imports for a number of product groups, this is particularly the result of the leading position of Turkey, mainly in dried fruits, and the fact that canned tomatoes are not included under canned vegetables as they are not a very interesting product for developing countries. As shown in Figure 5.8, developing countries played a relatively more important role in The Netherlands' and French imports compared to the EU average.

Figure 5.8 **Share of developing countries in imports of preserved fruit & vegetables in consumer & catering packs into the EU and selected EU countries, 1998-2000 % of imported value**



Source: Eurostat, 2001

Figure 5.9 **Share of developing countries in imports of preserved fruit and vegetables in consumer and catering packs by EU member countries, 1998-2000, % of imported value**



Source: Eurostat, 2001

Dried fruit was the leading product group supplied by developing countries. Between 1998 and 2000, the share of imports of dried fruit supplied by developing countries increased from 50 percent to 54 percent of total value imports of dried fruit. Other important product groups for developing country exporters were canned fruit and canned vegetables, of which the share of imports originating in developing countries was over 20 percent of total imports.

Among the top fifteen supplying countries of preserved fruit and vegetables in consumer & catering packs were the following developing countries: Turkey, China, Thailand, Peru, Morocco and South Africa. Other important developing country suppliers were Kenya, Tunisia, Costa Rica and India.

Product groups and main developing country suppliers (share in % of total value supplied by developing countries, 2000)

canned vegetables	→ China (27%), Turkey (20%), Peru (19%), Morocco (13%), Thailand (7%), India (5%), Kenya (2%)
canned fruit	→ Thailand (27%), South Africa (11%), Kenya (9%), Costa Rica (8%), Turkey (7%), Philippines (7%), Indonesia (6%), China (6%)
dried fruit	→ Turkey (64%), Tunisia (11%), Chile (6%), Iran (5%), South Africa (4%), Algeria (3%)
jam	→ Turkey (55%), South Africa (8%), Taiwan (4%), India (3%), Costa Rica (2%), Moldova (2%), Swaziland (2%)
preserved mushrooms	→ China (96%), Indonesia (1%), Turkey (1%), Morocco (1%)
candied fruit	→ China (39%), Thailand (32%), Fiji (10%), Brazil (10%), Turkey (5%), South Africa (1%)
total	→ **Turkey (29%), China (15%), Thailand (11%), Peru (6%), Morocco (5%), South Africa (5%)**

DC = Developing countries
Source: Eurostat, 2001

6 EXPORTS

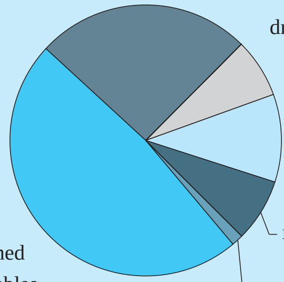
In 2000, value exports by EU member countries of preserved fruit and vegetables in consumer & catering packs amounted to US$ 4.3 billion, representing a decrease by 13 percent since 1998. In terms of volume, exports remained more or less stable, with a small decline in 1999, amounting to 4.3 million tonnes in 2000.

Spain was the leading EU exporter accounting for 19 percent of total exports, followed by France (16%), The Netherlands (14%) and Greece (11%). Between 1998 and 2000, the values exported by these countries decreased considerably.

In 2000, the leading destinations for preserved fruit and vegetables in consumer & catering packs were Germany, the United Kingdom, France and the USA, receiving 52 percent of total exports by EU member countries. Most of the trade was intra-EU oriented (almost 75% of total value exports). Leading extra-EU destinations were the USA, Canada, Switzerland, Russia, Japan, Australia, Poland and Saudi Arabia.

Canned vegetables were, by far, the leading exported product group, followed by canned fruit. This trade in canned fruit and vegetables, however, mainly consists of re-exports to the other EU member states. The EU member countries exported relatively small amounts of dried fruit.

Figure 6.1 Exports by EU member countries of preserved fruit and vegetables in consumer & catering packs, 2000 % of total value



Source: Eurostat, 2001

Table 6.1 Exports by EU member countries of preserved fruit and vegetables in consumer & catering packs, 1998-2000 US$ thousand / € thousand / tonnes

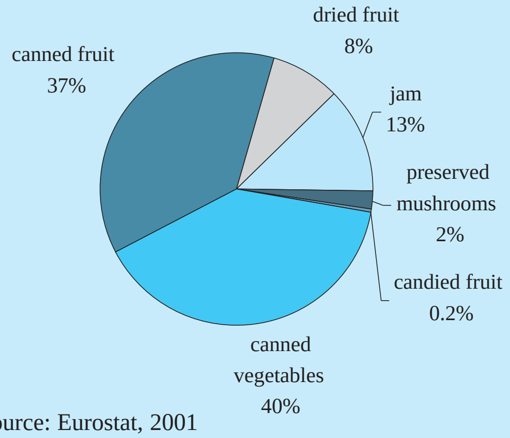
	1998 value US$	1998 volume	1999 value US$	1999 value €	1999 volume	2000 value US$	2000 value €	2000 volume
Total	4,946,678	4,256,266	4,824,227	4,551,158	4,144,208	4,303,870	4,678,120	4,266,047
Extra-EU	1,129,923	778,083	1,088,557	1,026,941	773,715	1,120,336	1,217,756	983,258
Spain	869,951	684,150	865,648	816,649	656,538	818,729	889,923	729,981
France	799,532	553,182	779,153	735,050	547,920	698,163	758,873	560,914
The Netherlands	812,871	991,360	821,289	774,801	867,344	620,091	674,012	782,934
Greece	534,897	494,713	428,798	404,526	435,386	483,342	525,372	578,209
Italy	532,786	541,630	518,595	489,241	557,149	445,535	484,277	538,372
Germany	508,988	324,827	493,197	465,280	339,589	433,434	471,124	337,315
Belgium	n.a.	n.a.	473,127	446,346	484,875	397,335	431,886	481,995
United Kingdom	181,817	101,716	186,182	175,643	107,463	165,094	179,450	98,798
Denmark	96,188	57,473	107,166	101,100	63,996	97,333	105,797	64,801
Austria	68,302	38,796	72,330	68,236	41,989	73,981	80,414	49,341
Portugal	33,162	21,588	34,227	32,290	20,957	28,509	30,988	21,435
Sweden	20,400	10,166	17,965	16,948	9,412	17,770	19,315	9,857
Ireland	12,855	3,956	16,002	15,096	6,256	13,783	14,982	5,900
Finland	16,557	6,763	9,944	9,381	5,038	7,961	8,653	4,569
Luxembourg	n.a.	n.a.	651	614	296	2,845	3,092	1,626
Belgium & Luxembourg	458,414	425,946	-	-	-	-	-	-

Source: Eurostat, 2001

Germany

In 2000, German exports of preserved fruit and vegetables in consumer and catering packs amounted to US$ 433 million or 337 thousand tonnes, indicating a decrease in value by 15 percent, but an increase by 4 percent in volume, since 1998. Germany exported a relatively large share of canned fruit, but only small amounts of preserved mushrooms.

Figure 6.2 German exports of preserved fruit and vegetables in consumer & catering packs, 2000 % of total value

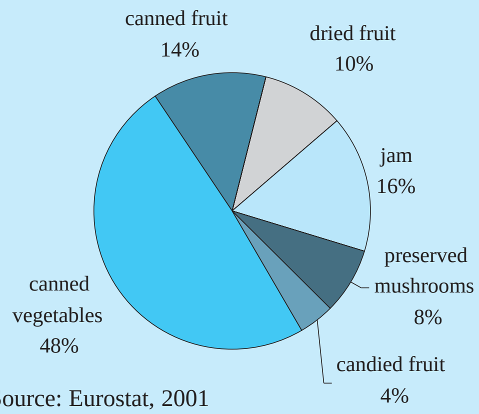


Source: Eurostat, 2001

France

In 2000, France was the second leading EU exporter of preserved fruit and vegetables in consumer and catering packs, with imports amounting to US$ 681 million or 561 thousand tonnes in 2000. Compared to 1998, this represented a decrease of 13 percent in terms of value, while imports in terms of volume remained fairly stable. In 2000, France was the leading EU exporter of candied fruit.

Figure 6.4 French exports of preserved fruit and vegetables in consumer & catering packs, 2000 % of total value

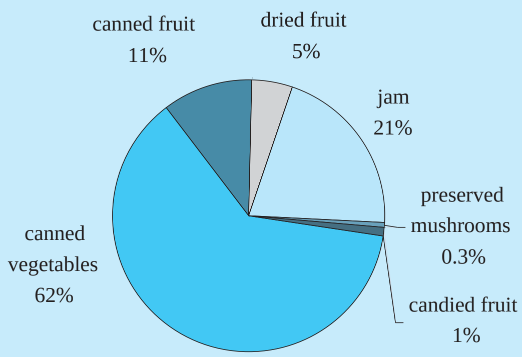


Source: Eurostat, 2001

United Kingdom

Although the United Kingdom was the second leading importer of preserved fruit and vegetables in consumer & catering packs, it was a relatively small exporter of these products. In 2000, exports amounted to US$ 165 million or 99 thousand tonnes, representing a decrease of 11 percent in value and of 8 percent in volume compared to the preceding year. Most of the exported value consisted of canned vegetables. Jam was also a leading product group exported by the United Kingdom.

Figure 6.3 UK exports of preserved fruit and vegetables in consumer & catering packs, 2000 % of total value

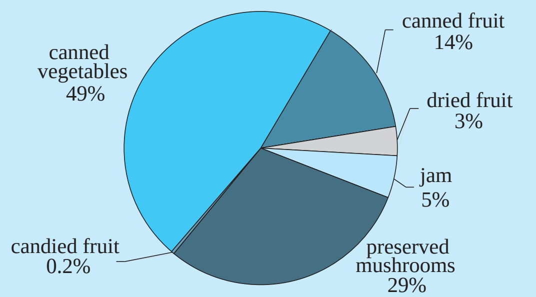


Source: Eurostat, 2001

The Netherlands

In 2000, total Netherlands exports of preserved fruit and vegetables in consumer and catering packs amounted to US$ 620 million or 783 thousand tonnes in 2000, representing a decrease of 24 percent in value and 21 percent in volume since 1998. In 2000, The Netherlands was the third leading EU exporter of these product groups. However, like neighbouring Belgium, The Netherlands is mainly used as gateway to the rest of the EU, as 94 percent of the exported value was destined for other EU member countries.
The Netherlands was by far the leading EU exporter of preserved mushrooms.

Figure 6.5 Netherlands exports of preserved fruit and vegetables in consumer & catering packs, 2000 % of total value

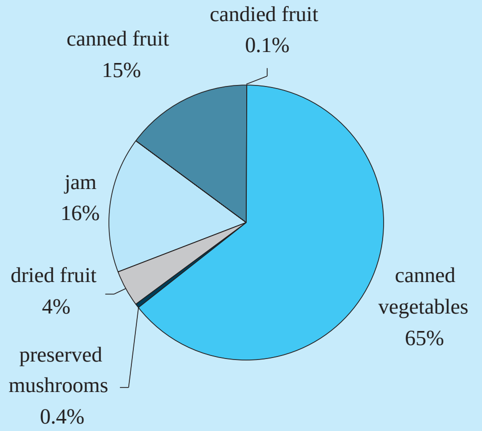


Source: Eurostat, 2001

Belgium

Belgian exports of preserved fruit and vegetables in consumer and catering packs amounted to US$ 397 million or 482 thousand tonnes in 2000, which represented a 16 percent decrease in value compared to the preceding year. In terms of volume, exports remained fairly stable. Belgium mainly exported canned vegetables and relatively small amounts of preserved mushrooms.

Figure 6.6 Belgian exports of preserved fruit and vegetables in consumer & catering packs, 2000 % of total value



Source: Eurostat, 2001

7 TRADE STRUCTURE

7.1 EU trade channels

Preserved fruit and vegetables in consumer and catering packs can reach their final destination by passing through different trade channels. The selection of the trade channel and the trade partner depends on the product and services to be delivered by the potential trade partner. By selecting one specific channel and trade partner, other trade partners are often automatically included. It is important that the exporter is aware of the different channels in the market.
Some producers will bargain directly with the major end users. Other producers will sell by means of independent traders (importers) or sales agents.

Nevertheless, for exporters of most preserved fruit and vegetables, the following major business partners can be distinguished:

Agents
Agents are intermediaries executing the buying and selling orders of a customer against a commission. The products do not pass physically through the agents' hands or even through their countries of operation. The customer of an agent can be a wholesaler, importer, a catering organisation or a retail organisation.
Agents are usually well informed about the current market trends, prices and users. Leading agents for preserved fruit and vegetables in The Netherlands are E. van de Sandt, Gloe & Co and Buttner & Co.

Importers
Importers buy and sell preserved fruit and vegetables on their own account mainly to the food industry and re-exporters. Importers take 'long' or 'short' positions in the market depending on their expectations of future price trends. If an importer sells 'short', he is contracting to sell products, which he does not yet possess, while taking a 'long' position means that he has unsold products in his trading account. Often, these large intermediaries function as importers, wholesalers and exporters at the same time. Leading importers in The Netherlands are Catz International and Boas.

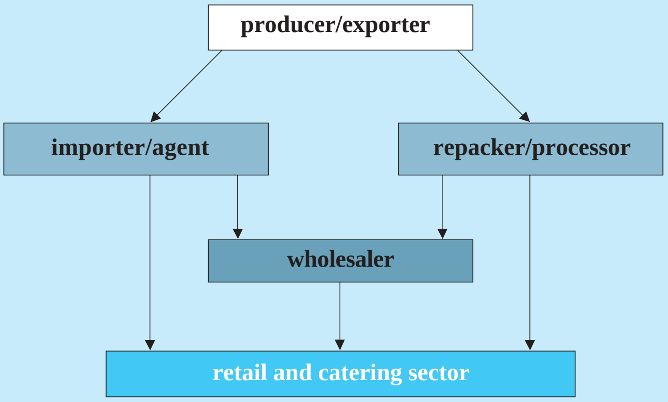
Retail and catering organisations
Retailers carry out the final stage of selling preserved fruit and vegetables to consumers, accounting for a very large share of the total sales. The retail sectors hardly import directly, but buy from wholesalers or importers. In the case of jam and canned vegetables, retailers have a strong negotiating position due to the many substitution possibilities between products and suppliers, as well as the practice of private labelling. In The Netherlands, large supermarket buying groups are Ahold (Albert Heijn supermarkets) and Laurus (Edah, Konmar and Super De Boer). Because of their much smaller size, catering sectors do not import directly from source.

Packers
These organisations pack goods in standard packs for the European market. The repackers keep the goods on stock in their warehouse, at their own risk,
and sometimes under their own brand or the private label of a customer. These packers sometimes function as importers as well.
More or less the same trade structure applies to all the products discussed in this survey. Many importers, agents, or repackers are specialised in more than one product group. For example, Catz Int. is specialised in dried fruit and frozen fruit and vegetables.
Some importers also act as an agent.
Moreover, most importers trade in preserved fruit and vegetables in consumer packs and catering packs, but also in preserved fruit and vegetables for industrial use.

Potential exporters in developing countries should contact importers, processors and packers in the EU. These intermediaries have long established links with their customers and are in a better position (than foreign processors) to know the requirements of the local market and of individual end users. They supply supermarkets chains directly and are financially able to support exclusive contracts, advertising campaigns and to service special requirements.

For contact details of Netherlands importers and most important EU importers, please refer to Appendix 11.

Figure 7.1 Distribution channels



7.2 Distribution channels for developing country exporters

An interesting distribution channels for developing country exporters of preserved fruit and vegetables are importers. Importers not only have experience and knowledge of the international market, they also have strong relationships with suppliers and buyers all over the world. Please refer to Appendix 11 for a list of importers of preserved fruit and vegetables in consumer & catering packs. Some of the importers have an Internet site, where interested parties can find more information on the field in which these importers are active.

Trade fairs are also important meeting points for developing countries' exporters and EU importers. A trade fair is a good opportunity for personal contact between business partners. Please refer to Appendix 6 for contact details of trade fairs. More information on trade fairs is provided in Section 1.6.1 of the EU Strategic Marketing Guide 'Preserved Fruit and Vegetables for Consumer & Catering Packs'.

Developing-country exporters of organically grown products can get themselves listed as suppliers on www.green-tradenet.de, a site where suppliers and buyers of organic products come together on a market place. Suppliers can specify their offer and company name. Product groups on offer include dried fruit, canned pickles and fruit products. Please refer to Appendix 9 for full contact details of Green Trade Net. The Internet site www.europages.com is another good source for finding contact details and information on the activities of importers. The most interesting contacts at Europages can be found under the categories Agriculture & Livestock and Food & Related Products.

8 PRICES AND MARGINS

8.1 Prices and margins

Domestic, import and export prices of preserved fruit and vegetables are highly dependent on several factors, such as the type of the product, its origin and the total supply of the fresh products. The highly changeable harvests of fresh fruit and vegetables are the major determinant of price fluctuations of preserved fruit and vegetables, because prices of fresh products are set on a global level, and speculation on the harvests can cause rapid changes in the price level of the preserved fruit and vegetables.

Other factors that play a price-determining role:

- preservation method;
- correct and constant quality;
- size of the order;
- inflation and/or exchange rate.

Prices for many preserved fruit and vegetables vary considerably. Therefore, it is recommended to monitor world markets and price movements, in order to be able to set a realistic price. Please refer to Table 8.1 for an indication of retail prices of canned vegetables in The Netherlands. These prices include a value added tax (VAT) of 10 percent.
The considerable fluctuation in prices is reflected in the margins, making it difficult to give an exact indication. Some general differences between the intermediaries can nevertheless be distinguished. Importers or repackers take more risks than agents, because of the fact that the preserved fruit and vegetables are temporarily in their possession. Their margins are therefore higher than the margins of agents.

Table 8.1 Retail prices (incl. 19% VAT) in The Netherlands for dried fruit products

Product	Brand	Size in gram	Retail price in €
Raisins (dark)	AH	250	0.69
Raisins (organic)	AH	250	0.90
Raisins (white)	AH	250	0.90
Currants	AH	200	0.54
Apricots	AH	200	1.35
Apples	AH	150	1.49
Prunes	AH	250	1.69
Tutti frutti*	AH	500	2,19

* Tutti frutti containing dried prunes, apricots, peaches, pears and apples.
Source: Albert Heijn (AH), the leading supermarket in The Netherlands, September 2002

8.2 Sources of price information

As prices of preserved fruit and vegetables can fluctuate strongly, it is important to have continuous access to up-to-date price information. Intermediaries can provide this information. Other sources of price information are international publications listed below.

- “The Public Ledger” (dried fruit)
- “Foodnews” (canned/frozen fruit and vegetables, preserved mushrooms)
- “Commodity Market Review” (food and agricultural commodities)
- “Food Outlook” (cereals and other basic food commodities)

Some of these information sources have an Internet site on which more information on prices can be obtained. Contact details of the publishers of these magazines are provided in Appendix 4 and 7.

9 OPPORTUNITIES FOR EXPORTERS

Competition in the food sector is strong and quality requirements are high. Most of the preserved fruit and vegetables are imported for industrial use. On the basis of the trade statistics, it seems that developing countries have a strong position in the trade of preserved fruit and vegetables in catering & consumer packs supplying almost 30 percent of total imports by EU member countries. The high figure, however, is particularly the result of the leading position of Turkey and the fact that canned tomatoes are not included under canned vegetables as they are not very interesting for producers in developing countries. The import of preserved fruit and vegetables only concerns a small number of products.

Leading products from developing countries are canned pineapples (Thailand) and canned asparagus (Peru, China). However, it very difficult to export processed products in consumer & catering packs to the EU. Most of the trade channels traditionally import raw materials/semi-processed products, which will be further processed and packaged in consumer or catering packs by European industry.

Therefore, opportunities seem limited. There may be opportunities on the EU market for preserved fruit and vegetables in consumer and catering packs, but only if exporters in developing countries can offer a high-quality, attractive product at a competitive price.

The advice we can give in order to be successful in the competitive food market is:

Go 'organic'
Healthy, natural and organic products are occupying an increasingly stronger position in the EU. This applies to the consumer market as well as to the food industry. Organic production is particularly attractive for growers in developing countries, since much of their food production is already organic or can easily be changed to organic.

Adopt HACCP
Although exporters to the EU are not obliged to apply an HACCP system and their system will not be subject to control by the food inspection service in the importing country, adopting an approved HACCP system, or working following a similar principle of quality control, will be a very positive argument in export business. The HACCP standard is sometimes required by the importer. More information on HACCP and its adoption is provided in Section 1.1 of the EU Strategic Marketing Guide 'Preserved Fruit and Vegetables in Consumer & Catering Packs'.

Adopt GAP
The standards for Good Agricultural Practice have been developed by the Euro-Retailer Produce Working Group. These standards are applicable to the production of fresh fruit and vegetables by promoting food safety, sustainable use of natural resources and more environment-friendly production. If exporters of preserved fruit and vegetables can ensure that their raw materials are produced according to GAP, they have an advantage on the European market. For more information on the Eurep Group and its standards, please refer to *www.eurep.org*

APPENDIX 1 NOMENCLATURE

DRIED FRUIT

HS code		Description
0803		**Bananas, including plantains, fresh or dried**
	0090	bananas
0804		**Dates, figs, pineapples, avocados, guavas, mangoes and mangosteens, fresh or dried**
	1000	dates (fresh and dried)
	2090	figs
0806		**Grapes, fresh or dried**
	2011/91	currants
	2012/92	sultanas
	2018/98	other dried grapes
0813		**Other dried fruit; mixtures of nuts or dried fruit**
	1000	apricots
	2000	prunes
	3000	apples
	4010	peaches, including nectarines
	4030	pears
	4050	papayas
	4060	tamarind fruit
	4070/95	other dried fruit
	5012/15/19/91/99	mixtures of dried fruit

PRESERVED MUSHROOMS

HS code		Description
2001		**Vegetables, fruit, nuts, and other edible parts of plants, prepared or preserved by vinegar or acetic acid**
	9050	mushrooms
2003		**Mushrooms and truffles, prepared or preserved otherwise than by vinegar or acetic acid**
	1030	cultivated mushrooms
	1080	other mushrooms
	2000	truffles

CANNED FRUIT

HS code		Description
2008		**Fruit, nuts and other edible parts of plants, otherwise prepared or preserved, whether or not containing added sugar or other sweetening matter or spirit, not elsewhere specified or included**
	20	pineapples
	30	citrus fruit
	40	pears
	50	apricots
	60	cherries
	70	peaches
	80	strawberries
	91	palm hearts
	92	mixtures
	99	other fruit

CANNED VEGETABLES

HS code	Description
2001	**Vegetables, fruit, nuts and other edible parts of plants, prepared or preserved by vinegar or acetic acid:**
1000	cucumbers and gherkins
2000	onions
9010	mango chutney
9020	fruit of the genus Capsicum other than sweet peppers or pimentos
9030	sweet corn (Zea mays var. saccharata)
9040	yams, sweet potatoes and similar edible parts of plants containing 5% or more by weight of starch
9060	palm hearts
9065	olives
9070	sweet peppers
9075	salad beetroot (beta vulgaris var. conditiva)
9085	red cabbages
9091/96	other
2005	**Other vegetables prepared otherwise than by vinegar or acetic acid, not frozen, not preserved by sugar**
10	homogenised vegetables
20	potatoes
40	peas (pisum sativum)
51/59	beans (vigna spp., phaseolus spp.)
60	asparagus
70	olives
80	sweet corn
90	other vegetables and mixtures of vegetables

JAM

HS code	Description
2007	**Jam, fruit jelly, marmalade, fruit or nut puree and fruit or nut pastes, being cooked preparations, whether or not containing added sugar or other sweetening matter**
10	homogenised preparations
91	citrus fruit
99	other fruit

CANDIED FRUIT

HS code	Description
2006	**Vegetables, fruit, nuts, fruit peel and other parts of plants, preserved by sugar (drained, glacé or crystallised)**
0010	ginger
0031	cherries with a sugar content exceeding 13% by weight
0035	tropical fruit and nuts with a sugar content exceeding 13% by weight
0038	other fruit with a sugar content exceeding 13% by weight
0090	other fruit

APPENDIX 2 DETAILED IMPORT/EXPORT STATISTICS

The source of the data presented below is Eurostat COMEXT 2001.

IMPORTS

Imports of preserved fruit and vegetables in consumer & catering packs into the EU, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	5,629,584	4,637,591	5,576,002	5,260,379	4,909,891	4,814,381	5,233,023	4,747,099
Extra-EU	1,972,251	1,606,617	2,012,371	1,898,463	1,728,668	1,790,615	1,946,321	1,752,016
Developing countries	1,523,732	1,297,809	1,572,557	1,483,544	1,413,061	1,392,033	1,513,079	1,443,858
Top 5 suppliers:								
The Netherlands	776,752	743,775	788,502	743,870	757,922	630,122	684,915	735,951
France	647,034	486,789	619,359	584,301	522,533	507,893	552,058	450,902
Turkey	437,112	339,590	460,041	434,001	385,902	400,646	435,485	363,335
Germany	398,410	265,240	405,712	382,747	283,180	400,153	434,949	322,487
Spain	424,669	370,388	403,023	380,210	337,022	342,125	371,875	337,491
Developing countries:								
China	190,600	176,758	209,568	197,706	195,718	204,431	222,208	218,686
Thailand	168,255	192,018	195,474	184,409	227,577	157,677	171,388	239,720
Peru	76,692	33,491	87,602	82,643	38,565	87,331	94,925	41,440
Morocco	94,246	81,202	97,178	91,677	96,543	74,522	81,002	88,881
South Africa	111,892	103,681	102,686	96,874	93,301	74,095	80,538	81,350
Kenya	77,952	68,948	72,446	68,345	58,495	50,938	55,367	61,167
Tunisia	59,424	25,972	47,808	45,102	23,119	47,534	51,667	26,616
Costa Rica	31,163	24,782	33,677	31,771	35,537	37,287	40,529	38,394
India	33,752	34,156	36,297	34,242	37,450	37,060	40,283	39,433

Imports of preserved fruit and vegetables in consumer & catering packs into GERMANY, 1998-2000
US$ thousand /   thousand / tonnes

	1998		1999			2000		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	1,508,938	1,440,728	1,491,695	1,407,259	1,472,895	1,229,201	1,336,088	1,417,567
Extra-EU	478,875	425,840	466,595	440,184	434,954	430,338	467,759	464,180
Developing countries	356,741	333,012	348,260	328,547	339,273	316,334	343,841	359,067
Top 5 suppliers:								
The Netherlands	393,070	386,671	391,196	369,053	382,845	289,465	314,636	351,049
France	187,490	184,227	194,901	183,869	200,303	144,093	156,623	165,436
Turkey	120,362	94,236	126,248	119,102	105,466	112,194	121,950	102,125
Italy	133,707	144,094	137,474	129,692	160,824	109,336	118,844	139,703
Greece	83,682	83,332	84,358	79,583	95,255	73,404	79,787	104,259
Developing countries:								
China	74,484	74,062	70,546	66,553	71,182	72,004	78,265	84,013
Thailand	41,834	53,555	51,016	48,128	67,289	36,244	39,396	62,099
South Africa	30,041	30,008	25,653	24,201	25,722	21,073	22,905	24,676
Indonesia	13,596	19,116	10,389	9,801	14,517	13,356	14,517	24,454
Kenya	14,194	13,141	10,922	10,304	9,415	8,229	8,945	8,896
Chile	14,250	5,043	12,017	11,337	5,423	7,373	8,014	3,451
Iran	4,489	4,291	4,603	4,342	5,028	6,998	7,606	7,795
Philippines	9,160	10,084	5,679	5,358	5,836	5,402	5,872	6,903
Morocco	4,835	4,495	4,943	4,663	5,521	5,376	5,844	7,000

Imports of preserved fruit and vegetables in consumer & catering packs into UNITED KINGDOM, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	1,030,296	760,637	1,005,112	948,219	876,042	832,390	904,772	740,913
Extra-EU	379,572	295,964	382,405	360,759	304,541	331,888	360,748	301,154
Developing countries	241,129	204,685	246,673	232,710	215,953	215,636	234,387	220,362
Top 5 suppliers:								
Italy	125,794	129,805	120,009	113,216	221,599	103,147	112,116	104,215
France	126,627	63,115	120,223	113,418	67,813	93,397	101,519	55,827
Turkey	97,358	74,915	97,486	91,968	78,338	92,793	100,862	81,545
USA	87,450	49,483	85,665	80,816	48,228	70,556	76,691	41,999
The Netherlands	69,657	68,176	80,712	76,143	85,206	65,266	70,941	82,395
Developing countries:								
Thailand	28,436	30,739	33,886	31,968	33,853	24,910	27,076	35,677
India	14,216	11,798	17,308	16,328	14,500	18,419	20,021	15,763
South Africa	27,756	25,243	25,210	23,783	21,481	15,950	17,337	19,546
China	14,320	13,053	14,311	13,501	15,624	12,496	13,583	14,905
Philippines	4,850	4,760	5,701	5,378	6,236	7,748	8,422	10,109
Kenya	9,832	7,165	7,384	6,966	5,471	7,079	7,695	7,975
Swaziland	10,096	8,608	7,596	7,166	6,217	6,348	6,900	6,164
Iran	6,019	7,370	7,325	6,910	10,571	4,476	4,865	6,499
Chile	4,632	2,184	4,230	3,991	2,257	3,476	3,778	1,894

Imports of preserved fruit and vegetables in consumer & catering packs into FRANCE, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	877,734	678,191	848,636	800,600	691,204	754,958	820,606	705,321
Extra-EU	328,334	224,504	313,060	295,340	238,306	272,119	295,782	232,390
Developing countries	303,845	209,729	290,019	273,603	223,443	252,238	274,172	220,489
Top 5 suppliers:								
Spain	129,074	108,492	112,328	105,970	91,519	111,652	121,361	102,392
The Netherlands	114,883	122,933	128,333	121,069	132,825	108,555	117,995	132,535
Germany	100,027	60,230	96,145	90,703	58,267	90,718	98,606	64,647
Belgium	n.a.	n.a.	75,994	71,692	66,351	65,501	71,197	69,711
Italy	81,496	61,912	83,848	79,102	69,003	64,650	70,272	60,273
Developing countries:								
Morocco	71,071	60,832	70,005	66,042	69,414	53,232	57,861	64,900
Turkey	54,578	35,514	53,056	50,053	35,380	47,010	51,098	35,899
Tunisia	27,471	11,881	17,934	16,919	8,982	21,671	23,555	12,095
Thailand	20,583	21,692	20,434	19,277	22,070	18,377	19,975	24,490
China	19,613	16,266	17,199	16,225	16,213	16,452	17,883	16,024
Costa Rica	15,447	5,662	11,051	10,425	5,627	14,942	16,241	7,213
Peru	16,639	6,261	17,771	16,765	7,053	14,515	15,777	6,105
Algeria	15,987	9,329	14,356	13,543	9,645	13,441	14,610	9,401
Kenya	13,189	9,228	20,844	19,664	12,878	8,996	9,778	8,927

Imports of preserved fruit and vegetables in consumer & catering packs into THE NETHERLANDS, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	511,184	464,001	535,424	505,117	515,277	441,876	480,300	483,220
Extra-EU	267,515	257,651	291,581	275,076	304,000	243,256	264,409	292,491
Developing countries	232,649	231,888	257,109	242,556	275,357	208,692	226,839	260,085
Top 5 suppliers:								
Belgium	n.a.	n.a.	92,740	87,491	83,025	73,916	80,344	64,625
Germany	73,881	57,627	81,384	76,777	70,747	68,960	74,957	70,034
Turkey	65,243	57,257	85,552	80,709	88,000	55,022	59,807	59,996
China	44,452	39,557	49,800	46,981	46,025	45,475	49,429	47,706
Thailand	35,129	38,852	31,096	29,336	36,826	34,059	37,021	53,311
Developing countries:								
Costa Rica	8,308	12,973	15,013	14,163	22,944	15,200	16,522	23,501
South Africa	17,672	15,629	17,098	16,130	15,293	9,988	10,857	10,036
India	9,308	10,733	11,099	10,471	12,954	8,586	9,333	10,768
Ecuador	3,590	5,507	7,542	7,115	12,755	7,797	8,475	14,039
Indonesia	9,481	12,531	7,414	6,994	11,177	5,889	6,401	12,956
Peru	6,839	3,061	6,388	6,026	3,093	4,204	4,570	2,634
Chile	3,097	1,629	3,541	3,341	1,956	3,758	4,085	2,070
Kenya	6,414	6,117	4,691	4,425	4,398	3,747	4,073	4,918
Morocco	4,403	4,712	4,818	4,545	5,298	3,110	3,380	4,189

Imports of preserved fruit and vegetables in consumer & catering packs into BELGIUM, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	360,231	298,834	349,700	329,906	304,475	309,752	336,687	299,817
Extra-EU	68,515	61,746	73,575	69,410	68,020	65,673	71,384	67,144
Developing countries	53,539	49,058	52,292	49,332	50,371	50,243	54,612	55,854
Top 5 suppliers:								
France	107,657	87,661	99,332	93,709	84,779	95,046	103,311	81,005
The Netherlands	98,008	86,128	87,648	82,687	81,224	80,515	87,516	88,576
Germany	41,312	26,004	37,214	35,108	27,859	29,767	32,355	26,163
Turkey	16,720	14,112	15,469	14,593	14,226	14,805	16,092	14,496
Spain	16,299	15,448	15,074	14,221	14,293	13,065	14,201	14,258
Developing countries:								
Kenya	7,067	6,755	6,454	6,089	5,549	7,301	7,936	8,289
South Africa	6,852	6,636	7,046	6,647	6,637	5,320	5,783	5,643
Morocco	4,425	4,216	4,662	4,398	4,986	4,974	5,407	5,743
Thailand	4,974	5,709	6,345	5,986	7,123	4,377	4,758	6,467
Philippines	1,845	2,629	1,923	1,814	2,566	3,359	3,651	4,952
China	4,219	3,499	3,616	3,411	3,069	2,634	2,863	2,754
Iran	441	440	631	595	684	1,795	1,951	2,012
Tunisia	1,352	1,189	1,162	1,096	907	887	964	845
Indonesia	642	858	795	750	1,137	874	950	1,557

Imports of fruit CANNED VEGETABLES into the EU, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	2,194,623	1,970,044	2,268,698	2,140,281	2,211,450	1,914,088	2,080,530	2,031,773
Extra-EU	538,961	457,894	633,165	597,325	576,505	545,869	593,336	543,466
Developing countries	432,332	360,390	510,349	481,461	452,002	443,458	482,020	434,460
Top 5 suppliers:								
The Netherlands	371,318	435,858	375,206	353,968	427,486	308,365	335,179	425,398
France	351,025	324,356	330,320	311,623	334,492	263,382	286,285	301,413
Belgium	n.a.	n.a.	248,226	234,175	225,098	180,015	195,669	205,302
Spain	179,887	132,064	191,157	180,337	135,028	159,752	173,643	136,939
Germany	140,059	106,715	158,474	149,504	129,605	155,900	169,456	146,433
Developing countries:								
China	103,622	90,529	116,563	109,965	104,049	121,299	131,847	127,090
Turkey	92,809	93,196	118,903	112,173	133,302	87,359	94,955	105,614
Peru	75,568	32,983	86,568	81,668	37,872	86,128	93,617	40,692
Morocco	72,047	59,333	82,650	77,972	80,057	59,851	65,055	66,784
Thailand	32,476	37,262	28,725	27,099	33,677	29,096	31,626	36,455
India	15,708	16,145	19,501	18,397	20,234	20,026	21,767	21,300
Kenya	15,102	9,112	24,573	23,182	14,725	11,085	12,049	9,982
Madagascar	2,650	1,400	3,949	3,725	3,182	3,597	3,910	1,552
Zimbabwe	1,551	886	4,185	3,948	2,397	2,728	2,965	2,536

Imports of fruit CANNED FRUIT into the EU, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	1,710,252	1,594,888	1,621,998	1,530,187	1,593,204	1,410,533	1,533,188	1,651,751
Extra-EU	678,792	676,546	637,019	600,961	671,500	551,567	599,529	710,846
Developing countries	569,119	586,864	534,331	504,086	585,414	457,999	497,825	623,179
Top 5 suppliers:								
Italy	216,103	226,518	210,761	198,831	235,944	164,428	178,726	209,656
Germany	159,135	104,217	155,554	146,749	103,004	156,201	169,784	119,895
Spain	187,743	198,563	160,184	151,117	166,784	128,601	139,784	161,114
Thailand	132,474	153,056	162,846	153,628	192,014	125,186	136,072	201,351
Greece	142,100	157,668	135,445	127,778	167,803	120,698	131,194	186,574
Developing countries:								
South Africa	87,151	88,641	70,179	66,207	73,479	52,426	56,985	67,931
Kenya	62,636	59,795	47,690	44,991	43,725	39,792	43,252	51,155
Costa Rica	30,028	23,297	33,076	31,204	34,880	36,818	40,020	37,984
Turkey	38,625	31,144	37,768	35,630	31,942	34,129	37,097	32,319
Philippines	31,053	34,613	27,073	25,541	30,638	32,442	35,263	45,149
Indonesia	35,136	45,848	30,240	28,528	41,345	28,348	30,813	53,083
China	42,674	50,520	37,403	35,286	47,609	25,555	27,777	37,181
India	15,485	15,345	14,659	13,829	15,492	14,867	16,160	17,020
Ecuador	12,590	10,843	14,642	13,813	18,053	14,675	15,951	19,617

Imports of fruit DRIED FRUIT into the EU, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	936,883	561,401	879,245	829,476	550,340	791,380	860,196	540,926
Extra-EU	686,958	417,764	649,180	612,434	410,677	598,120	650,130	417,096
Developing countries	472,240	308,449	461,593	435,465	323,408	424,963	461,916	326,701
Top 5 suppliers:								
Turkey	301,411	213,330	297,847	280,988	217,729	273,061	296,805	222,448
USA	176,182	93,617	157,758	148,828	75,910	145,062	157,676	78,082
France	66,388	38,850	56,375	53,184	29,269	49,729	54,053	26,940
Greece	57,180	40,974	59,111	55,765	47,683	47,165	51,266	36,432
Tunisia	58,779	25,545	46,228	43,611	22,190	46,903	50,982	26,078
Developing countries:								
Chile	32,114	14,903	28,479	26,867	15,120	24,086	26,180	13,186
Iran	14,783	15,771	18,870	17,802	23,028	19,294	20,972	23,092
South Africa	21,750	13,291	29,577	27,903	17,979	18,800	20,435	11,516
Algeria	17,753	10,250	15,016	14,166	10,074	14,384	15,635	9,957
Argentina	4,544	2,834	6,597	6,224	4,665	8,844	9,613	6,362
China	9,320	4,386	6,708	6,328	3,794	6,815	7,408	4,223
India	750	609	757	714	558	1,705	1,853	709
Thailand	1,651	841	1,985	1,873	840	1,643	1,786	929
Ecuador	1,550	844	1,479	1,395	861	1,547	1,682	934

Imports of fruit JAM into the EU, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	371,592	245,765	370,749	349,763	248,192	337,634	366,993	255,995
Extra-EU	13,915	11,228	17,407	16,422	13,907	16,304	17,722	12,673
Developing countries	8,897	6,473	10,290	9,708	8,040	9,951	10,816	6,809
Top 5 suppliers:								
France	74,883	38,982	76,937	72,582	36,734	73,258	79,628	41,658
The Netherlands	54,412	50,406	65,219	61,527	62,595	49,658	53,976	56,122
Belgium	n.a.	n.a.	54,445	51,363	36,564	49,357	53,649	40,506
Germany	52,264	32,046	50,805	47,929	32,345	46,107	50,116	34,317
Denmark	29,950	19,189	28,564	26,947	16,284	27,568	29,965	16,975
Developing countries:								
Turkey	3,901	1,793	4,919	4,641	2,743	5,427	5,899	2,698
South Africa	1,025	734	1,141	1,076	839	799	868	663
Brazil	325	362	474	447	529	556	604	631
Yugoslavia, Fed. Rep.	67	71	359	339	412	494	537	626
Taiwan	15	4	186	175	147	417	453	287
India	148	88	215	203	141	268	291	195
Croatia	25	18	92	87	88	203	221	244
Costa Rica	772	1,340	276	260	534	196	213	308
Swaziland	151	58	124	117	75	179	195	68

Imports of fruit PRESERVED MUSHROOMS into the EU, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	342,898	236,627	363,423	342,852	254,007	294,567	320,181	236,236
Extra-EU	46,785	40,808	68,003	64,154	53,110	70,036	76,126	64,637
Developing countries	36,287	33,779	50,445	47,590	41,806	50,545	54,940	50,494
Top 5 suppliers:								
The Netherlands	194,444	130,689	193,658	182,696	130,192	133,266	144,854	108,260
China	33,004	30,754	47,268	44,592	39,580	48,706	52,941	49,376
France	43,099	31,708	45,880	43,283	38,592	36,783	39,981	30,649
Spain	30,426	19,818	31,088	29,328	19,739	31,297	34,019	21,432
Poland	9,115	5,938	16,425	15,495	10,544	18,469	20,075	13,356
Developing countries:								
Indonesia	735	649	877	827	773	530	576	496
Turkey	209	44	391	369	88	422	459	114
Morocco	134	23	209	197	35	327	355	46
India	1,658	1,965	1,155	1,090	1,015	178	193	202
Vietnam	340	234	251	237	207	130	141	117
Thailand	48	32	42	40	25	75	81	62
Chile	0	0	10	9	5	68	74	33
Macedonia	60	16	120	113	35	23	25	4
Lebanon	4	0	6	6	0	23	25	17

Imports of fruit CANDIED FRUIT into the EU, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	73,334	28,866	71,889	67,820	52,698	66,180	71,935	30,418
Extra-EU	6,841	2,377	7,597	7,167	2,969	8,720	9,478	3,298
Developing countries	4,856	1,854	5,548	5,234	2,391	5,117	5,562	2,215
Top 5 suppliers:								
France	25,351	7,271	24,755	23,354	30,608	23,508	25,552	7,617
Italy	19,354	8,939	19,747	18,629	9,504	14,764	16,048	8,666
The Netherlands	10,525	5,179	9,099	8,584	4,919	7,733	8,405	4,818
Germany	2,074	842	2,524	2,381	1,121	2,836	3,083	1,414
Greece	2,921	1,041	2,624	2,475	1,088	2,335	2,538	1,317
Developing countries:								
China	1,961	557	1,598	1,508	672	1,972	2,144	769
Thailand	1,592	812	1,808	1,706	971	1,618	1,759	881
Fiji	372	137	465	439	139	531	577	173
Brazil	97	11	996	940	302	497	540	161
Turkey	157	83	212	200	98	248	270	142
South Africa	198	33	127	120	19	69	75	18
Jamaica	13	3	11	10	3	26	28	5
Indonesia	21	6	0	0	0	18	20	12
India	3	4	10	9	10	17	19	7

EXPORTS

EU exports of preserved fruit and vegetables in consumer and catering packs, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	4,946,678	4,256,266	4,824,227	4,551,158	4,144,208	4,303,870	4,678,120	4,266,047
Extra-EU	1,129,923	778,083	1,088,557	1,026,941	773,715	1,120,336	1,217,756	983,258
Leading destinations:								
Germany	1,196,886	1,402,349	1,126,210	1,062,462	1,196,269	880,093	956,623	1,084,527
United Kingdom	554,268	467,917	587,861	554,586	517,992	513,791	558,469	511,811
France	507,316	415,587	520,102	490,662	461,982	435,273	473,123	478,407
USA	343,237	212,129	395,779	373,376	231,013	391,845	425,918	274,064
The Netherlands	322,376	273,474	319,230	301,160	280,573	314,238	341,563	260,420
Belgium	n.a.	n.a.	260,694	245,938	218,186	219,295	238,364	230,364
Italy	292,238	212,994	237,920	224,453	182,694	215,122	233,828	198,846
Spain	137,701	93,665	157,005	148,118	109,904	133,099	144,673	112,195
Sweden	90,787	61,470	96,277	90,827	69,462	93,373	101,492	75,024
Austria	85,780	67,691	85,926	81,062	70,936	73,542	79,937	74,005
Ireland	75,520	46,511	72,741	68,624	55,010	65,284	70,961	45,788
Portugal	73,021	67,792	70,344	66,362	64,516	63,750	69,294	66,312
Canada	57,541	37,274	56,028	52,857	40,468	61,021	66,327	66,021
Switzerland	56,347	27,527	60,184	56,777	29,978	56,492	61,404	31,273
Russia	100,766	71,935	38,304	36,136	33,237	54,558	59,302	56,426

APPENDIX 3 STANDARDS ORGANISATIONS

INTERNATIONAL

Internationalisation Standardisation Institute (ISO)

Address: P.O. Box 56,
CH-1211 Geneva 20, Switzerland
Telephone: + 41 (0) 22 7490 111
Fax: + 41 (0) 22 7333 430
E-mail: central@iso.org
Internet: www.iso.org

UN/ECE

Trade Division - Agricultural Standards Unit

Address: Palais des Nations,
1211 Geneva 10, Switzerland
Telephone: + 41 (0) 22 9174 444
Fax: + 41 (0) 22 9170 505
E-mail: info.ece@unece.org
Internet: www.unece.org

Joint FAO/WHO Food Standards Programme

Codex Alimentarius Commission ESN Division

Address: Viale delle Terme di Caracalla,
00100 Rome, Italy
Telephone: + 39 (0) 6 5705 1
Fax: + 39 (0) 6 5705 3152
E-mail: fao-hq@fao.org
Internet: www.fao.org

EUROPEAN UNION

Comité Européen de Normalisation (CEN)

European Normalisation Committee

Address: Third Countries Unit, Rue de Stassart 36,
B-1050 Brussels, Belgium
Telephone: + 32 (0) 2 5500 811
Fax: + 32 (0) 2 5500 819
E-mail: infodesk@cenorm.be
Internet: www.cenorm.be

AUSTRIA

Österreichisches Normungsinstitut (ON)

Address: P.O. Box 130,
A-1021 Vienna, Austria
Telephone: + 43 (0) 1 2130 0
Fax: + 43 (0) 1 2130 0650
E-mail: infostelle@on-norm.at
Internet: www.on-norm.at

BELGIUM

Institut Belge de Normalisation (IBN)

Address: Avenue de la Brabançonnelaan 29,
B-1000 Brussels, Belgium
Telephone: + 32 (0) 2 7380 111
Fax: + 32 (0) 2 7334 264
E-mail: info@ibn.be
Internet: www.ibn.be

DENMARK

Dansk Standard (DS)

Address: Kollegievej 6,
DK-2920 Charlottenlund, Denmark
Telephone: + 45 (0) 39 9661 01
Fax: + 45 (0) 39 9661 02
E-mail: dansk.standard@ds.dk
Internet: www.ds.dk

FINLAND

Suomen standardisoimisliito r.y. (SFS)

Address: P.O. Box 116,
00241 Helsinki, Finland
Telephone: + 358 (0) 9 1499 331
Fax: + 358 (0) 9 1464 925
E-mail: info@sfs.fi
Internet: www.sfs.fi

FRANCE

Association Française de Normalisation (AFNOR)

Address: 11, avenue Francis de Pressencé 93571
Saint-Denis La Plaine Cedex, France
Telephone: + 33 (0) 1 4162 8000
Fax: + 33 (0) 1 4917 9000
E-mail: norminfo@afnor.fr
Internet: www.afnor.fr

GERMANY

Deutsches Institut für Normung eV (DIN)

Address: Burggrafenstraße 6
D-10787 Berlin, Germany
Telephone: + 49 (0) 30 2601 0
Fax: + 49 (0) 30 2601 1231
E-mail: postmaster@din.de
Internet: www.din.de

GREECE

Hellenic Organisation for Standardisation

Address: 313 Acharnon,
GR-1145 Athens, Greece
Telephone: + 30 (0) 1 2120 100
Fax: + 30 (0) 1 2283 034
E-mail: info@elot.gr
Internet: www.elot.gr

ITALY

Ente Nazionale Italiano di Unificazione (UNI)

Address: Via Battinotti Stassi 11B,
I-20133 Milano, Italy
Telephone: + 39 (0) 2 7002 41
Fax: + 39 (0) 2 7010 6106
E-mail: uni@uni.com
Internet: www.unicei.it

IRELAND
National standards Authority of Ireland (NSAI)

Address: Glasnevin,
Dublin 9, Ireland
Telephone: + 353 (0) 1 8073 800
Fax: + 353 (0) 1 8073 838
E-mail: nsai@nsai.ie
Internet: www.nsai.ie

LUXEMBOURG
Service de l'Energie de l'Etat (SEE)

Address: Département Normalisation,
B.P. 10, L-2010 Luxembourg
Telephone: + 352 (0) 46 9746 1
Fax: + 352 (0) 46 9746 39
E-mail: see.normalisation@eg.etat.lu
Internet: www.etat.lu/SEE

THE NETHERLANDS
Nederlands Normalisatie Instituut (NNI)
Netherlands Standardisation Institute

Address: P.O.Box 5059,
2600 GB Delft, The Netherlands
Telephone: + 31 (0) 15 2690 390
Fax: + 31 (0) 15 2690 190
E-mail: info@nni.nl
Internet: www.nni.nl

PORTUGAL
Instituto Português Da Qualidade (Ipq)

Address: Rua António Gião, 2,
P-2829-513 Caparica, Portugal
Telephone: + 351 (0) 21 29481 00
Fax: + 351 (0) 21 29482 60
E-mail: ipq@mail.ipq.pt
Internet: www.ipq.pt

SPAIN
Asociación Española de Normalización y Certificación (AENOR)

Address: Genova 6,
28004 Madrid, Spain
Telephone: + 34 (0) 91 4326 000
Fax: + 34 (0) 91 3104 032
E-mail: info@aenor.es
Internet: www.aenor.es

SWEDEN
Standardiseringen i Sverige (SIS)

Address: P.O. Box 6455,
113 82 Stockholm, Sweden
Telephone: + 46 (0) 8 5555 2000
Fax: + 46 (0) 8 5555 2001
E-mail: info@sis.se
Internet: www.sis.se

UNITED KINGDOM
British Standards Institution (BSI)

Address: British Standards House, 389
Chiswick High Road, London W4 4AL,
United Kingdom
Telephone: + 44 (0) 208 9969 000
Fax: + 44 (0) 208 9967 400
E-mail: info@ bsi-global.com
Internet: www.bsi-global.com

APPENDIX 4 SOURCES OF PRICE INFORMATION

INTERNATIONAL

FAO (Food and Agriculture Organization)

Publisher of 'Monthly Bulletin of Statistics', 'Commodity and Market Review', and 'Food Outlook'

Address:	Via delle Terme di Caracalla, 00100 Rome, Italy
Telephone:	+ 39 (0) 6 5705 1
Fax:	+ 39 (0) 6 5705 3152
E-mail:	FAO-HQ@fao.org
Internet:	www.fao.org

UNITED KINGDOM

Agra Europe Ltd.

Publisher of 'The Public Ledger'

Address:	80 Calverly Road, Turnbridge Wells, Kent, TN1 2 UN, United Kingdom
Telephone:	+ 44 (0) 1892 5338 13
Fax:	+ 44 (0) 1892 5448 95
E-mail:	marketing@public-ledger.com
Internet:	www.public-ledger.com

Foodnews

Address:	80 Calverley Road, Tunbridge Wells, Kent TN1 2UN, United Kingdom
Telephone:	+ 44 (0) 1892 5338 13
Fax:	+ 44 (0) 1892 5448 95
E-mail:	marketing@foodnews.co.uk
Internet:	www.foodnews.co.uk

APPENDIX 5 TRADE ASSOCIATIONS

EUROPE

European Association of Fruit and Vegetables Processing Industry (OEITFL)
(Organisation Européenne des Industries Transformatrices des Fruits et Légumes)
Address: Avenue de Roodebeek 30,
1030 Brussels, Belgium
Telephone: + 32 (0) 2 7438 730
Fax: + 32 (0) 2 7368 175
E-mail: oeitfl@sia-dvi.be
Internet: www.oeitfl.org

Federation of the Associations of EU Frozen Food producers (FAFPAS)
(Fédération des Associations de Fabricants de Produits Alimentaires Surgelés de l'UE)
Address: Avenue de Roodebeek 30,
1030 Brussels, Belgium
Telephone: + 32 (0) 2 7438 730
Fax: + 32 (0) 2 7368 175
E-mail: fafpas@sia-dvi.be

European Federation of Dried Fruit (FRUCOM)
(Fédération Européenne de Commerce de Fruits Secs)
Address: Gross Bäckerstrasse 4,
D-20095 Hamburg, Germany
Telephone: + 49 (0) 40 3747 190
Fax: + 49 (0) 40 3747 1926

BELGIUM

Verbond van Groentenverwerkende Bedrijven en Industriegroenten Groothandelaars en Exporteurs (VEGEBE)
Adress: Rue de Spa, 8,
B-1000 Brussels, Belgium
Telephone: + 32 (0) 2 2380 620
Fax: + 32 (0) 2 2380 408
E-mail: vegebe@kmonet.be

Belgafood
(Belgian Professional Union for the Import of Foods)
Address: Rue St. Bernard 60,
B-1060 Brussels, Belgium
Telephone: + 32 (0) 2 5373 060
Fax: + 32 (0) 2 5394 026

FRANCE

French Association of Preserving Industry
(Chambre Syndicale Nationale des Industries de la Conserve)
Address: Rue d'Alésia 44,
75684 Paris Cedex 14, France
Telephone: + 33 (0) 1 5391 4444
Fax: + 33 (0) 1 5391 4470

French Federation of Preserving Cooperations
(Fédération Nationale des Conserveries Coopératives de produits agricoles - F.N.C.C.)
Address: Boulevard St. Germain 129,
75279 Paris Cedex 06, France
Telephone: + 33 (0) 1 4326 1447
Fax: + 33 (0) 1 4326 3520
E-mail: fncc@wanadoo.fr

French Federation of Fruit Preserving Industry
(Fédération Nationale des Syndicats de Confituriers et Conserveurs de Fruits)
Address: Rue d'Alésia 44,
75014 Paris, France
Telephone: + 33 (0) 1 5391 4491
Fax: + 33 (0) 1 5391 4470

French Association of Dried Food Products Industry
(Syndicat National des Déshydrateurs des Produits Alimentaires)
Address: Rue d'Alésia 44,
75684 Paris Cedex 14, France
Telephone: + 33 (0) 1 5391 4444
Fax: + 33 (0) 1 5391 4470

GERMANY

German Association of Fruit and Vegetables Processing Industry
(Bundesverband der obst-, gemüse und kartoffelverarbeitender Industrie e.V.)
Address: Von der Heydt Strasse 9,
53177 Bonn, Germany
Telephone: + 49 (0) 228 3540 25
Fax: + 49 (0) 228 3618 89
E-mail: bogk-vds@t-online.de

Waren-Verein
Address: Gross Bäckerstrasse 4,
20095 Hamburg, Germany
Telephone: + 49 (0) 40 3747 190
Fax: + 49 (0) 40 3747 1919

ITALY

Italian Association of Food Industry
(Associazione Italiana Industrie Prodotti Alimentari, AIPPA)
Address: Corso di Porta Nuova 34,
20121 Milan, Italy
Telephone: + 39 (0) 2 6541 84
Fax: + 39 (0) 2 6548 22
E-mail: aiipabo@mclink.it
Internet: www.aiipa.it

THE NETHERLANDS

Netherlands Horticulture Commodity Board

(Produktschap voor de Tuinbouw)

Address: P.O. Box 280,
2700 AG Zoetermeer, The Netherlands

Tel.: + 31 (0) 79 3470 707

Fax: + 31 (0) 79 3470 404

E-mail: pt@tuinbouw.nl

Internet: www.tuinbouw.nl

Netherlands Association of Fruit and Vegetables Processing Industry

(Vereniging van de Nederlandse Groenten en Fruitverwerkende Industrie, VIGEF)

Address: P.O. Box 177,
2300 AD Leiden, The Netherlands

Telephone: + 31 (0) 71 5224 220

Fax: + 31 (0) 71 5225 095

E-mail: vigef@vsl.nl

Internet: www.vigef.nl

Netherlands Dried Fruit Trade Association

(Nederlandse Vereniging voor de Handel in Gedroogde Zuidvruchten, Specerijen en Aanverwante Artikelen)

Address: Bezuidenhoutseweg 82,
2594 AX The Hague, The Netherlands

Telephone: + 31 (0) 70 3833 011

Fax: + 31 (0) 70 3475 253

E-mail: info@nzv-org.nl

Internet: www.zuidvruchten.nl

Netherlands Mushroom Growers Association (CNC)

(Coöperatieve Nederlandse Champignonskwekersvereniging)

Address: P.O. Box 13,
6590 AA Gennep, The Netherlands

Telephone: + 31 (0) 485 5165 41

Fax: + 31 (0) 485 5178 23

E-mail: info@cnc.nl

Internet: www.cnc.nl

UNITED KINGDOM

British Association of Fruit and Vegetables Processing Industry (BFVCA)

Address: 6 Catherine Street,
London WC2 5JJ, United Kingdom

Telephone: + 44 (0) 20 7420 7110

Fax: + 44 (0) 20 7836 0580

National Dried Fruit Association (NDFTA)

Address: 15 Primrosecourt,
49-50 Prince Albert Road,
London NW8 7LD, United Kingdom

Telephone: + 44 (0) 207 7227 488

Fax: + 44 (0) 207 7222 009

Food & Drink Federation

(members include the British Fruit & Vegetable Canners' Association)

Address: 6 Catherine Street,
London WC2 5JJ, United Kingdom

Telephone: + 44 (0) 207 8362 460

Fax: + 44 (0) 207 8360 580

E-mail: generalenquiries@fdf.org.uk

Internet: www.fdf.org.uk

APPENDIX 6 TRADE FAIR ORGANISERS

Alimentaria
Frequency: biennial (2002 Barcelona)
Address: Reed Exhibitions Iberia,
C/ Diputació 119, E-08015 Barcelona, Spain
Telephone: + 34 (0) 9345 20722
Fax: + 34 (0) 9345 16637
Internet: www.reedexhibitions.com

ANUGA
Frequency: biennial (2003 Köln)
Address: Köln messe,
Messeplatz 1, 50679 Cologne, Germany
Telephone: + 49 (0) 221 8210
Fax: + 49 (0) 221 8212 574
E-mail: anuga@koelnmesse.de
Internet: www.koelnmesse.de/anuga

Bio Fach (Certified organic products)
Nürnberg Messe GmbH
Frequency: annual (Nurnberg)
Address: Messezentrum,
90471 Nürnberg, Germany
Telephone: + 49 (0) 911 86060
Fax: + 49 (0) 911 86068282
E-mail: info@biofach.de
Internet: www.biofach.de

IFE
Frequency: biennial (2003 London)
Address: 11 Manchester Square,
London W1U 3PL, United Kingdom
Tel: + 44 (0) 20 7886 3100
Fax: + 44 (0) 20 7886 3091
Email: ife@freshrm.co.uk
Internet: www.ife.co.uk

Natural Products Europe
New Hope International Media Ltd.
Frequency: annual (Amsterdam)
Address: Penton House, 288-290
Worton Road, Isleworth,
Middlesex TW7 6EL, United Kingdom
Telephone: + 44 (0) 20 8232 1600
Fax: + 44 (0) 20 8232 1625
Internet: www.expoeurope.com

ROKA
Frequency: biennial (2003 Utrecht)
Address: Koninklijke Jaarbeurs, P.O. Box 8500,
3503 RM Utrecht, The Netherlands
Telephone: + 31 (0) 30 2955 911
Fax: + 31 (0) 30 2940 379
E-mail: roka@jaarbeursutrecht.nl
Internet: www.rokafoodfair.nl

SANA
Exhibition of Health Food, Health and Environment
Frequency : biennial (2002 Bologna)
Address: Illaria Borri, Via San Vittore 14,
I-20123 Milan, Italy
Telephone: + 39 (0)2 8645 1078
Fax: + 39 (0) 2 8645 3506
E-mail: info@sana.it
Internet: www.sana.it

SIAL
Frequency: biennial (2002 Paris)
Address : 1 Rue du Parc,
92593 Levallois-Perret, France
Telephone : + 33 (0) 1 4968 5499
Fax : + 33 (0) 1 4731 3782
Internet: www.sial.fr

APPENDIX 7 TRADE PRESS

Biopress
(German language)
Address: Biopress Verlag, Schulstrasse 10,
74927 Eschelbronn, Germany
Telephone: + 49 (0) 6226 4351/95110
Fax: + 49 (0) 6226 4004 7
E-mail: info@biopress.de
Internet: www.biopress.de

Distrifood
(Dutch language)
Address: Elsevier Business Information,
Van de Sande Bakhuyzenstraat 4,
1061 AG Amsterdam, The Netherlands
Telephone: + 31 (0) 20 5159 222
Fax: + 31 (0) 20 5159 990
Internet: www.zibb.nl/food

Food Magazine
(Dutch language)
Address: Elsevier Business Information,
Van de Sande Bakhuyzenstraat 4,
1061 AG Amsterdam, The Netherlands
Telephone: + 31 (0) 20 5159 222
Fax: + 31 (0) 20 5159 990
Internet: www.zibb.nl/food

Food Management
(Dutch language)
Address: Keesing Noordervliet B.V.,
P.O. Box 325, 3990 GC Houten,
The Netherlands
Telephone: + 31 (0) 30 6358 585
Fax: + 31 (0) 30 6358 500
E-mail: vmt@keesing.nl
Internet: www.vmt.nl

Foodnews
(English language)
Address: 80 Calverley Road,
Tunbridge Wells, Kent TN1 2UN,
United Kingdom
Telephone: + 44 (0) 1892 5338 13
Fax: + 44 (0) 1892 5448 95
E-mail: marketing@foodnews.co.uk
Internet: www.foodnews.co.uk

Voedingsmiddelen Technologie (VMT)
(Dutch language)
Address: Keesing Noordervliet B.V.,
P.O. Box 325, 3990 GC Houten,
The Netherlands
Telephone: + 31 (0) 30 6358 585
Fax: + 31 (0) 30 6358 500
E-mail: vmt@keesing.nl
Internet: www.vmt.nl

APPENDIX 8 BUSINESS SUPPORT ORGANISATIONS

INTERNATIONAL
International Trade Centre (ITC)
Address: Palais des Nations,
P. O. Box 10, 1211 Geneva 10, Switzerland
Telephone: + 41 (0) 22 7300 111
Fax: + 41 (0) 22 7334 439
E-mail: itcreg@intracen.org
Internet: www.intracen.org

AUSTRIA
Austrian Federal Economic Chamber
Address: P.O. Box 150,
A-1045 Vienna, Austria
Telephone: + 43 (0) 1 5010 50
Fax: + 43 (0) 1 5010 5150
E-mail: aw-online@wk.at
Internet: www.wk.or.at

DENMARK
DIPO, Danish Import Promotion Office for Products from Developing Countries
Address: Danish Chamber of Commerce, Børsen,
1217 Copenhagen K, Denmark
Telephone: + 45 (0) 33 9505 00
Fax: + 45 (0) 33 1205 25
E-mail: dipo@commerce.dk
Internet: www.dipo.dk

GERMANY
BfAI, Federal Office of Foreign Trade Information
Address: Agrippastrasse 87-93,
P. O. Box 100522, 50455 Cologne, Germany
Telephone: + 49 (0) 221 2057 0
Fax: + 49 (0) 221 2057 212
E-mail: bus.contacts@bfai.com
Internet: www.bfai.com

ITALY
ICE, National Institute for Foreign Trade
Address: Via Liszt 21,
P.O. Box 10057, 00144 Rome, Italy
Telephone: + 39 (0) 6 5992 1
Fax: + 39 (0) 6 5964 7438
E-mail: ice@ice.it
Internet: www.ice.it

THE NETHERLANDS
CBI, Centre for the Promotion of Imports from developing countries
Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013 434
Fax: + 31 (0) 10 4114 081
E-mail: cbi@cbi.nl
Internet: www.cbi.nl

NORWAY
Norad, Norwegian Agency for Development Co-operation
Address: Ruseløkkveien 26,
P. O. Box 8034 Dep., 0030 Oslo, Norway
Telephone: + 41 (0) 22 2420 30
Fax: + 41 (0) 22 2420 31
E-mail: firmapost@norad.no
Internet: www.norad.no

SWEDEN
SIDA, Swedish International Development Co-operation Agency - Department for Infrastructure & Economic Co-operation
Address: Sveavägen 20,
S-105 25 Stockholm, Sweden
Telephone: + 46 (0) 8 6985 000
Fax: + 46 (0) 8 6208 864
E-mail: info@sida.se
Internet: www.sida.se

SWITZERLAND
SIPPO, Swiss Import Promotion Programme
Address: Stampfenbachstrasse 85,
Postfach 492 , CH-8035 Zurich, Switzerland
Telephone: + 41 (0) 1 3655 200
Fax: + 41 (0) 1 3655 202
E-mail: info@sippo.ch
Internet: www.sippo.ch

APPENDIX 9 OTHER USEFUL ADDRESSES

INTERNATIONAL
International Chamber of Commerce

Address: 38, Cours Albert 1er,
75008 Paris, France
Telephone: + 33 (0) 1 4953 2828
Fax: + 33 (0) 1 4953 2942
E-mail: icc@iccwbo.org
Internet: www.iccwbo.org

IFOAM
(International Federation of Organic Agriculture Movements)

Address: c/o Ökozentrum Imsbach,
D-66636 Tholey-Theley, Germany
Telephone: + 49 (0) 6853 9198 90
Fax: + 49 (0) 6853 9198 99
E-mail: headoffice@ifoam.org
Internet: www.ifoam.org

EUROPE
TransFair International
(Fair trade organisation)

Address: Remigiusstraße 21,
50937 Cologne, Germany
Telephone: + 49 (0) 221 9420 400
Fax: + 49 (0) 221 9420 4040
E-mail: info@transfair.org
Internet: www.transfair.org

GERMANY
BCS ÖKO-GARANTIE GMBH
(Contact point for organic certification)

Address: Cimbernstrasse 21,
90402 Nürnberg, Germany
Telephone: + 49 (0) 911 4917 3
Fax: + 49 (0) 911 4922 39
E-mail: info@bcs-oeko.de
Internet: www.bcs-oeko.de

Ecocert
(Contact point for organic certification)

Address: Sülte 20,
37520 Osterode, Germany
Telephone: + 49 (0) 5522 9511 61
Fax: + 49 (0) 5522 9511 64
E-mail: info@ecocert.de
Internet: www.ecocert.de

GTZ Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH
(Service enterprise for development cooperation)

Address: Dag-Hammarskjöld-Weg 1-5,
65760 Eschborn, Germany
Telephone: + 49 (0) 6196 790
Fax: + 49 (0) 6196 7911 15
E-mail: postmaster@gtz.de
Internet: www.gtz.de

Naturland Verband für naturgemäßen Landbau e.V
(Germany's Naturland association for organic agriculture)

Address: Kleinhaderner Weg 1,
82166 Gräfelfing, Germany
Telephone: + 49 (0) 89 8980 820
Fax: + 49 (0) 89 8980 8290
E-mail: naturland@naturland.de
Internet: www.naturland.de

UnitednatureX Europe / Green Trade Net Office
(Green Trade Net is an information network on organic raw materials world-wide)

Address: P.O. Box 1712,
53007 Bonn, Germany
Telephone: + 49 (0) 228 7215 776
Fax: + 49 (0) 228 7215 777
Internet: www.green-tradenet.de

FRANCE
Ecocert
(Contact point for organic certification)

Address: P.O. Box 47,
F-32600 L'Isle-Jourdain, France
Telephone: + 33 (0) 5 6207 3424
Fax: + 33 (0) 5 6207 1167
E-mail: info@ecocert.fr
Internet: www.ecocert.fr

THE NETHERLANDS
CBI/Accesguide
(CBI's database on European non-tariff trade barriers

Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013 434
Fax: + 31 (0) 10 4114 081
Email: cbi@accessguide.nl
Internet: www.cbi.nl/accessguide

The Ministry of Public Health, Welfare and Sports

Address: Food inspection service,
P.O. Box 20350, 2500 EJ The Hague,
The Netherlands
Telephone: + 31 (0) 70 3407 911
Fax: + 31 (0) 70 3407 890
Internet: www.minvws.nl

SKAL
(Internationally operating organisation, inspecting and certifying sustainable agricultural production methods and products).

Address: P.O. Box 384,
8000 AJ Zwolle, The Netherlands
Telephone: + 31 (0) 38 4268 181
Fax: + 31 (0) 38 4213 063
E-mail: info@skal.com
Internet: www.skal.com

Stichting Max Havelaar
(Max Havelaar Foundation, fair trade organisation)

Adres: P.O. Box 1252,
3500 BG Utrecht, The Netherlands
Telefoon: + 31 (0) 30 2337 070
Fax: + 31 (0) 30 2332 992
E-mail: website@maxhavelaar.nl
Internet: www.maxhavelaar.nl

UNITED KINGDOM
Soil Association
(IFOAM accredited contact point for organic certification)

Address: Bristol House, 40-56 Victoria Street,
Bristol BS1 6BY, United Kingdom
Telephone: + 44 (0) 117 9290 661
Fax: + 44 (0) 117 9252 504
E-mail: info@soilassociation.org
Internet: www.soilassociation.org

APPENDIX 10 LIST OF DEVELOPING COUNTRIES

The countries listed below are taken from the OECD DAC list of countries receiving Official Development Assistance (Part I). The list used is the one as at 1/1/2000.

Afghanistan
Albania
Algeria
Angola
Anguilla
Antigua and Barbuda
Argentina
Armenia
Azerbaijan
Bahrain
Bangladesh
Barbados
Belize
Benin
Bhutan
Bolivia
Bosnia & Herzegovina
Botswana
Brazil
Burkina Faso
Burundi
Cambodia
Cameroon
Cape Verde
Central African rep.
Chad
Chile
China
Colombia
Comoros
Congo, Dem. Rep
Congo, Rep.
Cook Islands
Costa Rica
Côte d'Ivoire
Croatia
Cuba
Djibouti
Dominica
Dominican republic
Ecuador
Egypt
El Salvador
Equatorial Guinea
Eritrea
Ethiopia
Fiji
Gabon
Gambia
Georgia
Ghana
Grenada
Guatemala
Guinea
Guinea-Bissau
Guyana
Haiti
Honduras
India
Indonesia
Iran
Iraq
Jamaica
Jordan
Kazakstan
Kenya
Kiribati
Korea, Rep. of
Kyrghyz Rep.
Laos
Lebanon
Lesotho
Liberia
Macedonia
Madagascar
Malawi
Malaysia
Maldives
Mali
Malta
Marshall Islands
Mauritania
Mauritius
Mayotte
Mexico
Micronesia, Fed. States
Moldova
Mongolia
Montserrat
Morocco
Mozambique
Myanmar
Namibia
Nauru
Nepal
Nicaragua
Niger
Nigeria
Niue
Oman
Pakistan
Palau Islands
Palestinian Admin. Areas
Panama
Papua New Guinea
Paraguay
Peru
Philippines
Rwanda
São Tomé & Principe
Saudi Arabia
Senegal
Seychelles
Sierra Leone
Slovenia
Solomon Islands
Somalia
South Africa
Sri Lanka
St. Helena
St. Kitts-Nevis
St. Lucia
St. Vincent and Grenadines
Sudan
Surinam
Swaziland
Syria
Tajikistan
Tanzania
Thailand
Timor
Togo
Tokelau
Tonga
Trinidad & Tobago
Tunisia
Turkey
Turkmenistan
Turks & Caicos Islands
Tuvalu
Uganda
Uruguay
Uzbekistan
Vanuatu
Venezuela
Vietnam
Wallis & Futuna
Western Samoa
Yemen
Yugoslavia, Fed. Rep.
Zambia
Zimbabwe

APPENDIX 11 LIST OF NETHERLANDS IMPORTERS AND MOST IMPORTANT EU IMPORTERS

(1) Dried fruit and vegetables
(2) Fruit juices
(3) Canned fruit and vegetables
(4) Jam
(5) Preserved mushrooms

(A) Agent
(B) Importer

BELGIUM

Harto International NV (1/A)
Address: Vlaamse Kaai 11,
B-2000 Antwerpen, Belgium
Telephone: + 32 (0) 3 2162 910
Fax: + 32 (0) 3 2384 886
E-mail: harto-intl@glo.be

Hygiena NV (2/B)
Address: Oostjachtpark 3,
B-9100 Sint Niklaas, Belgium
Telephone: + 32 (0) 3 7763 461
Fax: + 32 (0) 3 7781 413
E-mail: info@hygiena.be
Internet: www.hygiena.be

International Spiced Food Import SA (1/3/B)
Address: Avenue de l'Industrie 20,
B-1420 Braine l'Alleud, Belgium
Telephone: + 32 (0) 2 3846 077
Fax: + 32 (0) 2 3845 147
E-mail: issi.spices@skynet.be

Markelbach & Corne SA (1/B)
Address: Mechanicalaan 10,
B-2610 Antwerp-Wilrijk, Belgium
Telephone: + 32 (0) 3 8281 463
Fax: + 32 (0) 3 8282 320
E-mail: irfo@marcor.be

Scana-Noliko NV (3/5/B)
Address: Ind. Terrein Kanaal Noord 2002,
B-3960 Bree, Belgium
Telephone: + 32 (0) 89 4738 00
Fax: + 32 (0) 89 4722 86
E-mail: reception@scana-noliko.be
Internet: www.scana-noliko.be

FRANCE

Cooperative Agricole des Champignonistes du Saumurois (5/B)
Address: 4 rue Charles de Gaulle,
F-49250 Beaufort en Vallée, France
Telephone: + 33 (0) 2 4144 7700
Fax: + 33 (0) 2 4144 7724
E-mail: francechampignon@wanadoo.fr

CSR Pampryl (2/B)
Address: 9 rue Cidrerie,
F-35113 Domagné, France
Telephone: + 33 (0) 2 9900 0102
Fax: + 33 (0) 2 9900 0710

Eurobroker SA (1/A/B)
Address: 30 rue d' Astorg,
F 75008 Paris, France
Telephone: + 33 (0) 1 4494 8787
Fax: + 33 (0) 1 4006 0313
E-mail: euro@eurobroker.fr
Internet: www.eurobroker.fr

Joker SA (2/B)
Address: 53 avenue du Marché Gare,
F 34063 Cedex, Montpellier, France
Telephone: + 33 (0) 4 6792 4542
Fax: + 33 (0) 4 6758 5275
Internet: www.joker.fr

Navimpex Sarl (1/B)
Address: 110 rue de Paris,
F-94220 Charenton le Pont, France
Telephone: + 33 (0) 1 4179 3320
Fax: + 33 (0) 1 4179 3328/9
E-mail: navimpex@wanadoo.fr
Internet: www.navimpex.com

Ste de Distribution de Produits Alimentaires (2/B)
Address: 30 Zac le Pontet,
69380 Civrieux d'Azeigues, France
Telephone: + 33 (0) 4 7254 6489
Fax: + 33 (0) 4 7254 6488
E-mail: info@dpa-sarl.com
Internet: www.dpa-sarl.com

Vergers d' Alsace (2/B)
Address: Zone Ind. Metzweiher,
F-67260 Sard Union, France
Telephone: + 33 (0) 3 8800 3840
Fax: + 33 (0) 3 8800 3867

GERMANY

Brückner-Werke KG (1/A/B)

Address: Wendenstrasse 4,
D 20097 Hamburg, Germany
Telephone: + 49 (0) 40 2373 0801
Fax: + 49 (0) 40 2373 0888
E-mail: brucknerwerke@bwhh.de
Internet: www.brueckner-werke.de

Drinks & Food Vertriebs GmbH (2/3/4/B)

Address: Tempelhoferweg 11-12,
D-10829 Berlin, Germany
Telephone: + 49 (0) 30 7879 300
Fax: + 49 (0) 30 7879 3069
E-mail: info@drinksfood.de
Internet: www.drinksfood.de

Ernst Rickertsen Trockenfruchtimp. Handelsges. mbH (1/B)

Address: Rodigallee 233,
D 22043 Hamburg, Germany
Telephone: + 49 (0) 40 6549 760
Fax: + 49 (0) 40 6539 206
E-mail: info@erik.de
Internet: www.erik.de

Horst K. Danner (5/B)

Address: Labertalstrasse 4,
D-93161 Alling Regensburg, Germany
Telephone: + 49 (0) 9404 9555 0
Fax: + 49 (0) 9404 2096
E-mail: info@danner-pilze.de
Internet: www.danner-pilze.de

Odenwald Konserven GmbH (3/B)

Address: Bahnhofstrasse 31,
D-64747 Breuberg, Germany
Telephone: + 49 (0) 6165 3010
Fax: + 49 (0) 6165 3015 5
E-mail: info@odenwald-fruechte.de
Internet: www.odenwald-fruechte.de

Omnitrade handels-GmbH (1/B)

Address: Grosse strasse 2,
D-22926 Ahrensburg, Germany
Telephone: + 49 (0) 4102 8862 0
Fax: + 49 (0) 4102 8862 88
E-mail: info@omnitrade-hamburg.com
Internet: www.omnitrade-hamburg.com

Wilhelm F. Stirn GmbH & Co KG (1/B)

Address: Sandbergsteige 25,
D-74074 Heilbronn, Germany
Telephone: + 49 (0) 7131 9868 0
Fax: + 49 (0) 7131 9868 68
E-mail: stirn@stirn.de

THE NETHERLANDS

Alanheri Producten (1/A/B)

Address: P.O. Box 107,
4260 AC Wijk en Aalburg, The Netherlands
Telephone: + 31 (0) 416 3584 50
Fax: + 31 (0) 416 3527 04
E-mail: alanheri.prod@alanheri.nl

Boas B.V. (2/3/4/B)

Address: Postbus 340,
2700 AH Zoetermeer, The Netherlands
Telephone: + 31 (0) 79 3442 600
Fax: + 31 (0) 79 3421 722
E-mail: info@boas.nl
Internet: www.boas.nl

G. Buttner & Co (1/3/A)

Address: De Korf 54,
2924 AH Krimpen aan de IJssel,
The Netherlands
Telephone: + 31 (0) 180 5500 55
Fax: + 31 (0) 180 5504 32
E-mail: buttner@euronet.nl

Cargill B.V. (1/C)

Address: P.O. Box 8074,
1005 AB Amsterdam, The Netherlands
Telephone: + 31 (0) 20 5801 911
Fax: + 31 (0) 20 6820 193
Internet: www.cargill.com

Catz International B.V. (1/A/B)

Address: P.O. Box 180,
3000 AD Rotterdam, The Netherlands
Telephone: + 31 (0) 10 4113 440
Fax: + 31 (0) 10 4118 913
E-mail: info@catz.nl
Internet: www.catz.nl

Doens B.V.

(Organic products)

Address: P.O. Box 10,
4515 ZG IJzendijke, The Netherlands
Telephone: + 31 (0) 117 3020 20
Fax: + 31 (0) 117 3011 66
E-mail: info@doensfood.com
Internet: www.doensfood.com

Döhler-Euro Citrus B.V. (1/C)

(European specialist for standardized concentrate mixtures for juices and nectars)

Address: P.O. Box 227,
4900 AE Oosterhout (N.B.), The Netherlands
Telephone: + 31 (0) 162 4795 00
Fax: + 31 (0) 162 4795 81
Internet: www.doehler.com

Felix Cohen B.V. (1/3/A/B)
Address: P.O. Box 410,
4900 AK Oosterhout, The Netherlands
Telephone: + 31 (0) 162 6841 20
Fax: + 31 (0) 162 6865 36
E-mail: info@felixcohen.nl
Internet: www.felixcohen.nl

Go-Tan BV (1/3/5/C)
Address: P.O. Box 7,
4040 DA Kesteren, The Netherlands
Telephone: + 31 (0) 488 4871 00
Fax + 31 (0) 488 4821 93
E-mail: info@go-tan.nl

Horizon Natuurvoeding B.V. (1/2/B) *(organic products)*
Address: P.O. Box 77,
3400 AB IJselstein, The Netherlands
Telephone: + 31 (0) 30 6887 730
Fax: + 31 (0) 30 6887 142
E-mail: info@horizonnatuurvoeding.nl

The Nut Company B.V. (1/B)
Address: P.O. Box 29,
7000 AA Doetinchem, The Netherlands
Telephone: + 31 (0) 314 3702 45
Fax: + 31 (0) 314 3707 60
E-mail: ingredients@imkonut.com
Internet: www.thenutcompany.com

Jas Trading B.V. (1/5/B)
Address: P.O. Box 404,
1180 AK Amstelveen, The Netherlands
Telephone: + 31 (0) 20 6436 412
Fax: + 31 (0) 20 6432 127
E-mail: info@jastrading.com
Internet: www.jastrading.com

MCM Foods B.V. (1/3/B)
Address: P.O. Box 23375,
3001 KJ Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2130 488
Fax: + 31 (0) 10 4116 545
E-mail: mail@mcmfoods.com
Internet: www.mcmfoods.com

Pietercil Barends B.V. (3/B)
Address: Bleiswijkseweg 51,
2712 PB Zoetermeer, The Netherlands
Telephone: + 31 (0) 79 3441 100
Fax: + 31 (0) 79 3420 831
E-mail: pietercil_barends@pietercil.com

Polak & Co B.V. (1/3/5/B)
Address: P.O. Box 37022,
3005 LA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 4110 190
Fax: + 31 (0) 10 4125 938
E-mail: info@polakco.nl
Internet: www.polakco.nl

Samba (1/B)
Address: P.O. Box 12,
4284 ZG Rijswijk, The Netherlands
Telephone: + 31 (0) 183 4450 50
Fax: + 31 (0) 183 4450 59
E-mail: info@samba.nl
Internet: www.samba.nl

C. van de Sandt B.V. (1/A)
Address: P.O. Box 35030,
3005 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 4182 040
Fax: + 31 (0) 10 4610 665
E-mail: info@cvandesandt.com

Stolp International B.V. (1/B)
Address: P.O. Box 28,
3750 GA Bunschoten, The Netherlands
Telephone: + 31 (0) 33 2991 711
Fax: + 31 (0) 33 2984 224
E-mail: sales@stolp-int.com
Internet: www.stolp-int.com

UNITED KINGDOM
Chadha International Foods (3/B)
Address: 428 Long Drive, Greenford,
Middlesex UB6 8UH, United Kingdom
Telephone: + 44 (0) 20 8575 8575
Fax: + 44 (0) 20 8575 8771
E-mail: chadha@silkroadwt.co.uk
Internet: www.wtfoods.com

European Food Ingredients Ltd (1/A/B)
Address: Haddonsacre, Station Rd Offenham,
Evesham Worcestershire WR11 5LW,
United Kingdom
Telephone: + 44 (0) 386 8331 23
Fax: + 44 (0) 386 8336 55
Internet: www.foodfirst.co.uk

Food Brands Group Holdings Ltd (2/B)
Address: 9-10 Callico House, Plantation Wharf,
Battersea, London SW11 3TN,
United Kingdom
Telephone: + 44 (0) 20 7978 5300
Fax: + 44 (0) 20 7924 2732
E-mail: sales@spg.co.uk

Premier Brands UK Ltd (3/4/B)

Address:	P O Box 8, Pasture Road, Moreton, Wirral, Merseyside L46 8XF, United Kingdom
Telephone:	+ 44 (0) 151 5224 000
Fax:	+ 44 (0) 151 4731 685

APPENDIX 12 USEFUL INTERNET SITES

www.europages.com
This site includes contact details of European companies in the categories Agriculture & Livestock (dried fruit, fruit and vegetables, etc.) and Food & Related Products (drinks, frozen food, preserves, etc.).
(Language: English)

www.intracen.org
Web site of ITC with link to MNS Market News Service. Depending on the product group, the MNS product specialist contacts these sources of information to obtain up-to-the-minute data concerning the prices of products, supply and demand and other economic information. The collected information is then analysed, tabulated and processed in a computer programme specially designed for each product group, then transmitted to MNS subscribers by airmail, E-mail or fax.
(Language: English)

www.minlnv.nl
The web site of The Netherlands Ministry of Agriculture, Nature Management and Fishery provides information on policy and statistics on agriculture, nature management and fisheries. It also links up to other useful sites in Europe. For an overview of information by country, please refer to www.minlnv.nl/agribusiness/landen.
(Language: English, Dutch)

www.ifoam.org
Web site of the International Federation of Organic Agriculture Movements. Information on fairs, projects, events, regulations, reports and magazines on organic agriculture. Also provides links to other international organisations and databases including a collection of Country Reports on Organic Agriculture.
(Language: English)

www.green-tradenet.de
This site offers an overview of more than 950 organic raw materials certified or ready for certification, obtainable from 38 developing countries. Buyers and suppliers meet at an on-line marketplace where they can offer their products or submit requests for organic products. Moreover, it offers links to web pages of European importers of organic raw materials.
(Language: English)

www.foodnavigator.com
Research and Information Centre on food ingredients and the food ingredients industry. This site offers a variety of sites, articles, surveys and other products relevant to the food sector. Each Internet review offers direct access to the chosen material and a brief explanation about the link.
(Language: English)

http://apps.fao.org/page/collections?subset=agriculture
This Internet site contains the statistical database of the FAO (Food and Agriculture Organization). It offers detailed information on production, imports and exports of several kinds of fruit and vegetables.
(Language: English, French, Spanish, Arabic, and Chinese)

www.foodinfonet.com
Food Info Net is an Internet site for information and services related to food technology, R&D and manufacturing. The site combines the resources of food companies, research and academic institutions, industry suppliers, government agencies, and non-profit special interest groups.
(Language: English)

CBI puts you in touch with the markets of Europe

CBI, the Centre for the Promotion of Imports from developing countries, is an agency of the Netherlands Ministry of Foreign Affairs. Since its establishment in 1971, CBI operates within the policy framework set by the Minister for Development Co-operation. Its mission is to contribute to the economic independence of developing countries.
To fulfil this mission, CBI aims at strengthening the competitiveness of companies in those countries on international markets, primarily the West-European market, by improving conditions in enterprises and business support organisations. CBI considers social values and compliance with the most relevant environmental requirements to be an integral part of its policy and activities

CBI offers various programmes and services to its target groups:

Market information
- CBI News Bulletin (6 times annually);
- CBI guide "Exporting to the European Union";
- Market surveys and strategic marketing guides covering the EU including The Netherlands;
- Quick scans on environmental, social and health issues;
- Manuals on subjects such as technical and environmental regulations, trade fair participation, Fashion Forecast etc.;
- CBI's extensive Web site at www.cbi.nl providing general information about CBI, details about CBI programmes, CBI publications (downloadable free-of-charge) and the GreenBuss database on European trade-related environmental policy and technology;
- CBI' s Trade Documentation Centre offering supply-related information to importers, such as exporters' directories, country and sector information, periodicals from developing countries, and - to visiting exporters - demand-related information such as market information, trade magazines, address books of European companies etc.

Matching services
CBI's computerized exporters' and importers' databases, containing around 3,500 regularly updated company profiles, are instrumental in providing buyers and suppliers with relevant company data on potential trade partners.

Export promotion programmes (EPP)
Step-by-step approach providing intensive assistance to selected exporters in developing countries in order to obtain a firm and lasting position on the EU market. Made to measure, demand- driven and flexibility are combined with fixed elements such as:
- pre-selection of candidates based on written documentation;
- technical assistance during company visits and distance guidance by CBI branch experts;
- export marketing training (for instance through the EXPRO seminars);
- market entry (for instance via participation in European trade fairs);
- market consolidation by way of follow-up support, further technical assistance and/or repeat market entry activities.

Human resources development
- BSO MARKET INTEL: five-day seminar in Rotterdam for relevant middle management staff of BSO's, aiming at supporting BSO's in establishing or improving a Market Information Service (MIS);
- CAPITA: two-week seminar in Rotterdam for specific industry & trade associations. Aims to provide –through their associations- specific industries or sectors in developing countries with tools to engage in business relations with importers and/or manufacturers in the EU;
- BSO-FAME: two-week seminar in Rotterdam for project managers of BSOs focusing on practical knowledge and applicable tools in export promotion to international markets in general and the European market in particular;
- IntFair: two-week seminar in Rotterdam for BSO staff members on the organization of collective participation in European trade fairs;
- Expro: seven-day seminar in Rotterdam on export marketing and management for selected exporters participating in a CBI export promotion programme;
- Workshops in developing countries: 2-4 days for BSOs and/or exporters, focussing on general export marketing and management, a specific product sector or on specific subjects.

Multilateral co-operation
CBI co-operates with the International Trade Centre (ITC/WTO) to globalize trade promotion and with other European import promotion organizations to increase efficiency and effectiveness by combining efforts.

Please write to us in English, the working language of the CBI.

Centre for the Promotion of Imports from developing countries
Centrum tot Bevordering van de Import uit de ontwikkelingslanden

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