DRIED FRUIT AND EDIBLE NUTS

A SURVEY OF THE NETHERLANDS AND OTHER MAJOR MARKETS IN THE EUROPEAN UNION

Compiled for CBI by:

Searce

May 1999

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REPORT SUMMARY

This market survey covers two main product groups, dried fruit and edible nuts. For edible nuts there are two segments: groundnuts (or peanuts) and luxury nuts (or tree nuts). In trade statistics the term groundnuts is used, while in market descriptions more often is spoken about peanuts. The EU (European Union) is the leading importer of dried fruit and edible nuts in the world. In 1997, the EU imported more than one third of the total world imports of nuts, or 1,360 thousand tonnes of groundnuts and luxury nuts with a value of ECU 2,860 million. The Netherlands and the United Kingdom are the worlds' leading international traders of groundnuts, 70 per cent of which are produced by developing countries. Germany is the world's largest importer of luxury nuts. Of all luxury nuts 55 per cent was produced in developing countries.
Dried fruit is mainly produced by Mediterranean countries and the USA. In 1997, the EU imported 608,084 tonnes of dried fruit, with a value of ECU 857.3 million, which was more than three quarters of all the dried fruit imported throughout the world.

There is a long tradition of eating dried fruit and edible nuts in EU countries. A fast, "busy" lifestyle is now common throughout the EU and people, especially young people, are abandoning the habit of eating formal, sit-down meals and are more likely to eat snacks (or "graze") throughout the day. This trend is reflected in a higher consumption of luxury nuts. New variations of coated peanuts and small single packs stimulate impulse purchases in saturated groundnut markets. Demand for dried fruit shows little increase despite being increasingly used by the food industry in the manufacture of ready-to-eat, healthy snacks.

The Netherlands market

Consumption
The Netherlands is the largest importer of groundnuts in the world because of its extensive trade and a high domestic consumption of both groundnuts (peanuts) and related products (peanut butter and saté sauce). Total Dutch consumption of groundnuts in that year was estimated at around 70,000 tonnes, almost half of which were pure, salted or coated groundnuts, eaten as snacks. In 1997, the total consumption of luxury nuts was 38,283 tonnes, with a value of ECU 127.5 million, of which cashew nuts accounted for 30 per cent, coconuts (24 per cent) and almonds (19 per cent). Of the total consumption of edible nuts, or 108,283 tonnes, three quarters was used in the industrial sector.
The total consumption of dried fruit was 43,772 tonnes, with a value of ECU 52.4 million. People over the age of 45 buy more dried fruit, especially prunes, than any other age group, but now younger people are consuming more dried fruit in exotic, healthy dishes and desserts. However, food processors and packers of health food use the majority of dried fruit.

Production, imports and exports
The Netherlands does not produce dried fruit or edible nuts and, in 1997, imported 17 per cent of all the dried fruit and edible nuts imported by the EU. This represented a volume of 342,050 tonnes, with a total value of ECU 440 million. Edible nuts of all kinds, but mainly groundnuts, accounted for more than 80 per cent of this total, as The Netherlands

traditionally re-exports a large quantity of groundnuts. China was once the main supplier of groundnuts, but has now been overtaken by Argentina and the USA in importance. The USA is also an important supplier of luxury nuts and raisins. Most of the luxury nuts imported were coconuts, cashew nuts, almonds, hazelnuts, walnuts and pistachios. Other significant suppliers of edible nuts were India (cashew nuts), Ivory Coast (coconuts), Dominican Republic (coconuts), Iran (pistachios) and Singapore. Raisins/sultanas and apricots form the largest part of dried fruit imports, which amounted to 56,732 tonnes in 1997. Turkey is the main supplier of dried fruit to The Netherlands. Between 1995 and 1997 the proportion of dried fruit and edible nuts from developing countries increased from 65 to 71 per cent.

The EU market

Consumption

In 1997 apparent consumption (imports minus exports) of dried fruit and edible nuts in the EU was estimated to be 1.4 million tonnes, with a value of ECU 2,522 million.
The industrial sector consumed the largest proportion of dried fruit and most luxury nuts in 1997, due to the growing popularity of ready-to-eat healthy snacks, muesli, "healthier" chocolate with nuts and processed foods.
Germany, France and the United Kingdom, which have the largest populations in the EU, are the largest markets for dried fruit and edible nuts. Salted and roasted groundnuts dominate retail markets in most EU countries but in the last five years cashew nuts, pistachios, Brazil nuts, pecan, macadamia and other types of nuts, which are new to many consumers, have gained in popularity. Raisins/sultanas are by far the most important dried fruit for all EU countries, followed by currants, prunes, dates, figs, apricots and bananas. Demand for tropical dried fruit, such as papaya, mango, pineapple and guava is small but developing.

Production

EU countries produce substantial quantities of edible nuts and some dried fruit. Greece is the dominant world producer of currants; France is the second largest producer of prunes in the world and is well known for its hazelnuts, while Spain and Italy produce almonds, hazelnuts, chestnuts and very small quantities of pistachios. In 1993, the EU produced more than 770,000 tonnes of luxury nuts, but this had declined to 609,000 tonnes by 1997.

Imports and exports

Between 1995 and 1997 almost all EU countries increased their imports of dried fruit and luxury nuts, while demand for groundnuts remained fairly constant. Most of these products were imported in bulk. It is interesting to note that although total EU imports increased by only 2 per cent in volume, they had increased in value by 28 per cent. In terms of volume, 38 per cent of the imports were groundnuts, while luxury nuts and dried fruit shared almost equally in the remainder. Gross import figures, however, fluctuate considerably, because of the proportion of the total which represents re-exports between member countries of the EU and the tendency of major trading companies to hold varying stock levels.
The USA is an important supplier of raisins, prunes, almonds, walnuts, pecan nuts, hazelnuts and, increasingly, pistachios to the EU, while Turkey is the major supplier of

raisins, sultanas, dates, apricots and hazelnuts. Other significant suppliers of dried fruit are Greece, France, Australia and (re-) exporters like The Netherlands, Germany and Belgium. The EU import volume of dried fruit and edible nuts from developing countries increased by 4 per cent to 985,542 tonnes between 1995 and 1997. This increased the value of these imports by 23 per cent, or ECU 1,691.6 million. Argentina, India, South Africa, Indonesia, Tunisia, Algeria, Egypt, Sudan and Vietnam became important EU suppliers of dried fruit and edible nuts between 1995 and 1997.

Market prospects

Consumption levels of dried fruit and edible nuts vary from country to country within the EU, though the eating of snacks in place of regular meals is now increasingly common throughout the community. The Netherlands, Italy, Belgium, Portugal and Denmark are significant markets for dried fruit. Consumers in most EU countries enjoy salted and roasted groundnuts, which have the largest share of the retail nut market. Germany and France are large markets for luxury nuts since these are traditionally served with apéritifs (pre-dinner drinks). In the United Kingdom, other savoury snacks (crisps and taco chips) are popular as well as nuts, a trend that also applies to other EU countries. To stimulate sales of edible nuts, supermarkets have introduced private label large packs of nut mixtures at low prices, while snack kiosks in Spain and Italy encourage the impulse buying of single packs.

Opportunities

In recent years, suppliers of fast food and snacks have benefited from people's increasing tendency to eat snacks, so the savoury snack market grew significantly between 1993 and 1997. This development stimulated the market for groundnuts and, even more, for luxury nuts. In future, the market for nuts in Germany, United Kingdom, Spain, Italy, The Netherlands and some Scandinavian countries is expected to polarise between cheap, often private label products and premium products. The latter category includes pecan nuts, macadamia nuts and new, exotic nuts like the tropical almond, almondette, oyster nut, souari nut, butter nut, heart nut, quandong nut, pili nut, paradise nut, litchi nut, bread nut, jojoba nut or Chilean wild nut.

Demand for luxury nuts is growing fast in most markets, stimulated by the fall in import prices and the resulting lower retail prices for consumers. Luxury nuts such as pine nuts, cashew nuts, and almonds are also increasingly used in foods like salads or are chosen as a meat substitute, especially by an increasing number of vegetarians. New variations of coated groundnuts and coated luxury nuts will be introduced by packers to stimulate impulse purchases, while industrial applications like luxury nut oils or the use of groundnuts in sauces or in bird food may give additional opportunities for exporters of edible nuts.

The growing concern about health is also closely related to the consumer's ability to deal with a busier lifestyle. This has led to an expansion in the sale and variety of breakfast cereals, healthy or "energy boosting" chocolate snacks and muesli crunches, which are individually packed and which are being launched as modern, healthy, ready-to-eat products. This development will have a positive effect on the market for dried fruit, which has not shown much growth in the 1990s.

Constraints
In the market for dried fruit and edible nuts, success depends on consistency of quality, fast delivery, safe packaging, product innovation and variety in products, brought about by sound research and development. Food and drink manufacturers demand consistently high quality and tailor-made or pre-processed dried fruit, edible nuts or mixtures for their specific applications. They tend to stick with preferred suppliers who have proved themselves to be reliable and who work under the HACCP system. Price has been of secondary importance to quality but may become more important in the future. The trade channels most open to new exporters are those for the bulk sale of dried fruit and edible nuts to importers/traders. There are several major reasons for the low demand for nuts or fruits processed and packed in the country of origin. In the Dutch market especially, there is a tradition of expertise in the "gathering" and "mixing" of dried fruit and edible nuts by the major processors and packers. They supply supermarket chains direct and are financially able to support exclusive contracts and advertising campaigns or to service in-store racks and stock control. For these reasons, the prospects for exporting processed consumer packed dried fruit and edible nuts directly from the countries of origin are limited, with the possible exception of canned products.

1 INTRODUCTION

This survey deals with the Netherlands and European Union (EU) markets for dried fruit and edible nuts. Its main purpose is to provide exporters in developing countries with a better insight into this competitive market. It should assist them to find the right market opportunities and to become familiar with the most suitable market segments for their dried fruit and edible nuts.

The main product groups, which are covered in this survey, are explained in chapter 2, along with their classification for customs and statistical purposes.
Chapter 3 starts with a brief general review of market size, trends, segments, consumer preferences and buying behaviour, giving an idea of the demand in the Dutch market for dried fruit and edible nuts.
The following section in this chapter reviews production and significant trade and includes import and export statistics. Detailed information is also given on the role of developing countries in Dutch imports of dried fruit and edible nuts. The remainder of this chapter profiles the trade structure of the main Dutch importers, wholesalers and retailers, including recent developments, and gives an overview of prices and margins at different distribution levels.

Chapter 4 reviews the EU market as a whole and highlights the similarities and differences between the national markets for dried fruit and edible nuts. It also reviews production, imports and exports in the major countries. In a separate section at the end of this chapter, the role of developing countries in EU imports is explained in more detail. The main part of this chapter outlines the larger individual markets for dried fruit and edible nuts: Germany, United Kingdom, France, Italy, Spain and Belgium.

Chapter 5 covers some more practical issues of access to the Netherlands and EU markets for exporters from developing countries. Information is given on regulations and quality standards for imported dried fruit and edible nuts and suggestions are made for environmentally sound products for the Dutch market. This chapter concludes with a series of practical tips concerning the business practices and promotional tools often used in the food industry. A list of names and addresses of relevant trade fairs and magazines is included, along with a checklist showing the most important topics for exporters in developing countries.

It is important to note that since the establishment of the single EU market on January 1, 1993, the collection of data regarding trade flows has become more difficult. Prior to that date, trade was registered through compulsory customs procedures at border crossings. Due to the removal of the intra-EU borders, this is no longer the case, so statistical bodies like Eurostat can no longer 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. This threshold varies considerably from country to country, but it is typically to about ECU 100,000. Statistical information on trade within the EU is consequently underestimated and must be carefully interpreted.

The ECU (European Currency Unit) is the basic currency unit used to indicate values. The most recent Eurostat trade statistics are those of 1997. In that year, the EU was still used as a monetary instrument by financial institutions to simplify financial procedures. It presented the aggregate valuation of the 12 original EU member currencies. In 1997, *ECU 1* had an average value of *US $ 1.13* or *NLG 2.20*.

Exchange rates of EU currencies and US $ against the ECU, averages for 1997

Currency	Country	ECU	Currency	Country	ECU
Ash	Austria	7.26 / 100	L	Italy	5.20 / 10.000
Bfr	Belgium	2.47 / 100	NLG	Netherlands	45.04 / 100
Dkr	Denmark	13.40 / 100	Esc	Portugal	0.51 / 100
Ffr	France	15.17 / 100	Ptas	Spain	0.60 /100
FM	Finland	17.06 / 100	Skr	Sweden	11.60 / 100
DM	Germany	51.06 / 100	GB£	UK	1.45
GRD	Greece	0.32 / 100	US$	USA	0.89
I£	Ireland	1.34			

Source: ABN/AMRO Bank, 1 January 1998

On 1 January 1999, the Euro (€) became the legal currency of the EU. National currencies of participating countries became subdivisions of the Euro. It should be noted that not all EU currencies have joined the Euro. The exchange rate € / NLG was set at 2.20371, while the € / US$ exchange rate averaged 1.16 in January 1999. Although foreign exchange operations in Euro can begin and new public debt issues will be in Euro, national banknotes and coins will not yet be replaced. Banking is now possible both in Euro and the national currency. Production of Euro coins and banknotes begins 1 January 2002 and these will gradually replace notes and coins in national currencies, which must be withdrawn by 1 July 2002 at the latest.

2 PRODUCT CHARACTERISTICS

2.1 Product groups

This market survey covers two main product groups, dried fruit and edible nuts. Dried fruit can broadly be divided into vine fruits and tree fruits. The best-known vine fruits are raisins/sultanas and currants. The most important tree fruits for the European trade are apples, apricots, banana chips, dates, figs, papayas, peaches, prunes and various fruit mixtures.
For edible nuts there are two segments: groundnuts (peanuts) and luxury (tree) nuts.
The most important types of the latter for the European trade are almonds, hazelnuts, pistachios, coconuts, cashew nuts, walnuts and para- or Brazil nuts.
Information on related products may be found in the following CBI market surveys:
- Fresh fruit and vegetables
- Preserved fruit and vegetables in consumer and catering packs
- Oil seeds
- Health foods

The main dried fruit and edible nuts covered by this market survey are:

Dried fruit	Edible nuts
Raisins/sultanas	Groundnuts (peanuts)
Currants	Coconuts
Prunes	Cashew nuts
Apricots	Almonds
Figs	Hazelnuts
Dates	Walnuts
Bananas	Pistachios
Peaches/nectarines	Para- or Brazil nuts
Apples	Pecan nuts
Mixtures of dried fruit	Pine nuts
Other dried fruit	Macadamia (Australian) nuts
(Papayas, pears, tamarind, mangoes, lychees etc.)	Chestnuts
	Mixtures of nuts
	Other edible nuts
	(Cola, areca" betel" nuts etc.)

Appendix 1 gives a description of each major dried fruit and edible nut and its use.

2.2 Customs/statistical product classification

The HS code groups for dried fruit and edible nuts covered by this survey are grouped under the following headings. A detailed list of HS codes can be found in Appendix 1, which shows the codes used since 1996.

The relevant HS code groups for dried fruit and edible nuts covered in this report are:

HS code	Dried fruit
0803 0090	Bananas, incl. plantains, dried
0804 10	Dates, fresh or dried
0804 2090	Figs, dried
0806 2011/2091	Currants
0806 2012/2092	Sultanas
0806 2018/2098	Dried grapes, (excl. currants and sultanas)
0813 10	Apricots, dried
0813 20	Prunes, dried
0813 30	Apples, dried
0813 4010	Peaches (including nectarines), dried
0813 4030	Pears, dried
0813 4050	Papayas or pawpaws, dried
0813 4060	Tamarind fruit, dried
0813 4070/4095	Other dried fruit
0813 5012/5015/5019	Mixtures of dried fruit

HS code	Edible nuts
1202 10900	Groundnuts (in shell)
1202 20000	Groundnuts (shelled)
2008 1192/1196	Roasted groundnuts
0801 111	Dessicated coconut
0801 119	Fresh coconuts
0801 21/22	Brazil nuts (= para nuts = Amazonia nuts)
0801 31/32	Cashew nuts
0802 1110/1210	Almonds, bitter
0802 1190/1290	Almonds, sweet (= excl. bitter)
0802 21/22	Hazelnuts
0802 31/32	Walnuts
0802 40	Chestnuts
0802 50	Pistachios
0802 9010	Pecan nuts
0802 9050	Pine nuts
0802 9060	Macadamia (Australian) nuts
0802 9085/9030	Other nuts (incl. Areca "betel" and cola nuts)
0813 5031	Mixtures exclusively of coconuts, cashew nuts, Brazil nuts, areca "betel" nuts, cola nuts and macadamia nuts

3 THE NETHERLANDS MARKET

3.1 Consumption

3.1.1 Market size

The Netherlands is a densely populated country, which had a total of 15.7 million inhabitants in 1997. The average Gross Domestic Product (GDP) per capita in 1997 was ECU 20,530, of which the service sector contributed about 67 per cent. The total GDP in 1997 was ECU 320 billion. In 1997 The Netherlands accounted for 17 per cent of total EU imports of dried fruit and edible nuts, or a value of 342,050 tonnes. More than 80 per cent of all imports in this category are edible nuts, since The Netherlands has a long tradition as an important transit country for groundnuts and, together with Indonesia and the United Kingdom, is one of the largest importers of groundnuts in the world.
Demand from Dutch traders for imported raw groundnuts for the local market absorbed 52 per cent of total Dutch groundnut imports in 1997, with the remaining 48 per cent being re-exported. The Netherlands also re-exports luxury nuts, especially coconuts, cashew nuts and walnuts. Local consumption accounted for 77 per cent of Dutch imports of luxury nuts in 1997. Dried fruit is imported in bulk and about three-quarters of Dutch imports are sold as consumer-packed dried fruits or are used as an ingredient in various food products such as cereals, cereal bars, chocolate bars and bakery products.

As The Netherlands does not have any local production of dried fruit or nuts a very rough indication of domestic market demand can be given by the apparent consumption (imports minus exports) for dried fruit and edible nuts together. In 1997, this was estimated at 182,991 tonnes with a value of ECU 234 million, as is shown in table 3.1. Variations in the apparent consumption are caused not only by actual import and export volumes but also by the practice of major traders, who hold and release stock, especially of groundnuts, at different times of year. Variations in availability are also caused by varying annual harvests and by the demand for processing and mixing generated by major packers and traders. Shelled nuts and dried fruit imported into the Dutch market are often re-exported after processing.
The variation in volume of the apparent consumption of dried fruit and edible nuts between 1995 and 1997 was not substantial, but there was an increase in value in that period, since luxury nuts were more in demand.

Table 3.1 Apparent consumption of dried fruit and edible nuts in The Netherlands, 1995 and 1997

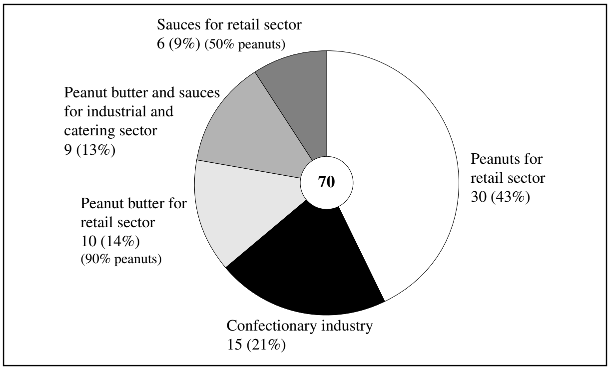
	1995		1997	
	Dried fruit	**Edible nuts**	**Dried fruit**	**Edible nuts**
Volume in tonnes				
Imports	60,519	297,246	56,732	285,318
Exports	13,194	154,919	13,010	146,049
Apparent consumption	*47,325*	*142,327*	*43,722*	*139,269*
Value in ECU million				
Imports	73.2	310.8	72.7	367.6
Exports	16.7	166.4	20.2	186.1
Apparent consumption	*56.5*	*194.4*	*52.5*	*181.5*

Source: Eurostat 1998

Luxury nuts accounted for 55 per cent, groundnuts for 23 per cent and dried fruit for 22 per cent of the total value of Dutch consumption in 1997. Because of their lower price, the share of groundnuts in volume terms was much more significant, at more then half of total consumption.
The per capita consumption of edible nuts in 1997 was 2.1 kg, which represents a value per head of ECU 8.59. This was high compared to other EU countries as was also the case for the per capita consumption of dried fruit, which was 2.4 kg in 1997. An overview of EU per capita consumption is given in chapter 4, figure 4.1. The Dutch per capita consumption of groundnuts and groundnut products (peanut butter, peanut sauce etc.) in 1996 was more than 4.5 kg per head.

Groundnuts: apparent consumption was 100,968 tonnes in 1997 but this figure does not represent the true situation as large variations are caused by stock being stored in six different locations, to meet a fluctuating demand throughout the year. Trade sources estimated the Dutch consumption of groundnuts to be around 70,000 tonnes in 1998. Almost half of those are pure, salted or coated peanuts used as snacks for the consumer market. Approximately 23 per cent is destined for food processors in the industrial sector, especially for the manufacture of peanut butter and for the popular saté sauce, which is used in Indonesian cuisine or barbecues, while a further percentage of the total is used by restaurants, snack bars (as in a popular sauce with French fries) and in the catering sector. Around 21 per cent of peanuts are coated and exported by large multinational chocolate manufacturers, like Mars. In 1996 the consumption of groundnuts by sector in The Netherlands was as follows:

Figure 3.1 Use of groundnuts by sector in The Netherlands, 1996
Volume in thousand tonnes



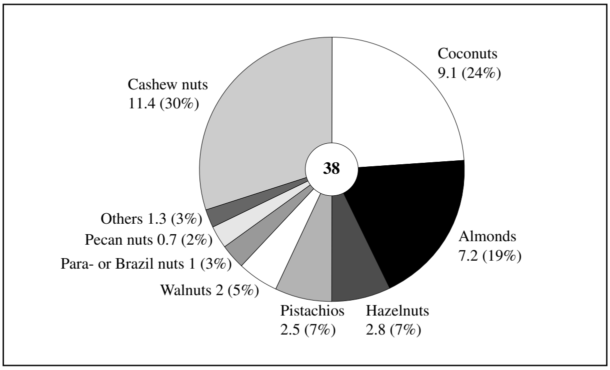
Source: International Trade Centre, 1998

Plain peanuts in salted or roasted form accounted for 50 per cent of the total Dutch consumer market in 1996. 40 per cent were coated peanuts and 10 per cent peanuts in the shell. In the 1970s the leading brand Duyvis introduced the "borrelnoot", a spiced flour-coated peanut which gave a large impetus to the saturated peanut market. Today, Dutch people consume a large number of coated and flavoured peanuts, ranging from chocolate, cheese, savoury, spicy or soy coatings to a large variety of flour-coated peanuts sold as "cocktail nuts", "party nuts", "tiger nuts" or exotically named nuts such as "Shanghai", "Mexicano" or "Katjang Pedis". Since the mid-1990s new flavours have been introduced and heavily promoted by two leading importers. The market for plain peanuts in the retail sector has stabilised and this is also expected to happen for coated and flavoured nuts. The industrial use of peanuts for bird food in The Netherlands was around 2,000 tonnes in 1996.

Luxury nuts have grown in popularity in all sectors and, in the consumer market, nut packers have successfully marketed newly developed mixtures. These are enjoyed as luxury snacks and are increasingly used as an ingredient in exotic French or Chinese dishes (e.g. Chinese chicken with cashew nuts). Luxury nuts are also becoming popular as a tasty and healthy substitute for meat. Nuts are also used in recipes for salads, especially combined with pine nuts, walnuts, almonds, pepitas, and other seeds or with croutons (small pieces of toast).
Dutch people also enjoy new varieties of salad dressings used in French, Italian, Asian and Mexican cuisine. For the grinder and processor this has given an opportunity to introduce ready-to-use "salad kits" consisting of nuts, seeds and dried fruit. These ready-to-use kits and nut oils used for stir-fry meals have become very popular. Luxury nuts are also eaten with cheese after a special dinner.
More consumers also recognise the health value of luxury nuts, with their high nutrition and protein levels another factor, which is expected to increase the demand for luxury nuts. Macadamia nuts, for example, contain 11 minerals, including magnesium, and are cholesterol-free.

The Netherlands imports mainly shelled nuts. In 1997 the apparent consumption of luxury nuts was 38,283 tonnes, with a value of ECU 127.5 million of which a large proportion were cashew nuts, as is shown in figure 3.2.

Figure 3.2 Apparent consumption of luxury nuts in The Netherlands, 1997 Volume in thousand tonnes



Source: Eurostat 1998

In 1998 the consumer market used around 80 per cent of all imported cashew nuts, pistachios, pine nuts, pecan nuts, macadamia and Brazil nuts were used as snacks or in salads. Luxury nut mixes were most popular and consumers are becoming interested in new mixtures, either salted, or sweet, eaten as a snack or as an ingredient in salads or meals.
As their disposable income continues to rise and prices have slightly lowered, the Dutch are increasingly willing to try new nuts with new or different flavours. Nuts are still regarded as luxury items, but because new and different uses for luxury nuts are being introduced, a continued growth in demand is expected. The increasing demand for luxury nuts in recent years has meant a reduction in the consumption of groundnuts, as is shown in table 3.2.

Table 3.2 Consumption ratio of edible nuts in The Netherlands in 1992 and 1997

	1992	**1997**
Groundnuts	75%	45%
Luxury nuts	25%	55%

Source: NZV

Around 85 per cent of imported almonds, coconuts and hazelnuts are used in the bakery and food processing industry, where some growth is expected.
At consumer level, little attention is paid to the origin of nuts and producing countries make no effort to promote the qualities of their groundnuts or luxury nuts directly to

consumers. Importers and packers, therefore, hold that nuts from various origins are generally interchangeable and the determining factor in selecting a particular product is its price. The same applies to dried fruit.

Dried fruit is mainly imported in bulk and its consumption in The Netherlands has remained fairly constant. In 1997 the apparent consumption was 43,772 tonnes with a value of ECU 52.4 million. Raisins/sultanas are the most popular dried fruit, comprising almost 70 per cent of Dutch imports. Others are currants (10 per cent), prunes (7 per cent), apricots (4 per cent), figs, dates and bananas. Only 5 per cent of raisins and currants are sold in consumer packs in the retail sector, the largest part being used by the industrial sector. Prunes, apricots and other dried fruits are mainly used in the retail/catering sector as is shown in table 3.3.

Table 3.3 End use of dried fruit in The Netherlands in 1997

	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%
Mixed dried fruit (tutti frutti)	85%	15%

Source: NZV, Primeur 1998

Further information on the volume of imports and the trends in major individual dried fruit and edible nuts can be found in section 3.3.2 and in Appendix 2.

3.1.2 Market segmentation

Dutch consumption of dried fruit and edible nuts can be divided into two end-user segments: the industrial sector and the retail/catering sector.

- **Industrial sector**

  There are 280 manufacturers in The Netherlands, producing 15,000 different confectionery, bakery and snack items, which are sold through more than 75,000 retail outlets. The major industrial users of dried fruit and shelled nuts in different forms are:

  - **The confectionery and chocolate industry** in chocolate bars, health and snack bars, nougat etc. Mars, who have a production plant and a European purchasing office in The Netherlands, use peanuts; important chocolate bar brands are *Snickers, M&M* and *Nuts*. The total retail sales of chocolate confectionery in The Netherlands in 1997 were 72,900 tonnes, of which filled bars accounted for 22,900 tonnes and chocolate and bonbons for 23,300 tonnes.

Adding nuts to chocolate bars gives not only extra flavour; their healthy image also appeals to consumers. New nutritious between-meal muesli snacks or biscuits, sometimes referred to as "nutritionals", have also been introduced by manufacturers like General Biscuits/Danone (brand: *Liga*) and United Biscuits *(Sultana)*, who have created healthy snacks with a sweeter taste targetted at busy people. Other manufacturers (Peijnenburg and Wasa) have also entered this growing market. Further growth is expected for the chocolate market, particularly for high value and "healthy" variations. Confectioners often have complex product specifications for ingredients to be used in chocolate products e.g. walnut halves with a maximum diameter of 25 mm, or Brazil nuts in the unusual size of 140-150 pieces to the pound.

- **The breakfast cereal industry** is a major and growing end user manufacturing cereals, mueslis and cereal bars that include dried fruit and nut components such as raisins, coconut, hazelnuts and almonds. The total market for breakfast cereals containing dried fruit and edible nuts grew to a volume of around 80,000 tonnes with a value of ECU 71.5 million in 1997. New variations of muesli, like tropical or exotic muesli and muesli snacks and the continuing development of new mixes, crunches and healthy snacks are increasing the usage of apple, banana chips/flakes, dates, papaya, mango, guava and a variety of nuts as ingredients;

- **The bakery trade** is a very significant user of currants, raisins, prunes and hazelnuts for ready made bread and cakes, bread and cake mixes, biscuits etc.. Hazelnuts are purchased in different sizes and in a large variety of forms: natural, blanched, roasted, in pieces, as meal or in paste form. The same applies to almonds, which are most often used in paste form in sweet bread and the almond pastry rolls which are most popular in the St Nicholas (December 6) and Christmas period. Dutch bakeries often also use desiccated coconut, walnuts, pecan nuts and other dried fruits. The total retail sales of bakery products in The Netherlands in 1997 was 276,100 tonnes, of which biscuit-based snacks ("nutritionals") accounted for 9,400 tonnes and filled pastry for 62,200 tonnes;

- **The dairy industry** produces ice cream, desserts, flavoured yoghurt etc.. In 1996 the Dutch market for yoghurt was 344,200 tonnes and the ice cream market was 27,700 tonnes. Raisins, currants, desiccated coconut, almonds, pistachio nuts (pistachio flavoured ice) and walnuts are the main dried fruit and nuts used;

- **Peanut butter industry:** peanut butter and peanut (saté) sauce. In 1996, the consumption of peanut butter was estimated at 16,000 tonnes per year of which 25 per cent was used by the catering sector. In the same year the total consumer market for peanut sauce was valued at ECU 16.4 million. The most important brands are *Conimex*, with 18 per cent of the market, *Knorr*, (13 per cent), *Suzi-Wan* (12 per cent) and *Calvé* (8 per cent) and *Gouda's Glorie*, which is produced by Van Dijk Foods and which also has a large presence in the catering sector.

- Health foods manufacturers: pastas, spreads, vegetarian meals, confectionery, sauces etc.;

- Other industries such as the manufacturers of hazelnut-chocolate spreads *(Nutella)*, baby food, nut oils, fruit teas, ready meals, ready-to-use mixtures for stir-fry and salads (pine nuts, walnuts, cashew nuts) and bird foods (peanuts) etc.;

This sector is expected to grow further since the prevailing emphasis on healthy foods using more dried fruit and edible nuts affects all the above industries. There is expected to be an increased demand for groundnuts from the food processing industry as manufacturers increase their ranges of ready-to-use (exotic) products containing nuts and dried fruits for stir fry meals and ready-to-use salad kits, which busy housekeepers find convenient.

■ **Retail sector**

Edible nuts in The Netherlands include peanuts and luxury nuts and rice crackers. Edible nuts, rice crackers, salted biscuits, chips and other snacks form the market for savoury snacks. The number of snacks consumed per day is likely to increase, since consumers, leading increasingly hectic lives, are tending to adhere less to formal meal patterns and preferring instead to take quick snacks throughout the day.

Total retail sales of the savoury snack market amounted to ECU 532 million in 1997 - a total which had grown constantly in value since 1991, and now exceeds the total sales of chocolate confectionery and represents only a slightly smaller total than the market for sugar confectionery. In volume retail sales of savoury snacks amounted to 99,900 tonnes, of which edible nuts accounted for 32,200 tonnes. In The Netherlands, edible nuts represent almost one third of the savoury snack market, which is high in comparison to other EU countries.

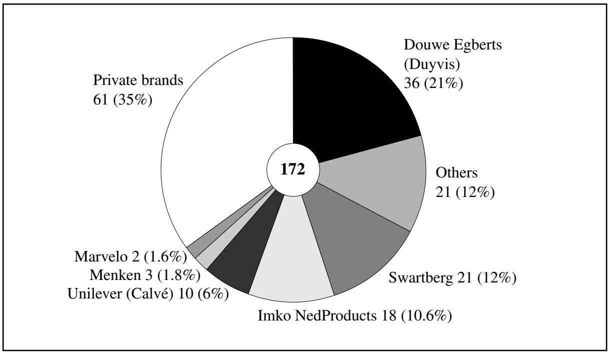
Between 1991 and 1997, sales of packaged edible nuts increased by 28 per cent to a value of ECU 172 million. Since 1990, packaged nuts have replaced edible nuts sold in loose form because supermarkets stopped selling loose nuts at service counters.

In 1997 (coated) peanuts accounted for 53 per cent of sales of edible nuts; luxury nuts 30 per cent and mixtures (luxury nuts, peanuts and raisins) 10 per cent, while rice crackers have grown fast in popularity and accounted for 7 per cent. The demand for luxury nuts rose from a retail value of ECU 4.6 million in 1987 to ECU 51.6 million in 1995, and this trend is expected to continue. Between 1995 and 1997 the sale of nut mixtures increased by more than 40 per cent.

Douwe Egberts (brand: *Duyvis*) and Calvé, a Unilever subsidiary, (brand: *Calvé*), who together hold a market share of 80 per cent in the coated peanut segment, dominate the market for edible nuts. In July 1996 Douwe Egberts bought the coated peanut business from Calvé with the right to use the brand name for three years. Calvé retained their peanut butter business, where they are the market leaders.

In 1998, more then 30 per cent of retail sales of edible nuts in The Netherlands was taken by private brands, of which that of leading supermarket chain Albert Heijn is the largest. In the luxury nut segment Imko Ned Products B.V. (brand: *Klijn*) has a large presence and is a well-known supplier to the catering sector. *Baukje* is the major brand for luxury nuts for baking purposes. In 1997 the relative shares of the Dutch market for edible nuts were as follows:

Figure 3.3 Retail / Catering market shares of edible nuts in The Netherlands, 1997 Value in ECU million (in per cent of total market)



Source: ITC, CIG 1998

In terms of overall consumer demand for edible nuts peanuts, desiccated coconut, cashew nuts, almonds and hazelnuts are the most important products. Desiccated coconut and almonds are significant as ingredients, whereas peanuts, cashew nuts, pistachios, Brazil nuts and pecan nuts are primarily snack products.

There is growing demand for cashews, pistachios, pine nuts, Brazil nuts and pecan nuts. Sales of both cashew nuts and pistachios were stimulated in 1997 by price competition initiated by the leading supermarket chain Albert Heijn who had a large share of the market with their private brand. Pine, pecan and macadamia nuts are included in recipes and publicity campaigns organised by major importers and the NZV (Netherlands Dried Fruit and Nut Trade Association). Most Dutch people are familiar with cashew nuts, peanuts, pistachios and mixtures but there are still many less familiar nuts such as pecan nuts, Brazil nuts and macadamia nuts. Walnuts and almonds are perceived as too expensive and are therefore only used as an ingredient in meals or salads. The most popular edible nuts are shown in table 3.4.

Table 3.4 The most popular edible nuts in The Netherlands, 1998

Product name	Main nuts in mixes
– Peanuts large (groundnuts)	
– Peanuts (salted, unsalted groundnuts)	
– Cashew nuts (salted, unsalted)	
– Pistachios	
– Shanghai nuts/cocktail nuts/party nuts	Savoury coated peanuts
– Nut mixes	Almonds, hazelnuts, Brazil nuts and pecan nuts
– Huis mix royal	Cashew nuts, almonds, pecan nuts, macadamia nuts
– Elite haver (unsalted nuts with raisins)	Brazil nuts, almonds, hazelnuts, pecan nuts
– Dutch salad mix	Almonds, cashew nuts
– Katjang pedis	Indonesian spicy coated peanuts
– Pine nuts	
– Almonds (normal or smoked)	
– Sugared peanuts / Chocolate coated peanuts	
– Honey pecans	

Source: NZV, Albert Heijn 1999

Edible nuts are perceived positively by most Dutch people and are often associated with a pleasant and sociable atmosphere. According to a survey of the PT (Netherlands Horticulture Commodity Board), 30 per cent of the consumers of edible nuts buy luxury nuts weekly and 25 per cent once every two weeks. Dutch consumers can be divided into four segments:

- **Traditionals** - who know the most common kinds of edible nuts like peanuts (salted, flavoured and sugar-coated), cashew nuts, mixtures and pistachios. They buy nuts during the weekend, and price is an important factor, since they regard luxury nuts to be rather expensive. Traditionals are typically between the ages of 16 and 50 years old and live in households with children. Supermarkets and importers promote new uses for luxury nuts (in meals, salads etc.) by placing them in different sections of the supermarket. Encouraging them to use luxury nuts and mixes more often (during the week, for example), introducing new types of luxury nuts and nut mixes and selling them at affordable prices should stimulate demand within this group;

- **Rich creative** - these are the nut "experts", who are likely to be familiar with macadamia, pecan and Brazil nuts. They regard luxury nuts as trendy and consume the same amount of luxury nuts during the week as they do at the weekend. They use nuts in salads and in various meals because they love cooking and experimenting; they follow new trends and seek out new products and inspiration in stores and often buy on impulse in nut bars and open markets, but they also shop in supermarkets.

They enjoy a variety of nuts and cuisine, often combined with entertainment and healthy eating. For them price is a less important factor. They are typically between the ages of 20 and 39 years old and usually live in single person households. This group is estimated at around 20 per cent of all nut consumers and is likely to grow in number. Supermarkets and importers continuously need to introduce new kinds of nuts and new ideas to retain the interest of this group, to prevent the nut trend being "over", which would undoubtedly result in decreased consumption by this group. Rich creative consumers are setting trends that are often followed by the other groups;

- **Simple sensualists** - these people have some knowledge of the different kinds of edible nuts; they usually have them as a social snack during the weekend and hardly ever use luxury nuts in meals. For them price is less important than it is for the traditionals. Simple sensualists usually live in two person households, are typically over 55 years old and buy mostly in nut bars and delicatessens, where they can find a large assortment of luxury nuts.

- **Uninterested** - they do not have an interest in luxury nuts and are mainly consumers of other savoury snacks like potato crisps, hot snacks or (coated) peanuts. They do not feel attracted to nor are they curious about different types of luxury nuts. They seldom buy them, preferring a large variety of alternative snacks for their money.

There are two main types of package in supermarkets: the "industrially" packed shelled nuts (150 - 250 grams, 500 grams for peanuts) and pre-packed fresh shelled nuts, sold in plastic bags and transparent boxes (150 -250 grams) at the snack section in the supermarket. At the bakery product section almonds (with skin, blanched, slivered), peanut slivers, hazelnuts and shelled walnuts are sold, serving as ingredients for cakes etc.. The nut bars and market stalls offer a wide range of fresh nuts and nut mixes, which are mostly sold in loose form. The fresh blends of nuts sold in the stalls encourage people to buy them impulsively. Consumers prefer fresh (pre-packed) nuts, since their freshness is guaranteed. In-shell nuts are mainly offered and sold during the festive season, which includes St. Nicholas (December 6), Christmas and New Year.

Dried fruit sales in the retail sector in The Netherlands have been fairly constant since 1990. Raisins are the most popular dried fruit and currants, prunes, apricots and mixtures of dried fruit rank next in importance. 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 per cent buy raisins, 60 per cent buy currants and 25 per cent buy apricots, prunes and tutti frutti. Only 10 per cent of consumers buy dates, 8 per cent buy figs and a very small group of people buys other dried fruit. People over the age of 45 are the biggest consumers of dried fruits, especially prunes, and this entire product group has a somewhat old-fashioned image. Dried fruits have been promoted by importers to be used in exotic dishes and desserts, but among young people these products are more associated with exotic countries and summer.

Raisins, currants and apples are used primarily as ingredients in bakery products, (cakes, bread, pies, pancakes) and meals (rice dishes, salads, main meal dishes, puddings). Mixtures of dried fruit, apricots and prunes are usually eaten raw or are used as ingredients in desserts. Mixed dried fruit (tutti frutti) is often eaten as a snack at Christmas, while prunes are often combined with game meats during winter or are used in exotic meals. Apricots are rich in minerals and are recommended to women who have a shortage of iron. Figs, dates and banana chips are real snack products, of which banana chips have grown fast in popularity. The consumption of dried fruit can be divided into the use as an ingredient and use as snacks. Estimates for the relative importance of the two uses are shown for each product group in table 3.5.

Table 3.5 Consumption of dried fruit by usage (in percent of total)

	As ingredient	As snack
Currants	65%	35%
Raisins	65%	35%
Apple, prunes	65%	35%
Tutti frutti	70%	30%
Apricots	50%	50%
Figs, dates	20%	80%
Banana chips	5%	95%

Source: PGF/NZV 1998

Some impulse has been given to the market by special advertising campaigns organised by The Netherlands Dried Fruit Trade Association in co-operation with the trade, and by the promotion of new and lesser known fruits, such as papaya, guava, kumquats and sour pitted cherries. The publicity has stimulated demand amongst younger people by informing them about the variety of fruits available, about the ways in which they can be eaten and prepared in recipes and about the contribution dried fruits can make to a healthy diet. The main purpose of this campaign is to change the old-fashion image of dried fruit into a healthy/exotic image. According to a survey conducted by the PT (Netherlands Horticulture Commodity Board) the price of dried fruit is less important for young people than it is for older people.

In supermarkets, dried fruit is displayed at the bakery section, which is not often visited by young people. In summer, dried fruit is normally displayed near the nuts at the snack section, to be eaten as a healthy snack. The use of dried fruit in desserts, meals and salads has also encouraged older people to use it in this way. Supermarkets sometimes display dried fruits in the vegetable section.

- **Catering sector**

The quantity of dried fruit and edible nuts (peanut sauce) used by the catering sector is relatively small but is now growing, reflecting the rising social trend for dining out. The higher proportion of working women (and hence double-earning households), single person households and the reluctance of people to spend too much time preparing meals are all factors stimulating more frequent consumption of meals in snack bars, canteens, fast food outlets, restaurants and also take-away foods.

3.1.3 Consumption patterns and trends

Recent demographic and social changes in the Dutch population have stimulated demand for a much wider variety of food than the traditional diet and for foods which are prepared easily and quickly. Dried fruit and edible nuts have a long tradition as part of the diet of Dutch people and since the early 1990s, new uses have created new segments in this growing market.

- **Familiarity**
  Raisins, currants, prunes and apricots are very familiar to Dutch consumers. Uncertainty about how to eat and/or prepare dried fruits is a major reason for not buying them. Everybody in The Netherlands knows peanuts, partly because of their popularity as a snack product, and peanut butter, which is a taste all Dutch consumers acquire from childhood. They are also familiar with peanuts as a widely used ingredient in sauces, like saté sauce, and in meals (Indonesian and Chinese cuisine). Luxury nuts are becoming more widely known. Ease of use also affects the type of demand for nuts: favourites are snack nuts, except pistachios and walnuts; mixed nuts for festive occasions and whole peanuts for children, who enjoy cracking the shells.

- **Eating habits**
  Traditionally fresh fruit and vegetables form an important part of the daily diet of Dutch people, who are able to buy a great variety of fresh produce throughout the year. Dried fruit and nuts are used less frequently. However, in recent years, interest in a wide range of international and ethnic dishes has been stimulated by foreign travel, the establishment of many different ethnic restaurants, the influence of the immigrant population and promotion by the media and the food industry. After 1997 more and more ready-to-use kits with dried fruit and edible nuts specially created for salads and stir-fry dishes were introduced into the Dutch market. The popularity of dried fruit and nuts has also been influenced by the modern consumer habit of "grazing", i.e. of eating more and more snacks between meals and often away from the home, rather than having three regular meals per day. Consumers are very receptive to new innovations in flavours, coatings and mixtures of nut products and fruit and nut mixtures. Above all, new products must be convenient and suggest an element of "adventure".

- **Quality / price**
  Respondents to the PT (Netherlands Horticulture Commodity Board) survey stated the importance of quality, in terms of freshness and the kind of nut, followed by price and taste. Preservability, smell, colour and brand are also important factors and, in the case of dried fruit, whether the merchandise has been sulphur-treated or not. The PGF survey indicated that 40 per cent of consumers claim not to like the taste of dried fruits and 27 per cent claim not to like nuts. Price has recently been actively used as a promotional tool in generating sales of nuts, but this is not a feature of the dried fruit trade.

- **Health consciousness**
  Awareness and interest in dried fruits as a healthy alternative to sweets, chocolate, crisps etc. is growing slowly. Conversely, with regard to nuts, despite the fact that many consumers consider nuts to be fattening, sales are booming. The average consumer’s decision to buy is influenced more by taste, quality and variety than the health conscious

argument that nuts contain natural unsaturated fats, minerals and vitamin B. Convinced consumers of organic foods and vegetarians use more dried fruits and nuts than the average consumer. They tend to use a wider variety of dried fruits and nuts in their everyday diet. Fruits are, for example, an important source of sweetness and an ingredient in mueslis and pastes; nuts are an important source of protein and are consumed in quantity by vegetarians as an alternative to meat and in vegetarian diets. Increasing demand for organic dried fruits and edible nuts is being stimulated by the growing availability of all products. The strongest brand for both dried fruit and edible nuts in The Netherlands is *Ekoland*. For dried prunes, raisins and sultanas *Terrasana* and *Horizon* are a well known brands.

3.2 Production

There is no production of dried fruit and edible nuts in The Netherlands, with the exception of some very small scale companies producing hazelnuts and a few companies which grow organic raisins, prunes and apricots. All requirements for the domestic market and for re-export are therefore imported. Dried fruit and edible nuts are largely imported from Argentina, USA, China, Turkey, India, South Africa, Southern Europe and other countries, where climate conditions and the cost of production are much more favourable. Peanuts and luxury nuts come from tropical climates and Dutch "production" consists mainly of blanching, slivering, roasting, cutting, milling, mixing and packaging imported products.

3.3 Imports

After the unification of the EU in 1992, customs authorities stopped recording the intra-EU trade in dried fruit and edible nuts, and since then import and export figures have been based on reports given by the companies themselves. In the case of intra-EU trade, statistical reporting is only compulsory for Dutch exporting and importing firms, whose trade exceeds ECU 80,000 (NLG 175,000). Smaller companies, whose trade is below this level, are not obliged to report and are, therefore, excluded from these statistics. However, the customs authorities still register imports from non-EU sources so official statistics only give an indication of major trends and of the relative importance of individual importing countries, and do not represent the situation accurately.

All statistics specify total imports, divided into volumes/values sourced from EU countries (intra-EU) and from non-EU countries (extra-EU) with the values/volumes coming from developing countries. Developing countries, as defined by the OECD, are listed in Appendix 11.

3.3.1 Total imports

Reference has already been made in Chapter 3.1.1 to the major significance of Dutch imports in the context of those for the EU as a whole. After Germany and the United Kingdom, The Netherlands, as the third largest importer, accounted for 17 per cent of all EU imports of dried fruit and edible nuts in 1997. In the same year, Dutch imports amounted to a total of ECU 440 million, an increase of 15 per cent over imports in 1995, which was mainly due to higher import values of groundnuts, cashew nuts, hazelnuts and pistachios. Between 1995 and 1997 the volume of Dutch imports decreased by 5 per cent, mainly due to a decrease in demand for dried fruit and groundnuts, which formed the largest part of all dried fruit and nuts imports to The Netherlands.

In 1997, nuts accounted for more than 80 per cent of the total dried fruit and edible nuts imported to The Netherlands, with groundnuts forming the largest part of this total. Important product groups in the volume of luxury nuts imported are coconuts, cashew nuts, almonds, hazelnuts, walnuts and pistachios. Between 1995 and 1997, imports of cashew nuts increased by 21 per cent, while import volumes of almonds, coconuts, hazelnuts, walnuts and pistachios decreased. The group "other nuts" includes pine nuts, chestnuts, macadamia and cola nuts.
The import volume of dried fruit decreased by 7 per cent between 1995 and 1997, which was mainly due to a reduction in the imports of raisins/sultanas and apricots. In the same period more prunes, figs, dates and other dried fruit (apples, pears and dried fruit mixtures) were imported. An overview of imports of the main product groups is given in table 3.6. A more detailed breakdown of all dried fruit and edible nuts can be found in Appendix 2.

Table 3.6 Imports of dried fruit and edible nuts to The Netherlands by product group, 1995-1997 in tonnes/ECU 1,000

	1995		**1996**		**1997**	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**357,765**	**384,083**	**349,247**	**421,678**	**342,050**	**440,329**
Intra-EU	**32,905**	**48,686**	**26,927**	**45,523**	**26,370**	**48,145**
Extra-EU	**324,860**	**335,397**	**322,320**	**376,155**	**315,680**	**392,184**
Developing countries	**235,164**	**234,968**	**248,069**	**269,602**	**241,679**	**286,033**
Dried fruit	**60,519**	**73,247**	**59,810**	**74,618**	**56,732**	**72,708**
Raisins/sultanas	42,915	46,750	46,085	48,210	38,596	42,692
Currants	6,631	8,028	5,422	8,369	6,415	5,376
Prunes	3,493	3,919	1,952	2,678	3,943	6,294
Apricots	2,590	4,502	2,391	4,494	2,174	5,269
Figs	1,005	1,608	741	1,266	1,833	2,947
Dates	1,277	2,823	1,544	3,915	1,336	3,581
Bananas	1,057	982	66	169	707	746
Other dried fruit	1,551	4,635	1,609	5,517	1,728	5,803
Groundnuts	**226,806**	**146,155**	**211,327**	**143,630**	**216,968**	**167,148**
Luxury nuts	**70,440**	**164,681**	**78,110**	**203,430**	**68,350**	**200,473**
Coconuts	24,323	12,949	26,204	17,656	22,610	15,946
Cashew nuts	15,935	62,269	19,816	80,452	19,380	85,471
Almonds	10,206	37,124	9,314	45,966	8,868	41,292
Hazelnuts	6,509	17,102	6,815	15,896	4,574	17,031
Walnuts	5,101	10,632	4,554	10,895	4,455	11,618
Pistachios	3,829	10,282	6,087	16,346	3,750	12,277
Brazil nuts	2,082	4,507	2,933	7,058	2,392	6,870
Pecan nuts	1,080	4,946	939	4,195	972	4,079
Other nuts	1,375	4,870	1,448	4,966	1,349	5,889

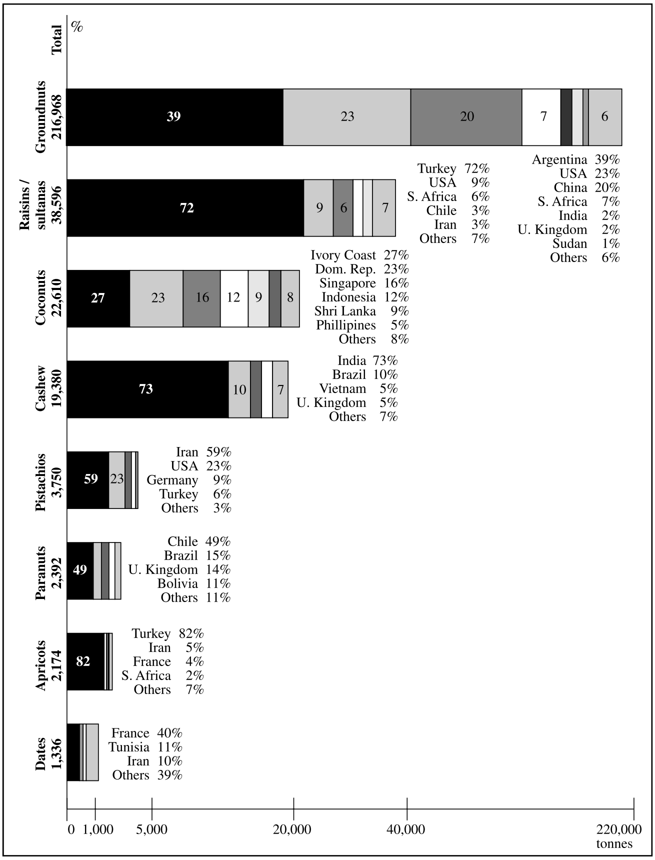
Source: Eurostat 1998

3.3.2 Imports by product

Dutch imports of the most important dried fruit and edible nuts and their main non-EU supplying countries are shown in figure 3.4. Detailed statistics of raisins/sultanas, groundnuts, coconuts and cashew nuts are given in Appendix 2. The market for these can be briefly described as follows:

- **Groundnuts** Shelled groundnuts form more then 90 per cent of Dutch imports, as is the case in other EU countries. Groundnuts (peanuts) are usually imported by specialised importers, processors, traders or brokers and almost half of Dutch imports are re-exported to Germany and other EU countries. Variation in import volumes are also caused by the practice of maintaining stock levels by holding and releasing groundnuts in stock. In 1997, the DGA (Dutch Groundnut Association) had 34 members. Demand for in-shell groundnuts is limited, since these are consumed mainly at Christmas. Most imported peanuts are unblanched, since there are many blanching facilities in The Netherlands. Peanuts are used in many different ways in The Netherlands, compared to other EU countries. More than half of those used for domestic consumption go to the food processing industry, particularly chocolate confectioners; to manufacturers of saté sauce or peanut butter.
  The import price of groundnuts closely follows world prices, which in turn largely depend on the supply situation (weather and harvesting conditions). Between 1995 and 1997 the volume of Dutch imports decreased by 5 per cent to a total volume of 216,968 tonnes and increased by 14 per cent in value. Their higher value in 1997 was caused mainly by groundnuts being imported from other sources. In 1995 almost 40 per cent of Dutch groundnut imports came from China. In 1996 China was hit by the economic crisis in South East Asia and there was more demand for round, sized groundnuts, which were sourced in South Africa who has a good reputation in this respect. In 1997, only 20 per cent of groundnuts imported to The Netherlands came from China. Instead, more groundnuts were sourced in Argentina, which became the largest supplier, the USA, South Africa, India, Sudan and other African countries.

Figure 3.4 Imports of dried fruit and edible nuts by product group, 1997
Main suppliers as per cent of total volume



Source: Eurostat 1998

■ **Raisins/sultanas**

In 1997 more than 80 per cent of imported raisins were used for domestic consumption, especially by the industrial sector. Raisins have traditionally been a major ingredient for bread, bakery products, chocolate, confectionery, muesli, desserts and yoghurt and an ever-increasing variety of healthy snacks.

In The Netherlands, raisins/sultanas are the most widely consumed dried fruit. In addition, the sultana, a variety of Turkish grapes that produces a very high quality of raisins, forms the largest proportion of Dutch imports. In 1997, around 20 per cent of the raisins/sultanas imported to The Netherlands were re-exported to other EU countries.

Import prices of raisins closely follow world prices which in turn largely depend on weather and harvesting conditions. Fluctuations in price have an immediate effect on demand, and price levels have slightly increased since 1992.
Between 1995 and 1997 imports of raisins/sultanas decreased by 10 per cent to a total volume of 38,596 tonnes, with a value of ECU 42.6 million. In addition, packed raisins and sultanas have slightly decreased in volume and accounted for 5 per cent of Dutch imports in 1997, with Turkey as the main source of supply, accounting for almost three-quarters of total Dutch imports.
The USA (California) is the second largest supplier, followed by South Africa, Iran and Chile. Belgium and Greece are important sources of supply within the EU.

■ **Coconuts**

Almost half of the coconuts imported by The Netherlands are re-exported mainly to Russia (whole coconuts) and to other EU countries. Desiccated coconut accounted for more than 60 per cent of coconut imports to The Netherlands in 1997. It is mainly used in chocolate bars (Bounty), biscuits, cakes, pies, ice-creams, sauces and various ingredients for Indonesian cuisine etc. By volume, coconuts were the third most important nuts imported to The Netherlands in 1997, but their value is less significant because of their low price per kilogram. The import volume slightly decreased by 10 per cent between 1995 and 1997 to 22,610 tonnes. The Dominican Republic and Ivory Coast are the main suppliers for whole coconuts. Desiccated coconut came from Singapore, Indonesia and Ivory Coast at the expense of Sri Lanka and the Philippines, whose exports to The Netherlands decreased between 1995 and 1997 by more than half due to the damage to supply by caused by storms associated with the weather phenomena El Niño and La Niña .

■ **Cashew nuts**

In 1997, more than 60 per cent of imported cashew nuts were for domestic use, with the remainder mainly re-exported to Germany, France and Russia. In 1997, Dutch imports were 19,380 tonnes, with a total value of ECU 63.7 million. The lowering in the price of cashew nuts meant more Dutch people ate them, which led to an increase in the volume of imports between 1995 and 1997. More cashew nuts are now used by the industrial sector for the manufacture of ready meals, salads kits etc.. Cashew nuts are imported raw and shelled, and are roasted and salted in The Netherlands. Imports from India, the main supplier, have increased. Other suppliers include Brazil, Vietnam and, to a lesser extent, Indonesia. The average price of cashew nuts has increased since 1996 The United Kingdom and Germany are also significant EU importers of cashew nuts.

■ **Pistachios**

Since they became better known as snack nuts in the early 1990s reaching second place in popularity after peanuts, pistachios have been extremely successful in The Netherlands. Between 1993 and 1996 Dutch imports more than doubled, reaching a peak volume of 6,087 tonnes in 1996. Almost all imported pistachios were in shell and came from Iran, the world's main supplier. But Iran soon had competition from the USA and other new producing countries like Turkey, Syria, Greece and Italy. In September 1997 the EU enforced an import ban on Iranian pistachios because they contained unacceptably high levels of aflatoxin, a potentially carcinogenic chemical. This resulted in a drop in Iranian production, an enormous shortage in supply in all EU countries and price increases. In 1997 Dutch imports were 3,750 tonnes of which almost 40 per cent were slightly different types of pistachios coming from the USA, Turkey and Germany. The Netherlands re-exported around one third of the total imported pistachios to Belgium and Germany.

■ **Brazil nuts**

Brazil nuts are used by chocolate manufacturers who use them in chocolate-covered whole nuts, or as broken or sliced kernels in chocolate bars. They are also used for bakery products, candies, toppings and crunch snacks, or are included in nut mixtures. The quantities used in such mixes are limited both by the size of these nuts, which are large, compared to other nuts and, by their high fat content. The volume of Dutch imports showed a fluctuating pattern between 1995 and 1997 when the total amounted to 2,392 tonnes, with an import value of ECU 6.8 million. Most Dutch imports came, not from Brazil, but from Chile, which supplied almost half the total, with the remainder supplied by South Africa and France.

■ **Apricots**

Apricots are mainly used in bakery products, breakfast cereals, healthy snacks and dairy products (yoghurt, desserts). Between 1995 and 1997 the volume of Dutch imports fell by 20 per cent to 2,174 tonnes, but their total value increased by 17 per cent to ECU 5.2 million. Turkey, which supplied 82 per cent of imports in 1997, dominates the supply of apricots to The Netherlands, with the remainder supplied by Iran, France, South Africa and Australia.

■ **Dates**

Dates are used mainly in bakery products, healthy snacks and as a snack (filled with cream cheese) at parties or special celebrations such as Christmas. Dates accounted for 2 per cent of total Dutch dried fruit imports in 1997. In the past, France was a major supplier, but suppliers from developing countries, Tunisia, Iran, Algeria, Turkey and Egypt have become more important.

■ **Almonds**

Almonds, especially sweet almonds, accounted for around 10 per cent of Dutch imports of luxury nuts in 1997. Around 85 per cent of all imported almonds are used in the bakery industry.
The remaining 15 per cent are used in nut mixtures and increasingly in the Dutch kitchen (salads, desserts). The Netherlands re-exported around 14 per cent of Dutch imports by volume to other EU countries in 1997. Between 1995 and 1997 imports decreased by 15 per cent to a volume of 8,868 tonnes with a value of ECU 41.2 million. More then half of these came from the USA; other suppliers included Spain, France, Italy, Morocco and Iran.

■ **Hazelnuts**

Hazelnuts, mainly shelled, accounted for around 7 per cent of Dutch imports of luxury nuts in 1997. These were mainly used in the bakery industry, in cereals, healthy snacks and nut mixtures. Approximately 30 per cent of the hazelnuts imported to The Netherlands by volume were re-exported, mainly to other EU countries. Between 1995 and 1997 imports decreased by 40 per cent to a volume of 4,574 tonnes, with a value of ECU 17 million. More than 70 per cent came from Turkey; other suppliers included Italy, Germany, United Kingdom.

■ **Walnuts**

Walnuts, 70 per cent of which were shelled, accounted for some 6 per cent of luxury nuts imported to The Netherlands in 1997. Of this total, approximately 55 per cent by volume were re-exported, mainly to Germany. Between 1995 and 1997 imports decreased by 14 per cent, to 4,455 tonnes, with a value of ECU 11.6 million. These came mainly from the USA; other suppliers included France and China.

■ **Other nuts**

Pine nuts have become a very popular ingredient in salads. Between 1995 and 1997 Dutch imports by volume increased by 40 per cent to 177 tonnes, but enormous price increases have trebled the value of imports from China and new countries like Pakistan, Turkey and Israel.
Macadamia nuts have grown in popularity and are used in mixes. Between 1995 and 1997 the import volume increased by 37 per cent to 84 tonnes. Australia, Malawi, South Africa and the USA were the main suppliers.

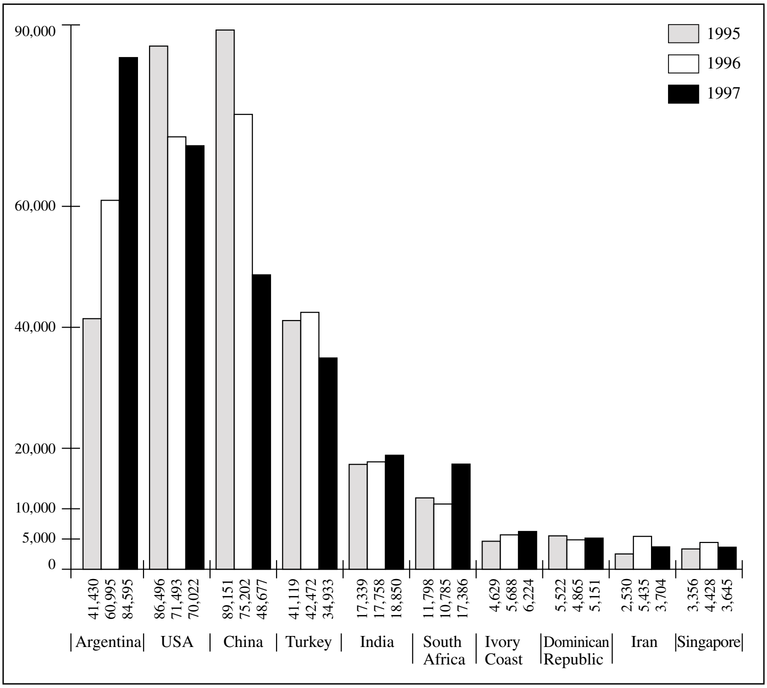
Other dried fruit

Prunes accounted for 7 per cent of Dutch dried fruit imports in 1997. They are increasingly used in meals and are used by the bakery and cereal industry. In 1997 more then half of the prunes imported to The Netherlands were re-exported to Germany and Austria. Between 1995 and 1997 the volume of imports fluctuated, to a total of 3,943 tonnes in 1997, with a value of ECU 6.3 million. France and USA dominate supplies.

Dried bananas are now a popular snack and The Netherlands re-exports large volumes to other EU countries. In 1997 Dutch imports of bananas were 707 tonnes in volume terms, with a value of ECU 0.7 million. Ecuador, Colombia, Philippines, Thailand and other EU countries were important suppliers.
Dried apples are used in the bakery and cereal industries. Between 1995 and 1997 the volume of imports increased by 13 per cent to 863 tonnes, with a value of ECU 3.3 million. Chile and Italy are key suppliers, followed by the USA and Turkey.

A detailed overview of the sources of imports to The Netherlands can be found in Appendix 2. The leading suppliers are shown in figure 3.5.

Figure 3.5 Main non-EU suppliers of dried fruit and edible nuts to The Netherlands, 1995-1997 (tonnes)



Source: Eurostat 1998

Argentina and the USA are the single largest suppliers of groundnuts to The Netherlands and play an important role in Dutch groundnut distribution to other EU countries. Argentina exported 84,595 tonnes of groundnuts to The Netherlands in 1997, which represented 40 per cent of total groundnut imports and so has overtaken China as the main

supplier. The USA is an important supplier of groundnuts, luxury nuts and raisins and, with a volume of 70,022 tonnes, accounted for 20 per cent of total Dutch imports in 1997. Other significant suppliers of edible nuts were India (cashew nuts), Ivory Coast (coconuts), Dominican Republic (coconuts), Iran (pistachios) and Singapore.
Turkey, whose import share declined from 67 to 61 per cent between 1995 and 1997, remains the dominant supplier of dried fruit (raisins/sultanas) to The Netherlands. Of the remainder, EU countries supplied 23 per cent and the USA 6 per cent. Other notable suppliers include South Africa, Chile, Iran, Israel and Tunisia.

In 1997, more than 70 per cent of edible nuts imported by The Netherlands came from developing countries. The market share of other EU countries in the supply of edible nuts fell from 6 per cent in 1995 to 5 per cent in 1997. Within the EU, the United Kingdom is an important supplier of groundnuts. Important EU suppliers for luxury nuts include Germany, Italy and Spain. Developing countries supplied 36,789 tonnes of dried fruit to The Netherlands and accounted for 65 per cent of Dutch dried fruit imports in 1997, while imports from other EU countries declined from 25 per cent to 23 per cent. Greece is a major supplier of currants; Italy of dried apples and France of prunes.

3.3.3 The role of developing countries

Between 1995 and 1997 the proportion of imports of dried fruit and edible nuts from developing countries increased from 65 to 71 per cent. This was due to increased imports, mainly of groundnuts, from Argentina and South Africa. Developing countries, particularly Argentina and China, are important suppliers of groundnuts to The Netherlands. This is at variance to the import pattern in the United Kingdom or other EU countries, where the USA has traditionally been the main source of supply. The main reason for this variation is that Dutch importers are accustomed to buying peanuts from different developing countries. Producers in the USA do not appear to have established markets in The Netherlands as forcefully as they have done in other EU countries, in spite of the fact that there was a Dutch representative on the American Peanut Council until 1994.
Between 1995 and 1997, The Netherlands increased the imports of luxury nuts from India, Indonesia, Brazil, Chile, Sudan and Vietnam. The import volume of dried fruit and edible nuts from developing countries in this period increased by 3 per cent to 241,679 tonnes, but this represented an increase in value of 21 per cent, or a total value of ECU 286 million. The importance of developing countries in the supply of each product group is shown in table 3.7. A list of developing countries, as defined by the OESO can be found in Appendix 11.

Table 3.7 Imports of dried fruit and edible nuts into The Netherlands from developing countries, 1997 (tonnes)

	Total imports	from DC's	% per product group	% of total DC's* supply
All groups	**342,050**	**241,679**	**71**	**100**
Raisins/sultanas	38,596	32,300	83	14
Currants	6,415	0	0	0
Prunes	3,943	150	4	0
Apricots	2,174	1,949	89	1
Figs	1,833	1,406	77	1
Dates	1,366	345	25	0
Bananas	707	103	15	0
Other dried fruit	1,728	547	32	1
Groundnuts	216,968	156,236	72	64
Coconuts	22,610	20,013	88	8
Cashew nuts	19,380	17,357	89	7
Almonds	8,868	177	2	0
Hazelnuts	4,574	3,306	72	1
Walnuts	4,455	42	1	0
Pistachios	3,750	2,470	66	1
Brazil nuts	2,392	2,019	84	1
Pecan nuts	972	22	2	0
Other nuts	1,349	576	43	1

Note : DC = Developing country

Source: Eurostat 1998

Most dried fruit come from Mediterranean countries, with Turkey the main supplier from developing countries for raisins/sultanas, apricots and figs. Developing countries supply most nuts, with the exception of almonds, walnuts and pecan nuts, which mainly come from the USA and Australia. Developing countries also dominate the supply of groundnuts, coconuts, cashew nuts, Brazil nuts, pistachios and other nuts. Between 1995 and 1997 there was an increase in the supply of groundnuts, cashew nuts, figs, dates and other dried fruit mixtures from developing countries. In the same period imports of raisins, apricots, bananas, coconuts, hazelnuts and pistachios decreased. In 1997, groundnuts, which accounted for 64 per cent of imports formed the largest proportion of total Dutch imports from developing countries. Raisins accounted for 14 per cent, while coconuts and cashew nuts took approximately 7 per cent each.

3.4 Exports

The Netherlands is a sizeable exporter of dried fruit and edible nuts because of the quantities which are re-exported and its long history in the trading of groundnuts through the port of Rotterdam. In 1997 The Netherlands, with a volume of 159,059 tonnes, was the largest exporting country in the EU. As is shown in table 3.8, in that year the total export value amounted to ECU 206 million. Other EU countries were the destination for around 78 per cent of exports, of which the greatest part was groundnuts. Re-exports of dried fruit are less significant, since they originate in other EU countries and Mediterranean areas that export them directly to the user markets. Between 1995 and 1997 Dutch exports fell by 5 per cent, but grew in value by 12 per cent, mainly because of the rising price of roasted groundnuts and luxury nuts. Groundnuts are the major export product and accounted for 73 per cent of exports in 1997. The other main export products, in order of their share of the total were: coconuts (8 per cent), cashew nuts (5 per cent), raisins (4 per cent), walnuts (2 per cent), mixed nuts (2 per cent), Brazil nuts (2 per cent). Major destinations in the EU are Germany, which took 41 per cent of Dutch exports in 1997, France (12 per cent), United Kingdom (12 per cent), Belgium (7 per cent) and Denmark (2 per cent). Non-EU destinations are Czech Republic (6 per cent), Russia (6 per cent), Poland (4 per cent) and Ukraine (2 per cent).

Table 3.8 Exports of dried fruit and edible nuts by The Netherlands, 1995-1997 Tonnes/ECU 1,000

	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**168,113**	**183,197**	**145,685**	**181,204**	**159,059**	**206,367**
Intra-EU	**129,720**	**150,385**	**106,063**	**145,820**	**125,036**	**168,201**
Extra-EU	**38,393**	**32,812**	**39,622**	**35,384**	**34,023**	**38,166**
Developing countries	**4,825**	**4,055**	**2,132**	**2,105**	**1,266**	**1,688**
Dried fruit	**13,194**	**16,743**	**13,817**	**17,770**	**13,010**	**20,235**
Raisins/sultanas	8,732	9,710	9,667	10,333	5,902	7,093
Prunes	1,274	1,331	662	767	2,305	4,772
Figs	516	810	276	501	1,036	1,716
Apricots	638	1,265	664	1,280	701	1,774
Dates	421	1,368	758	2,026	506	1,661
Bananas	1,052	912	737	644	1,155	1,096
Currants	194	276	637	1,041	424	452
Other dried fruit	367	1,071	416	1,178	981	1,671
Groundnuts	**126,969**	**105,375**	**104,185**	**99,350**	**115,982**	**113,193**
Luxury nuts	**27,950**	**61,079**	**27,683**	**64,084**	**30,067**	**72,939**
Cashew nuts	6,883	30,916	7,306	34,737	7,429	36,383
Coconuts	12,084	7,041	12,165	7,454	12,764	7,273
Walnuts	1,871	3,680	1,582	3,764	2,517	6,293
Hazelnuts	1,588	4,075	1,538	3,789	1,381	5,169
Almonds	2,307	7,696	1,260	5,659	1,253	5,994
Brazil nuts	655	1,677	1,099	3,145	1,432	3,249
Pistachios	703	1,799	371	1,066	1,157	4,125
Other nuts	1,859	4,195	2,362	4,470	2,134	4,453

Source: Eurostat 1998

3.5 Trade structure

3.5.1 Distribution channels

The Netherlands has a long history of trading in dried fruit and nuts, particularly groundnuts. Since a large proportion of goods are transported to The Netherlands and other EU markets by sea and unloaded at the port of Rotterdam, an infrastructure for trading in imported dried fruit and nuts has been established there. The Netherlands supplies packers and food manufacturers elsewhere in Europe with raw material.
Dried fruit is traded in comparatively small quantities, while groundnuts and most luxury nuts are handled in bulk. Goods from Mediterranean countries are brought by road. Many of the companies involved in the trade (agents/brokers, importers/wholesalers, packaging and processing companies) are based in or near Rotterdam. The bulk of the trade enters The Netherlands through a number of specialised brokers and traders/importers.

The trade and distribution of most food products between the countries of the EU is now integrated, and this applies beyond the boundaries of the EU. This has brought an increase in direct trading between producers and exporters in the major supplying countries and the packers, processors, the food industry and large supermarket organisations who are the end-users. The number of times a particular consignment of dried fruits or edible nuts changes hands between the place of production and the consumer can very considerably. Typically, the main parties involved in the distribution of dried fruit and edible nuts are:

- **Agent/broker**
  These are independent companies which negotiate and settle business on the instructions of their principals and which act as intermediary between buyer and seller. They do not buy or sell on their own account.

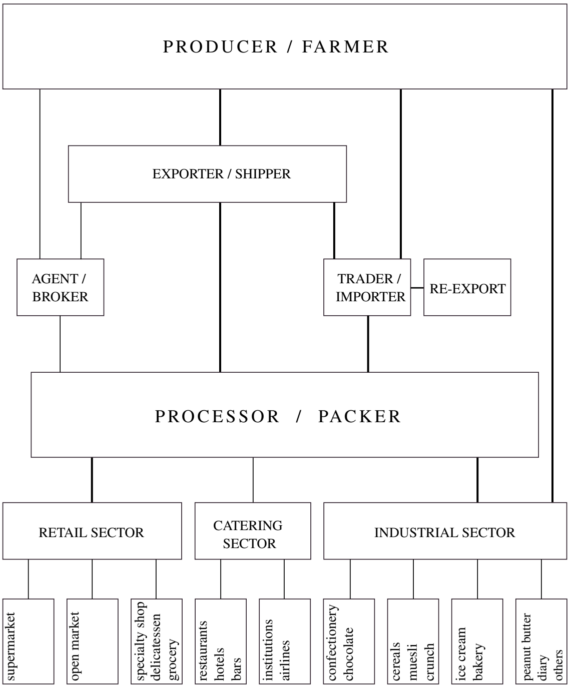
- **Traders/importers**
  Traders import on their own account and sell to packers/processors and to major industrial users. They mainly buy bulk quantities and resell them at an increased price. The major trading centres for dried fruit and edible nuts are New York, Rotterdam, London and Hamburg, where Iranian exporters (for pistachios) have their branch offices. Importers are responsible for all costs associated with importation: duty, terminal fees, unloading charges, local delivery and warehouse costs. Like the traders, they know the world supply situation well and sell the imports to processors. In 1997, there were around 20 active importers of groundnuts. For a list of members of the Dutch Groundnut Association (DGA), see Appendix 6. Some act as importers, while at the same time acting as brokers in buying nuts, sometimes in their own names and selling to other importers/traders or to processors. There are two main categories of intermediaries for dried fruit. The first, who handle most of the trade, are companies who specialise in importing dried fruit and nuts. The second group are specialised importers/processors of dehydrated fruit and vegetables.

Before re-exporting dried fruit and edible nuts to other EU markets, some large importers not only import but also perform other functions, such as that of:

- **Packer** packing goods in standard packs for the Dutch market;
- **Refiner** applying further treatment processes to the goods;
- **Wholesale distributor** supplying packaged goods to the catering and retail trade;
- **Processor** using the products as an ingredient or component of other products;
- **Exporter** mainly to other European markets.

Smaller traders/wholesalers import some of their requirements directly, but may also buy from larger importers who can offer them better conditions and delivery terms: e.g. on small quantities, or for more specialised requirements. The most important Dutch trading companies for dried fruit and edible nuts are Man Produkten Rotterdam B.V. and Catz International B.V. (coconuts). Significant importers for edible nuts include Imko Ned Products, Menken, Klinkenberg Noten B.V., Rhumveld, Winter & Konijn, Orlando, Delvinis and Raphorst. For dried fruit Catz International, Baljet, Samba and Qualinorm are also very important companies. One importer, Horizon, is the main distributor of organic dried fruits and edible nuts to the Dutch health food trade. Addresses of these companies can be found in Appendix 12.

Figure 3.6 Distribution channels for dried fruit and edible nuts



- **Processors/packers and industrial sector**

The processor usually roasts and/or salts the nuts and packs them in smaller units for the retail, industrial and catering sectors, of which the latter includes restaurants, hotels, bars and airlines.
A packer re-packs dried fruit and nuts, by individual or mixed sorts, into consumer- and catering-size packs. The (standard) sizes of these packs are dictated either by the packer’s own selling and marketing strategy for its own brand or by the customer (supermarket group, catering company etc.), according to the specifications agreed for its private label range of merchandise. There are also some companies who pack exclusively under a manufacturer's brand.

Large packers and processors are increasingly buying dried fruits and nuts directly from producers and exporters in the countries of origin, although purchasing through importers is still important. This is especially true in the case of dried fruit, or where smaller quantities are involved and/or special packages are required. On the other hand, leading processors of peanuts such as Calvé and Douwe Egberts usually import directly and, from time to time, use the services of a specialised importer who may, for instance, have special knowledge of the Chinese peanut trade. The major industries who use dried fruits and edible nuts in many different forms are those manufacturing breakfast cereals/muesli, confectionery, chocolate, bakery products, ice cream, desserts, health foods etc. (see section 3.1.2).
Important Dutch processors/packers include Calvé, Douwe Egberts, Duyvis, General Biscuits, Go-Tan, Mars, Nestlé, CPC, Honig, Quaker Oats, Den Hartog and Unilever.

- **Retail and catering sector**

Retailers carry out the final stage of selling dried fruit and nut products to consumers. Sales of dried fruit and edible nuts can be divided into impulse and planned purchases. Impulse purchases tend to be from open markets, nut specialty shops and delicatessens. Planned purchases are made mainly in supermarkets. More than 85 per cent of retail sales of dried fruit and edible nuts are made through supermarkets.
Since 1990, supermarkets have stopped selling dried fruit and edible nuts in loose form at their in-store "nut bars", and instead sell industrial pre-packaged products. Supermarkets issue contracts for mixing and packing of their brands, which are mainly pre-packed nuts. Because of the growing popularity of luxury nuts, processors persuade supermarkets to display more fresh pre-packed shelled nuts at the snack section or at special promotional sections (the so-called "gondola ends").
Special promotions are organised in the Christmas, winter and, more recently, spring seasons to stimulate sales of dried fruit and edible nuts. Some nuts used in salads (pine nuts, almonds) are now displayed at the vegetable section in supermarkets. Very important supermarket buying groups in The Netherlands include Ahold (Albert Heijn supermarkets), Superunie (De Boer Unigro, Hermans Groep, Coop, Vomar, Hoogvliet etc.), Vendex Food Groep (Edah, Konmar, Radar Food), T.S.N. (C1000, Kopak, Spar, Plusmarkt etc.), Aldi Nederland (Aldi), Koopconsult (Dirk van den Broek) and Lidl Nederland (Lidl).

In 1997, around 9 per cent of all dried fruits and 6 per cent of edible nuts were sold in loose form at open arkets. The remainder of dried fruit and edible nuts were sold in loose form at nut specialty shops. There are a large number of specialised nut shops or "nut bars" in The Netherlands and a well-known franchise operation for dried fruit and edible nuts is C'est Bon, with 46 outlets. Industrially pre-packed dried fruit, peanuts and luxury nuts are usually sold at greengrocers, delicatessens, health food shops and petrol stations.
The functional distinctions between the different types of traders described above have become blurred in recent years because of structural changes in the trade and a decline in the number of brokers and traders in Western Europe as a whole. Different types of trading activity are often carried out concurrently within one company.

The trade channel most open to new exporters is that of bulk sale to importers/traders in The Netherlands. Local importers, processors and packers have long established links with their customers and are in a better position than distant processors to know the requirements of the local market and of individual end use. They supply supermarket chains direct and are financially able to support exclusive contracts, advertising campaigns and to service in-store racks for dried fruit and edible nuts. Customer service extends to extremely fast deliveries, which are highly computerised. Incoming orders are bar-coded by sales representatives and processed by computer at night. Afterwards the goods are made up in the early morning and shipped to retailers or other customers within 24 hours.
Some consumer-packaged products (raisins, peanuts, hazelnuts and almonds) are imported to The Netherlands from countries outside the EU like the USA, Turkey and Israel, but quantities are very low in comparison to bulk sales.

For these reasons the prospects for exporting processed consumer packed products directly from the countries of origin are low and a very high percentage of dried fruit and edible nuts imported are dried and cleaned but not otherwise processed.

3.6 Prices and margins

3.6.1 Prices

Domestic and import/export prices of dried fruits and nuts vary according to a number of factors, such as the type of product, its origin and the level of supply available on the world market. Because of the big variations in availability caused by changeable harvests, weather conditions or disasters (e.g. El Niño), changes in supply have a much larger effect on price levels than changes in demand. Most dried fruit and edible nuts have only one harvest per year and most products can be kept dehydrated in special cold stores.
Prices are set on a global level and speculation based on forecasts for the coming harvest can cause rapid changes in prices. On the other hand, a drop in supply of one type of nut does not necessarily mean a price increase, if substitution by another type of nut is possible, which is often the case. Sometimes manufacturers switch to using more almonds instead of hazelnuts, because the hazelnut prices increased as a result of a shortage in supply.

Other factors which have a significant effect on prices are the exchange rate of the dollar; quality; grade; presentation (whole, shelled, pitted, broken, sliced etc.) and the method of drying/processing which has been used prior to export. The major origin country for a

particular product often determines the basic reference price for that product world-wide. For example, the USA is the reference for groundnuts, Iran for pistachios, India and Brazil for cashew nuts, Sri Lanka for coconut and Thailand for papaya.
An indication of the average annual import prices of some main product groups is given in table 3.9 but, as with all import statistics, they should be interpreted with care.

Table 3.9 Average annual import prices of the main dried fruit and edible nuts, 1995-1997

ECU / kg	1995	1996	1997
Raisins, bulk	1.17	1.17	1.32
Sultanas, bulk	1.05	0.99	1.03
Sultanas, packed	1.20	1.18	1.21
Prunes	1.12	1.37	1.59
Apricots	1.73	1.87	2.42
Dates	2.21	2.53	2.68
Groundnuts, in shell	0.63	0.66	0.78
Groundnuts, shelled	0.64	0.67	0.76
Roasted groundnuts	2.34	1.76	1.87
Coconut, desiccated	0.68	0.83	0.99
Coconuts	0.27	0.29	0.31
Cashew nuts	3.90	4.06	4.41
Almonds, sweet	3.65	5.01	4.69
Almonds, bitter	2.86	2.72	3.53
Hazelnuts, shelled	2.66	2.34	3.85
Walnuts	1.62	1.91	2.01
Pistachios	2.68	2.68	3.27
Pine nuts	3.99	5.15	9.38
Macadamia nuts	8.24	9.33	10.02

Source: Eurostat 1998

In supermarkets, the majority of dried fruit and edible nuts are sold in fresh, pre-packed form. The pack sizes of dried fruit and edible nuts from suppliers tend to be uniform, but pack contents vary in weight. In the case of luxury nuts, their high price, compared to peanuts and to other savoury snacks, has been an obstacle for buying them on a regular basis. Recently prices of some popular luxury nuts (cashew nuts, pistachios) and nut mixtures have decreased slightly, so they have became affordable to a larger group of consumers. Consumers who are more interested in buying dried fruit as a specific ingredient for a recipe seem less concerned about prices. There is often little or no difference between retail prices for the same items within different supermarkets. At the open market, prices of fresh nuts are less than at nut specialty shops and delicatessens, where they tend to cost more.

Table 3.10 Retail prices of dried fruit and edible nuts in The Netherlands (1999)

Nr. photo/category	Description	Brand	Package	Size gram	Retail price in ECU (incl. 17.% VAT)
1. Dried fruit	Raisins	C'est Bon	bag	200	1.05
(fresh)	Raisins	Market	loose in bag	200	0.72
	Apricots	C'est Bon	bag	200	1.32
	Prunes	C'est Bon	bag	200	1.68
	Banana chips	Priv. label	bag	200	0.76
2. Dried fruit	Dates	JA	tray	200	0.90
(fresh)	Dates snack	C'est Bon	tray	14 pcs	2.67
3. Dried fruit	Raisins (blanched)	Sunripe	bag	200	0.53
(industrial)	Raisins (no sulph.)	Priv. label	bag	250	0.89
	Currants	Priv. label	bag	200	0.44
	Apricots	Priv. label	bag	200	1.16
	Prunes	Priv. label	bag	250	1.29
	Tutti frutti	Priv. label	bag	250	1.29
4. Peanuts	Salted with skin	Priv. label	bag	250	0.76
(fresh)	Salted, king size	Priv. label	bag	250	1.02
	Coated (Katjang)	Priv. label	bag	250	1.67
	Coated (chocolate)	Priv. label	bag	250	1.79
5. Peanuts	Salted and roasted	Duyvis	luxury bag	250	0.89
(industrial)	Coated (Tiger)	Duyvis	luxury bag	200	1.25
	Coated (Cocktail)	Priv. label	luxury bag	150	1.56
6. Luxury nuts	Cashew nuts	Priv. label	bag	200	1.79
(fresh)	House mixture	Priv. label	bag	200	1.79
	Pine nuts	Priv. label	pre-packed	65	1.74
7. Luxury nuts	Cashew nuts	Priv. label	plastic box	175	2.24
(fresh)	Melange de luxe	Priv. label	plastic box	150	2.46
8. Luxury nuts	Cashew nuts	Priv. label	luxury bag	150	1.61
(industrial)	Pistachios	Klijn	luxury bag	150	1.56
	Pine nuts	Royal Mail	luxury bag	75	2.06
9. Nuts for baking	Hazelnuts blanch.	Baukje	luxury bag	65	1.16
(industrial)	Almond paste	Baukje	foiled pack	300	2.32
10. Organic	Prunes	Terrasana	bag	250	2.55
(fresh)	Elite mixed nuts	Ekoland	bag	200	2.44
11. Peanut butter	Peanut butter	Calvé	jar	350	0.98
(industrial)	Saté sauce	Knorr	pack	400	1.25
	Saté sauce, instant	Conimex	bag	68	0.62
12. Snacks/kits	Sultana snack	Verkade	4x3 pcs	175	1.03
(industrial)	Grany snack	Liga/Danone	6 pcs	200	1.66
	Right snack	Peijnenburg	6 pcs	170	1.12
	Salad kit	Es Tu Ceasar	box	120	2.19

Source: Store checks (Albert Heijn, Vomar, Dekamarkt, open market, C'est Bon), April 1999

1. **Dried fruit**
(fresh pre-packed in bags)

2. **Dates / dates snacks**
(fresh pre-packed in bags)

3. **Dried fruit**
(industrially packed in bags)

4. **Peanuts / coated peanuts**
(fresh pre-packed in bags)

5. **Peanuts / coated peanuts**
(industrially packed in bags)

6. **Luxury nuts**
(fresh pre-packed in bags)

7. Luxury nuts
(fresh pre-packed in plastic boxes)

8. Luxury nuts
(industrially packed in bags)

9. Nuts for baking purpose
(industrially packed)

10. Organic dried fruits and nuts

11. Peanut butter / Saté sauce

12. Healthy snacks/ salad kit

3.6.2 Margins

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

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

Dried fruit and edible nuts have a particular attraction for retailers because of direct product profitability (gross profit less handling and display costs). Compared to other products, the cost of keeping the shelf filled is low and dried fruit and edible nuts do not take much space in their warehouse or distribution centre. In addition, the margins on some luxury nuts (pine nuts, macadamia mixes, smoked almonds and pecan nuts) can be extremely high.

3.6.3 Sources of price information

In general, exporters should receive regular information from their business partner in The Netherlands. The best up-to-date information on dried fruit and edible nuts can be obtained from the weekly Public Ledger. Also, major brokers and traders publish regular market reports to advise their customers about supply, demand and price developments. The trader Man Producten B.V. issues an Edible nut report every six months, and Catz International B.V. regularly publishes reports on the price of coconuts. Addresses can be found in Appendix 5.
Many factors, such as the type of dried fruit or edible nut; its origin, its quality, the method of drying or cleaning and predictions about the forthcoming harvest(s), can cause considerable fluctuations in both the physical and the futures market for different products. It is essential that the exporter obtains regular information on prices and market trends.

An on-line computer connection to all countries, through the Internet, makes it possible to follow the latest news and find the best offers on a daily basis. The Market News Service of the ITC (International Trade Centre) is in direct contact with one central reception point in all supplying countries and publishes up-to-date price information in a regular bulletin, called "Fresh Fruits and Vegetables" in which some dried fruits (raisins, bananas, apricots) and coconuts are covered. The MNS, located in Geneva, collects the information by telephone, fax and e-mail. The information is gathered, analysed, then transmitted immediately to all participating developing countries. Exporters who wish to subscribe to this service should contact the ITC. In order to obtain information on the MNS locally, exporters can contact either their export/trade promotion organisation or their exporters' association.

Two published sources of information are listed below. The addresses can be found in Appendix 5

The Public Ledger	Weekly publication on commodities with overviews of global market prices
Man Producten B.V.	Six-monthly edible nut market report
ITC - International Trade Centre	Market News Service (MNS), fresh fruits and vegetables, fortnightly bulletin
FAO	Information on prices at the FAO internet site

4 THE EUROPEAN UNION MARKET

4.1 The European Union market summary

4.1.1 Consumption

Groundnuts or peanuts are mostly used for the production of oil and, according to the FAO 29 million tonnes of in-shell HPS (hand-picked selected) groundnuts were harvested in 1996. China and India are the world's largest producers of groundnuts, followed by the USA, Nigeria and Indonesia. Groundnuts play a major role in international trade and in 1996 total world imports amounted to 1 million tonnes with a total value of ECU 896.3 million. The majority (87 per cent) were shelled groundnuts. Between 1992 and 1996 world imports of shelled groundnuts increased by 27 per cent, of which around 70 per cent were produced by developing countries.

Tree nuts or luxury nuts are mainly produced in the USA (one third of world output, mostly almonds), Turkey (25 per cent, mostly hazelnuts), China (12 per cent, mostly walnuts) and Iran (5 per cent, mostly pistachios). In 1996, the total volume of in-shell tree nuts produced in the world was estimated to be around 4 million tonnes. Walnuts accounted for 25 per cent of this volume, almonds for 24 per cent, cashew nuts 17 per cent, hazelnuts 15 per cent, pistachios 9 per cent while other nuts accounted for 10 per cent. In 1996 total world imports of edible tree nuts amounted to a volume of 900,000 tonnes, with a value of ECU 3,272 million, of which developing countries produced 55 per cent.

Dried fruit is produced mainly by the USA, Turkey, Greece, Tunisia, France and also South Africa. In 1995, 1,063,000 tonnes of raisins/sultanas were produced world-wide. Total imports of all dried fruit, whether from temperate-zones, subtropical or tropical climates into the EU, Japan and the USA was estimated, in 1996, to be around 730,000 tonnes, of which three quarters were imported by the EU.

For groundnuts and luxury nuts, as well as for dried fruit, the EU, followed by Asia (especially Japan) and the USA are leading world importers. Since January 1, 1995, the EU has comprised 15 member states. In 1997, this represented 373 million consumers, who had an average GDP per capita of ECU 18,100 in 1996.

In 1997 the EU imported about 1,360 thousand tonnes of edible nuts (groundnuts and luxury nuts) with a value of ECU 2,860 million. In the same year, the EU imported 608,084 tonnes of dried fruits, with a value of ECU 857.3 million. In 1997 the EU apparent consumption (EU imports minus exports) of dried fruit and edible nuts together was estimated to be 1,400 thousand tonnes with a value of ECU 2,522 million. Gross imports fluctuate quite considerably around this figure due to the differing stock levels held by major trading companies at any one time and to the (re-) export trade between member countries of the EU.

Table 4.1 Apparent consumption of dried fruit and edible nuts in Europe, 1995-1997

	1995		**1997**	
	Dried fruit	**Edible nuts**	**Dried fruit**	**Edible nuts**
Volume in tonnes				
Imports	594,812	1,344,275	608,084	1,359,842
Exports	145,200	390,375	158,311	409,275
Apparent consumption	*449,612*	*953,900*	*449,773*	*950,567*
Value in ECU million				
Imports	752.2	2,137.6	857.3	2,860.4
Exports	217.6	729.4	236.4	958.9
Apparent consumption	*534.6*	*1,408.2*	*620.9*	*1.901.5*

Source: Eurostat 1998

In 1997 luxury nuts accounted for 61 per cent, groundnuts for 11 per cent and dried fruit for 28 per cent of total EU consumption value. In terms of volume, 38 per cent of the EU apparent consumption were groundnuts, while luxury nuts and dried fruit accounted more or less equally for the remainder. There are no official statistics on the overall size of the EU market for dried fruit and edible nuts. Net import figures, or apparent consumption (i.e. imports minus exports), give only an indication of the volume of EU trade and roughly estimate the overall demand for many products. In addition, the production of currants, prunes, walnuts, almonds, hazelnuts and chestnuts within the EU tends to distort the picture of the actual demand for these products. Further information on EU production and imports of dried fruit and edible nuts can be found in sections 4.1.2 and 4.1.3. Detailed statistics of supplying countries and products are given in Appendix 2.

Between 1995 and 1997 almost all countries in the EU increased their imports of dried fruit and luxury nuts, while demand for groundnuts was little changed. In this period, therefore, total EU imports increased by 2 per cent in volume and by 28 per cent in value. Germany, which imports a quarter of all EU imports, is the largest EU market for both dried fruit and edible nuts: 494.483 tonnes, with a value of ECU 1,175 million in 1997. Germany is followed by the United Kingdom (21 per cent of EU imports in 1997), The Netherlands (17 per cent), France (10 per cent), Italy (8 per cent) and Spain (6 per cent). However, it should be noted that Rotterdam, Hamburg, Marseille and, to a lesser degree, London are the major EU trading centres for groundnuts, luxury nuts and dried fruit, with significant quantities re-exported onwards to other EU countries.

Table 4.2 EU imports of dried fruit and edible nuts, 1995-1997
Tonnes/ECU 1,000

	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Germany	450,893	884,933	495,410	1,029,000	494,483	1,175,517
United Kingdom	398,080	419,113	394,882	477,133	418,135	560,645
Netherlands	357,765	384,083	349,247	421,678	342,050	440,329
France	206,139	326,065	213,030	379,163	204,282	440,141
Italy	151,057	262,713	158,343	327,373	149,554	330,565
Spain	111,919	183,171	134,331	256,778	117,281	224,619
Belgium	107,551	149,255	66,124	138,284	72,675	179,048
Austria	32,019	62,256	39,965	80,735	37,697	87,691
Greece	31,958	45,557	34,462	57,553	33,771	68,984
Denmark	30,736	62,518	30,979	66,718	31,545	73,986
Sweden	23,680	52,452	26,528	62,933	24,619	62,987
Portugal	15,938	23,562	19,276	33,043	18,548	30,870
Ireland	10,753	14,470	11,463	15,137	12,041	17,937
Finland	10,599	19,749	12,989	25,142	11,245	24,504
Total	**1,939,087**	**2,889,897**	**1,987,029**	**3,370,670**	**1,967,926**	**3,717,823**

Source: Eurostat 1998

Belgium is a large importer of dried fruit and luxury nuts and imported 72,675 tonnes in 1997. Other sizeable importers include Austria, Greece and Denmark. There is a long tradition of eating dried fruit and nuts in EU countries, making the EU a very significant world market for dried fruits, groundnuts and luxury nuts. The general trends described in section 3.1.3 for the Dutch market, can be observed throughout the EU. Recent trends have affected the consumption of dried fruit and edible nuts as follows:

- The rise in popularity of individual luxury nuts, especially cashew nuts and pistachios and the ever-increasing assortment of attractive nut mixtures and other snack products being developed by the food industry has meant that fewer peanuts are consumed as snacks and sales have consequently fallen;
- Demand for luxury nuts is growing fast in most markets, stimulated by the fall in import prices and the resulting lower retail prices for consumers. The use of nuts as an ingredient in domestic cooking (salads, vegetarian and healthy dishes) is increasing and promotion of lesser known nuts such as macadamia nuts are also having a positive effect on sales;
- Although the demand for dried fruit is fairly stable, it is being stimulated by the increased use of dried fruit by the food industry, the largest end user, for breakfast cereals, healthy ready-to-eat snacks and desserts. In addition to becoming more interested in lesser-known tropical fruits, consumers are tending to regard dried fruit as healthy and therefore to use more in recipes.

Average consumption and the popularity of dried fruits and different luxury nuts varies considerably from region to region within the EU. Figure 4.1 shows consumption per capita in the retail sector. Italians prefer sweets and chocolate to savoury snacks and in 1997 their consumption of nuts was the lowest in the EU. In 1997, Greece had the highest per capita consumption of nuts (especially pistachios and almonds) in the EU, at 6.8 kg per year. Denmark and The Netherlands had the highest per capita consumption of dried fruit, with 2.3 kg and 2.4 kg respectively.

Figure 4.1 Per capita consumption of dried fruit and edible nuts in the EU in 1997

≥ 3 kg
- **Greece**
  1.0 (F) + 6.8 (N)= 7.8 kg
- **Netherlands**
  2.4 (F) + 2.1 (N)= 4.5 kg

2 - 3 kg
- **Finland**
  1.7 (F) + 1.1 (N)= 2.8 kg
- **Denmark**
  2.3 (F) + 0.3 (N)= 2.6 kg
- **France**
  1.5 (F) + 0.9 (N)= 2.4 kg
- **Germany**
  1.0 (F) + 1.2 (N)= 2.2 kg
- **United Kingdom**
  0.9 (F) + 1.2 (N)= 2.1 kg
- **Belgium**
  1.7 (F) + 0.3 (N)= 2.0 kg

≤ 2 kg
- **Sweden**
  0.7 (F) + 1.2 (N)= 1.9 kg
- **Norway**
  0.8 (F) + 1.1 (N)= 1.9 kg
- **Spain**
  1.4 (F) + 0.4 (N)= 1.8 kg
- **Austria**
  1.4 (F) + 0.4 (N)= 1.8 kg
- **Portugal**
  1.3 (F) + 0.5 (N)= 1.8 kg
- **Ireland**
  0.9 (F) + 0.2 (N)= 1.1 kg
- **Italy**
  0.6 (F) + 0.2 (N)= 0.8 kg

Total average per capita consumption in the EU in 1997: 1.2 (F) + 0.8 (N)= 2.0 kg
(F) = Dried fruit (N)= Edible nuts

Source: CIG, Euromonitor 1998

The principal end users of dried fruit and edible nuts in all EU markets can be divided into two end user segments. In 1997 in almost all EU countries the industrial sector was the major user of dried fruit and most luxury nuts. The retail and catering sectors consumed more peanuts and pistachios. In most markets the ratio is moving towards higher relative usage by the industrial sector, reflecting the growing popularity of ready-to-eat healthy snacks, muesli, chocolate with nuts and processed foods (exotic ready meals, salad kits) using more healthy ingredients like dried fruit and edible nuts.

- **Industrial sector**

  Confectioners are the largest industrial users of edible nuts, especially chocolate confectioners, who use many almonds, hazelnuts and walnuts. The total EU production of chocolate and chocolate related products was estimated to be around 2,870 thousand tonnes in 1997.
  Future growth in chocolate confectionery sales is being sought in special occasions (St. Valentine's Day, Easter or Christmas) and in special or attractively packed chocolates for young people, e.g. chocolate for kids or chocolate, as extra nourishment, after sports. Manufacturers are also looking for new products and added value (quality) instead of selling more chocolate (quantity). A problem for chocolate has been its reputation to be "bad for you", since it is associated with obesity, tooth decay and excess "bad" fat consumption. To counteract this, manufacturers are increasingly launching "light", "low-fat" and "vitamin enriched" varieties of chocolate. The addition of nuts to a chocolate bar improves its health value and therefore its appeal to consumers, as is the case with health bars, muesli bars or multi fruit bars.

  Bakeries and breakfast cereal mixers are the second largest users of dried fruit and edible nuts. According to Frost & Sullivan, in 1997 the EU bakery market had grown to a value of ECU 85 million. It is expected to grow to ECU 99 million in 2002. Here sales of breakfast cereals and cereal snacks will grow faster than the bread segment. Almonds, hazelnuts, walnuts and, increasingly, pecan nuts are used in biscuits, cakes and pastries. Bakeries have recently tended to buy more convenient products, such as more shelled, pre-cut, slivered or similarly pre-processed nuts, especially in the case of walnuts and pecan nuts. Processors and packers consequently tend to make mixes that are more multi-functional for bakeries. The bakery industry is a fairly small end user of dried tropical fruit but some increase is expected. More and more supermarkets offer a wider range of muesli of which some are tropical/exotic variations. The same applies to the other breakfast cereals.

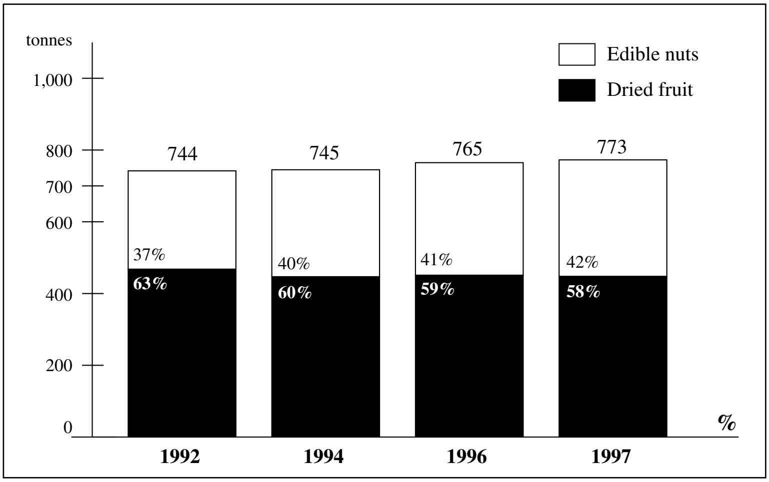
  Other industries include the ice cream industry, where almonds, walnuts and pecan nuts are used. The liquor industry uses almonds in the Italian Amaretto or the Portuguese Amaro. Dried fruit is used for the production of dairy food, desserts, fruit teas, baby foods and in various convenience foods.

  Some large industrial users of dried fruit and edible nuts include Danone (confectionery, desserts, cereals, France), Belin LU (biscuits, savoury snacks, France), Kellogs (cereals, USA), Quaker Oats (cereals, bakery, USA), United Biscuits (confectionery, UK), Oetkar (cereals, desserts, Germany), Mars (chocolate, USA), Alfred Ritter (chocolate, Germany), Jacob Suchard (confectionery, cereals, USA), Ferrero (confectionery, spreads, Italy), Unilever (UK), Nestlé (Switzerland) and CPC (Germany/ Ireland).

- **Retail sector**

Each individual country has its own favourite snack and the savoury snack market in the EU is growing. In Germany and France, edible nuts account for a large share of the domestic market for savoury snacks, since they have been used there for many years. In France and Spain the term "savoury snack" has traditionally referred to nuts, crackers or savoury biscuits which are eaten with apéritifs before dinner. Crisps and extruded snacks are most popular in Italy, the United Kingdom and Spain.
In 1997 the total savoury snack market was estimated to be around 962 thousand tonnes, which includes edible nuts, crisps (made from potatoes), extruded snacks (maize or wheat) and other savoury snacks. The major growth areas have been in the extruded snack category for American style snacks (corn and taco chips) and Oriental style snacks. Since they are new, they are often associated with a modern lifestyle and consumers enjoy eating them with a large variety of fancy or exotic dip sauces.
The increased consumption of savoury snacks had a positive effect on the EU market for edible nuts, which grew by 15 per cent to a volume of 322 thousand tonnes, representing a value of ECU 1,355 million between 1992 and 1997. In the same period the total EU market for dried fruit decreased by 3 per cent to 451 thousand tonnes, which is nonetheless a larger volume than the market for edible nuts, as is shown in figure 4.2.

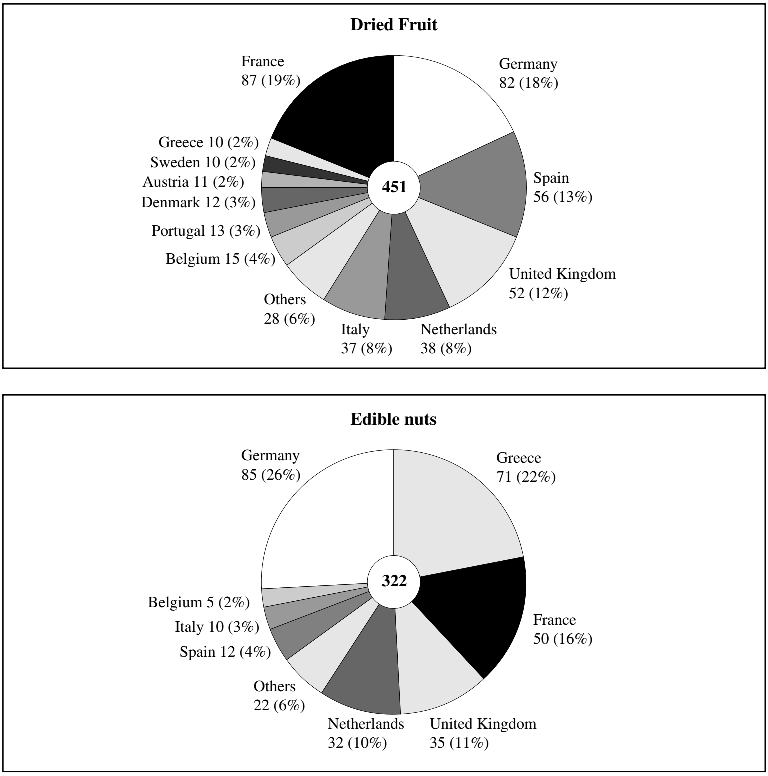
Figure 4.2 EU retail market development of dried fruit and edible nuts, 1992-1997
Tonnes 1,000



Source: Euromonitor, The Clipper 1998

The major EU retail markets for dried fruit and edible nuts are Germany, France and the United Kingdom, because of their large population sizes. There are different consumption levels for both product groups in other EU markets: for dried fruit, The Netherlands, Italy, Belgium, Portugal and Denmark are significant markets, while Greece, The Netherlands, Spain and Italy are large markets for edible nuts. A breakdown of the retail markets for dried fruit and edible nuts by country is shown in figure 4.3.

Figure 4.3 Retail sales of dried fruit and edible nuts in the EU (1997) Tonnes 1,000



Source: CIG, Euromonitor 1998

4.1.2 Production

EU countries produce substantial quantities of edible nuts and some dried fruit. Greece is the dominant world producer of currants, supplying about 58,000 tonnes per year, of which around 60 per cent are exported, primarily to other EU markets. Greece also supplies about 25,000 tonnes of raisins per year. France is the second largest producer of prunes in the world after California but exports have declined substantially in the last few years, from 28,000 tonnes in 1993 to around 17,500 tonnes in 1997.

The southern EU countries bordering the Mediterranean produce almonds, hazelnuts, walnuts, chestnuts and very small quantities of pistachios. Total production of nuts in 1993 was more than 770 thousand tonnes and fell to 609 thousand tonnes in 1997.
The following table indicates total EU production levels between 1993 and 1997 and a breakdown by producer country for 1997.

Table 4.3 EU production of edible nuts, 1993-1997
Tonnes 1,000

Country	Chestnuts	Almonds	Walnuts	Pistachios	Hazelnuts	Total
Total EU						
1993	128	459	72	6	113	777
1995	133	322	68	6	153	683
1997	130	306	52	6	115	609
By country, 1997						
France	11	-	21	-	-	21
Greece	13	56	22	4	-	95
Italy	71	91	-	2	100	264
Spain	28	151	9	-	15	202
Portugal	19	8	-	-	-	27

Source: Eurostat, statistical supplement Agropress 1998

4.1.3 Imports

In 1997 the EU was the largest importer of dried fruit and edible nuts in the world, with imports valued at ECU 3,718 million. The percentage supplied by sources in Asia is still rising and more is imported from some African countries but import and export statistics are distorted by the existence of four major trading centres in Rotterdam, Hamburg, Marseilles and London. Although they import dried fruit and edible nuts from non-European sources to one location, they subsequently re-export the same goods to individual EU markets.
The actual volume and value of imports are strongly affected by price speculation, which in turn is determined by harvest forecasts and actual harvests. Import figures also fluctuate considerably according to the different stock levels held by major trading companies.

Official statistics only give an indication of the major trends and relative significance of individual importing countries and do not represent the overall situation. Since the unification of the EU in 1992, Customs authorities do not record the intra-EU trade, so import and export figures are based on the reports of the companies themselves. Smaller companies are not obliged to report and are therefore excluded from the statistics. However, the imports from non-EU sources are still registered by Customs authorities.

In 1997 the total volume of EU imports amounted to 1,967 thousand tonnes and represented a total value of ECU 3,718 million. Of the total volume of dried fruit and edible nuts imported, luxury nuts accounted for 36 per cent, groundnuts for 32 per cent and dried fruit for 31 per cent. Within the luxury nuts' category hazelnuts, almonds, pistachios, coconuts and walnuts were the most important products. Significant dried fruit products are raisins/sultanas, prunes, dates, figs, currants, apricots and bananas.

Table 4.4 EU imports of dried fruit and edible nuts by product group, 1995-1997 Tonnes/ECU 1,000

	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**1,939,087**	**2,889,897**	**1,987,029**	**3,370,670**	**1,967,926**	**3,717,823**
Intra-EU	**462,738**	**729,612**	**498,364**	**905,093**	**550,784**	**1,067,044**
Extra-EU	**1,476,349**	**2,160,285**	**1,488,665**	**2,465,577**	**1,417,142**	**2,650,779**
Developing countries	**942,439**	**1,330,213**	**1,020,696**	**1,450,053**	**985,542**	**1,691,639**
Dried fruit	**594,812**	**752,215**	**595,339**	**800,688**	**608,084**	**857,342**
Raisins/sultanas	287,182	314,797	299,750	328,505	294,398	358,955
Currants	36,021	42,366	29,173	45,942	33,225	31,394
Bananas	80,159	44,016	69,128	45,679	81,851	66,279
Dates	48,476	89,459	50,987	92,026	52,310	97,025
Figs	33,299	50,584	35,316	54,296	37,695	59,657
Prunes	53,039	94,525	52,993	93,679	55,333	98,421
Other dried fruit	56,636	116,468	57,992	140,561	53,272	145,611
Groundnuts	**642,105**	**429,514**	**634,722**	**474,841**	**642,146**	**542,908**
Luxury nuts	**702,170**	**1,708,168**	**756,968**	**2,095,141**	**717,696**	**2,317,573**
Hazelnuts	171,399	438,741	171,993	394,002	167,614	606,497
Almonds	145,995	519,914	168,440	788,828	161,768	730,890
Pistachios	103,086	268,080	116,840	318,843	104,516	354,933
Coconuts	101,009	60,854	109,290	85,817	107,832	96,633
Walnuts	75,219	149,620	76,607	175,486	67,216	163,361
Cashew nuts	39,350	150,853	49,076	197,694	48,638	210,504
Other nuts	66,112	120,106	64,722	134,471	60,112	154,755

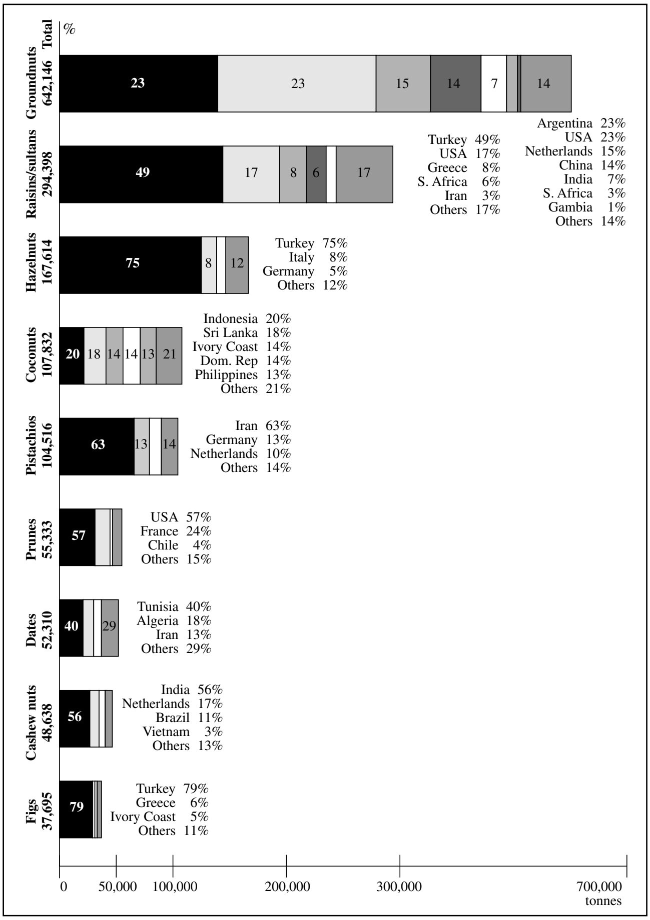
Source: Eurostat 1998

Since 1995, demand for imports of luxury nuts has increased. In 1997, there was an especially high demand for almonds (bitter and sweet), pistachios, cashew nuts and desiccated coconut. Imports of the product group "other nuts" decreased by 10 per cent because there was less demand for chestnuts, which took the largest proportion in this group, and for cola nuts, areca or betelnuts and nut mixtures. However, imports of pine nuts, pecan nuts and macadamia nuts, which are also included in this product group, increased enormously increased between 1995 and 1997. Imports of groundnuts (shelled and in shell) showed a fluctuating pattern: imports of in-shell groundnuts decreased, while imports of roasted groundnuts more than trebled.

There was an increase in the demand for dried fruit, particularly for raisins (bulk), prunes, dates, figs and "bananas" (in which fresh bananas were included). Imports of sultanas (bulk), which form the largest part of the product group raisins/sultanas have decreased, while imports of packed sultanas and raisins showed a fluctuating pattern. EU imports of the product group "other dried fruit", which includes apricots, apples, peaches, nectarines, pears, papayas, tamarind fruit, fruit mixtures, lychees, passion fruit and other dried fruit, decreased between 1995 and 1997.

A detailed overview of EU imports by product group is given in Appendix 2. An overview of total EU imports by most important product group and main non-EU suppliers in 1997 is given in figure 4.4.

Figure 4.4 EU imports of dried fruit and edible nuts by product group, 1997 Main non-EU suppliers as per cent of total volume



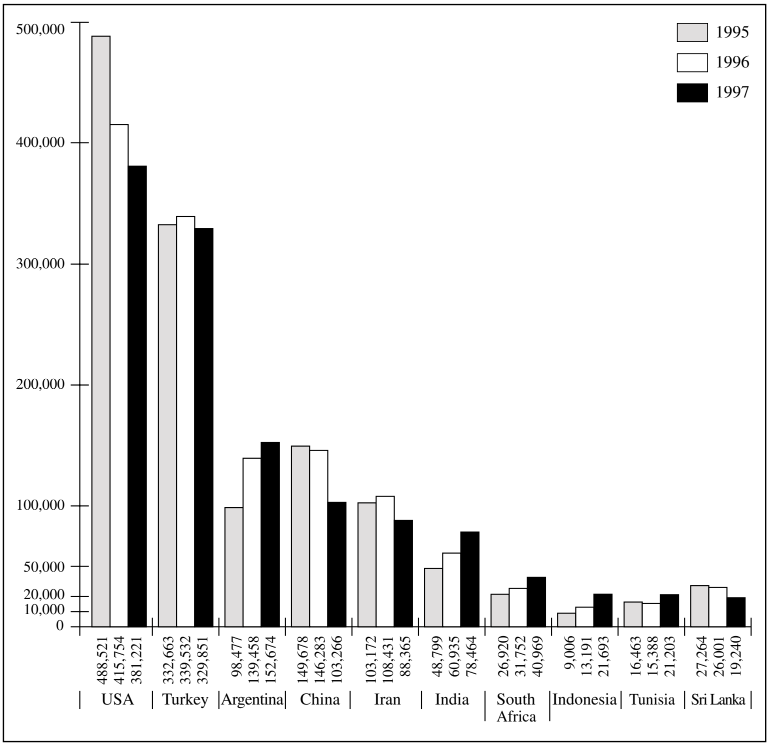
Source: Eurostat 1998

Groundnuts dominate imports of dried fruit and edible nuts. They are mainly supplied by Argentina, whose imports to the EU increased by 58 per cent between 1995 and 1997 to 149,501 tonnes, making Argentina the main supplier of groundnuts to the EU in place of the USA and China, whose exports decreased by 40 per cent and 80 per cent respectively. Turkey is the major supplier of raisins, sultanas, dates, apricots and hazelnuts to the EU. The third largest exporter to EU countries is the USA which, in addition to supplying groundnuts, is also an important supplier of raisins, prunes, almonds, walnuts, pecan nuts, hazelnuts and, increasingly of pistachios. Other important sources for dried fruit and edible nuts are: South Africa (raisins, groundnuts), Iran (pistachios), India (cashew nuts), Indonesia, Ivory Coast, Dominican Republic, Sri Lanka, Philippines (coconuts), Chile (prunes, Brazil nuts), Brazil (cashew nuts), Algeria (dates).

Developing countries supplied 53 per cent of EU imports of groundnuts in 1997. In the same year, the USA supplied 22 per cent of groundnut imports and, within the EU, The Netherlands, as a major (re-) exporter of groundnuts, was the main supplier, accounting for 14 per cent of all EU imports. In 1997 more then half the luxury nuts consumed in the EU were supplied by the USA, Italy, Spain, Portugal, France and through major (re-) exporters like The Netherlands, Germany and The United Kingdom, while 48 per cent of luxury nuts came from developing countries.
Most dried fruit is imported to the EU from Mediterranean countries, but 47 per cent came from developing countries in 1997. Other significant suppliers of dried fruit were the USA, Greece, France, Australia and (re-) exporters like The Netherlands, Germany and Belgium.

Some supplying countries, while not featuring as key suppliers in terms of total imports, nonetheless play a major role as the source of single dried fruit or edible nuts. This applies, for instance, to Gambia and Sudan, who export groundnuts, Portugal (pine nuts), Italy (chestnuts), Australia (macadamia nuts), Tunisia (dates) and Ecuador (bananas). A detailed overview of EU imports by source is given in Appendix 2. In addition to the mentioned sources, smaller quantities of EU imports come from Peru, Colombia, Paraguay, Honduras, Guatemala, Costa Rica, Nigeria, Senegal, Mozambique, Uganda, Madagascar, Ghana, Tanzania, Zimbabwe, Malawi, Mexico, Thailand, Malaysia, Pakistan, Afghanistan and Bangladesh. An overview of the main non-EU suppliers is given in figure 4.5.

Figure 4.5 The main non-EU suppliers of dried fruit and edible nuts to the EU, 1995-1997 (tonnes)



Source: Eurostat 1998

The role of developing countries

Between 1995 and 1997 the share of developing countries in the import volume increased slightly from 48 to 50 per cent but their value share decreased from 46 to 45 per cent. However, in 1996 imports from developing countries increased because of high imports of groundnuts and coconuts in that year. For dried fruit and edible nuts together, the EU import volume from developing countries increased by 4 per cent between 1995 and 1997 to 985,542 tonnes. In terms of value, this represented an increase of 23 per cent or a total value in 1997 of ECU 1691.6 million. Argentina, India, South Africa, Indonesia, Tunisia, Algeria, Egypt, Sudan and Vietnam became important suppliers of dried fruit and edible nuts to the EU between 1995 and 1997. The importance of developing countries in the supply of each product group is shown in table 4.5. A list of developing countries, as defined by the OESO, can be found in Appendix 11.

Table 4.5 EU imports of dried fruit and edible nuts from developing countries, 1997 Tonnes

	Total imports	from DC's	% per product group	% of total DC's* supply
All groups	**1,967,926**	**985,542**	**50**	**100**
Raisins/sultanas	294,398	179,018	61	18
Currants	33,225	384	1	0
Prunes	55,333	3,634	7	1
Figs	37,695	31,976	85	3
Dates	52,310	39,688	76	4
Bananas	81,851	993	1	0
Apricots	25,117	21,579	86	2
Other dried fruit	53,272	12,673	24	1
Groundnuts	642,146	339,428	53	35
Coconuts	107,832	93,928	87	10
Cashew nuts	48,638	35,654	73	4
Almonds	161,768	4,411	3	1
Hazelnuts	167,614	125,529	75	12
Walnuts	67,216	812	1	0
Pistachios	104,516	69,404	66	7
Other nuts	60,112	20,858	35	2

Note: DC = Developing country

Source: Eurostat 1998

Developing countries supply half of the dried fruit (except prunes and currants) imported to the EU, along with most of the groundnuts and luxury nuts, except almonds, walnuts, pine nuts, pecan nuts and macadamia nuts. In 1997, developing countries were the largest suppliers of groundnuts to the EU, with 35 per cent of total imports. Their shares of total imports of raisins/sultanas, hazelnuts and coconuts were 18 per cent, 12 per cent and 10 per cent respectively as is shown in table 4.5.

4.1.4 Exports

A large part of the EU export trade in dried fruit and nuts consists of re-exports of shelled groundnuts and raisins, which are traded by The Netherlands to other EU countries in raw form. Another significant part of this total consists of dried fruit and edible nuts which have been imported in bulk or in shelled form and which, following cutting, processing, mixing and/or repackaging, are re-exported to other EU and overseas markets. Products which originate in large quantities within the EU are almonds, hazelnuts, chestnuts, walnuts, pistachios, prunes and currants. In 1997, the total value of these EU exports was ECU 1,195 million, of which almost 80 per cent went to other EU countries. Between 1995 and 1997 the total of EU exports grew by 6 per cent in volume, with a value increase of 26 per cent, mainly due to rising prices for pistachios, hazel nuts, pine nuts and raisins.

Groundnuts are the major export product and accounted for 30 per cent of total exports of dried fruit and edible nuts in 1997. The other main dried fruit and nut export products, in order of their share of total exports in 1997 are: almonds (11 per cent), raisins (9 per cent), hazelnuts (7 per cent), chestnuts (6 per cent), currants (6 per cent), pistachios (5 per cent), prunes (5 per cent), coconuts (4 per cent), figs (2 per cent), dates (2 per cent) and a large variety of dried fruit and nut mixtures.

Major destinations for EU exports within the EU in 1997 were Germany, who took 24 per cent, France (13 per cent), United Kingdom (11 per cent), The Netherlands (6 per cent), Italy (6 per cent), Belgium (5 per cent), Spain (4 per cent), Austria (3 per cent) and Denmark (2 per cent). Non-EU destinations were: Poland (3 per cent), Czech Republic (3 per cent), Russia (2 per cent) and the USA (2 per cent). An overview of the exports of each EU country is given in table 4.6. An overview of total EU exports by product group can be found in Appendix 2.

Table 4.6 EU exports of dried fruit and edible nuts, 1995-1997
Tonnes/ECU 1,000

	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Netherlands	168,113	183,197	145,685	181,204	159,059	206,367
Germany	75,910	161,453	88,887	201,206	75,210	188,991
Spain	44,770	153,983	57,733	216,580	71,896	276,697
France	60,112	116,812	65,847	131,731	57,508	125,603
Italy	49,204	122,578	58,554	142,972	53,028	159,801
Greece	72,107	87,338	62,656	90,240	73,618	84,420
Belgium	26,585	51,104	23,155	48,754	28,399	59,313
United Kingdom	22,449	39,867	21,781	40,759	24,001	47,384
Portugal	11,060	16,147	11,988	15,842	15,256	21,638
Austria	1,777	3,944	2,705	6,299	4,958	12,433
Denmark	2,612	8,657	2,823	9,416	2,487	8,609
Sweden	514	1,373	632	2,205	693	2,538
Finland	327	621	369	943	417	1,015
Ireland	35	48	263	287	1,056	618
Total	**535,575**	**947,122**	**543,078**	**1,088,438**	**567,586**	**1,195,427**

Source: Eurostat 1998

4.1.5 Market prospects

The eating habits of the populations of all the EU countries are affected by the same changes in living and working conditions, though each country is affected differently by these changes. As households get smaller, the importance of having regular meals decreases. Consumers in all countries leading increasingly hectic lives are consequently adhering less to formal meal patterns, preferring to "graze", which means taking quick snacks when and where they can throughout the day. This does not apply to the same extent in southern EU countries, with family-oriented societies where meal times are more important family occasions and few snacks are eaten between meals. In recent years, suppliers of fast food and snacks have gained from this development and the savoury snack market grew significantly between 1993 and 1997. This development stimulated the market for peanuts and, even more so, for luxury nuts.

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

Segmentation between adult and children's products will become more apparent, since processors and manufacturers are looking for opportunities to stimulate consumers' interest and add value to the market. The packaging of nuts will become more important and high volume packs, individual packs and re-sealable packs will help the market to broaden further. Individual packs may result in more impulsive buying. Supermarkets, with their private labels and flexibility in the packing of nuts, are expected to increase their market share in most countries, since consumers increasingly have less time, and prefer to buy all their food (including) savoury snacks in one supermarket (one stop shopping).

The growing western preoccupation with healthy lifestyles could limit the consumption of nuts and other savoury snacks. However, manufacturers hope that reduced-fat and low-salt varieties will satisfy this group of consumers. Also, luxury nuts are being increasingly used in foods such as salads or are suggested as an alternative for meat, especially by an increasing number of vegetarians. More recipes for Asian or exotic meals using nuts are expected to give an impulse to the nut market, while luxury nuts are expected to be included more often in stir-fry mixes and convenience food (ready meals).

The growing concern about health is also closely related to the consumer's ability to deal with a busier lifestyle. This has led to an expansion in the sale and variety of breakfast cereals, healthy or "energy boosting" chocolate snacks and muesli crunches, which are individually packed and which are being launched as modern, healthy, ready-to-eat products. This development will have a positive effect on the market for dried fruit, which has not shown much growth in the 1990s.

The health food sector is also a growing market, as industry and consumers focus more on healthy food and natural flavours as substitutes for sugar, salt and artificial products. Growing public concern about health and the increasing number of food scares may have a positive effect on the growth of the market for dried fruit and edible nuts. The awareness in most EU countries of the healthy aspects of the different nuts, like almonds and macadamia nuts is low, so these facts are likely to be promoted. Health problems associated with the excessive consumption of caffeine in coffee and tea are driving the market towards the use of herbal teas using different kinds of dried fruit. Although the share of organic dried fruit and edible nuts is estimated now at little more than one per cent of total demand, consumption is said to be growing very fast year on year.

Competitive issues in the market for dried fruit and edible nuts are consistency of quality, product innovation and variety in products or product mixtures, brought about by sound research and development. The emphasis on quality has led to a higher degree of customer loyalty. Food and drink manufacturers demand consistently high quality and tailor made or pre-processed dried fruit, edible nuts or mixtures for their specific application. They tend to stick with preferred suppliers who have proved themselves to be reliable. Price has been of secondary importance to quality but may become more important in the future.

As with any industry, processors and packers are under pressure from food manufacturers to keep prices as low as possible. The food processing industry is extremely competitive, as is the distribution of food products through supermarkets. At the same time, there is continual pressure to develop ever more products to give a wider variety of products and for tailor-made products, with a relative increase in production costs.

4.2 Profiles of the major EU markets

4.2.1 Germany

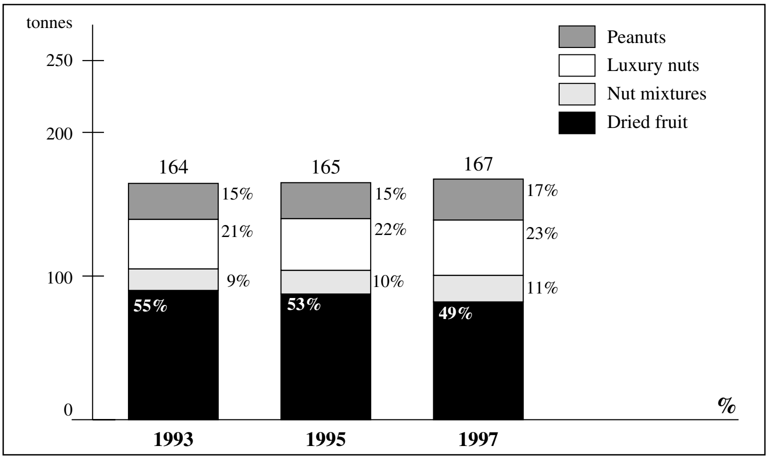
Within the EU Germany has by far the largest population size, with 81.8 million inhabitants in 1997 and a recorded average GDP (Gross Domestic Product) per capita in 1997 of ECU 22,500. Consequently, Germany is the largest market in the EU. With a 25 per cent share of total EU imports, Germany is the largest EU market for dried fruit and edible nuts and the world's biggest import market for luxury nuts. In 1997, Germany imported 494,483 tonnes with a value of ECU 1,175 million. Of that total, German apparent consumption of edible nuts in 1997 was 307,250 tonnes, an increase of 17 per cent compared to the 261,876 tonnes imported in 1995. In 1997, the apparent consumption of dried fruit was 112,023 tonnes. Variations in apparent consumption from year to year are caused not only by actual import and export volumes but also by the holding and releasing of stock by major traders in different periods. In 1997, the German per capita consumption of dried fruit and edible nuts was 1 kg and 1.2 kg respectively, which cost, on average, ECU 9.43 at retail prices.

Consumption and market trends

The increase in single person households (13.6 million in 1997) and an increasing number of women entering the workforce has led to a strong and growing demand for snacks, easy-to-prepare meals and different kinds of convenience food. Despite the fact that Germany is traditionally a large consumer of luxury nuts and peanuts, recent trends have created an increase in demand for all sorts of savoury snacks, including edible nuts. These casual snacks are often eaten between meals - a development of recent years known as "grazing". Pistachios are enormously popular and in 1997 there was a shortage in supply after the ban on supplies from Iranian suppliers, whose EU branch offices are mainly located in Hamburg. Since 1996, the growth of the savoury snack market has slowed down and matured, as German people have become more interested in other kinds of snacks or small ready meals.

The total German retail market for savoury snacks (excluding dried fruit) was 320,000 tonnes in 1997, which represented a value of ECU 1,215 million. Edible nuts accounted for 30 per cent, which is higher than the share of nuts in the savoury snack market in other EU countries. Germany's share in the total EU retail market for dried fruit and edible nuts in 1997 was 22 per cent, or 167,000 tonnes, which represented a 2 per cent decrease compared to the 1995 total, as is shown in figure 4.6. In the same year, edible nuts accounted for 51 per cent of the German market, representing a sales volume 85,000 tonnes, of which luxury nuts formed the largest part. Between 1995 and 1997 the sales of all nut categories (peanuts, luxury nuts and nut mixtures) rose slightly, while sales of dried fruit decreased by 12 per cent to a total volume of 82,000 tonnes. Nonetheless, German households traditionally bake pies, cakes or healthy pastries using dried fruit and are likely to continue to do so.

Figure 4.6 German retail market development of dried fruit and edible nuts, 1993-199 7 (tonnes 1,000)



Source: Euromonitor 1998, Lebenmittelzeitung 1998

In the distribution of dried fruit and edible nuts, supermarkets account for approximately 42 per cent of retail sales. Almost 41 per cent of total sales occur in discount stores, whose numbers are still growing in Germany; only 6 per cent is sold in small supermarkets and the remaining 12 per cent in delicatessens, nut speciality shops, petrol stations or other retail outlets.

The German retail food market is essentially stable and little growth is expected either in population income levels or in the per capita expenditure on food. Growth is expected to be sought in the market for more expensive, healthier or organic products. Growing consumer resistance to industrially manipulated ingredients has helped to stimulate the organic food market in Germany, as in other EU countries. Germany is now one of the world's largest producers and consumers of organic foods. Germany sells a comprehensive range of organic food items. In 1997, the 1,700 organic food shops in Germany sold organic food with a total value of ECU 1,788 million. This amounts to 1.5 per cent of German food sales and is expected to grow by 2-3 per cent every year. Organic foods are now sold in German supermarkets (Tengelmann, Rewe, Metro, Edeka and Globus). Sales of luxury nuts will remain stable, since they are traditionally consumed with apéritifs, but growth can be expected in the market for cashew nuts, nut mixtures and the more exotic nuts (macadamia and pecan nuts).

Production and processing

A large variety of nuts (especially hazelnuts, almonds, walnuts, and cashew nuts) is used in the German industrial sector. In 1997 production volume of chocolate preparations filled with cereals, nuts or fruits was 171,000 tonnes (value ECU 534 million), while production of all bakery products was 2,765,000 tonnes. Germany is also a leading EU producer of marzipan and pralines in which various types of dried fruit and edible nuts are used. Germany is the second largest EU importer of dried fruit after the United Kingdom. Most dried fruit (raisins, prunes, figs, apricots and apples), is used in the manufacture of bakery products, desserts, yoghurts and breakfast cereals. Sales of breakfast cereals have increased in recent years and, in 1997, amounted to ECU 2,101 million. This may be due in part to the introduction of more varieties of breakfast cereals, crunches and healthy ready to eat snacks, which contain different kinds of (tropical) dried fruit.

Large food processors in Germany are the confectionery, cereal and snacks manufacturers Ludwig (health food, bakery products), Suchard (with the brands *Milka* for chocolate and Balisto for muesli bars), Alfred Ritter (brand *Ritter*), Nestlé (chocolate, muesli bars, ice cream with the brand *Motta*), Kellogg (cereals), Bahlsen (bakery products), Oetker (desserts), Dr. Balke (multi-fruit bars) and Henselwerk (muesli). The health food trade, with its many health shops (Reformhäuser), is well developed and is supplied through the processor Neuform International.
In 1997, there were 16 major processors of dried fruit and edible nuts, of which the largest processor/packer is the May Group, with 17 per cent of the total retail market for dried fruit and edible nuts, followed by Bahlsen with the brand *Bahlsen* (11 per cent) and Ultje with the brand *Ultje* (11 per cent). The remainder is shared between other processors. In 1997, private labels took 35 per cent of the total retail market Kaufhofs' brand *Elite* and *Aldi* are popular.

Imports and exports

Germany is a major trader, processor and re-exporter of pistachios, hazelnuts, groundnuts and raisins. Hamburg, along with Rotterdam, Marseilles and London, is one of the world's key trading centres. In 1997, 68 per cent of imports were sourced outside the EU, while 48 per cent of total German imports came from developing countries. Germany is the largest EU importer of luxury nuts (36 per cent of total EU imports in 1997) and of hazelnuts, almonds, pistachios, walnuts and pecan nuts. Imports of raisins/sultanas, prunes, figs, apricots, apples and dates are also significant.

German imports increased by 10 per cent between 1996 and 1997, mainly because of a high demand for groundnuts, almonds, pistachios, cashew nuts, coconuts, Brazil nuts and other nuts. In 1997, raisins/sultanas, prunes, figs, apples, dates, currants and peaches/nectarines were more in demand, whereas walnuts, chestnuts, apricots and other dried fruit were not. The main German suppliers of dried fruit and edible nuts are Turkey, The Netherlands, USA, Iran, Argentina, Spain, Italy, China, South Africa, Greece, France and Australia. An overview of German imports by product group is given in table 4.7.

Table 4.7 Imports of dried fruit and edible nuts to Germany, 1995-1997 Tonnes/ECU 1,000

	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**450,893**	**884,933**	**495,410**	**1,029,000**	**494,483**	**1,175,517**
Intra-EU	**84,435**	**176,223**	**136,948**	**252,982**	**158,081**	**315,678**
Extra-EU	**366,458**	**708,710**	**358,462**	**776,018**	**336,402**	**859,839**
Developing countries	**247,715**	**457,796**	**239,842**	**443,646**	**238,061**	**573,337**
Dried fruit	**124,554**	**175,916**	**123,450**	**181,018**	**127,288**	**187,375**
Raisins/sultanas	73,133	79,135	68,584	71,748	73,671	79,637
Prunes	13,375	26,981	14,691	28,116	16,124	30,613
Figs	8,857	13,238	10,075	14,992	9,361	14,710
Apricots	8,167	11,594	6,692	11,945	6,608	14,850
Apples	5,066	12,471	6,051	15,784	5,812	15,082
Dates	4,426	9,076	5,062	10,427	5,182	10,459
Peaches/nectarines	1,360	2,481	1,498	2,679	1,790	3,245
Currants	1,182	1,406	1,141	1,894	1,196	1,167
Other dried fruit	8,405	18,673	9,103	22,816	6,550	16,464
Groundnuts	**81,375**	**56,103**	**107,664**	**74,627**	**111,068**	**88,616**
Luxury nuts	**244,964**	**652,914**	**264,296**	**773,355**	**256,127**	**899,526**
Hazelnuts	89,132	225,377	93,228	204,997	89,072	317,522
Almonds	57,373	199,842	61,637	291,785	61,585	279,931
Pistachios	41,255	108,453	49,671	134,672	47,494	154,669
Walnuts	20,476	44,677	18,911	46,836	18,131	46,397
Coconuts	16,747	10,811	17,818	15,115	17,428	16,857
Cashew nuts	10,033	40,647	12,683	52,644	11,510	51,951
Brazil nuts	3,913	6,657	3,569	6,811	4,279	9,543
Chestnuts	3,961	6,349	4,106	6,521	3,786	6,192
Other nuts	2,054	10,101	2,673	13,974	2,842	16,464

Source: Eurostat 1998

The most significant suppliers of the main dried fruit and edible nut items are:

Groundnuts	Netherlands, Argentina, USA, China, South Africa, India, Israel
Hazelnuts	Turkey, USA, France, Italy, Netherlands, Spain, Azerbaijan
Almonds	USA, Spain, Iran, Australia, Netherlands, Morocco
Pistachios	Iran, Netherlands, USA, Belgium, Turkey
Walnuts	USA, France, China, Chile, Netherlands, Italy
Coconuts	Philippines, Indonesia, Sri Lanka, Netherlands, Dom. Republic
Raisins/sultanas	Turkey, Greece, South Africa, USA, Netherlands, Iran, Australia
Prunes	USA, France, Netherlands, Chile, Turkey
Figs	Turkey, Greece, Netherlands
Dates	Tunisia, France, Iran, Pakistan, USA
Peaches/nectarines	Italy, China, South Africa
Macadamia nuts	Netherlands, Australia, USA

Germany is the second largest exporter of dried fruit and edible nuts in the EU and exported 75,210 tonnes in 1997, which represented 13 per cent of total EU exports. Roasted groundnuts account for 27 per cent, pistachios 22 per cent, hazelnuts 11 per cent, groundnuts 7 per cent, raisins 8 per cent and other dried fruit 12 per cent. Other EU markets imported 73 per cent of German's exports, while Russia, Poland and other Eastern European markets were other significant customers in 1997.

4.2.2 United Kingdom

The United Kingdom has a long trend in the import of dried fruit and edible nuts, is the second largest trader in the EU and dominates community imports of dried fruit. The population of 58.7 million inhabitants (1997) constitutes the second largest market with an average per capita GDP of ECU 19,480. The United Kingdom accounted for 21 per cent of EU imports of dried fruit and edible nuts in 1997. Imports amounted to 418,135 tonnes, with a value of ECU 560 million, of which imports of dried fruit accounted for almost half. This represented an apparent consumption of 394,134 tonnes in 1997, an increase of five per cent compared to 375,631 tonnes in 1992. It should be noted that variations in apparent consumption from year to year are caused not only by actual import and export volumes but also by major traders holding and releasing stock in different periods.

Consumption and market trends

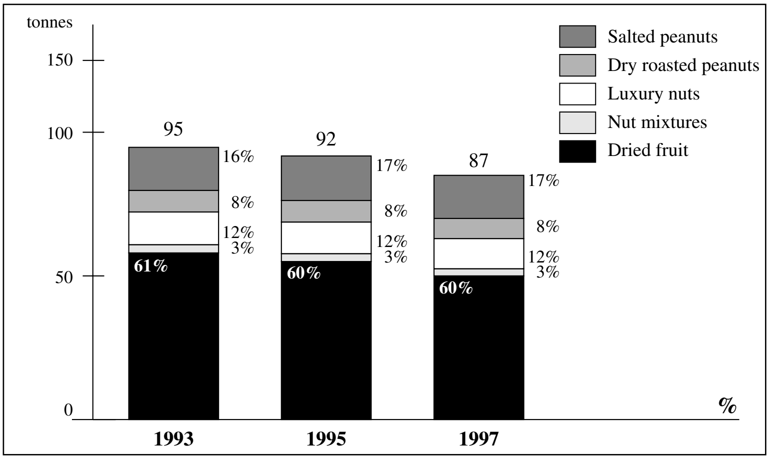
British people, with an average consumption of 5.7 kg per year, consume more snacks, including savoury snacks, than any other EU country. 1997 figures show, however, that nuts take a small share of this total. The British per capita consumption of dried fruit and edible nuts was average compared to other EU countries, being 0.9 kg for dried fruit and 1.2 kg for edible nuts. Although their consumption of peanuts is one of the highest in the EU, after The Netherlands, in 1997 British people spent only an average of ECU 8.86 per year on dried fruit and edible nuts.

As in other EU countries, the pattern in the United Kingdom shows a decrease in the tendency of families to have formal family meals and a strong tendency to eat more snacks between meals. Potato chips and crisps, followed by extruded snacks (taco chips and crisps made of maize), are the most popular snacks and each accounted for more than one third of the total savoury snack market in 1997. Peanuts are the favourite nuts in the United Kingdom and are often eaten as snacks with alcohol either at home or when drinking elsewhere. British people prefer the salted and roasted variety to dry-roasted peanuts and almost half are bought impulsively. New variations of coated peanuts, red skin peanuts (from USA) and new forms of packaging (flip-top tubes for young people) have stimulated the mature peanut market. In addition, market leader KP Foods has emphasised the nutritious value of eating peanuts in their promotions in order to reach health conscious consumers. In 1997, around 30 per cent of total peanut consumption was as snacks, 30 per cent was used by the confectionery industry, 15 per cent for peanut butter, 15 per cent for bird food and 10 per cent by other industries (cereals, convenience food etc.).

Since British people have become more interested in other kinds of snacks and small meals, the market for peanuts has declined and additional demand is more likely to be found in the industrial sector. The very highly developed taste for Indian and other Asian cuisine in the United Kingdom has stimulated a demand for peanuts and other nuts, as ingredients in ethnic dishes and sauces. Luxury nuts are used in bakery, health foods and ethnic dishes. Coconut is by far the most important luxury nut and consumer demand for pistachios, cashew nuts, walnuts, pecan nuts, macadamia nuts and other nuts has grown in the past few years. The United Kingdom is the second largest EU importer of Brazil nuts, which are used for nut mixtures (for cereals) and is a comparatively large importer of macadamia nuts. The use of luxury nuts in salads is now being promoted through recipe leaflets, to encourage consumer interest and to stimulate impulse purchasing of luxury nuts.

The total British retail market for savoury snacks in 1997 was around 450,000 tonnes, with a value of ECU 2,253 million, excluding dried fruit. Crisps and extruded snacks dominate this market, while edible nuts accounted only for 6 per cent, which is low when compared to the share of nuts consumed as savoury snacks in other EU countries.
The United Kingdom's share in the total EU retail market for dried fruit and edible nuts in 1997 was 11 per cent, or 87,000 tonnes, which represented a 9 per cent decrease compared to the 1995 total. The United Kingdom consumption of dried fruit has been stable for some time and in 1997 accounted for 52,000 tonnes or 60 per cent of the British retail market. Edible nuts accounted for 40 per cent of this market, with a sales volume of 35,000 tonnes, of which salted and dry roasted peanuts took the largest proportion. Coated and whole peanuts took a small share of the market and are included in the salted peanut category. Between 1995 and 1997 the sales of all nut categories (peanuts, luxury nuts and nut mixtures) decreased, as is shown in figure 4.7.

Figure 4.7 United Kingdom retail market development of dried fruit and edible nuts, 1993-1997 (tonnes 1,000)



Source: CIG, Euromonitor 1998

In recent years there has been a rising demand for organically grown food in the United Kingdom as in other EU countries. As yet, organically produced dried fruit and edible nuts are not sold in large quantities but future growth is expected. In 1997, sales of organic foods amounted to about ECU 562 million. Organic foods are also making progress in British supermarkets (Sainsbury, Tesco, Waitrose and Safeway).

Grocery multiples accounted for around 82 per cent of retail sales of dried fruit and edible nuts in 1997. Independent grocers sold almost 7 per cent, reflecting a fall from 9 per cent in 1993. Petrol stations accounted for 6 per cent of total retail sales; CTNs (confectioners, tobacco shops and newspaper stands) for 3 per cent (in 1993: 5 per cent) and convenience stores for 2 per cent.

Production and processing

The United Kingdom is the largest EU importer of dried fruit, with raisins/sultanas as important products, and accounted for 37 per cent of EU imports in 1997. The once-strong tradition of home baking, a major source of demand for raisins, desiccated coconut and currants in the past, is declining. However, strong demand continues from industry, the catering sector and the health food industry, where the popularity of tropical and other dried fruits is increasing. With regard to the nuts, HPS (hand-picked, selected) groundnuts, Brazil nuts, cashew nuts, macadamia and pistachio nuts will continue to be in demand in the industrial sector.

The main industrial user of dried fruit and edible nuts is the chocolate confectionery industry. In 1997, British consumers ate 650,000 tonnes of chocolate and there is also demand for healthy variations (reduced fat and low calorie bars). In other industries, dried fruit (raisins, prunes, figs, apricots and apples) are used in bakery products, desserts, yoghurts and in breakfast cereals. Sales of breakfast cereals have constantly increased and in 1997 amounted to ECU 578 million. An increased selection of breakfast cereals, crunches and healthy ready-to-eat snacks, have meant that more different kinds of (tropical) dried fruit are now used in these products. In 1997, there were 24 main United Kingdom processors/packers of dried fruit and edible nuts. The largest of these is KP Foods (United Biscuits) with the brand *KP McVitie's*, which in 1997 held 43 per cent of the total retail market for edible nuts. Between 1996 and 1997 private labels increased their share from 44 to 46 per cent. The remaining 3 per cent of the retail market is held by Walkers Snack Foods.

Imports and exports

In 1997, British importers sourced around 80 per cent of their requirements directly from producer countries and, of this total, 45 per cent came from developing countries.
The United Kingdom dominates EU imports of raisins/ sultanas, accounting for 32 per cent of total EU imports. Between 1995 and 1997 United Kingdom imports increased by 5 per cent, mainly because of a high demand for raisins/sultanas and groundnuts. In 1997, prunes, bananas, pears, papayas and other dried fruit, coconuts, almonds, cashew nuts, Brazil nuts, chestnuts and pecan nuts formed the bulk of dried fruit and nut imports, with a lesser demand for currants, dates, apricots, apples, walnuts and other nuts. The main suppliers of dried fruit and edible nuts to the United Kingdom are USA, Turkey, India, France, Greece, Belgium, Argentina, The Netherlands, China, South Africa, Indonesia, Iran and Germany. An overview of United Kingdom imports by product group is given in table 4.8.

The most significant suppliers of the main dried fruit and edible nut items are:

Raisins/sultanas	Turkey, USA, South Africa, Iran, Australia, Afghanistan
Dates	Iran, Tunisia, France, Iran, Pakistan, USA
Prunes	USA, France, Chile, South Africa
Figs/apricots	Turkey, France, Iran, Italy
Bananas	France, Belgium, Netherlands, Ireland
Groundnuts	India, Argentina, USA, China, South Africa, Nicaragua, Sudan
Coconuts	Indonesia, Philippines, Sri Lanka, Ivory Coast, Dom. Republic
Almonds	USA, Spain, Iran, Australia, Ireland
Cashew nuts	India, Brazil, Nigeria
Brazil nuts	Bolivia, Brazil, Chile, Peru
Pistachios	Germany, Iran, Austria
Macadamia nuts	Malawi, Australia

Compared to other EU countries the United Kingdom is a small exporter of dried fruit and edible nuts exporting only 24,001 tonnes, or 4 per cent of total EU exports. Roasted groundnuts account for 29 per cent of total exports, raisins 14 per cent, pistachios 12 per cent, shelled groundnuts 12 per cent, almonds 5 per cent and other nuts 5 per cent. In 1997, other EU markets imported 79 per cent, while Russia, Poland other Eastern European markets and South Africa were also significant customers.

Table 4.8 Imports of dried fruit and edible nuts to The United Kingdom, 1995-1997 Tonnes/ECU 1000

	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**398,080**	**419,113**	**394,882**	**477,133**	**418,135**	**560,645**
Intra-EU	**142,242**	**123,204**	**113,131**	**122,390**	**139,131**	**165,431**
Extra-EU	**255,838**	**295,909**	**281,751**	**354,743**	**279,004**	**395,214**
Developing countries	**153,630**	**168,609**	**194,198**	**217,381**	**190,381**	**238,611**
Dried fruit	**218,207**	**210,072**	**214,149**	**242,591**	**226,145**	**279,269**
Raisins/sultanas	83,260	89,461	96,932	109,487	95,320	131,249
Currants	25,671	29,731	19,335	31,356	22,540	21,501
Bananas	77,097	40,398	66,920	42,929	78,731	62,544
Dates	12,336	14,312	9,094	12,169	10,198	15,015
Prunes	7,375	11,925	8,394	13,583	7,442	12,255
Apricots	6,669	10,186	7,260	15,330	5,943	16,480
Figs	2,225	3,555	2,534	4,312	2,235	4,245
Apples	1,754	6,041	1,719	8,319	1,635	9,368
Other dried fruit	1,648	4,463	1,795	5,106	1,922	6,612
Groundnuts	**103,471**	**65,111**	**114,171**	**80,346**	**124,772**	**93,369**
Luxury nuts	**76,402**	**143,930**	**66,562**	**154,196**	**67,213**	**188,007**
Coconuts	21,750	13,486	25,481	22,302	22,852	24,047
Almonds	9,517	34,279	9,761	46,558	10,541	52,084
Cashew nuts	5,724	21,000	7,061	29,418	7,074	30,272
Walnuts	6,286	11,724	6,169	14,579	5,991	14,612
Brazil nuts	5,239	9,228	5,119	10,432	5,722	14,684
Pistachios	6,955	18,137	2,820	7,030	4,510	16,961
Hazelnuts	5,946	16,672	4,399	9,714	4,676	17,651
Chestnuts	1,926	3,453	2,150	3,292	2,261	3,990
Pecan nuts	852	4,226	1,050	4,397	1,233	6,570
Other nuts	12,207	11,725	2,552	6,474	2,353	7,136

Source: Eurostat 1998

4.2.3 France

In 1997, France had around 58.3 million inhabitants, who had an average GDP per capita in 1997 of ECU 21,270. France is one of biggest EU markets for dried fruit, especially 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, while nuts are traditionally eaten as a snack, but are also used in chocolates, sweets (nougats), nut oils, salads and increasingly in recipes. France is not only a significant importer of dried fruit and luxury nuts from the countries of origin, but also a large producer, consumer and exporter of prunes, walnuts, chestnuts, hazelnuts and almonds. In terms of volume France accounted for almost 10 per cent of EU imports of dried fruit and edible nuts in 1997, or a total of 204,282 tonnes, valued at ECU 440 million. In 1997, the apparent consumption of dried fruit alone amounted to 43,188 tonnes (including 17,500 tonnes of home-grown prunes). In the same year the apparent consumption of edible nuts was 142,000 tonnes (including 21,000 tonnes of home-grown nuts). Variations in apparent consumption from year to year are caused not only by actual import and export volumes but also by major traders holding and releasing stock in different periods. An overview of French production is given in table 4.3, section 4.1.2.

Consumption and market trends

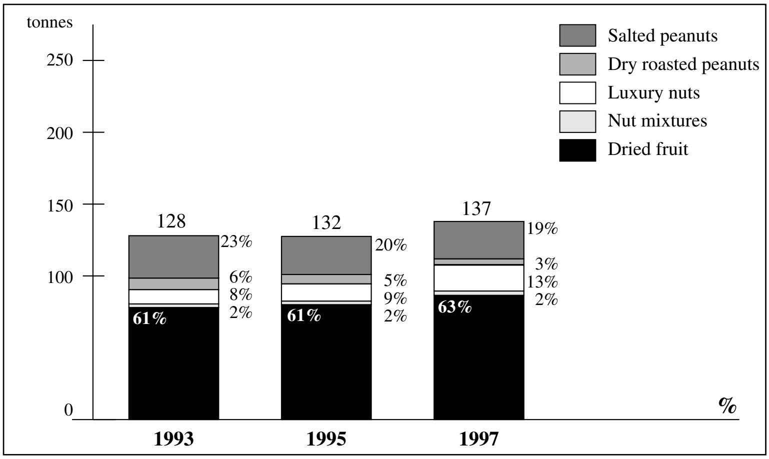
In 1997, the per capita consumption of dried fruit and edible nuts was 1.5 kg and 0.9 kg respectively. The French spent an average of ECU 9.32 per year on dried fruit and edible nuts together. France is traditionally a large consumer of peanuts and luxury nuts, which are eaten with the usual late afternoon drinks and with apéritifs (just before dinner). Recent trends have created an increase in demand for all savoury snacks, including edible nuts, which are marketed as "apéritif snacks". Peanuts have suffered from the fact that they are traditionally eaten with apéritifs, while French people now eat other snacks during the day, particularly crisps or other extruded snacks. In order to stimulate the market for nuts, manufacturers are increasingly promoting nuts as snacks, selling them in smaller packages (single packs, multi-packs) and introducing flavour-roasted peanuts as well as new kinds of "exotic" luxury nuts.

In France, which is renowned for its classical cuisine, a busier lifestyle has lead to a growing demand for convenience foods, such as various types of snacks and ready meals. Young consumers especially like to eat snacks between meals, a new habit for the traditionally gourmet French, which is called "grignotage" (grazing). In 1997, small snacks ("petit plats") with a new or typical taste, which could be either French or more exotic flavours, became popular. Examples of new, exotic snacks or meals are Mexican taco chips with guacamole and chilli, or Moroccan taboulé and tajine. Eating dipping chips has been quite uncommon in France but is gaining in popularity. The French like innovative recipes using dried fruit and edible nuts but these should be ready-to-use and practical. To save time, French people choose culinary aids in which all the ingredients they need for a dish, including fruits or nuts, have already been added. On the other hand, in many older French households, they still prefer to compose their own recipes, which gives French home cooking its flair and originality, in which the use of prunes and some nuts complements the flavour of the dish.

In 1997 the total French retail market for savoury snacks was 148,000 tonnes, representing a value of ECU 772 million. Dried fruit is not included in this total. Edible nuts accounted for 28 per cent, which is low, compared to the share of nuts in the savoury snack market in other EU countries. France's share in the total EU retail market for dried fruit and edible nuts in 1997 was 17 per cent, or 137,000 tonnes, which represented a 7 per cent increase compared to the 1995 total, as is shown in figure 4.8. In 1997, dried fruit accounted for 63 per cent of the French market, representing a sales volume of 87,000 tonnes and making France the largest retail market for dried fruit in the EU.

Plain, salted peanuts are still the most popular nuts sold and account for 46 per cent of the French nut market segment. In the past few years, luxury nuts have been by far the most dynamic sector and their share in the total volume sold increased from 31 per cent in 1993 to 35 per cent in 1997. The main reason for this growth is the dramatic price reductions that have taken place in this sector and the emergence of private labels, which have made them more accessible for consumers. The increase and market penetration of nuts sold at competitive prices under private labels has slowed the value growth of this market. Pistachios account for almost two thirds of the sales of luxury nuts, followed by almonds, hazelnuts and cashew nuts. Bénétuts first launched dry roasted peanuts in the French market in 1988, as part of the trend towards healthy food alternatives. The demand for dry roasted peanuts, which grew quickly when they were first introduced, has stabalised by volume as they became accepted and represented 9 per cent of the nut market in 1997. Flavoured peanuts take 3 per cent of the nut sector, particularly peanuts roasted with spices. Manufacturers have recently introduced mixtures of luxury nuts and of nuts with fruits, flavoured with Mexican or Indian spices.

Figure 4.8 French retail market development of dried fruit and edible nuts, 1993-1997 (tonnes 1,000)



Source: Euromonitor 1998, LSA 1998.

The demand for nuts in France is likely to be sustained by the development of products with exotic flavours. However, this segment of the savoury snack market is set to stabilise, as it is unlikely to break into the between-meal snacks market. Nuts appear to be more suited for consumption with apéritifs.

Production and processing

Demand from the French industrial sector will continue to grow, especially from confectioners and cereal manufacturers. Between 1992 and 1996 the production volume of confectionery products grew from 674,000 to 784,000 tonnes, of which chocolate confectionery accounted for 73 per cent. In 1997, the production of candied chestnuts, sugar-coated almonds and nougat was 8,200 tonnes. Large food processors in France are Eridania-Beghin-Say, Danone and Nestlé. There are about 20 packers of dried fruit and edible nuts in France. Leading packers for dried fruit are Saman SA (Dole), located in Marseilles, with estimated sales of around ECU 80 million in 1997, France Prune (sales: ECU 64 million), Color (ECU 16 million), CCO and Benoit. For edible nuts, the largest processor/packer is Bénétuts (Douwe Egberts), who had 22 per cent of the French retail market for edible nuts in 1997. The second largest packer in France was Bahlsen Saint-Michel (Bahlsen), who had 14 per cent. Other brands such as *Ancel* (Oetkar), *Menguy's, Jacques Benoit* together held 28 per cent of the French market. In 1997, private labels accounted for 26 per cent of sales and their share has remained more or less stable in recent years. The main private labels were those of the largest hypermarkets, such as Carréfour, Auchan and Promodès.

Imports and exports

In 1997, 58 per cent of total French imports were sourced outside the EU with 44 per cent of that total being sourced from developing countries. France is, compared to other EU countries, a large importer of dates and figs. Groundnuts dominate imports, accounting for 31 per cent of total imports in 1997, while almonds and raisins/sultanas accounted for 11 per cent each. French imports of dried fruit and edible nuts together remained more or less stable between 1995 and 1997. Groundnuts were less in demand and imports of these had decreased by 14 per cent to a volume of 65,971 tonnes in 1997. Instead, more dried fruit (dates, figs and currants) and luxury nuts (almonds, coconuts, pistachios, cashew nuts, pecan nuts and macadamia nuts) were imported, with apricots, bananas, prunes, apples and chestnuts less in demand. An overview of French imports by product group is given in table 4.9.

Table 4.9 Imports of dried fruit and edible nuts to France, 1995-1997 Tonnes/ECU 1000

	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**206,139**	**326,065**	**213,030**	**379,163**	**204,282**	**440,141**
Intra-EU	**84,554**	**127,500**	**83,327**	**152,660**	**84,854**	**182,141**
Extra-EU	**121,585**	**198,565**	**129,703**	**226,503**	**119,428**	**258,000**
Developing countries	**93,542**	**136,766**	**100,309**	**139,573**	**90,329**	**170,736**
Dried fruit	**54,191**	**85,005**	**57,649**	**89,704**	**57,552**	**93,677**
Raisins/sultanas	21,208	23,707	20,684	22,970	21,072	24,712
Dates	17,041	33,635	20,302	35,890	18,881	35,232
Figs	6,725	10,682	7,479	11,923	9,190	14,118
Apricots	4,773	9,528	4,597	10,655	4,496	12,356
Currants	1,151	1,387	1,450	1,718	1,541	1,415
Bananas	643	866	976	1,054	589	731
Prunes	808	1,452	863	1,633	466	669
Apples	711	1,091	299	1,347	404	1,973
Other dried fruit	1,131	2,657	999	2,514	913	2,471
Groundnuts	**74,582**	**50,981**	**74,181**	**64,383**	**65,971**	**73,493**
Luxury nuts	**77,366**	**190,079**	**81,200**	**225,076**	**80,759**	**272,971**
Almonds	21,162	78,436	21,325	103,328	22,609	105,323
Hazelnuts	17,599	44,441	16,198	37,576	17,147	65,131
Pistachios	10,158	26,255	11,807	33,273	11,527	41,944
Coconuts	9,339	5,887	8,801	6,664	9,636	7,908
Chestnuts	8,500	6,084	12,031	9,218	6,973	6,849
Cashew nuts	3,243	10,675	4,174	14,853	4,883	18,970
Walnuts	5,049	10,262	4,272	11,314	4,947	13,647
Pecan nuts	469	2,932	530	2,425	773	4,096
Brazil nuts	526	594	468	654	476	871
Other nuts	1,321	4,513	1,594	5,771	1,788	8,232

Source: Eurostat 1998

In 1997, most French imports of dried fruit and edible nuts came from Turkey, The Netherlands, USA, Germany, Spain, Algeria and Tunisia. Significant sources for the major products are as follows:

Raisins/sultanas	Turkey, Greece, South Africa, Iran, USA, Australia, Belgium
Dates	Algeria, Tunisia, Israel
Figs	Turkey, Ivory Coast, Cameroon
Apricots	Turkey
Bananas	Ecuador, United Kingdom
Prunes	Spain, Chile
Groundnuts	Netherlands, USA, Argentina, Gambia, China, United Kingdom
Coconuts	Dom. Republic, Indonesia, Philippines, Sri Lanka, Ivory Coast
Almonds	Spain, USA, Tunisia, Belgium
Cashew nuts	India, Brazil, Vietnam
Hazelnuts	Turkey, Italy, Germany
Pistachios	Iran, United Kingdom, Germany, Belgium
Brazil nuts	Brazil, Italy, Netherlands
Macadamia nuts	Germany, Costa Rica

Being a producer, France is a major exporter of dried fruit and edible nuts, exporting a volume of 57,508 tonnes or 10 per cent of total EU exports in 1997. Prunes accounted for 37 per cent of this total, dates for 14 per cent, walnuts 14 per cent, shelled groundnuts 7 per cent and other nuts 20 per cent. In 1997, other EU markets imported 80 per cent of total exports, while Algeria, Tunisia, Morocco, Poland other Eastern European markets were also significant customers.

4.2.4 Italy

Italy had around 57.3 million inhabitants in 1997, with an average GDP per capita in 1997 of ECU 17,465. Italy is the largest producer of nuts in the EU and the fifth largest import market. In terms of volume, Italy accounted for almost 8 per cent of EU imports of dried fruit and edible nuts in 1997, or a total of 149,554 tonnes, valued at ECU 330 million.
In the same year, the apparent consumption of dried fruit and edible nuts together amounted to 96,526 tonnes. Variations in apparent consumption from year to year are caused not only by actual import and export volumes but also by major traders holding and releasing stock in different periods. In consumption terms, the market is larger, because of the amount of home-produced almonds, hazelnuts, walnuts, pistachios and dried apples.
An overview of the Italian production of nuts is given in table 4.3, section 4.1.2.

Consumption and market trends

Italy has the lowest per capita consumption of dried fruit and edible nuts in the EU at 0.6 kg of dried fruit and 0.2 kg for edible nuts in 1997. It is unlikely that consumption in Italy will reach the level of the other markets in Northern Europe, where the tradition for sweet snacks remains strong and competition from other snacks is intensifying.
Peanuts are eaten primarily as snacks and their usage by food processors in cereals, confectionery and ready meals is low by the standards of other EU countries, because there is little tradition or interest in eating ethnic Asian foods or breakfast cereals and muesli,

though luxury nuts (cashew nuts, pine nuts) are increasingly used in salads and meals. Italy has traditionally been a family-oriented culture where meals are important family occasions. The population do not tend to eat snacks between meals and the habit of "grazing", common in other countries, is still quite small.

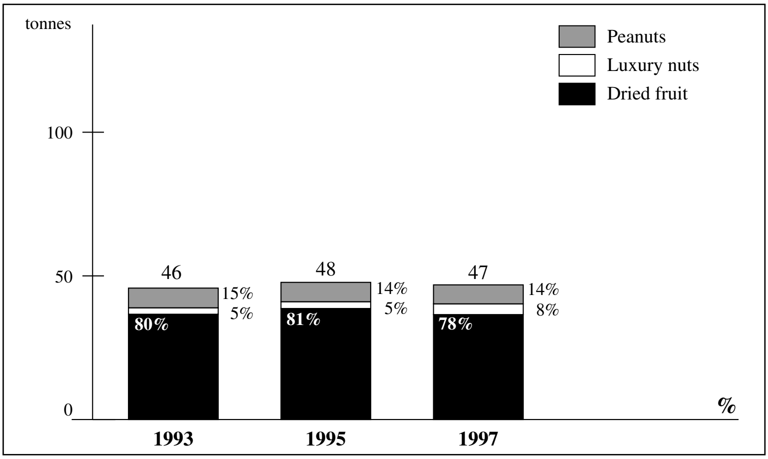
Large nut brands are Cameo, with 42 per cent of the Italian nut retail market, Nut Club holding 13 per cent and a large number of smaller brands holding 42 per cent of the market. The share of private labels in the Italian nut market in 1997 was small at 3 per cent, whereas private labels were stronger in the total savoury snack market at 14 per cent.

In 1997, the total Italian retail market for savoury snacks was 70,000 tonnes, representing a value of ECU 446 million; Dried fruit is not included in this figure. Edible nuts accounted for 15 per cent, which is low, compared to the share of nuts in the savoury snack market in other EU countries. Crisps and extruded snacks (savoury snack biscuits) are dominant in the savoury snack market and the large variety and introductions of new savoury snacks in Italy have proved very successful in the past few years.

Italy's share in the total EU retail market for dried fruit and edible nuts in 1997 was 6 per cent, or 47,000 tonnes, which represented a 2 per cent increase compared to the 1995 total, as is shown in figure 4.9. In 1997, dried fruit accounted for 78 per cent of the Italian market, representing a sales volume of 37,000 tonnes, which makes Italy one of the larger retail markets for dried fruit in the EU.

Within the nuts sector, plain peanuts are still the most important product, accounting for more than half of the Italian nut market. Snacks are often bought impulsively and the existence of a large number of kiosks, selling single packs of peanuts and luxury nuts, has stimulated the market. In the past few years, luxury nuts have been by far the most dynamic sector and have increased their volume share within the nut market. The main reason for this growth has been the large price reductions in this sector, which have made them more accessible. However, luxury nuts are still regarded as being rather expensive compared to other savoury snacks.

Figure 4.9 Italian retail market development of dried fruit and edible nuts, 1993-1997 (tonnes 1,000)



Source: CIG, Euromonitor 1998, AIIPA 1999

In 1997, the distribution of dried fruit and edible nuts by hypermarkets and supermarkets accounted for some 64 per cent of retail sales. Of these, 21 per cent were sold in traditional outlets, whose market share had decreased from the 1993 total of 29 per cent. Between 1993 and 1997 discount outlets increased their share from 3 to 8 per cent, while independent retail outlets accounted for 8 per cent of total retail sales.

Production and processing

Demand from the industrial sector for dried fruit and edible nuts comes mainly from the large number of small confectioners, bakeries, ice cream and a few cereal manufacturers. Almonds are used for the production of liqueur (*Amaretto*) and in a large variety of desserts. In 1997, the production volume of confectionery products was around 300,000 tonnes, of which chocolate confectionery accounted for 60 per cent. In 1997, the production of biscuits, crackers and other industrial pastries was 847,000 tonnes, while production of Italian ice cream was 221,000 tonnes. It is expected that production and consumption of sugar and chocolate confectionery will stabilise around the 1997 level, because of an increased concern among Italian people about health and diet. Some growth in the biscuit and industrial pastry market is expected, as long as the economic conditions in Italy improve, since these products tend to be regarded as luxury items. Large food processors in Italy are Ferrero, Veronesi, Suchard, Eridania, Unilever, Cirio, Nestlé, Danone and Unichips.

Imports and exports

In 1997, 80 per cent of Italian imports were sourced outside the EU and 56 per cent came from developing countries. Groundnuts dominated imports and accounted for 24 per cent of total imports of dried fruit and edible nuts together, with hazelnuts and raisins accounting for 13 per cent each.

Between 1995 and 1997, Italian imports of dried fruit and edible nuts decreased. Dried fruit was less in demand, with imports down by 2 per cent, to a volume of 42,658 tonnes by 1997. Imports of groundnuts were at a similar level in 1997 as they were in 1995, at 36,844 tonnes, while imports of luxury nuts fell slightly to 70,052 tonnes in 1997. Within the product group of luxury nuts, almonds and pine nuts were more in demand, followed by hazelnuts, walnuts, chestnuts, prunes and other nuts. An overview of Italian imports by product group is given in table 4.10.

Table 4.10 Imports of dried fruit and edible nuts to Italy, 1995-1997
Tonnes/ECU 1,000

	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**151,057**	**262,713**	**158,343**	**327,373**	**149,554**	**330,565**
Intra-EU	**23,360**	**54,529**	**31,505**	**92,416**	**29,183**	**86,670**
Extra-EU	**127,697**	**208,184**	**126,838**	**234,957**	**120,371**	**243,895**
Developing countries	**85,344**	**140,353**	**88,410**	**152,112**	**83,820**	**170,322**
Dried fruit	**43,503**	**69,227**	**42,067**	**65,638**	**42,658**	**69,321**
Raisins/sultanas	19,188	20,632	18,811	20,193	19,501	21,956
Prunes	10,828	22,042	10,089	19,214	9,499	20,036
Figs	6,389	10,153	6,510	10,660	6,029	10,028
Dates	5,013	12,406	4,972	11,580	5,729	12,687
Apricots	1,114	2,234	1,001	2,416	1,106	2,868
Currants	357	404	270	350	265	381
Bananas	96	102	16	37	17	58
Other dried fruit	518	1,254	398	1,188	512	1,307
Groundnuts	**36,848**	**31,519**	**31,742**	**31,319**	**36,844**	**35,680**
Luxury nuts	**70,706**	**161,967**	**84,534**	**230,416**	**70,052**	**225,564**
Hazelnuts	22,261	58,295	21,229	54,435	19,848	67,016
Almonds	7,516	28,616	16,063	78,273	14,893	66,581
Pistachios	13,839	35,998	14,960	41,785	13,164	46,996
Walnuts	11,757	19,868	14,480	27,711	8,298	17,389
Coconuts	6,852	2,724	6,976	3,410	6,810	3,385
Brazil nuts	2,472	2,782	1,979	2,596	2,117	3,153
Cashew nuts	1,157	3,619	1,215	3,930	1,716	6,183
Chestnuts	3,707	4,110	5,740	6,610	1,620	2,416
Pine nuts	732	5,075	1,356	10,234	1,473	11,791
Other nuts	413	880	536	1,432	113	654

Source: Eurostat 1998

In 1997, most Italian imports of dried fruit and edible nuts came from Turkey, USA, China, Iran, Germany, Spain, France, Israel, Tunisia and The Netherlands. Significant sources for the major products are as follows:

Raisins/sultanas	Turkey, Greece, Chile, Germany, USA
Prunes	France, USA, Chile
Figs	Turkey, Greece, Iran
Dates	Tunisia, Israel, France
Apricots	Turkey, Iran
Groundnuts	USA, Argentina, China, Israel, Netherlands, Egypt, India
Hazelnuts	Turkey, USA, Azerbaijan
Almonds	Spain, USA, Germany
Pistachios	Iran, Turkey, USA
Walnuts	Turkey, USA, France, Romania, Bulgaria
Cashew nuts	India, Brazil, Indonesia

Being a producer, Italy controlled a 9 per cent significant share of all the dried fruit and edible nuts exported by the EU, in 1997, with a volume of 53,028 tonnes. Most of this total was domestically produced nuts, like hazelnuts and chestnuts, each of which accounted for more than one third of total Italian exports. Other large export products are dried apples (5 per cent), roasted groundnuts (6 per cent) and almonds (3 per cent). In 1997, other EU markets imported 60 per cent of these Italian products, while the USA, Canada, Eastern Europe and Asian markets were also significant customers.

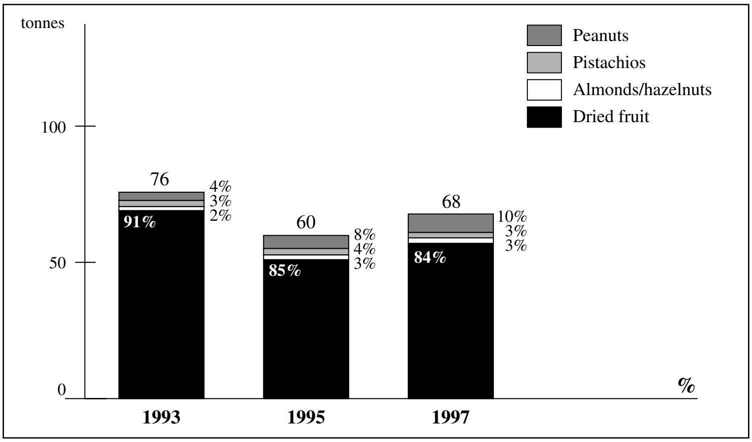
4.2.5 Spain

In 1997, Spain had around 39.2 million inhabitants. The population growth has been slowing in recent years and is forecast to rise by just 1.1 per cent between 1996-2005. Tourism brings 60 million foreigners into Spain every year. The average GDP per capita in 1997 was ECU 11,960 and Spain is among the fastest growing economies in the EU. After Italy, Spain is the second largest producer of dried fruit and edible nuts in the EU and total production in 1997 amounted to 202,000 tonnes. An overview of Spanish production is given in table 4.3, section 4.1.2.
In terms of the total volume of imports of dried fruit and edible nuts, Spain ranks fifth in the EU and imported a total of 117,281 tonnes in 1997, with a value of ECU 224 million. The per capita consumption of dried fruit and edible nuts in 1997 was 1.4 kg and 0.4 kg respectively. The breakfast cereals market in Spain has grown considerably since the early 1990s and the average annual consumption of cereals is now estimated to be around 0.95 kg per head. Children consume more then half of this total consumption but there is a growing demand for adult and diet-related lines, such as muesli and ready-to-eat snacks. The Spanish dried fruit retail market is the fourth largest in the EU and raisins/sultanas, prunes, dates, figs, apricots and exotic dried fruit (pineapple, bananas, papayas) are most popular.

Consumption and market trends

Like France, Spain is traditionally a large consumer of peanuts and luxury nuts, which are typically eaten with late afternoon drinks and with apéritifs (just before dinner). The most popular luxury nuts in Spain are pistachios, almonds, walnuts, hazelnuts and pecan nuts. Nuts are often bought impulsively and the existence of a large number of kiosks selling single packs of peanuts and luxury nuts has stimulated the market. Since the Spanish customarily treat meals as important family occasions, snacking is a relatively recent introduction and the savoury snack market is still small, despite intense competition, which has led to a decline in prices. Smaller pack sizes and developments in multiple retailing have stimulated impulse purchasing. Manufacturers increasingly monitor markets, seeking to adapt new snacks to suit national flavours and preferences in order to increase sales. Large food processors/packers in Spain are Nestlé Spain, Gallina Blanca, Sanboz Nutrition, Kellogg's, Danone and Borges. In 1997, there were still few private labels for dried fruit and edible nuts. The total Spanish retail market for savoury snacks, excluding dried fruit, in 1997 was 48,000 tonnes, with a value of ECU 274 million. Edible nuts accounted for 20 per cent of this total, which is slightly lower than the market share they have achieved in other EU markets. Potato chips, crisps and a few other savoury snacks dominate the market. Spain's share in the total EU retail market for dried fruit and edible nuts in 1997 was 9 per cent, or 68,000 tonnes, which represented a 11 per cent decrease compared to the 1995 total, as is shown in figure 4.10. This was mainly due to a drop in sales of dried fruit, which still accounted for 84 per cent of the Spanish market, representing a sales volume of 56,000 tonnes in 1997. Peanuts are still the most important item in the nuts sector, accounting for 62 per cent of the Spanish nut market. In the past few years, pistachios have shown the most dynamic increase in sales, followed by almonds, hazelnuts and walnuts. In 1997, luxury nuts accounted for about one third of the total nut market. The main reason for this growth has been strong price reductions in this sector and the emergence of private labels, which have made them more accessible.

Figure 4.10 Spanish retail market development of dried fruit and edible nuts, 1993-1997 (tonnes 1,000)



Source: CIG, Euromonitor 1998

Distribution of dried fruit and edible nuts by hypermarkets accounted for around 46 per cent of retail sales in 1997. Almost 24 per cent were sold in small supermarkets, whose share had decreased compared to 27 per cent in 1995. Around 18 per cent were sold in large supermarkets, 5 per cent in petrol stations and 4 per cent in traditional outlets.

Imports and exports
In 1997, 80 per cent of Spanish imports were sourced outside the EU and 40 per cent came from developing countries. Groundnuts dominated these imports and accounted for 32 per cent of total imports of dried fruit and edible nuts together, with almonds and walnuts accounting for 13 per cent each. Between 1995 and 1997, Spanish imports of dried fruit and edible nuts increased slightly. The demand for dried fruit increased by 21 per cent, leading to an import volume of 17,377 tonnes in 1997. In the same year imports of groundnuts increased by 7 per cent, to 37,939 tonnes, while imports of luxury nuts have remained the same, at 61,965 tonnes. Prunes, dates, apricots, pine nuts, cashew nuts and chestnuts were more in demand, while there was less demand for raisins, walnuts, pistachios and hazelnuts. An overview of Spanish imports by product group is given in table 4.11.

Table 4.11 Imports of dried fruit and edible nuts to Spain, 1995-1997
Tonnes/ECU 1,000

	1995		**1996**		**1997**	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**111,919**	**183,171**	**134,331**	**256,778**	**117,281**	**224,619**
Intra-EU22,225	**41,193**	**27,059**	**59,263**	**23,164**	**42,096**	
Extra-EU	**89,694**	**141,978**	**107,272**	**197,515**	**94,117**	**182,523**
Developing countries	**37,820**	**50,993**	**48,372**	**67,062**	**47,122**	**78,411**
Dried fruit	**14,994**	**22,522**	**15,401**	**23,944**	**17,377**	**27,648**
Raisins/sultanas	5,500	5,956	4,526	5,001	4,580	5,230
Prunes	3,868	6,240	4,505	6,913	5,444	7,739
Dates	2,698	5,932	3,550	7,509	4,545	9,104
Figs	1,365	2,097	1,626	2,228	1,394	2,142
Apricots	933	1,575	790	1,594	1,229	2,978
Currants	72	192	54	93	37	66
Bananas	67	58	37	65	18	62
Other dried fruit	491	472	313	541	130	327
Groundnuts	**35,366**	**25,825**	**46,509**	**29,978**	**37,939**	**33,011**
Luxury nuts	**61,559**	**134,824**	**72,421**	**202,856**	**61,965**	**163,960**
Almonds	17,534	55,263	26,154	108,245	17,943	68,154
Walnuts	15,335	27,720	16,318	34,830	14,288	30,724
Pistachios	10,084	25,390	10,994	30,095	8,593	29,612
Hazelnuts	5,492	12,198	5,919	13,108	4,644	15,545
Coconuts	6,865	3,748	6,644	4,911	6,764	5,189
Pine nuts	3,683	3,503	3,116	3,952	6,404	4,754
Cashew nuts	1,127	4,649	1,294	5,143	1,476	6,477
Brazil nuts	556	1,288	402	1,040	456	1,436
Chestnuts	714	448	1,392	853	1,042	947
Other nuts	169	617	188	679	355	1,122

Source: Eurostat 1998

The USA, China, Portugal and Turkey are major suppliers to Spain. A summary of the key sources of Spanish imports is as follows:

Raisins/sultanas	Turkey, USA, Argentina
Prunes	France, USA, Chile, Argentina, United Kingdom
Dates	Tunisia, Israel, France
Figs/Apricots	Turkey
Groundnuts	USA, China, Argentina, USA, India, Netherlands
Almonds	USA, Portugal, Germany, France, Australia
Walnuts	USA, France
Hazelnuts	USA, Turkey, Italy
Pistachios	Iran, Germany, Turkey
Cashew nuts	Brazil, India, France, Netherlands
Pine nuts	Portugal

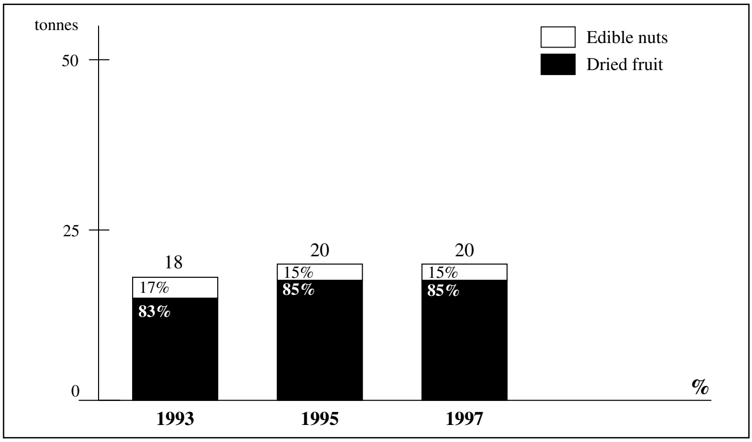
Being a producer, Spain is the fourth largest EU exporter of dried fruit and edible nuts, with a volume of 71,896 tonnes or 12.7 per cent of total EU exports. Between 1995 and 1997, Spanish exports increased by 60 per cent, the majority of which were domestically produced almonds. Chestnuts and hazelnuts each accounted for 7 per cent of total exports. Other large export products are dried pears (6 per cent), prunes (4 per cent) and figs (4 per cent). In 1997, other EU markets imported 83 per cent, while the USA and Eastern Europe were also significant customers.

4.2.6 Belgium

In 1997, Belgium had around 10.1 million inhabitants and the average GDP per capita in 1997 was ECU 21,042. Belgium is a relatively small market for dried fruit and edible nuts 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 and edible nuts was 1.7 kg and 0.3 kg respectively. In terms of the total volume of imports of dried fruit and edible nuts to the EU, Belgium ranks seventh, importing a total of 72,675 tonnes in 1997, with a value of ECU 179 million.
As in other northern EU markets, luxury nuts have grown fast in popularity since they have been sold under private labels at lower prices. Cashew nuts, nut mixtures, pistachios, pecan nuts and macadamia nuts are often eaten as snacks with drinks. Due to the enormous variety of products available, growth in the Belgian savoury snack market as a whole has slowed, with Belgian people becoming more interested in other kinds of snacks or small ready meals. To stimulate the market, nuts are promoted as snacks and as ingredients in Belgian cuisine. The Belgian industrial sector does use a large variety of nuts (hazelnuts, almonds, walnuts, pecan nuts), particularly in the confectionery industry for the production of Belgian bonbons and pralines. Most of the traditional dried fruits (raisins, prunes, figs, apricots and apples) are used in bakery products, desserts, yoghurts and breakfast cereals. Large processors/packers for dried fruit and edible nuts are Menken N.V., Euronuts B.V.B.A., Harto International N.V. and Belfrudis N.V.

Belgian's share in the total EU retail market for dried fruit and edible nuts in 1997 was 2 per cent, or 20,000 tonnes, which represented a 10 per cent increase compared to the 1995 total, as is shown in figure 4.11. In 1997, dried fruit accounted for 85 per cent of the Belgian market, representing a sales volume of 15,000 tonnes. In the nut segment, sales of peanuts have decreased, bringing the total sales volume of edible nuts in Belgium to a level of 5,000 tonnes in 1997.

Figure 4.11 Belgian retail market development of dried fruit and edible nuts, 1993-1997 (tonnes 1,000)



Source: CIG, Euromonitor 1998

In 1997, 56 per cent of Belgian imports were sourced outside the EU and, of this total, 40 per cent came from developing countries. Since 1996, groundnuts have ceased to dominate Belgian imports. This had a dramatic effect on imports, which fell from 48,581 tonnes in 1995 to 8,597 tonnes in 1997, of which hazelnuts accounted for 20 per cent of total imports of dried fruit and edible nuts and raisins and coconuts each accounted for 15 per cent. Between 1995 and 1997 Belgian imports of dried fruit decreased by 20 per cent, to a total volume of 19,376 tonnes. Prunes and raisins were less in demand, while imports of dates, figs and bananas increased. Luxury nuts (hazelnuts, coconuts and almonds) were more in demand and imports increased by 25 per cent to a volume of 44,702 tonnes in 1997. An overview of Belgian imports by product group is given in table 4.12.

Table 4.12 Imports of dried fruit and edible nuts to Belgium, 1995-1997
Tonnes/ECU 1,000

	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**107,551**	**149,255**	**66,124**	**138,284**	**72,675**	**179,048**
Intra-EU	**25,138**	**54,142**	**25,261**	**55,275**	**29,274**	**78,453**
Extra-EU	**82,413**	**95,113**	**40,863**	**83,009**	**43,401**	**100,595**
Developing countries	**31,669**	**58,520**	**32,090**	**58,516**	**35,426**	**72,327**
Dried fruit	**23,377**	**32,471**	**20,767**	**28,843**	**19,376**	**27,709**
Raisins/sultanas	12,697	14,371	11,560	12,506	11,556	12,913
Dates	1,977	4,454	2,781	4,669	2,642	4,318
Prunes	5,352	6,820	2,386	3,720	1,753	3,147
Figs	895	1,466	925	1,561	1,021	1,981
Apricots	769	1,743	792	1,802	812	2,037
Bananas	35	63	148	181	391	489
Currants	215	258	330	427	285	324
Peaches/nectarines	877	1,479	1,048	1,735	38	64
Other dried fruit	560	1,817	797	2,242	878	2,436
Groundnuts	**48,581**	**21,772**	**7,784**	**8,051**	**8,597**	**9,091**
Luxury nuts	**35,593**	**95,012**	**37,573**	**101,390**	**44,702**	**142,248**
Hazelnuts	10,697	28,938	9,900	23,835	14,782	55,895
Coconuts	4,662	3,668	5,949	4,481	11,129	11,690
Pistachios	10,660	26,644	11,015	29,237	7,099	22,842
Almonds	5,147	21,219	5,705	27,328	6,744	32,405
Walnuts	1,546	3,902	2,094	4,987	1,468	4,069
Cashew nuts	796	2,678	849	3,106	830	2,987
Brazil nuts	188	496	208	556	415	938
Other nuts	1,897	7,467	1,853	7,860	2,235	11,422

Source: Eurostat 1998

Turkey, The Netherlands, USA, Iran, France, Germany, Indonesia, Spain and the United Kingdom are major suppliers of dried fruit and edible nuts to Belgium. Between 1995 and 1997, Belgian exports increased by 7 per cent to a volume of 23,399 tonnes, which represented 5 per cent of all EU exports. The main products were coconuts, pistachios, roasted groundnuts, almonds and raisins, of which the majority went to other EU markets.

5 ACCESS TO THE EUROPEAN UNION MARKET

5.1 Quality and grading standards

In all EU markets, there are very high quality requirements and strict phytosanitary regulations, particularly with regard to the presence of aflatoxin. There are no official international standards for dried fruit and edible nuts and each EU country has its own national legislation. At EU level many regulations regarding the health and safety of foodstuffs have been harmonised and subsequently adopted into the national law of individual member states. This means that there are common EU laws on, for example, permitted additives and the restriction of toxins. Controls by national food inspection services are strict and thorough and when quality problems occur in one country, this will have a negative effect on imports from other EU countries. Infringements can lead to seizure (and disposal) of foodstuffs, severe penalties, closure of premises or even to a total EU ban on imports, as happened with the "toxic pistachios" from Iran in 1997. Exporters should always check, through their importers, the specific requirements of the national market to which they are exporting. Different kinds of quality problems have occurred with products from various supplying countries and importers often find the following problems in the main types of edible nuts coming from developing countries:

Groundnuts ➔ rancidity, presence of too much afloxatin B1, damage by insects, presence of pesticides/dust/other foreign matter;
Cashew nuts ➔ presence of insects or mould, not properly ripe (size, taste), brittle and uneven coloured kernels, kernels developing dark spots when roasted;
Almonds ➔ presence of foreign matter/pieces of nutshell in shelled nuts because of inadequate cleaning/sorting with a risk of contamination;
Pistachios ➔ presence of too much afloxatin, early splitting, damage by insects, presence of dust/other foreign matter, which can be prevented by gathering fallen nuts quickly;
Brazil nuts ➔ rancidity caused by failing to keep the nuts cool, dry and well ventilated;
Pecan nuts ➔ presence of foreign matter (shell pieces, leaves, sticks etc.) mould and rot which can be avoided by gathering the nuts quickly and keeping them dry, poor quality packaging
Macadamia ➔ rancidity by over-exposure to hot and humid conditions, damaged kernels caused by rodents and insects while shells are still soft.

5.1.1. EU standards

Although there are no official EU or national quality standards for dried fruit and edible nuts the Economic Commission for Europe of the United Nations (UN/ECE) is working to establish minimum standards for the marketing and quality control of dried fruit and nuts which are in line with the demands of EU countries. These aim to give supplier countries a clear indication of the minimum standards, which must be met when exporting to EU countries. An example of one UN/ECE standard, that for decorticated pistachio nuts, is given in Appendix 3 along with the address of UN/ECE. To date ECE standards have been adopted for walnuts, hazelnuts, sweet almonds, pistachios, pine kernels, prunes, whole dates, dried grapes and dried pears. Standards are in preparation for dried apples, dried apricots, figs and cashew kernels.

In 1997, figures showed that in some EU countries packaged nuts containing up to 235 times the permitted level of aflatoxin were found on shop shelves. Excessive levels of afloxatin may have serious consequences for human and animal health. In 1997, the limits applied by EU importers for pistachios differed from country to country, varying from 2 to 15 ppb (part per billion). The EU is currently working on a new directive for aflatoxin limits for processed and unprocessed nuts, for edible nuts and for dried fruit. The new guidelines will be established in 1999 and will also cover sampling procedures to check aflatoxin in nut and dried fruit cargoes. Depending on the weight of the consignment, between 10 and 100 samples must be taken from various places throughout the cargo. During the sampling daylight should be excluded as much as possible, since aflatoxin breaks down under the influence of ultra-violet light.

In trade, the following basic standards always apply for edible nuts imported to EU countries:

- The product must be processed under clean, sanitary conditions to ensure that it is free from mould, infestation, contamination, foreign materials and unacceptable flavours or odours;
- Unless otherwise agreed, the product must always be from the current crop year. A new crop year starts with the harvesting of the crop;
- The product must meet all the requirements of the food laws of the importing country;
- The product must be completely free from unacceptable flavours or odours, mould, insects, insect webbing and evidence of rodent or bird activities;
- The product must be packed in new, clean, dry packaging, which must be of sufficient strength to ensure the integrity of the product during shipment and storage. Damaged packing, which has lost the ability to hold or to provide protection to the product, will not be accepted. The packaging must be free of infestation and visual mould and sealed without staples;
- Cartons should be clearly marked;
- The product must meet the agreed specification when delivered to the buyers; i.e. not only details on when the product left the factory of the packer in the source country;
- Disputes: it is generally written into the contract that if the seller objects to the buyer's rejection of his goods the seller may appoint an independent laboratory (specified by name in the contract) to inspect the goods according to the agreed specification.

It is expected that quality standards and import requirements in the EU will continue to be tightened. For exporters this will require a high level of technical expertise in terms of production and post-harvest handling techniques. Nuts which do not meet the requirements of the edible nut market will often have to be crushed for oil production, resulting in a heavily discounted price. The reputation, not only of the exporter but also of the exporting country, can easily suffer in such cases. Importers will soon refuse to buy from countries whose performance in respect of quality is poor, even though the nuts may be offered at a discount.

CBI has published a manual on the European quality standards for edible nuts, which gives a detailed overview of quality standards of EU importers and gives some guidelines on how to deal with these high quality requirements and production standards. Product groups, which are covered in more detail in this publication, include almonds, Brazil nuts, cashew nuts, groundnuts, macadamia nuts and pecan nuts. The manual is available at the CBI trade documentation centre.

5.1.2 Dutch standards

The quality standards required by Dutch traders must ultimately meet the strict specifications of supply set by the food industry and by companies in the processing and packing sector. A typical sample specification of bananas from a Dutch importer can be found in Appendix 3. The sale of all foodstuffs in The Netherlands is subject to regulations laid down in the Food and Drug Act. The Dutch Food Inspection Service is responsible for enforcing the Act and can give detailed information on the regulations (see address Appendix 3). The following regulations are particularly important for imported dried fruit and edible nuts:

- **Toxin restrictions**
  Dutch law concerning the preparation and processing of foodstuffs requires the absence of fungal and bacterial toxins, which can be dangerous to health. For dried fruit and nut products, especially peanuts, figs and pistachios, this applies in particular to aflatoxins. The legal requirement is 5 ppb (parts per billion) for so-called "total aflatoxin' in groundnuts, measured at final point of sale.
  Because of the particular danger of aflatoxin B^1 in groundnuts and the fact that The Netherlands is a key entry point for imports of groundnuts to Europe, the Dutch groundnut trade, together with the Commodity Board for Fruit and Vegetables, have recently (January 1996) set down an official strict code of practice for the handling and processing of groundnuts. The code obliges Dutch importers to test imported groundnuts in batches of a maximum weight of 25,000 kg as soon as possible following import. Importers will often insist that the Dutch code of practice is followed and this allows for only 4 ppb total aflatoxin and 2 ppb for B^1 aflatoxin. For groundnuts intended for peanut butter, higher aflatoxin contents of up to 10 ppb may be accepted. Further information on this code can be obtained from the Commodity Board for Fruits and Vegetables (see address Appendix 3);

- **Approved additives legislation**
  All additives and residues which are allowed to remain in products for human consumption, are now covered by EU legislation in Directive 95/2/EG. This directive has been adopted into Dutch (and other EU national) food and drug legislation and it lists the maximum permissible amounts for approved additives. For dried fruit, maximum concentrations are specified for sulphur dioxide/sulphates (SO^2) and sorbic acid/potassium sorbate/calcium sorbate (Sa).

Table 5.1 Permitted level of SO^2 in dried fruit and nuts

Product	Allowable quantity SO^2 (mg/kg)
Apricots, peaches, grapes, prunes, figs	2000
Bananas	1000
Apples, pears	600
Other fruit	500
Dried coconut	50

Source: EG Publikatieblad L61 (18.3.95)

The Netherlands Food and Drugs Act specifies which additives may be used in food. The enforcement of this Act lies with the Food Inspection Service.

- **Pesticide residues**
  In recent years the negative impact of pesticides on nature, the environment and human health have received increasing attention. Restrictive legislation has banned the use of many pesticides and restricted the use of others. Imported foodstuffs, including dried fruit and edible nuts, must comply with the Dutch Pesticide Law – Residue Decree, which sets out the legally allowed pesticide residues and the permitted maximum quantities thereof. These laws are continually being altered to exercise stricter control and limit the allowable residues even further. Up-to-date information can be obtained from the Dutch Food Inspection Service (see Appendix 3). Further comments regarding pesticides can be found in section 5.3.7, which covers trade-related environmental matters.

Other methods are used by the trade to indicate the high quality standards that are applied to edible nuts. These include quality assurance standards like ISO 9002 and the use of the HACCP system. The ISO 9000 series gives the best known standards for quality assurance worldwide. In particular ISO 9002 provides guidelines for the establishment of a quality system, and is recognised in more than 60 countries. The certificate of approval assigned to companies which meet the standards of ISO 9002 is an internationally recognised symbol of their high quality assurance systems. The HACCP system is a series of preventive measures in the production process and its controls are designed to ensure food safety. Its control systems focus on preventive measures instead of relying mainly on end-product testing. In the HACCP system, which is explained in more detail in section 5.3.4, the elements of the Food and Drugs Act are automatically taken into account. Further information can be obtained from the Food Inspection Services, whose address is in Appendix 3.

5.1.3 Standards for organic dried fruit and edible nuts

There is growing demand for organic dried fruit and edible nuts in Europe. Legal standards and control procedures for organic agriculture and production throughout the EU came into force on January 1, 1993 with the adoption of Directive (EEC) 2092/91. In The Netherlands the term "biologisch" (organic) is protected by law and can be applied only to products which have been certified by the official inspectorate SKAL. Certified products carry the official symbol "EKO". Within Dutch law the EU directive was given legality in the "Landbouwkwaliteitswet" (the Agriculture Quality Act) and the "Regeling Biologische Produktiemethode" (the Agricultural Quality Act) and the "Regeling Biologische Produktiemethode" (Regulation for Organic Production), which came into force on January 1, 1993. In summary, these rules:

- set standards for the production of organic food, together with requirements for record keeping, labelling and marketing;
- set out registration and inspection rules;
- require that organic foods, imported from outside the EU, are grown and certified to an equivalent standard.

If there is no nationally approved inspectorate the production unit and products must be inspected and certified by another recognised inspectorate such as the Dutch SKAL organisation, which is active world-wide in this regard. Their address is given in Appendix 3. A brochure in English is available.

5.2 Packaging, marking and labelling

5.2.1 Packaging standards

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

➔ packaging material must be strong enough to protect the product during transportation;
➔ packaging should ensure that no contamination, mould growth etc. can take place;
➔ excessive packaging must be avoided - this increases cost and is less environmentally friendly;
➔ investigate thoroughly and use materials that are as environmentally friendly as possible; try to reduce the use of PVC, Chlorine, Cadmium and CFCs;
➔ avoid the use of staples and nails;
➔ if different sorts of packaging materials must be used these must be separable;
➔ give information on materials and the quantity of packaging materials.

Vacuum packing and/or nitrogen flushing are essential for the bulk packaging and export of most nuts, except pecan nuts and almonds, which can be packed dry and loosely in boxes. Nuts prone to rancidity, infestation and mould development need flushing with nitrogen or a mixture of nitrogen and carbondioxide to ensure that contamination does not occur. The effectiveness of the packaging in preserving the (good) quality of the nuts depends on very clean packaging conditions, an absolute minimum of delay between shelling and packaging and the completely airtight sealing of the packages.
Typical packages for dried fruit and edible nuts are given in table 5.2.

Table 5.2 Typical packaging for dried fruit and nuts

Product	Export packing	Typical sizes/kg
Apples	Export cartons lined with polythene	20
Apricots	Export cartons	10/12.5
Banana chips	Export cartons	5-7
Currants	Export cartons	12.5/15
Figs	Export cartons or wooden boxes	10/15/20
Papayas	Export cartons	4
Peaches	Export cartons	15
Pears	Export cartons	20
Prunes	Export cartons	10 – 20
Raisins	Export cartons	10 – 15
Almonds (shelled)	Export cartons or bales	10/12.5/20/25/50
Almonds (in shell)	Sacks	25 – 100
Cashew nuts	Sealed tins (nitrogen-flushed)	10 – 20
Groundnuts (shelled)	Bales	50
Groundnuts (in shell)	Jute bags or bales	25/45/50
Hazelnuts (shelled)	Bales	12.5 – 50
Hazelnuts (in shell)	Bales	25
Macadamias	Sacks or tins	10 – 20
Paranuts (shelled)	Sealed tins (nitrogen- flushed)	10 – 20
Pecan nuts (shelled)	Export cartons	10 – 20
Walnuts (shelled)	Bales	10/12.5/20/25/50
Walnuts (in shell)	Sacks or bales	25 – 100
Other shelled nuts	Cartons or sealed containers	10 – 20

Although a large proportion of Dutch imports of dried fruit and nuts are shipped in bulk in containers, some products, particularly of EU, Turkish and North American origin are imported pre-packaged in consumer packs. Whereas bulk packing is designed primarily to protect the goods in transit, special demands are placed on consumer packs, which are sold in a variety of pack and container sizes. These must have advertising impact, be easy to handle when filling shelves, be of a size compatible with the height of shelves in shops and be easy for consumers to handle. A variety of packing materials is used: plastic bags, metallised foil, aluminium foilfresh packs, poly-paper sacks, etc. The most popular sizes are 200, 250, 500 and 1000 grams.

Pre-packed nuts from developing countries are sold in a few retail outlets. In this case packing foil was made up, designed and produced in the consuming country and the importer sent the foil packaging to the producer. This has proven to be a rather expensive method and it cannot compete with industrially packed nuts, produced by individual retail organisations, who increasingly want to "tailor" their own nut mixtures along with the different seasons. There may be some opportunities for the sale of canned nuts.

5.2.2 Packaging waste

Environmental considerations have become increasingly more important in determining the legal requirements for packaging and labelling. By law from July 1996 onwards all EU countries had to have a packaging waste recycling system in operation. By the year 2000 all EU countries (excluding Ireland, Portugal and Greece) are committed to recycling between 50 and 65 per cent of their packaging waste. The "green dot" system have been introduced in Germany (Grüne Punkt), Belgium, Austria and France and are strategies which legally compel all organisations to take effective measures for the recycling and waste reduction of packaging. In The Netherlands a so-called Packaging Convenant has been reached between representatives of industry and the relevant government ministries. On December 15, 1997, a new packaging Convenant II was agreed between the government (Ministry of VROM) and Dutch industry, organised as the SVM (Stichting Verpakking and Milieu). An exporter can make his contribution by taking the following measures:

- ➲ take care that packaging materials (transport packaging, surrounding packaging and sales packaging) are limited and re-usable or recyclable and use as much packaging of the same kind as possible;
- ➲ try to use (recycled) paper, cardboard, polythene or polypropylene;
- ➲ try to combine products and make larger shipments instead of shipping frequently in small quantities.

Because the regulations are constantly changing, exporters are advised to check the latest regulations and requirements regarding packaging. If these are not met, it may reduce the competitiveness of the final product, since the importer will be confronted with additional costs and time-consuming investigations and procedures.

5.2.3 Labelling

The Dutch Food and Drug Act contains a special law concerning the labelling of foodstuffs which is in line with EU Directive 89/395/EEG which harmonised labelling requirements throughout the Community. Labels on the packaging of bulk dried fruit and edible nuts (i.e. product that is not intended for direct retail sale) should include the following information:

- name, address (code) of the packer/exporter;
- name of the product, variety and type;
- country of origin (optional production area);
- crop year;
- size (if sized);
- net weight;
- lot identification/batch number;
- buyer's reference (specification or purchase order number code);
- storage conditions (where necessary).

The accompanying documentation must provide details of any treatments the product has undergone and any further information specified in the contract with the importer, such as the crop year, the method of drying used, preservatives, "best before" date etc. For the export of dried fruit and nuts in retail packs all details of the labelling must be agreed and specified with the importer or the end customer (supermarket group, wholesaler etc.), who should also be fully informed regarding the legal requirements. Labelling can be a major obstacle for producing countries, where meeting the requirement for information on nutrition values on the labels may be extremely difficult because of the absence of reliable data on the nutrition values of dried fruit and edible nuts. Bar-coding may be a problem in countries with inadequate facilities to apply these to labels.

5.3 Trade-related environmental measures

A growing awareness of environmental pollution and hazardous ingredients, particularly in the bio-industry, and more criticism by consumers, has led to a reduction in the use of chemicals that are dangerous to human health in foods. Consumers are increasingly showing a willingness to pay premium prices for higher quality products in terms of flavour, food safety and environmental aspects. In the EU, there are strong environmental concerns in Germany, Scandinavia, The Netherlands and increasingly in other EU countries. Environmental issues mainly concern GMP (Good Manufacturing Practices), phytosanitary measures and the use of pesticides.

5.3.1 Financial instruments in the EU

In addition to legislation, the EU promotes environmentally sound products by awarding tariff preferences or by levying so-called "environmental taxes" on products. The major instruments for this are subsidies and the Green GSP (General System of Preferences). Here extra preferences can be granted to producers who show their commitment to environmental and social issues by cleaner and safer production techniques. On the other hand, some EU countries, including The Netherlands, discourage the import of polluting products by imposing the so-called "ecotax", which is placed on energy consumption.

5.3.2 Sustainable development and ecolabels

The concept of sustainable development, adopted by nearly all the countries in the world at the 1992 Rio de Janeiro Conference, represents the philosophy that economic development should automatically take into account environmental issues. In this respect all parties, from the general public to manufacturers, are asked to accept their social responsibility and minimise the environmental impact of their activities. This is called sustainability. In recent years, issues such as (environmental) Life Cycle Assessment (LCA) of products, Cleaner Production (CP) and Ecodesign have all become important tools for companies. These changes in production methods are meant to improve the environmental performance of manufacturers and create more sustainable development in their country.

In Europe, some "green" marketing tools such as ecolabels (for products) and environmental management standards (for the whole organisation) have been created both by governments and by private parties. An ecolabel is voluntary and is found mainly on the packaging of the final product. For the immediate future, an EU Ecolabel will not be established for the product group dried fruits and edible nuts. In fact, the whole structure of the current system is the subject of heavy discussion in the EU. In The Netherlands, the "Stichting Milieukeur" (the Dutch Ecolabelling Foundation) is planning to develop criteria for dried fruits and edible nuts in the longer term. However, it seems clear that for now, Milieukeur focuses on - "Dutch" - fruit and vegetables. For more information, interested parties should contact the Stichting Milieukeur (see Appendix 3).

5.3.3 Environmental standards

Ecolabelling procedures are aimed purely at products and indicate that products carrying an ecolabel have less impact on the environment. If a manufacturer wants to publicise the fact that he is manufacturing in an environmentally sound way, he can comply with standards which have been developed for this purpose. There are now two general, but voluntary, standards to which manufacturers can comply: BS 7750 and ISO 14001. Both standards are based on the popular ISO 9000 series of standards for quality management. One norm currently being developed is the EU Ecological Management and Audit Scheme (EMAS), but as this only applies to companies with production facilities within the EU, it is usually not relevant for manufacturers in developing countries. So far, EMAS registration is widely accepted only in Germany. It is therefore expected that other EU companies will favour ISO 14001.

5.3.4 Hazard Analysis Critical Control Point (HACCP); standard for the food industry

According to the EU Directive on Hygiene for Foodstuffs (93/43/EC), the HACCP system must be the basis for safety procedures for all foods. The HACCP system is a statutory requirement for all food producers, traders etc. in the EU. This requires them to identify each aspect of their activities, which has a bearing on the safety of foodstuffs and ensures that suitable safety procedures are established, applied and maintained. All food processors are legally bound either to have a HACCP plan or to be working on a HACCP system, which is also applicable to companies that process, treat, pack, transport, distribute or trade foodstuffs. These companies are forced to understand the possible hazards associated with food production at all stages, from growth, processing, manufacture and distribution, until the point of consumption. This includes all risks associated with macro-biological (vermin), micro-biological (viruses, bacteria, moulds), toxicological (chemical contamination with pesticides), or physical (wood, metal, glass, plastic or fabric) contamination. Food processors must eliminate possible hazards by using effective prevention methods, to ensure that there is no potential risk to consumers.

The HACCP system consists of seven principles:

- assessment of hazards associated with the products; (Hazard Analysis, HA) - identify the potential hazard(s) associated with food production at all stages, from growth, processing, manufacture and distribution, until the point of consumption; assess the likelihood of occurrence of the hazard(s) and identify the preventive measures for their control;
- determination of Critical Control Points (CCP); CCPs are the points/procedures/steps that can be controlled to eliminate the hazard(s) or minimise its likelihood of occurrence. A "step" means any stage in food production and/or manufacture including raw materials, their receipt and/or production, harvesting, transport, formulation, processing, storage, etc.;
- establish critical limit(s) which must be met to ensure the CCP is under control;
- establish a system to monitor control of the CCP by scheduled testing or observation;
- establish the corrective action to be taken when monitoring indicates that a particular CCP is not under control;

- establish procedures for verification which include supplementary tests and procedures to confirm that the HACCP system is working effectively;
- establish documentation concerning all procedures and records appropriate to these principles and their application.

5.3.5 Issues related to dried fruit and edible nuts
Dried fruit and edible nuts are products from the wide category "agriculture", which carries the strictest compulsory standards, with organic agriculture being the most tightly regulated, environmentally sound, agricultural practice. Its main focus is on minimising environmental damage and on sustaining or building soil fertility. A key characterstic of organic agriculture is the absence of of chemical inputs, such as synthetic fertilisers, pesticides, herbicides or defoliants. More environmentally sound alternatives are suggested to replace chemicals, such as good crop rotation, particularly incorporating legumes; the careful management and use of manure and crop waste; the use of appropriate cultivation techniques; natural and biological pest and disease control measures and mechanical and other non-chemical weed control techniques. Before full organic status is achieved, the land must undergo a conversion period which is generally one to three years.

5.3.6 The use of pesticides
Opponents of the use of pesticides argue that pesticides can often be replaced by non-chemical methods of pest control. For fruits and nuts, one could investigate the possibility of reducing the amount of pesticides used during growing. There have been many methods developed to reduce dependence on the use of pesticides. Alternative methods such as planting resistant cultivars, crop rotation, pest-avoidance plantings and harvest times, proper sanitation and irrigation have been used by competent growers for decades. The use of natural predators, parasites and pathogens has had some success. One of the serious problems in the development of organic agriculture is the lack of non-chemical alternatives for pest control. This is caused either by a lack of confidence in the effectiveness of available alternatives, a shortage in supply or a corresponding price difference in the final product, which remains a disincentive for consumers. In the EU, several directives have been formulated for acceptable pesticide residues on agricultural products.

5.3.7 CBI's environmental efforts
For detailed information about environmental aspects relevant to trade, please refer to the Eco Trade Manual, which can be obtained from CBI. Information can also be obtained through GreenBuss®, CBI’s on-line database for Environment, Trade and Technology, which can be found on the Internet, at: http://www.kommanet.nl. CBI has also published an environmental quick-scan for selected food ingredients, which includes dried fruit and edible nuts. Its purpose is to inform individual companies about relevant environmental standards in trade and to offer them solutions to meeting these standards.

5.4 Tariffs and quotas
Since the completion of the single EU market, the external trade conditions of all members, including The Netherlands, have been governed by common regulations and trading agreements. If there is no special trade agreement in force, general import tariffs apply. For many developing countries, some kind of preferential trade agreement may apply. An example

of this is the Renewed Generalised System of Preferences (RGSP) or the Lomé Convention for the ACP countries (Africa, Caribbean and Pacific). Under these schemes, general import tariffs for the least developed countries are reduced to zero. In the case of dried fruit and edible nuts, this rule also applies to imports from the countries that have signed the fourth Lomé Convention. Goods originating in China, Thailand and Malaysia are excluded from the RGSP.

Since January 1, 1995, the EU has operated the above-mentioned RGSP. The duration of this system was intended to be four years (until December 1998), but it will continue officially until July 1999. The tariff preference for products from developing countries effectively reduces the General Customs Tariff (GCT) and does not impose quantitative restrictions in EU countries. All dried fruit and edible nuts are exempt from quantitative restrictions.

Showing a Customs Authority Certificate of Origin ("form A") can presently reduce the import duty for dried fruit and edible nuts and a permanent reduction is being considered. In addition, a Movement Certificate EUR 1 is required to show where the products have been produced (the country of origin). Under the GSP scheme, the tariff for all dried fruit and edible nuts is reduced to zero for most developing countries. A detailed overview is given in Appendix 4.

For up-to-date information on import tariffs and for an updated list of least developed countries, contact the Customs Authorities in Rotterdam, The Netherlands. Information can be also be obtained by telephone, in The Netherlands and from abroad. The relevant information numbers are given in Appendix 9. The HS code of the product concerned must always be mentioned. Other information sources are the European Commission, branch organisations or importers. Details of the GSP are published annually in the Official Journal of the EU, which can be obtained from the European Commission, whose address can be found in Appendix 10.

Through the EU Common Agricultural Policy, import levies are applied to agricultural products, depending on the quantity and quality of harvest/supply available from EU countries. Import levies can therefore increase the final import price of products entering the Dutch market from outside the EU. In the category dried fruits and edible nuts, the products most affected are apricots, apples, pears, peaches and prunes. The Minimum Import Price (MIP) system of the EU, which imposes minimum import prices on vine fruit (raisins, currants) from outside the EU to protect EU (mainly Greek) production, will be eliminated by the year 2000 in a process of annual reductions which have been in progress since 1994.

5.5 Terms of the trade

5.5.1 The contract

It is important to realise that differing customs, habits and traditions can cause problems in business relationships, even after both partners have carried out sound preliminary investigations. A contract is not necessarily a document. If two parties agree on something verbally, this verbal agreement is a contract according to most European laws. Since it is difficult, in the case of a verbal contract, to prove that something in particular has been agreed upon, the agreement should always be confirmed in writing.

The Contract

Details, which must be mentioned in a contract, are:

1. The contract parties: the seller, the buyer, the broker and/or buying/selling agent, with all names and addresses correctly spelled.
2. The product, price and quality of the product must be sufficiently specified, so that no misunderstandings can arise.
3. The quantities must be mentioned. If the buyer and the seller agree to more or less than the agreed quantity, this should be specifically mentioned.
4. The delivery terms should be mentioned according to the description of the Incoterms 1990 (available at the International Chamber of Commerce).
5. Payment terms are to be spelled out in detail.
6. The delivery time is a vital piece of information on which the seller and the buyer will have to agree.
7. Packaging details, including measurements and weights.
8. If one of the parties has negotiated special conditions, this is to be mentioned in the contract.
9. What will be done if the two parties disagree with each other? To which arbitration court/district will they go?

Contracts are taken extremely seriously in Europe, as well as in the USA and Japan.
A contract is of vital importance if there is disagreement. A dispute may arise for example because:

- the buyer is of the opinion that goods/equipment are delivered late;
- the agreed quality level has not been met;
- the seller is of the opinion that the buyer does not live up to his financial commitments.

Written contracts are common in the dried fruit and edible nuts trade, but may vary according to the nature of the agreement. In some cases, sales take place by "gentlemen's agreement", when buyer and seller undertake to honour the conditions they have agreed verbally. Trading relations between the exporter and the importer are based on trust, and can only be built up when the exporter meets the high expectations of the importer.
A delay in delivery or a difference in quality may harm the importer's confidence, which is an essential condition for the establishment of a long-term business relationship.

5.5.2 Payment methods and delivery terms

The determination of payment conditions for regular export transactions is part of the package of negotiations between seller and buyer, who each have more or less opposing interests. The seller wants to have the largest possible guarantee of financial coverage of the goods he has to supply according to his sales contracts. The buyer wants to be sure about the availability, quantity and quality of the goods he buys, before he pays the agreed price.

Common methods of payment include:

Clean payment

This is the most common method and is used when both parties know each other well. The process is fast and reliable, depending on the credit worthiness of the importer. The bank carries out the transactions through a swift electronic data system and the transfer costs are not very high.

Documents against payment (D/P)

Also known as cash against documents (CAD). The buyer takes possession of the goods only after payment. Although this method is not very popular, it is very safe and the costs about one pro mille. One can also make use of a "documents against acceptance of a bill of exchange", but this Bill of Exchange is not commonly used in the EU and it does not guarantee that the bill will be paid. It is therefore less secure than the D/P.

Letter of credit (LC)

The irrevocable LC is very often used at the beginning of a business relationship when the importer and exporter do not yet know each other very well. The LC is irrevocable and will always be paid. The costs, namely five pro mille, are higher than the D/P method. This method is widely used in the European Union when dealing with exporters from outside Europe.

Bank guarantee

The buyer's bank will present a bank guarantee for the amount of the invoice.

Cheques

Bank guaranteed cheques are generally no problem, though cashing them may take some time, and in some cases up to six weeks. Not all personal cheques are accepted.

Payment on consignment basis

Payment on consignment basis is often used in the trade of perishable products.
The products are sold at a predetermined price after a mutually appointed arbitrary person (General Superintendence Company (GSC)) has controlled the quantity, quality and other aspects of the sold products at the moment of acceptance/sale. If the products do not meet the conditions as described in the contract, the contract is not valid and, depending on the conditions of the contract, prices are generally adjusted. An open contract is used to make the payment after 14 days from acceptance/sale.

In the dried fruit and edible nuts trade, LC and CAD are the most frequently used methods of payment. However, methods of payment vary from company to company. Once trading relationships are established, clean payments are often used.
For every (new) supplier the importer considers very carefully on the method of payment that should be agreed. The same applies to delivery terms.

Common delivery terms include:

- **FOB** (Free on Board): the buyer arranges for transportation and insurance. FOB must specify the port of departure.
- **CFR** (Cost and Freight): the exporter pays the freight, the buyer arranges for the insurance.
- **CIF** (Cost, Insurance and Freight): the exporter pays the freight and the insurance.

5.5.3 Business practise

The market for dried fruit and edible nuts is highly competitive and is dominated by the large processors. In the recent past retailers in most counties have dominated the market with their private brands and decide for themselves when and what they will buy from processors.

In some fast growing segments and new markets, there are opportunities for exporters, provided that the product is reliable in quality, meets the strict EU standards especially (low level of aflatoxin) and delivery is consistent. The use of an importer or agent who is well informed about the latest trends and who can make the first contacts with buyers is invaluable in order to penetrate the market. Alternatively, direct sales of privately labelled dried fruit and edible nuts to retail multiples may possibly give entry to a market, provided they are of a consistent quality and can be delivered on a regular, reliable basis. Importers complain that new products offered by exporters are often of inferior quality compared to their reliable sources (USA or EU countries). It is, therefore, worthwhile for exporters to research the market thoroughly to determine exact details of importers and their industrial sector consumers or consuming retail organisations, before contacting them.

In general, the following steps are recommended when trying to establish business contacts in EU markets:

If the exporter has done his homework by studying the market possibilities, the next step is to select potential trade partners in EU countries. Names and addresses of relevant importing companies in for instance The Netherlands can be found in Appendix 12.
When the exporter has pre-selected a number of potential trade partners, the next step is to communicate with potential partners by mail, e-mail, fax or telephone.

When corresponding by mail, exporters should send documentation both on their company and its product and, if available, information on quality certificates. These documents should be as detailed as possible and should be written in English, stressing the quality and capability of the company, and giving information on the production capacity, processing and quality/safety control facilities. It is not advisable to exaggerate the potential capacity of the company. Most importers visit producers and exporters before placing orders, so that they can get to know the business partner and see for themselves the production and/or processing facilities and conditions.

It is best to quote prices (FOB or CIF) in US $, always bearing in mind that the exchange rate between the US $ and NLG varies, influencing the price which will be received at the moment of the transaction. Because of fluctuations in exchange rates, it is strongly advised not to guarantee product prices over an extended period. It is safer to quote prices linked to a date and/or the exchange rate. Regarding the final price of the product, transactions must always be subject to final confirmation. This avoids problems with fluctuating exchange rates.

If there is a promising response from the (potential) trade partner, a business trip to the country can be the next step. This allows potential suppliers to establish direct and personal contact with their potential business partners. At the same time, samples of competitive products available on the market can be obtained so that comparisons can be made on price, quality, brands, design, packaging and labelling. This is very important, as, in most cases, new products will need to be adapted before they can be successfully launched in the market.

Differing customs, habits and traditions can cause problems in business contacts, even after both partners have carried out sound preliminary investigations. For instance, Dutch importers are careful in their selection of a supplier and they will thoroughly scrutinise the product offered. Furthermore, they are well known for their no-nonsense approach to business. In some cases, this may lead to a culture shock for exporters or manufacturers from developing countries. The following points should be borne in mind when dealing with firms in for instance The Netherlands:

- correspondence is important, since it presents the company to the recipient and should be as correct, accurate and neat as possible;
- approach the right contact person in the potential distribution company. In the case of direct contact with retailers, store buyers are divided according to the product category they represent and are called "category managers". Dried fruit and edible nuts, vegetables, confectionery, dressings and health food sections are different categories and purchasing is generally carried out by individual buyers within the same company;
- Dutch businessmen tend to be direct, open and straightforward;
- business comes first;
- consistency, punctuality, reliability and honesty are very important. New suppliers should be honest and direct about delivery time, quality and/or production capacity. If necessary, the Dutch partner can offer assistance in order to improve any shortcomings, either directly or through the assistance of a third party. This will help to increase credibility and possibly lead to long-term export agreements;
- appointments are made prior to any visit. Once an appointment is made it is final; in case of delay, the company contact should be informed as soon as possible;
- prepare a product introduction plan, indicating clear targets in terms of sales, profit and distribution coverage within a certain period. A detailed proposal of the product and target group will be taken seriously.

Some of the problems which have a negative effect on the development of business between exporters from a developing countries and importers in EU countries are:

➔ **bad communication with the supplier**
telephone and fax are indispensable; telex is hardly used anymore in the EU; e-mail is becoming increasingly popular;
➔ **delayed replies**
answer any question as soon as possible, if not straight away, to let the importer know that you are working on his question;
➔ **late delivery**
make sure you can deliver on time and never exaggerate your capacity. If there is a delay, contact the customer promptly and state the reason;
➔ **product quality leaves a lot to be desired**
investigate product improvement possibilities if necessary, but never ship poorer quality goods than those specified and agreed; quality is extremely important.
➔ **high exporters' margins**
adopt a positive attitude towards long-term relations instead of incidental exports, even if this leads to smaller margins. Quote realistic prices;
➔ **bad packaging**
investigate packaging problems (mutually) to reduce transportation costs and improve product quality and appearance;
➔ **violating exclusive rights clause in contract**
never try to breach the terms of the contract by selling to other trade partners. This can mean the loss of both partners, since the market is highly organised.

5.6 Promotion

Promotional activity in the market for dried fruit and edible nuts is carried out mainly by the processors/ packers, who know the market well and who promote their own brands. They are in a position to organise the necessary distribution through their own service merchandisers when a special promotion campaign in a particular (test) region or city is being organised. In the case of direct supply to retail organisations, a good knowledge of account management is necessary. In order to make the introduction of a private brand a success, a promotion plan is made by the processor/ packer or by the retailer. Most often retailers expect packers to organise in-store product demonstrations, displays, product samplings, supply recipe leaflets or place advertisements or advertorial in the form of recipes in their in-store magazines. Recipes or suggestions in trying dried fruit and edible nuts in different dishes are being promoted in, for instance, The Netherlands by the NZV, who actively organise national campaigns in which the popularity of new kinds of exotic nuts is emphasised.

Nuts are now often bought on impulse since retail prices have fallen and because of more active promotion by supermarkets. Except for peanuts, consumers have no brand loyalty in deciding which dried fruit and edible nuts to buy and often purchase the (private) brand in their usual supermarket or nut specialty shop. Freshness, exclusivity and an affordable price are the key factors influencing consumers' decision to buy. There is still little known about which dried fruit and edible nuts should be used in which dish, so packers consider that giving customers suggestions for their use is a very important sales aid. The use of promotional "hot spots" within supermarkets and recipe leaflets/booklets are generally providing consumers with reasons to try new products. In order to keep market share, processors of peanuts continuously promote and advertise their brands (TV, radio, magazines, point of sales, lotteries etc.) to avoid loosing the attention of consumers who have more choice in other snacks.

5.6.1 Trade fairs

Generally, processors, packers and retailers keep themselves informed of the latest developments by visits to trade fairs all over the world. Here they can get an impression of new products and the latest trends and varieties in convenience foods. The key international trade fairs are the ISM and ANUGA in Köln (Germany) and SIAL in Paris (France). The most important European trade fairs are given in table 5.3:

Table 5.3 International trade fairs for dried fruit and edible nuts

Trade fair	Location	Date	Visitors
ISM (Int. Sweets Fair)	Köln, Germany	January (a)	27,000
ANUGA	Köln, Germany	October (b)	98,000
SIAL	Paris, France	October (b)	95,000
INTERSUC	Paris, France	February (a)	25,000
ALIMENTARIA	Barcelona, Spain	October (b)	55,000
ALIMENTARIA	Lisbon, Portugal	May (a)	12,400
IBA (German Bakery Trade)	Bad Honnef, Germany	November (a)	15,000
EXPO FOOD	Milan, Italy	November (a)	25,000
BIOFACH	Frankfurt, Germany	February (a)	26,000
AGF Totaal	Rotteram, Netherlands	September (a)	10,000
FOOD INGREDIENTS	Paris, France	September (a)	65,000
ROKA	Utrecht, Netherlands	April/May (a)	17,000
HORECAVA	Amsterdam, Netherlands	January/ February (a)	13,000

Note: (a) = annual (b) biennial

Source: The Clipper, Confection, CIR, Miller Freeman 1998

Addresses of trade fair organisers can be found in Appendix 6. The latest information about trade fairs can be found on the Internet site of Miller Freeman at http://www.dotfood.com/schedule/index.htm.

5.6.2 Trade press

Leading national trade magazines for dried fruit and edible nuts in the major EU countries are:

Title	Frequency	Coverage
The Cracker	Quarterly	International trade in nuts
The Clipper	Quarterly	International trade in dried fruit and nuts
Eurofruit Magazine	Monthly	Trade in fresh fruit and vegetables Europe
Market News Service	Weekly	Trade bulletin in fresh fruit and vegetables worldwide
Confection	Monthly	International confectionery worldwide
Lebensmittel Zeitung	Weekly	Food sector in Germany (German)
Fruchtenhandel	Weekly	Fruit sector in Germany (German)
The Grocer	Weekly	Food sector in the United Kingdom
LSA	Weekly	Food sector in France (French)
FLD	Weekly	Fruit sector in France (French)
Alimarket Revista	Weekly	Food sector in Spain (Spanish)
Nuova Distributione	Weekly	Food sector in Italy (Italian)
Distributie Vandaag	Monthly	Food sector in Belgium (Dutch/French)
Distrifood	Weekly	Retail sector in The Netherlands (Dutch)
Food magazine	Weekly	Food sector in The Netherlands (Dutch)
Primeur	Monthly	Fruit sector in The Netherlands (Dutch)

Publishers' addresses can be found in Appendix 8. Information on the worldwide trade of dried fruit and edible nuts can be found on several Internet sites. Here the latest information on prices and some general market trends can be found. Links can also be made with potential buyers in countries all over the world.
Here also exporters have an opportunity to introduce their products or company profile through a linked web page on the site for a fixed fee. Some addresses of web sites are:

- http://www.readysoft.es/inc
- http://www.agropress.com
- http://www.fruitnet.com/eurofruit/
- http://www.public-ledger.com
- http://www.unic.org/itc

5.6.3 Assistance with market entry

The stringent quality specifications and the standards for safety and health for all food products, which are designed to protect consumers, are the main barrier to market entry for new exporters. These exacting requirements are continually forcing exporting countries to upgrade the quality of their dried fruit and edible nuts through the adoption of improved cultivation techniques, reliable sourcing programmes, better post-harvesting methods, adequate storage facilities and improved packaging. Before approaching organisations abroad it is recommended that the exporter checks with local trade promotion organisations, Chambers of Commerce and foreign representatives in his/her country whether the information required is readily available. There are many organisations in

European countries that are important in the field of general representation, promotion and public relations activities for exporters from developing countries.

- *Import Promotion Organisations:*
  In most EU countries, there are organisations (for example CBI in The Netherlands) which support the imports from developing countries through a specific export promotion programme. They typically provide the following services:

  - supplying information about:
    - statistics and publications about the national market
    - regular news bulletins
    - database of importers
    - product market opportunities
  - individual assistance:
    - management training
    - testing products by display
    - product adaptation services
  - establishing contacts:
    - collective trade fair missions
    - selling missions

- *Branch organisations*
  In most European countries producers, wholesalers and retailers are organised in branch organisations. These organisations help new exporters to the EU, by supplying information about the market. In The Netherlands, the NZV can be contacted. Prospective exporters can be mentioned in the three weekly periodical news bulletin of the NZV.

For addresses, telephone and fax numbers of Import Promotion Organisations and other organisations which can be of assistance in entering the European Union market, see list in Appendix 9.

5.7 Checklist

This section provides a checklist for the identification of export possibilities to The Netherlands and to the other EU markets. Reference is made to previous chapters in this survey and to the appendices.

Checklist for identification of export possibilities to the Netherlands (EU) market

Preparation at home for you:

- ☐ Carefully assess the strengths and weaknesses of your company to determine the status of your business and of your export capacity. If you need assistance, contact your Trade Promotion Organisation or CBI (see Chapter 5.6.3 and Appendix 9);
- ☐ Study the opportunities and threats in the Netherlands market and gather relevant up to date information on:
  - *market size, market potential and target group for your product, market trends, imports, competition, pricing (Chapters 3 and 4)*
  - *quality standards required (Chapter 5.1)*
  - *packaging and labelling requirements (Chapter 5.2)*
  - *environmental standards (Chapter 5.3)*
  - *import regulations and any expected future changes in legislation (Chapter 5.4)*
  - *trade structure: identify the best distribution channel (Chapters 3.5 and 4)*
  - *check the dates of the relevant trade fairs and obtain relevant market information from trade magazines and from the branch organisations (Chapter 5.6 and Appendices 6,7 and 8)*
- ☐ Summarise the opportunities and (possible) threats for your product in The Netherlands, always bearing in mind the unique selling points (quality wise) of your products vis à vis your target group;
- ☐ Draw up a list of interesting business contacts (Appendix 12); check the web pages of importers;
- ☐ Check the period of the importers' buying season;
- ☐ Send out a direct mailing to the organisations or companies you have selected;
- ☐ Plan a personal visit.

Work to be done during the business trip:

- ☐ Look at competing products in the market (price, quality, packaging, style, promotion, market share) and assess the total possible sales volume for your product; buy samples of comparable products;
- ☐ Study the typical trade infrastructure for your product;
- ☐ Determine the most appropriate promotion opportunities to attract buyers;
- ☐ Study which cultural aspects influence the selling capacity of your product in the target market;
- ☐ Constantly update the list of possible interested partners in your product;

- ☐ Attempt to locate a possible trading partner for your product, find out his requirements concerning volume, prices, quality, service, finance, delivery, etc.;
- ☐ Analyse the possibilities for upgrading or adapting your product to meet market requirements;
- ☐ Study, and adapt to, the Dutch way of doing business;
- ☐ Think long-term to avoid impulsive decisions.

At home, after your business trip:

- ☐ Pay careful attention to follow-up activities, carry them out as soon as possible and as correctly as possible. Work according to a follow-up plan, clearly stating who in the firm is responsible for carrying out which activity and at what time;
- ☐ Make a thorough analysis of the opportunities found and the possibilities within your firm;
- ☐ Analyse potential threats and possible solutions;
- ☐ Work out an export marketing strategy if the venture should prove feasible.

APPENDIX 1 PRODUCT EXPLANATION / HS CODES

1 Product explanation dried fruit and edible nuts

The following notes give a brief description of the nature and origin of each main product, the form in which it is traded and its usage by European consumers and industry.

DRIED FRUIT

Apples
Dried apples are available in two main qualities: those with a high moisture content (22-25per cent) and those with a moisture content of 6 per cent or less. They are sold diced (in a size, for example, of 10mm), in flakes, rings or "quarters" (an inaccurate term because the apple is normally divided into more than four segments) and mainly without skin. The most important type of apple is the Granny Smith. Significant countries of origin include Italy, Chile, China, Argentina, USA and Hungary.

At least eight kilos of fresh apples are needed for one kilo of dried apples. They are dried either in a drying tunnel) or naturally in the sun. All the fruit is washed and sulphur dioxide (SO2) treatment may be used to improve colour retention and preservation and to kill mould and bacteria. By the time of sale the percentage of SO^2 in the dried apple must be under the allowable EU limit

Dried apple is mainly used as a constituent of snack dried fruit mixtures, known in the Netherlands as "tutti frutti" and in breakfast cereals, muesli and bakery products.

Apricots
Apricots, together with raisins and prunes, are one of the most popular dried fruits. They are sold whole or diced and are available in both sweet and sour varieties. Sweet dried apricots originate mainly in Turkey and Iran and the sour variety in Spain, USA, Argentina, Australia, Chile and South Africa.

About three kilos of apricots are needed for one kilo of dried apricots. After harvesting and 24 hours in the drying room, the fruit is de-pitted and dried in the sun for several days. All the fruit is washed and may be treated with sulphur dioxide. There is also demand, mainly from the health food sector, for untreated apricots, which are a darker colour.

Dried apricots are mostly eaten either as a loose individual fruit or as a component of "tutti frutti". They are also used in bakery and confectionery products, in dairy products and desserts, in chocolate, breakfast cereals and in home cookery.

Bananas
Banana chips come in various forms; cut from green bananas, deep-fried in coconut or palm oil or, more popularly, soaked in sugar syrup with or without honey. They are available in slices, whole, strips and other forms. Salted varieties are also produced. Although not strictly a dried/dehydrated product in the usual technical sense of the term, banana chips are popular in all markets. The leading supplier is the Philippines.

Sun-dried bananas are produced from a number of varieties, including *Musa Paradisiaca* and *Musa Cavendish.* They are available as whole fruit (fingers), slices and dice. The most significant country of origin is Ecuador, although they are also supplied by the Philippines and Thailand.

Banana chips are used in muesli and other breakfast cereals, fruit mixes, biscuits and similar products.

Currants

Currants are dried black seedless grapes of the Corinth grape variety. Greece produces 95 per cent of the world's currant output. Two to three kilos of fresh grapes are required to produce one kilo of currants. Sun-drying methods vary according to climate and soil, but keeping the grapes in the shade for the first part of the drying period is said to produce the best quality currants. Drying can take 7-14 days depending on the weather and on the method used (on white paper, on canvas, or on drying trays). After drying, when the moisture has evaporated and the grape has shrunk into a currant, stems and extraneous matter are removed and the currants are washed and sorted.

Currants are graded into two sizes, small and medium. Small currants are used primarily in the bakery trade and medium-sized ones are sold mainly through retail outlets to consumers for home baking and cookery.

Dates

Dates have for centuries been a very important foodstuff for people in the desert, because the dried products keep very well and can be easily transported. They are mainly sold whole, soft and unpitted. Key countries of origin include Tunisia, Pakistan, Israel, USA, Iran, Iraq and Algeria.

After harvesting, dates are washed and steamed in closed rooms, so that they become shiny and soft. They are also preserved with sugar, which gives the dates a sweet, soft taste very popular with consumers.

Dates are most frequently eaten whole as a snack food, either alone or combined with, for example, nuts or cheese, but are also an ingredient for bakery products and fruit muesli.

Figs

The variety for dried figs is *Sarilop* because of its big size, its sweet, fleshy and light-coloured character and its soft skin. Turkey is the source of three-quarters of world fig exports. Other sources include USA and Greece.

Figs, picked after drying on their branches, are spread out on wooden or metal frames or kraft paper to dry in the sun for a further two to four days. Shocking at a very low temperature is used to kill insects (methyl bromide treatment resulting in residues in the figs is no longer permitted by EU food and drug legislation). The figs are then washed in clean salt water, which is circulating continuously at a high temperature of 80-90°C. This treatment accentuates the taste and improves conservability. The figs are then passed under UV lamps to check for the presence of mould/aflatoxin, which is a particular risk for figs. Contaminated figs are removed before the figs are graded and packed.

Figs are an important health food owing to their high levels of iron and other minerals. They are used as snacks, are chopped and processed for use in pastes, bakery products, muesli and fruit mixtures.

Prunes

Prunes, which are different varieties of dried plums from *Prunus domestica L.*, are very popular dried fruit. The most usual types are Santa Clara, d'Agen and Presidente. California and France are the dominant counties of origin but are also supplied by Chile, Argentina and Brazil.

Most harvesting of plums is mechanical. Three to four kilos of fresh plums yield one kilo of prunes. After drying in drying tunnels and sorting, the prunes are stored in warehouses at controlled cool temperatures. At this stage, the prunes have a maximum moisture content of 24 per cent. Before packing they are steam-treated to give the desired moisture level which can be up to 35˚C, and may also be treated with preservative, so long as this is within limits set by EU food additive legislation. The prunes are then packed in boxes for export.

Prunes are consumed both as an individual snack fruit and as a component in dried fruit mixes. They are also often eaten as a dessert and in dairy and other processed foods.

Raisins/sultanas

Raisins are dried white seedless grapes and are the most widely consumed dried fruit. Turkey and California are the key world sources but other countries of origin include Greece, Chile, South Africa, Australia, Iran, and Afghanistan. The sultana, now used widely as a generic term, is actually a variety of Turkish grapes, which produces very high quality raisins.

Broadly speaking, three different post-harvest treatments may be used in the transformation of grapes into raisins:

- Natural sun drying, which takes two to three weeks, during which period the green/yellow colour of the fruit becomes blue and the moisture content is reduced to 16 per cent. These "natural" raisins are used in nut bars, chocolate and in health food mixes and products;
- Dipping, in which the grapes are sprayed or dipped in a vegetable based drying oil containing soda. This cracks the skin of the grapes, allowing moisture to escape faster and so reduces the sun-drying time, which is typically seven to ten days. This method leads to the gold colour of sultanas and is used by Turkish, Greek and Australian producers;
- Treatment with SO2 to improve preservation and kill mould and bacteria.

Raisins are very widely used in European countries as a snack food, as an individual fruit and as a major component of dried fruit and fruit and nut mixes. They are also widely used in bread, bakery products, chocolate, confectionery, muesli, other breakfast cereals and (in retail packs) in domestic baking and cookery.

Other dried fruit

Mangoes

Dried mangoes are little known by consumers, and their very high price is considered to limit demand.
The leading suppliers are Thailand, India and the Philippines. Other sources include Taiwan and Malaysia. Dehydrated mango is imported in dice of 4-6 mm or 8-10 mm, or other sizes according to buyers' requirements. They are also sold as granules, chunks, slices, spears (about one eighth of a fruit) and as powder. Mango is also offered slightly sweetened. The colour should normally be yellowish orange. Dried mango is used mainly in dairy products, cereals and in Asian dishes.

Papayas

Dried papayas are less well known to European consumers but are gaining a place in the assortment. They are sold diced, mostly in sizes of 8-10 mm, but also in other sizes.
The preferred colour is natural red, which is mainly sourced in Thailand. White and lighter colours, available from Thailand, the Philippines and Taiwan are less acceptable. Papayas are used mainly by the dried fruit and nut industry in tropical mixtures and in single fruit packs and by the food industry in exotic mueslis and Asian dishes.

Peaches

Peaches are mainly sold fresh and there is little demand for dried peaches. The most important countries of origin are South Africa, Argentina, China, Italy, Spain, Chile, Australia and USA. They are sun-dried and are mainly used in dried fruit mixtures.

Pears

There is limited demand for dried pears. The most important countries of origin are USA, Chile, Argentina, South Africa, China, Italy and Spain. Pears, which are imported by The Netherlands, are usually dried without the skin being removed. Medium or small sizes and bright colours are preferred. Before drying, the pears are treated with sulphur dioxide so that they keep their white colour. There are also red pears, which are most often preserved with sugar. They give fruit mixtures more colour and have a very sweet taste.

Pineapple

Pineapple is sold very widely in fresh and canned form and is not often dried. The main supplies come from Thailand, but also from the Philippines, South Africa and Taiwan. Dehydrated pineapple is imported diced, preferably in a size of 10 mm but also in 4-6 mm and 8-10 mm and other sizes. The dice may come from the core (in which case it is hard) or from the flesh (when it is soft), the latter being more expensive. Pineapples are also imported as granules or rings/slices. The colour should be yellow or gold.

Other dried fruits are sold in very small quantities, although packers and end-users are interested in experimenting with new fruit. These include cherries, guavas, kumquat durians, starfruit, jackfruit, guyabanos, longans and stargooseberry.

EDIBLE NUTS

Groundnuts (peanuts)

There are four basic varieties of peanuts – Spanish, Runners, Virginias and Valencias. Spanish is a small variety with light-coloured skin, grown chiefly in South Africa, China, Argentina and India. Runners are a medium-sized, light-coloured hybrid, developed in the USA as a cross between the Virginia and Spanish varieties. Spanish and Runner peanuts are chiefly used in the manufacture of peanut candies, peanut butter and peanut oil. Virginias, which take their name from the American State where they were originally cultivated, have the largest kernels and are in demand as cocktail nuts, salted nuts and in nut mixtures. They are now produced all over the world. Valencia peanuts are red in colour and originate mainly in Argentina, Brazil, New Mexico and China. They are in demand for roasting in the shell.

Following harvesting, which in America is highly mechanised but in many parts of the world is still carried out by hand, the peanuts are inspected, sampled and graded. Inspection is critical, to ensure that they are not contaminated by mould containing a poisonous substance called aflatoxin, which is dangerous for both human beings and livestock. A high proportion of peanuts are shelled and cleaned prior to export. The kernels are graded, sized and packed in bags.

Peanuts have a multitude of uses: for traditional use as a snack food they are sold oil- or dry-roasted and salted, coated or used in nut or fruit and nut mixtures. In the food industry they are processed into peanut butter and sauces and used widely as ingredients in chocolate, confectionery, cereal bars, ice cream, biscuits and Asian food recipes and sauces.

Almonds

The peach-like almond fruit consists of the edible seed or kernel, the shell, and the outer hull. The almond pit, containing a kernel of edible seed, is the commercial nut. There are two principal types, sweet almonds and bitter almonds, and some intermediate varieties. The sweet almond is grown for its edible nuts. Bitter almonds provide the main source of oil of bitter almond, which is used both as a flavouring and as an ingredient in cosmetic skin preparations. The most important countries of origin are the USA (California), Spain, Germany, Portugal and Italy.

Almonds are usually harvested mechanically then dried to reduce the moisture content to less than eight per cent. The almond crop is then delivered to a packing company to be shelled, processed and packaged. Broken, discoloured or chipped kernels are diverted for other uses, while top quality kernels are cleaned, sorted, separated according to size and finally manually inspected.

Shelled almonds are sold according to cultivars, sizes and grades. They may be sold as whole natural almonds or processed into various almond forms. Whole natural almonds have their shells removed, but still retain their brown skins. Blanched whole almonds have had both their shells and skins removed. Other popular almond forms are sold as "slices natural", "chopped natural" and "blanched silvered".

Almonds are often used in mixtures with other nuts (oil- or dry-roasted, salted, unsalted or smoked) and are an important ingredient for bakery and confectionery products, e.g. marzipan, nougat or sugar-coated almonds. They are also used as a garnish for food dishes and a component in salads and (vegetarian) meals.

Brazil nuts

Brazil nuts, also known as Amazonia nuts or paranuts, are the hard-shelled seeds of the *Berbolletia excelsa* tree, which grows wild in tropical rain forests. They are found mainly in Brazil and Bolivia and to a lesser extent in Peru, Colombia and Venezuela.

The fruits of this tree resemble large coconuts with a hard, woody casing. Inside the rough but fragile outer shell of the fruit is a tough, woody and fibrous inner shell, which contains a dozen or more Brazil nuts, closely packed together, with the thin edge inward, like the sections of an orange. When the fruits ripen, they fall to the ground. The mature fruits are picked off the ground and are broken in the forest where the outer shells are discarded. The nuts, still with their hard inner shell, are washed and given initial drying in a primitive shelter prior to transportation to the nearest local trading post. Due to the intense heat and high humidity of the Amazon region, the heaps of Brazil nuts tend to "sweat" and must constantly be turned over and aerated to prevent deterioration and mould. After drying, the unshelled nuts are manually selected to remove mouldy, empty, cracked, broken and oily-wet rejects. The nuts are then graded according to the colour of their shells, and subjected to quality control before being packed for export. The nuts to be shelled are soaked in water for 24 hours, boiled briefly to soften the shell and then cracked by hand or machine. The good kernels are dried and graded for quality and size.

Brazil nuts are eaten raw, roasted, salted and in shelled nut mixtures. They are also used in the chocolate industry, whole for chocolate covered nuts and broken or sliced in chocolate bars. They also have applications in ice-cream, bakery, confectionery and health food products.

Cashew nuts

Cashew nuts are considered in Europe as a luxury speciality nut and are imported in kernel form. They come from the *Anarcardium occidentale* tree and are mainly sourced from India. Other suppliers include Brazil, Tanzania, Mozambique, Indonesia, Guinea Bissau, Nigeria, Kenya, Malaysia and Thailand.

The cashew produces not only an edible nut, but also a nutritive, edible "apple" and valuable nutshell oil. The shell encloses a slightly curved, white, finely textured kernel, which is wrapped in a testa or thin brown skin. This is the commercial cashew nut. After harvesting, the ripe cashew apple will only keep for 24 hours, while the nuts may be kept for a year or longer, if dried to a moisture content of 8 per cent or less and stored with care.

The nuts must be dried immediately after harvesting and constantly turned over and dried for several days until they rattle in the shell. They are then roasted to remove the brown Caustic Nut Shell Liquid (CNSL) which contains the poisonous compounds cardol and anacardic acid. The nuts are then shelled, by hand or machine, with the necessary care taken to avoid damaging the kernels. The kernels are then mechanically peeled and classified by quality and graded according to whether they are whole or broken (into "splits", "butts", "large pieces" and "baby bits") according to size, after which they are packed for export.

Cashew kernels are consumed primarily as salted nuts, either individually or in nut mixtures. They have recently been widely promoted as a versatile ingredient in cookery and are also used as ingredients for desserts, in cereals and in exotic dishes.

Coconuts

Coconuts, from the *Cocos nurifera*, which grow in a narrow tropical belt around the world are a primary source of food, drink and shelter. The main demand in Europe is for whole coconuts in their shells and desiccated (shredded and dried) coconut. Important countries of origin are the Philippines, Thailand, Sri Lanka, Indonesia and Malaysia.

Mature coconuts are harvested, normally at about 14 months, either from the ground after they fall or by cutting from the trees. The components of a whole ripe coconut are roughly: shell 12 per cent, husk 35 per cent meat 28 per cent and water 25 per cent. Desiccated coconut has an oil content of about 68 per cent. Following shelling, the reddish-brown skin is pared off the outside surface of the white meat; the meat is then washed, pasteurised, blanched, shredded, dried and graded into extra fine, fine, medium and coarse qualities. It is also packaged in fancy cuts: strips, chips, slices and threads.

Whole coconuts are sold directly to consumers through the retail trade. Coconut in shredded or desiccated form is a popular ingredient for biscuits, cakes, chocolate, confectionery, ice cream, breakfast cereals, cereal bars and exotic food dishes. It may also be further processed by sweetening or toasting.

Hazelnuts

Hazelnuts for consumption come from *Corylus avellana L* and *Corylus maxima* Mill and their hybrids. Hazelnuts are imported mainly as shelled kernels and there is a small demand for unshelled nuts. 60 per cent of the world's production is in Turkey. California and Italy are other sources.

The nuts are harvested mechanically or by hand. Once picked in the husk, hazelnuts are transported to central locations to be dried in the sun or, less frequently, in heated buildings. After drying, the husks are removed, by hand or in husking machines. The shells are removed mechanically, after which the kernels are screened, graded according to size, sorted and bagged for export. Hazelnuts for sale in the shell are polished to make the colour more attractive to consumers.

The large hazelnuts called filberts are sold to consumers in shell, or in shelled (salted) form. Most imported hazelnuts are used in the production of pastes/spreads, chocolate, confectionery and bakery products. About one third of exports from Turkey are imported already processed by blanching, roasting, chopping, slicing, grinding, etc.

Pecan nuts

Pecan nuts from the *Carya illinoensis* are rather like walnuts with smooth shells. They are imported to European countries mainly in shelled form. Important countries of origin are Brazil, USA, Argentina, Peru, Mexico, Australia, South Africa, Israel and Egypt.
The pecan industry has developed largely during this century. Production of pecan nuts is a long-term business, which requires considerable capital investment.

Hand harvesting of pecan nuts has gradually been replaced by mechanical systems.
The kernel moisture content must be reduced by drying as soon as possible to 4-5 per cent to prevent mould and discoloration of the kernels. Quality is judged on the (light) colour and size of the kernel. After being cracked, pecan nuts go into a sheller, where the shell and middle partition are removed. After they are dried and sorted, the kernels are packed in different grades: halves, large pieces, medium large pieces, medium pieces, medium small pieces, small pieces and meal. Halves fetch a premium of about 10 per cent more than other sizes, because they are much in demand by bakers.

Shelled pecans are sold to bakeries, chocolate factories, confectioners and dairies for ice cream production. They are increasing in popularity with consumers as a component in nut mixes and as an ingredient in domestic baking/cookery.

Pistachios

The pistachio belongs to the *Anarcardiaceae* family, like the mango and the cashew. Pistachios are imported both in unshelled form (mainly for use as a snack product) and as kernels for use in the food industry. The most important countries of origin are Iran, Turkey and the USA.

The kernel of the pistachio is a characteristic green. In general, the deeper the shades of green, the more the nuts are valued. This kernel is protected from dust, dirt and other impurities by a thin, ivory coloured shell. The nuts are usually marketed in shell, and when the shell is split, the kernel can be readily extracted by hand. Harvesting methods are in some countries are primitive, but in the USA, the nuts are harvested mechanically. Following harvest, the nuts must be hulled and dried immediately in the sun for a short period so that they maintain their high quality and unblemished appearance. The nuts are tested for the presence of mould/aflatoxin, which is a particular risk factor with pistachio nuts, so that contaminated nuts can be removed. After sorting and grading, the nuts are roasted, salted and packaged.

Most pistachios reach the consumer roasted and salted in their shell for consumption. Shelled pistachios are utilised commercially (but not much in The Netherlands) in confectionery, ice cream and cooked pork/sausage meats.

Walnuts

Walnuts belong to the *Juglandaceae* family. Throughout a long history of cultivation, the walnut has been highly esteemed as a superior dessert nut, which requires neither roasting nor salting to enhance its flavour. They are sold both as unshelled walnuts and as walnut kernels. Important countries of origin are China, USA, France, India and Chile.

The mechanically harvested crop contains a mixture of hulled and unhulled walnuts, which are then hulled and washed. To prevent deterioration and darkening of the kernels and to retard mould development and permit efficient shell bleaching, the walnuts are thoroughly dried as soon as possible by mechanical dehydrators. They are then separated into three categories, depending on how they will be marketed: in the sell, as kernels or as by-products. Sorting of the unshelled nuts is followed by bleaching, rinsing and rubbing to obtain a uniform tan colour. The nuts are then dried and sampled to determine their quality, and subsequently packed for export. The other part of the crop, known as "cracking stock", is shelled before being graded, cracked, sorted and packaged.

Walnuts in their shell are consumed as a luxury snack product. Shelled walnuts are used both commercially and in the home for bakery, chocolate, confectionery, meal recipes, salads etc.

Macadamia nuts

The macadamia is an evergreen tree of the family *Proteaceae*, which is native to Australia. The Aborigines have been enjoying these "bush nuts" for thousands of years. In 1958, they were named after the Melbourne scientist Dr. John MacAdam. The nuts are not generally well known to European consumers but are growing in popularity. Macadamia nuts are now sourced in the USA (Hawaii), Australia, Kenya, Costa Rica, Malawi and Guatemala.

Inside the hard, durable shell is the kernel or macadamia nut, whose distinctive flavour has been compared to that of a superfine filbert. The macadamia nut is smooth, medium-brown in colour and medium in size. During the harvest season, the nuts need to be picked up every six to eight weeks to avoid deterioration of the final product. The moisture must be removed as soon as possible to prevent damage by mould. After harvesting, the outer husk of the nuts is removed and they are then dehydrated in drying ovens to reduce the moisture content to 2.5 to 4 per cent. The processing system has to be kept very clean because macadamia nuts easily absorb odours and flavours from their surroundings. The nuts are cracked and the kernels cleaned and sorted into grades which are called styles 0 to 7, from 0, which indicates 100 per cent large whole kernels with a diameter greater than 20.6 mm, to 7, which indicates pieces of less than 3 mm.

First-grade kernels are processed further for retail sale while second grade and broken kernels are used as ingredients in cakes, biscuits, confectionery, ice cream making and Asian cooking. Sometimes, the dried kernels are roasted in macadamia oil or refined coconut oil. After roasting, the kernels are drained of excess oil and cooled. Most kernels are then lightly salted. Apart from their excellent flavour, macadamia nuts are reputed to lower blood cholesterol, so reducing the risk of heart disease.

2 HS-Codes - Dried fruit and edible nuts

HS code	Dried fruit
0803 0090	Bananas, incl. plantains, dried
0804 10	Dates, fresh or dried
0804 2090	Figs, dried
0806 2011	Currants, in immediate containers of net capacity of ò 2 kg
0806 2091	Currants, in immediate containers of net capacity of ô 2 kg
0806 2012	Sultanas, in immediate containers of net capacity of ò 2 kg
0806 2092	Sultanas, in immediate containers of net capacity of ô 2 kg
0806 2018	Dried grapes, (excl. currants and sultanas), in immediate containers of net capacity of ò 2 kg
0806 2098	Dried grapes, (excl. currants and sultanas), in immediate containers of net capacity of ô 2 kg
0813 10	Apricots, dried
0813 20	Prunes, dried
0813 30	Apples, dried
0813 4010	Peaches (including nectarines), dried
0813 4030	Pears, dried
0813 4050	Papayas or pawpaws, dried
0813 4060	Tamarind fruit, dried
0813 4070	Dried cashew apples, lychees, jackfruit, sapodillo plums, passion fruit, carambola and pitahaya
08134095	Dried edible fruit, n.e.s. (not exactly specified)
0813 5012	Mixtures of dried papayas, tamarinds, cashew apples, lychees, jackfruit, sapodillo plums, passion fruit, carambola and pitahaya, not containing prunes
0813 5015	Mixtures of dried fruit not containing prunes (excl. fruit in heading 0801 to 0806) and papayas, tamarinds, cashew apples, lychees, jackfruit, sapodillo plums, passion fruit, carambola and pitahaya
0813 5019	Mixtures of dried apricots, apples, peaches (incl. nectarines), pears, papayas, or other dried fruit n.e.s., including prunes (excl. mixtures of nuts)

HS code	Edible nuts
1202 10900	Groundnuts (in shell)
1202 20000	Groundnuts (shelled)
2008 1192/1196	Roasted groundnuts
0801 111	Desiccated coconut
0801 119	Fresh coconuts, whether or not shelled or peeled
0801 21	Brazil nuts (= paranuts = Amazonia nuts), fresh or dried, in shell
0801 22	Brazil nuts (= paranuts = Amazonia nuts), fresh or dried, shelled
0801 31	Cashew nuts, fresh or dried, in shell
0801 32	Cashew nuts, fresh or dried, shelled
0802 1110	Almonds bitter, fresh or dried, in shell
0802 1190	Almonds excl. bitter, fresh or dried, in shell
0802 1210	Almonds bitter, fresh or dried, shelled
0802 1290	Almonds excl. bitter, fresh or dried, shelled
0802 21	Hazelnuts, fresh or dried, in shell
0802 22	Hazelnuts, fresh or dried, shelled and peeled
0802 31	Walnuts, fresh or dried, in shell
0802 32	Walnuts, fresh or dried, shelled and peeled
0802 40	Chestnuts, fresh or dried, whether or not shelled or peeled
0802 50	Pistachios, fresh or dried, whether or not shelled or peeled
0802 9010	Pecan nuts, fresh or dried, whether or not shelled or peeled
0802 9030	Areca "betel" and cola nuts, fresh or dried, whether or not shelled or peeled
0802 9050	Pine nuts, fresh or dried, whether or not shelled or peeled
0802 9060	Macadamia (Australian) nuts, fresh or dried, whether or not shelled or peeled
0802 9085	Other nuts, fresh or dried, whether or not shelled or peeled (excl. coconuts, Brazil nuts, cashew nuts, almonds, hazelnuts, walnuts, chestnuts "castania spp.", pistachios, pecans, areca "betel" nuts, cola nuts, pine nuts and macadamia nuts)
0813 5031*	Mixtures exclusively of coconuts, cashew nuts, brazil nuts, areca "betel" nuts, cola nuts and macadamia nuts

APPENDIX 2 DETAILED IMPORT/EXPORT STATISTICS

THE NETHERLANDS

Imports of dried fruit and edible nuts to The Netherlands by source, 1995-1997
Tonnes/ECU 1,000

	1995		1996		1997	
	Volume	Value	Volume	Value	Volume	Value
Total	**357,765**	**384,083**	**349,247**	**421,678**	**342,050**	**440,329**
Intra-EU	**32,905**	**48,686**	**26,927**	**45,523**	**26,370**	**48,145**
Extra-EU	**324,860**	**335,397**	**322,320**	**376,155**	**315,680**	**392,184**
Developing countries	**235,164**	**234,968**	**248,069**	**269,602**	**241,679**	**286,033**
USA	86,496	95,372	71,493	101,149	70,022	99,837
Greece	7,698	9,277	5,157	7,763	6,969	5,934
United Kingdom	10,678	10,912	9,584	12,668	5,986	10,010
Germany	5,348	10,168	4,724	10,219	4,091	9,229
Singapore	3,356	2,380	4,428	3,804	3,645	3,524
France	3,745	6,311	2,388	4,645	2,941	5,935
Belgium	3,328	5,161	2,125	2,542	2,288	2,599
Spain	1,241	4,099	1,904	4,572	2,241	10,030
Australia	410	1,376	445	1,172	1,262	1,407
Italy	754	2,371	813	2,247	953	2,516
Austria	7	3	6	14	553	1,087
Israel	314	796	417	1,102	292	984
Developing countries:						
Argentina	41,430	27,382	60,995	39,425	84,595	61,774
China	89,151	54,384	75,202	51,834	48,677	38,355
Turkey	41,119	53,331	42,472	53,073	34,933	50,127
India	17,339	56,720	17,758	68,000	18,850	70,628
South Africa	11,798	10,985	10,785	9,243	17,386	15,881
Ivory Coast	4,629	2,414	5,688	2,946	6,224	3,797
Dominican Republic	5,522	1,339	4,865	1,236	5,151	1,465
Iran	2,530	4,731	5,435	12,677	3,704	8,028
Indonesia	1,736	1,523	2,896	2,845	2,929	3,406
Chile	2,028	3,318	3,174	5,617	2,687	5,966
Brazil	2,004	5,530	2,127	5,802	2,430	7,599
Sudan	947	480	558	340	2,353	1,638
Sri Lanka	4,473	3,008	3,702	3,367	1,975	1,984
Vietnam	348	1,285	308	853	1,279	4,630
Philippines	3,149	2,243	3,144	2,857	1,172	1,318
Costa Rica	742	339	613	297	745	513
Senegal	385	187	912	550	581	373
Gambia	359	184	474	263	362	200

continued	1995		1996		1997	
	Volume	Value	Volume	Value	Volume	Value
Malaysia	169	88	345	311	331	335
Bolivia	472	1,020	499	1,253	280	830
Nicaragua	113	76	204	155	231	166
Nigeria	43	11	88	47	151	76
Tunisia	386	820	488	1,061	150	298
Morocco	86	245	99	407	139	504

Source: Eurostat

Imports of dried fruit and edible nuts to The Netherlands by product group, 1995-1997
Tonnes/ECU 1,000

	1995		1996		1997	
	Volume	Value	Volume	Value	Volume	Value
Total	**357,765**	**384,083**	**349,247**	**421,678**	**342,050**	**440,329**
Intra-EU	**32,905**	**48,686**	**26,927**	**45,523**	**26,370**	**48,145**
Extra-EU	**324,860**	**335,397**	**322,320**	**376,155**	**315,680**	**392,184**
Developing countries	**235,164**	**234,968**	**248,069**	**269,602**	**241,679**	**286,033**
Dried fruit	**60,519**	**73,247**	**59,810**	**74,618**	**56,732**	**72,708**
Raisins, packed	760	1,377	770	1,487	626	1,276
Raisins, bulk	5,754	6,771	5,839	6,864	6,630	8,776
Sultana, packed	1,993	2,395	3,067	3,636	1,829	2,211
Sultana, bulk	34,408	36,207	36,409	36,223	29,511	30,429
Currants, packed	243	366	271	344	128	142
Currants, bulk	6,388	7,662	5,151	8,025	6,287	5,234
Bananas	1,057	982	66	169	707	746
Dates, fresh or dried	1,277	2,823	1,544	3,915	1,336	3,581
Figs	1,005	1,608	741	1,266	1,833	2,947
Apricots	2,590	4,502	2,391	4,494	2,174	5,269
Prunes	3,493	3,919	1,952	2,678	3,943	6,294
Apples	761	2,561	850	3,019	863	3,317
Peaches, nectarines	38	91	42	141	9	42
Pears	67	186	26	115	60	160
Papayas	81	122	54	79	37	69
Tamarinds	97	75	97	89	46	44
Other dried fruit	180	802	280	1,473	247	1,243
Dried fruit mixtures	327	798	260	601	466	928
Edible nuts	**297,246**	**310,836**	**289,437**	**347,060**	**285,318**	**367,621**
Groundnuts in shell	13,283	8,471	12,622	8407	9,262	7,276
Groundnuts, shelled	213,388	137,367	197,769	133,575	206,678	157,943
Roasted groundnuts	135	317	936	1,648	1,028	1,929

continued	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Coconuts, dessicated	15,197	10,460	18,503	15,383	13,009	12,927
Coconuts	9,126	2,489	7,701	2,273	9,601	3,019
Brazil nuts	2,082	4,507	2,933	7,058	2,392	6,870
Cashew nuts	15,935	62,269	19,816	80,452	19,380	85,471
Almonds, bitter	271	777	316	861	286	1,011
Almonds, sweet	9,935	36,347	8,998	45,105	8,582	40,281
Hazelnuts in shell	180	238	127	182	336	707
Hazelnuts, shelled	6,329	16,864	6,688	15,714	4,238	16,324
Walnuts	3,686	5,982	3,366	6,456	3,052	6,104
Pistachios	3,829	10,282	6,087	16,346	3,750	12,277
Pecan nuts	1,080	4,946	939	4,195	972	4,079
Pine nuts	127	507	185	954	177	1,661
Chestnuts	344	525	453	741	521	663
Macadamia nuts	61	503	42	392	84	840
Other nuts	843	3,335	766	2,879	567	2,725
Mixtures of nuts	0	0	2	0	0	0

Source: Eurostat

Netherlands imports of selected product groups by source, 1995-1997
Tonnes/ECU 1,000

RAISINS/SULTANAS	**1995**		**1996**		**1997**	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**42,915**	**46,750**	**46,085**	**48,210**	**38,596**	**42,692**
Intra-EU	**3,980**	**4,335**	**4,117**	**4,288**	**2,515**	**2,596**
Extra-EU	**38,935**	**42,415**	**41,968**	**43,922**	**36,081**	**40,096**
Developing countries	**35,027**	**37,252**	**37,308**	**37,582**	**32,300**	**34,538**
Turkey	31,478	33,275	33,776	34,945	27,616	29,825
USA	3,618	4,093	3,692	3,867	3,343	3,714
South Africa	1,750	1,837	1,988	2,045	2,253	2,388
Chile	1,149	1,206	1,222	1,386	1,253	1,328
Iran	617	648	952	1,045	1,170	1,248
Belgium	1,292	1,407	1,189	1,238	1,157	1,194
Greece	1,096	1,193	1,347	1,402	567	586
Australia	270	305	266	235	248	276
United Kingdom	1,047	1,141	1,033	1,076	39	41

Source: Eurostat

GROUNDNUTS, shelled	1995		1996		1997	
	Volume	Value	Volume	Value	Volume	Value
Total	**213,388**	**137,367**	**197,769**	**133,575**	**206,678**	**157,943**
Intra-EU	**10,485**	**6,356**	**6,159**	**4,012**	**4,639**	**3,780**
Extra-EU	**202,903**	**131,011**	**191,610**	**129,563**	**202,039**	**154,163**
Developing countries	**135,802**	**84,202**	**140,022**	**92,153**	**149,769**	**110,294**
China	79,553	48,264	65,417	41,843	42,495	33,639
Argentina	41,098	27,063	57,883	35,923	84,306	61,560
USA	65,531	45,871	50,157	37,909	50,052	37,539
South Africa	9,676	6,417	8,738	7,488	14,558	13,297
India	3,292	2,048	3,766	2,420	4,312	3,387
United Kingdom	8,315	5,037	6,874	4,582	3,510	2,823
Germany	1,828	1,107	1,632	1,077	1,052	841
Sudan	947	480	558	340	2,353	1,638
Senegal	385	187	912	550	560	373
Gambia	359	184	474	263	362	200

Source: Eurostat

COCONUTS, desiccated	1995		1996		1997	
	Volume	Value	Volume	Value	Volume	Value
Total	**15,197**	**10,460**	**18,503**	**15,383**	**13,009**	**12,927**
Intra-EU	**191**	**176**	**195**	**203**	**345**	**359**
Extra-EU	**15,006**	**10,284**	**18,308**	**15,180**	**12,664**	**12,568**
Developing countries	**14,818**	**10,135**	**18,152**	**15,020**	**12,664**	**12,568**
Ivory Coast	2,292	1,195	2,790	1,445	3,040	1,814
Sri Lanka	4,318	2,944	3,566	3,180	1,792	1,813
Indonesia	1,587	1,478	2,579	2,533	2,719	3,161
Singapore	3,274	2,321	4,188	3,597	3,613	3,493
Philippines	3,094	2,203	3,076	2,796	1,094	1,232
Malaysia	164	86	327	294	326	329

Source: Eurostat

CASHEW NUTS	**1995**		**1996**		**1997**	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**15,935**	**62,269**	**19,816**	**80,452**	**19,380**	**85,471**
Intra-EU	**766**	**2,884**	**1,870**	**4,717**	**1,475**	**5,017**
Extra-EU	**15,169**	**59,385**	**17,946**	**75,735**	**17,905**	**80,454**
Developing countries	**15,024**	**58,837**	**16,748**	**70,789**	**17,357**	**78,232**
India	13,304	49,441	13,724	58,052	14,106	63,761
Brazil	1,162	4,492	1,867	7,897	2,001	9,044
Vietnam	307	1,187	746	3,155	978	4,421
United Kingdom	573	2,171	1,045	2,622	977	3,329
Germany	173	655	389	976	418	1,421
Indonesia	103	398	122	475	145	656

Source: Eurostat

EUROPEAN UNION

EU imports of dried fruit and edible nuts by source, 1995-1997
Tonnes/ECU 1,000

	1995		**1996**		**1997**	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**1,939,087**	**2,889,897**	**1,987,029**	**3,370,670**	**1,967,926**	**3,717,823**
Intra-EU	**462,738**	**729,612**	**498,364**	**905,093**	**550,784**	**1,067,044**
Extra-EU	**1,476,349**	**2,160,285**	**1,488,665**	**2,465,577**	**1,417,142**	**2,650,779**
Developing countries	**942,439**	**1,330,213**	**1,020,696**	**1,450,053**	**985,542**	**1,691,639**
Main countries of origin:						
USA	488,521	760,968	415,754	925,194	381,221	855,748
Netherlands	115,130	137,122	146,106	188,681	160,055	226,483
France	68,670	94,949	67,670	109,015	76,197	121,474
Germany	56,364	122,056	57,979	148,401	62,872	173,018
Greece	60,530	71,279	50,163	71,881	58,389	65,531
Spain	32,114	110,264	44,015	167,768	51,981	212,055
Belgium	53,710	52,461	42,446	45,082	50,167	62,998
Italy	29,362	70,718	37,709	87,017	38,893	105,439
United Kingdom	28,971	45,763	28,219	54,145	28,799	65,075
Australia	10,601	22,140	17,265	34,374	14,014	34,375
Portugal	7,950	9,394	11,415	12,459	12,282	11,995
Israel	11,462	18,726	12,199	21,214	9,210	18,597

continued	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Developing countries:						
Turkey	332,663	596,874	339,532	561,248	329,851	742,977
Argentina	98,477	66,064	139,458	97,384	152,674	115,994
China	149,678	107,940	146,283	122,039	103,266	98,943
Iran	103,172	215,956	108,431	250,094	88,365	252,417
India	48,799	122,626	60,935	154,741	78,464	173,777
South Africa	26,920	28,813	31,752	33,269	40,969	46,008
Indonesia	9,006	6,954	13,191	13,638	21,693	24,554
Tunisia	16,463	37,720	15,388	33,152	21,203	43,760
Sri Lanka	27,264	17,735	26,001	24,086	19,240	19,628
Ivory Coast	13,729	7,688	15,342	10,111	17,522	13,627
Dominican Republic	13,968	3,517	14,269	3,756	14,767	4,726
Philippines	13,692	10,326	14,475	14,129	14,294	16,329
Chile	15,334	29,334	17,523	39,035	13,309	31,488
Brazil	14,503	24,319	12,025	22,698	13,124	29,887
Algeria	7,400	12,237	12,381	19,326	9,492	14,639
Gambia	15,778	4,471	18,821	6,355	8,573	3,361
Egypt	5,228	3,979	4,637	4,353	5,733	5,679
Sudan	3,871	1,953	1,193	662	5,521	3,297
Nicaragua	3,343	2,000	1,083	740	4,539	3,327
Bolivia	3,213	6,270	4,050	9,412	3,865	10,557
Senegal	4,604	2,633	4,285	2,181	3,226	2,147
Pakistan	1,883	1,881	1,873	2,271	2,972	7,266
Malaysia	2,928	2,029	3,719	3,570	2,777	2,944
Vietnam	598	1,796	712	2,272	1,889	6,865
Afganistan	1,882	1,595	1,274	1,155	1,563	1,557

Source: Eurostat

EU imports of dried fruit and edible nuts by product group, 1995-1997
Tonnes/ECU 1,000

	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**1,939,087**	**2,889,897**	**1,987,029**	**3,370,670**	**1,967,926**	**3,717,823**
Intra-EU	**462,738**	**729,612**	**498,364**	**905,093**	**550,784**	**1,067,044**
Extra-EU	**1,476,349**	**2,160,285**	**1,488,665**	**2,465,577**	**1,417,142**	**2,650,779**
Developing countries	**942,439**	**1,330,213**	**1,020,696**	**1,450,053**	**985,542**	**1,691,639**
Dried fruit	**594,812**	**752,215**	**595,339**	**800,688**	**608,084**	**857,342**
Raisins, packed	16,163	23,056	21,245	30,093	19,362	32,162
Raisins, bulk	52,081	59,028	56,544	67,657	61,880	91,980

continued	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Sultana, packed	17,177	21,101	21,745	26,867	17,818	23,056
Sultana, bulk	201,761	211,612	200,216	203,888	195,338	211,757
Currants, packed	2,119	2,722	2,747	3,577	1,992	2,215
Currants, bulk	33,902	39,644	26,426	42,365	31,233	29,179
Bananas	80,159	44,016	69,128	45,679	81,851	66,279
Dates, fresh or dried	48,476	89,459	50,987	92,026	52,310	97,025
Figs	33,299	50,584	35,316	54,296	37,695	59,657
Apricots	27,751	46,504	26,325	54,670	25,117	64,161
Prunes	53,039	94,525	52,993	93,679	55,333	98,421
Apples	10,411	27,927	11,348	35,441	10,855	36,588
Peaches, Nectarines	3,092	5,669	3,,166	5,968	2,382	4,629
Pears	2,360	4,291	2,279	4,429	2,199	4,619
Papayas	461	916	446	887	440	854
Tamarinds	986	676	905	678	926	809
Other dried fruit	9,666	25,726	11,663	33,427	9,589	29,256
Dried fruit mixtures	1,909	4,759	1,860	5,061	1,764	4,695
Edible nuts	**1,344,275**	**2317,682**	**1,391,690**	**2,569,982**	**1,359,842**	**2,860,481**
Groundnuts in shell	120,655	71,405	79,405	61,243	86,022	72,728
Groundnuts, shelled	507,735	332,353	515,013	347,093	505,476	387,607
Roasted groundnuts	13,715	25,756	40,304	66,505	50,648	82,573
Coconuts, dessicated	64,226	46,173	76,107	69,768	73,253	78,369
Coconuts	36,783	14,681	33,183	16,049	34,579	18,264
Brazil nuts	15,365	26,523	15,067	30,123	16,273	38,627
Cashew nuts	39,350	150,853	49,076	197,694	48,638	210,504
Almonds, bitter	2,823	8,825	2,503	9,763	3,235	12,432
Almonds, sweet	143,172	511,089	165,937	779,065	158,533	718,458
Hazelnuts in shell	12,029	22,090	9,372	16,277	10,861	22,794
Hazelnuts, shelled	159,370	416,651	162,621	377,725	156,753	583,703
Walnuts	55,655	89,959	54,825	102,245	43,166	81,453
Pistachios	103,086	268,080	116,840	318,843	104,516	354,933
Pecan nuts	3,140	15,668	3,771	15,180	4,297	20,603
Pine nuts	6,268	17,253	7,198	28,615	9,677	33,968
Chestnuts	23,978	28,923	31,343	35,416	21,859	30,202
Macadamia nuts	713	6,018	549	4,864	721	6,697
Other nuts	16,565	25,473	6,707	20,013	7,232	24,481
Mixtures	83	248	87	260	53	177

Source: Eurostat

EU imports of selected product groups by source, 1995 -1997
Tonnes/ECU 1,000

RAISINS/SULTANAS	1995		1996		1997	
	Volume	Value	Volume	Value	Volume	Value
Total	**287,182**	**314,797**	**299,750**	**328,505**	**294,398**	**358,955**
Intra-EU	**53,308**	**58,143**	**46,457**	**50,969**	**52,865**	**64,275**
Extra-EU	**233,874**	**256,654**	**253,293**	**277,536**	**241,533**	**294,680**
Developing countries	**166,992**	**174,614**	**179,470**	**183,146**	**179,018**	**196,592**
Turkey	131,826	138,166	143,136	145,998	144,613	158,986
Greece	26,193	28,552	22,976	25,043	23,033	27,812
USA	54,968	60,393	59,365	69,850	51,146	62,472
South Africa	12,407	13,003	13,334	13,607	18,432	20,397
Netherlands	9,059	9,879	9,247	10,084	10,644	12,453
Iran	17,013	17,831	18,283	18,648	10,388	11,407
Australia	8,748	9,601	9,498	10,423	9,292	11,335
Germany	2,569	2,831	2,679	2,921	3,763	4,327
Belgium	12,587	13,727	5,782	6,649	5,244	6,453
Chile	3,922	4,110	4,014	4,174	4,113	4,516
Italy	66	71	576	645	4,585	5,272
Germany	2,569	2,801	2,897	3,159	3,763	4,327
Spain	1,240	1,352	1,345	1,466	2,225	2,738
Afganistan	1,882	1,972	1,675	1,708	1,563	1,716
Argentina	1,909	2,012	1,586	1,651	1,291	1,417

Source: Eurostat

DATES	1995		1996		1997	
	Volume	Value	Volume	Value	Volume	Value
Total	**48,476**	**89,459**	**50,987**	**92,026**	**52,310**	**97,025**
Intra-EU	**6,384**	**16,322**	**6,453**	**15,614**	**7,087**	**17,234**
Extra-EU	**42,092**	**73,137**	**44,534**	**76,412**	**45,223**	**79,791**
Developing countries	**34,604**	**56,075**	**37,345**	**58,325**	**39,688**	**64,137**
Tunisia	16,227	28,397	17,200	26,832	20,921	33,473
Algeria	7,367	12,892	7,809	12,182	9,447	15,115
Iran	7,764	13,587	8,229	12,837	6,920	11,072
France	4,297	10,742	4,339	10,413	5,211	12,671
Israel	3,586	7,172	3,801	9,122	3,352	5,899
Pakistan	1,713	2,997	1,815	2,831	1,888	3,020
USA	3,224	8,060	3,417	8,913	1,209	2,127
Netherlands	536	1,340	543	1,281	563	1,351
China	991	1,734	367	572	87	139

continued	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Germany	710	1,775	775	1,860	435	1,057
United Kingdom	417	1,042	437	1,048	524	1,274
Oman	335	837	169	405	14	24

Source: Eurostat

FIGS	**1995**		**1996**		**1997**	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**33,299**	**50,584**	**35,316**	**54,296**	**37,695**	**59,657**
Intra-EU	**5,308**	**7,784**	**4,786**	**8,645**	**5,683**	**10,659**
Extra-EU	**27,991**	**42,800**	**30,530**	**45,651**	**32,012**	**48,998**
Developing countries	**27,916**	**42,706**	**30,495**	**45,560**	**31,976**	**48,914**
Turkey	27,830	42,691	28,738	42,934	29,967	45,840
Greece	2,932	4,299	2,617	4,727	2,408	4,516
Ivory Coast	0	0	989	1,477	1,819	2,782
Netherlands	251	368	479	865	693	1,299
Germany	494	724	441	796	657	1,232
Austria	51	74	398	718	518	971
United Kingdom	568	832	507	915	304	570
Spain	435	637	381	688	284	532
Iran	85	95	123	183	198	302

Source: Eurostat

APRICOTS	**1995**		**1996**		**1997**	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**27,751**	**46,504**	**26,325**	**54,670**	**25,117**	**64,161**
Intra-EU	**2,534**	**6,681**	**2,875**	**8,499**	**3,444**	**10,108**
Extra-EU	**25,217**	**39,823**	**23,450**	**46,171**	**21,673**	**54,053**
Developing countries	**25,041**	**39,274**	**23,295**	**45,775**	**21,579**	**53,713**
Turkey	23,194	36,375	21,525	42,216	19,837	49,544
Iran	1,315	2,062	1,220	2,392	1,371	3,413
France	674	1,777	764	2,253	1,226	3,616
Netherlands	430	1,133	487	1,436	746	2,201
Germany	542	1,428	614	1,811	554	1,643
Italy	368	970	417	1,230	318	938
South Africa	341	899	386	1,138	161	474

Source: Eurostat

GROUNDNUTS, shelled	1995		1996		1997	
	Volume	Value	Volume	Value	Volume	Value
Total	**507,735**	**332,353**	**515,013**	**347,093**	**505,476**	**387,607**
Intra-EU	**81,602**	**58,294**	**83,360**	**55,095**	**87,381**	**65,713**
Extra-EU	**426,133**	**274,059**	**431,653**	**291,998**	**418,095**	**321,894**
Developing countries	**264,815**	**160,814**	**303,505**	**200,307**	**300,348**	**219,422**
Argentina	94,761	57,425	106,392	70,218	149,501	109,135
USA	155,982	100,312	138,992	89,385	111,897	85,925
China	109,531	66,375	91,845	60,617	61,573	44,948
Netherlands	59,846	42,849	66,318	43,942	74,836	55,909
India	16,919	10,252	35,479	23,416	46,273	33,779
South Africa	12,580	7,623	16,793	11,083	20,493	14,959
Gambia	15,704	9,516	12,371	8,164	8,573	6,258
United Kingdom	12,364	8,852	8,896	5,894	6,724	5,023
Sudan	3,871	2,345	4,988	3,292	5,392	3,936
Nicaragua	3,299	1,999	4,692	3,096	4,539	3,313
Germany	3,446	2,467	3,898	2,582	3,959	2,958
Egypt	2,859	1,732	3,162	2,086	3,044	2,222
Senegal	4,592	2,782	4,241	2,799	1,894	1,382
Belgium	4,944	3,539	2,567	1,701	1,116	834

Source: Eurostat

COCONUTS, desiccated	1995		1996		1997	
	Volume	Value	Volume	Value	Volume	Value
Total	**64,226**	**46,173**	**76,107**	**69,768**	**73,553**	**78,369**
Intra-EU	**7,226**	**6,205**	**7,867**	**7,582**	**7,650**	**8,488**
Extra-EU	**57,000**	**39,968**	**68,240**	**62,186**	**65,603**	**69,881**
Developing countries	**56,579**	**39,606**	**67,904**	**61,882**	**65,527**	**69,788**
Indonesia	8,330	5,837	17,689	15,035	19,903	19,504
Sri Lanka	21,948	15,381	19,555	17,802	15,607	17,167
Philippines	11,702	8,201	12,004	10,203	12,234	11,989
Ivory Coast	7,855	5,504	8,997	7,647	9,077	8,895
Singapore	3,966	2,776	5,257	4,786	4,935	5,182
Netherlands	4,670	4,021	5,388	5,181	4,942	5,483
Malaysia	2,448	1,715	2,244	2,042	2,181	2,291
Dominican Republic	68	48	531	488	1,411	1,368
Belgium	1,102	948	1,056	923	586	644

Source: Eurostat

HAZELNUTS	1995		1996		1997	
	Volume	Value	Volume	Value	Volume	Value
Total	**171,399**	**438,741**	**171,993**	**394,002**	**167,614**	**606,497**
Intra-EU	**22,704**	**61,506**	**30,896**	**74,687**	**34,097**	**127,272**
Extra-EU	**148,695**	**377,235**	**141,097**	**319,315**	**133,517**	**479,225**
Developing countries	**141,446**	**366,543**	**135,842**	**310,446**	**125,529**	**462,096**
Turkey	141,403	357,039	135,964	302,201	125,456	463,685
Italy	8,667	23,478	10,344	24,929	13,819	51,616
Germany	5,759	15,601	7,839	18,891	8,020	29,956
France	3,113	8,433	3,106	7,485	3,029	11,313
United Kingdom	1,498	4,058	2,987	7,199	3,160	11,803
Netherlands	2,426	6,572	2,496	6,015	2,324	8,681
USA	5,932	16,069	5,789	15,630	5,644	21,081
Azerbaijan	457	1,164	866	2,205	1,667	4,245
Georgia	482	1,227	488	1,243	491	1,251

Source: Eurostat

PISTACHIOS	1995		1996		1997	
	Volume	Value	Volume	Value	Volume	Value
Total	**103,086**	**268,080**	**116,840**	**318,843**	**104,516**	**354,933**
Intra-EU	**25,665**	**69,382**	**30,113**	**84,810**	**31,877**	**108,900**
Extra-EU	**77,421**	**198,698**	**86,727**	**234,033**	**72,639**	**246,033**
Developing countries	**75,475**	**193,382**	**84,777**	**228,501**	**69,404**	**234,098**
Iran	75,268	193,687	79,444	214,498	66,630	225,875
Germany	16,449	44,467	14,887	41,683	13,305	44,904
Netherlands	515	1,392	6,832	19,129	10,403	35,112
United Kingdom	3,632	9,818	3,257	9,119	2,897	9,778
Turkey	177	442	2,466	6,658	2,747	9,271
USA	1,749	4,728	2,793	7,821	3,183	10,742

Source: Eurostat

PINE NUTS	1995		1996		1997	
	Volume	Value	Volume	Value	Volume	Value
Total	**6,268**	**17,253**	**7,198**	**28,615**	**9,677**	**33,968**
Intra-EU	**4,446**	**9,668**	**4,346**	**14,468**	**7,642**	**18,713**
Extra-EU	**1,822**	**7,585**	**2,852**	**14,147**	**2,035**	**15,255**
Developing countries	**1,743**	**7,255**	**2,522**	**13,767**	**1,509**	**14,720**

continued	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Portugal	3,499	7,627	3,567	11,692	6,432	15,822
China	1,529	6,364	1,244	6,817	270	2,633
Pakistan	104	439	578	3,167	643	3,536
Spain	342	745	655	2,128	758	1,864
Turkey	57	237	462	2,531	558	3,058

Source: Eurostat

EXPORT

EU exports of dried fruit and edible nuts by product group, 1995-1997
Tonnes/ECU 1,000

	1995		1996		1997	
	Volume	**Value**	**Volume**	**Value**	**Volume**	**Value**
Total	**535,575**	**947,122**	**543,078**	**1,088,438**	**567,586**	**1,195,427**
Intra-EU	**406,485**	**737,490**	**419,960**	**875,354**	**439,465**	**945,500**
Extra-EU	**129,090**	**209,632**	**123,118**	**213,084**	**128,121**	**249,927**
Dried fruit	145,200	217,630	143,821	230,125	158,311	236,434
Raisins/sultanas	51,676	53,031	43,213	45,477	48,360	53,912
Prunes	20,008	36,363	25,517	39,741	28,584	44,295
Currants	33,522	40,816	28,382	45,335	36,458	33,538
Dates	9,077	21,012	10,563	24,547	10,554	23,802
Figs	12,804	18,559	10,405	17,644	12,237	20,017
Bananas	2,205	1,977	7,208	5,873	1,354	1,537
Other dried fruit	**15,908**	**45,872**	**18,533**	**51,508**	**20,764**	**59,333**
Groundnuts	**192,484**	**196,135**	**166,404**	**194,210**	**173,563**	**198,205**
Luxury nuts	197,891	533,357	232,853	664,103	235,712	760,788
Almonds	47,066	191,605	53,030	256,878	60,435	278,959
Hazelnuts	30,024	75,852	42,044	99,333	40,574	146,577
Pistachios	32,926	92,194	38,842	109,083	30,653	106,654
Chestnuts	33,175	52,167	40,794	58,146	34,217	59,190
Coconuts	21,922	14,920	20,914	15,830	24,334	20,519
Walnuts	12,176	39,534	15,654	47,153	18,957	53,300
Cashew nuts	8,311	36,949	8,328	39,720	9,033	43,204
Pine nuts	4,007	12,701	4,400	18,331	9,173	31,202
Brazil nuts	2,309	5,341	2,348	5,862	2,835	6,487
Other nuts	5,975	12,094	6,499	13,767	5,501	14,696

Source: Eurostat

APPENDIX 3 STANDARDS AND STANDARD ORGANISATIONS

3.1 Specimen UN/ECE quality standard for decorticated peeled pistachio nuts

UN/ECE STANDARD DF-10 relating to the marketing and commercial quality control of
DECORTICATED AND DECORTICATED PEELED, PISTACHIO NUTS
Moving in international trade

I. DEFINITION OF PRODUCE

This standard applies to decorticated peeled pistachio nuts from varieties (cultivars) grown from Pistacia vera L from which the protective pericarp has been removed. Decorticated and decorticated peeled pistachio nuts which are processed by salting, sugaring or roasting are excluded.

II. PROVISIONS CONCERNING QUALITY

The purpose of the standard is to define the quality requirements of decorticated and decorticated peeled pistachio nuts at the export control stage, after preparation and packaging.

➔ **Minimum requirements**

(i) In all classes subject to the special provisions for each class and the tolerances allowed, the decorticated and decorticated peeled pistachio nuts must be:

- Intact; the absence of a small part of the nut shall not be regarded as a defect;
- Sound: free from mould, rot, visible damage by insects and dead insects and insect debris
- Sufficiently developed
- Clean, practically free from living insects of mites whatever their stage of development
- Permitted level for total aflatoxin 4 ppb (parts per billion) and for B1 aflatoxin 2 ppb
- Dry; free from abnormal external moisture
- Free of foreign smell and/or taste
- Free from rancidity.

The condition of decorticated and decorticated peeled pistachio nuts be such as to enable them

- To withstand transport and handling, and
- To arrive in satisfactory condition at the place of destination.

(ii) Moisture content
Moisture content of decorticated and decorticated peeled pistachio nuts must not exceed 6.5 per cent.

➔ **Quality Classification**
Decorticated peeled pistachio nuts are classified as defined below:

Extra class
Decorticated peeled pistachio nuts must be of superior quality. They must be well developed, of normal shape and the inside longitudinal section must be of the colour specified with tolerance of 5 per cent for other colours; i.e. "Extra Class Decorticated Peeled Green (Pink – Gulic, yellow of mixed colour) Pistachio Nuts". They must be practically free from defects with the exception of very slight superficial defects provided that these do not affect the general appearance of the produce, the quality, the keeping quality of its presentation in the package.

Decorticated pistachio nuts are classified into three quality classes as defined below and in the defect tolerances in Table 1:

(i) **"Extra" class**
Decorticated pistachio nuts in this class must be of superior quality. They must be well developed, of normal shape and the inside longitudinal section must be according to colour type. They must be practically free from defects with the exception of very slight superficial defects provided that these do not affect the general appearance of the produce, the quality, the keeping quality of its presentation in the package.

(ii) **Class 1**
Decorticated pistachio nuts in this class must be of good quality. They must be fairly well developed and normal in shape and the inside longitudinal section must be according to colour type. Slight defects may be allowed provided that these do not affect the general appearance of the produce, the quality, the keeping quality of its presentation in the package.

(iii) **Class 11**
This class includes decorticated pistachio nuts which do not qualify for inclusion in the higher classes but satisfy the minimum requirements specified above. However, some defects in development are allowed, as are slight defects, provided the decorticated pistachio nuts retain their essential characteristics as regards general appearance, quality, keeping quality and presentation.

➔ **Colour Classification**

(i) **Green**
The inside longitudinal section must be green or dark green in colour. Not more than 25 per cent of kernels, by count, may display light green and/or yellow sections.

(ii) **Pink (Gulic)**
The external appearance shall be pink colour and the inside longitudinal section must be light green in colour. Not more than 30 per cent of kernels, by count may display yellow sections.

(iii) **Yellow**
The inside longitudinal section of the kernel must display predominately yellow colour. Not more than 25 per cent of kernels, by count, may display green and/or light green colour.

(iv) **Mixed colour**
Lots of exceeding the above colour tolerance fall into this category which otherwise are subject to all quality requirements of section 11.B

III. PROVISIONS CONCERNING SIZES

Decorticated and decorticated peeled pistachio nuts are not subject to sizing.

IV. PROVISIONS CONCERNING TOLERANCES

Tolerances in respect of quality shall be allowed in each in each package for produce not satisfying the requirements of the class indicated.

➔ **Quality tolerances**
Tolerances allowed (per cent of defective fruit by weight) are shown below in table 1

Defects	**Decorticated "Extra"**	**peeled "Extra"**	**Decorticated Class I**	**Decorticated Class II**
Total tolerances	8	8	10	15
Insufficiently developed		1.5	1.5	2.0
Shrivelled	6 b/	4	4	5
Halved	20 c/	1	2	3
Broken a/	5	1	2	4
Foreign matter	-	0.1	0.1	0.2
Damaged by insects	1	1	1.25	1.85
Visible mould	0.5	0.5	0.5	1.0

a/ Decorticated peeled pistachio halves are not considered as broken

b/ Include within this tolerance, not more than 3 per cent of dark shrivelled kernels.

c/ 20 per cent tolerance not included in total tolerance.

➔ **Mineral impurities**
Not greater than 1 g/kg.

V. PROVISIONS CONCERNING PRESENTATION

➔ **Uniformity**
The contents of each package must be uniform and contain only decorticated and decorticated peeled pistachio nuts of the same origin, type and quality. The visible part of the contents of the package must be representative of the entire contents.

➔ **Packaging**
The decorticated and decorticated peeled pistachio nuts must be packed in such a way so as to protect the produce properly. The materials used inside the package must be new, clean and of a quality such as to avoid causing any external of internal damage to the product. The use of materials, particularly of paper of stamps bearing trade specifications, is allowed provided the labelling has been done with a non-toxic ink or glue. Packaged must be free of all foreign matter.

➔ **Presentation**
The decorticated and decorticated peeled pistachio nuts must be packed in packaged of 10.0, 12.5 or 25.0 kg maximum net weight packages.

These packages may contain pre-packages of the following net weights: 0.100; 0.125; 0.250; 0.500 or 1 kilogram. At the request of the importer other units of weight are allowed in order to take account of trade habits and legislation in force in importing countries. The pre-packages contained in the outer packages must be the same weight and contain the same class of nuts.

VI. PROVISIONS CONCERNING MARKING

Each package must bear the following particulars, in letters grouped on the same side legibly and indelibly marked and visible from the outside.

➔ **Identification**
Packer and/or dispatcher – Name and address of officially issued or accepted code mark *. (* the national legislation of a number of European countries requires the explicit declaration of the name and address).

➔ **Nature of the produce**
Decorticated Pistachio Nuts; Decorticated Peeled Pistachio Nuts

➔ **Origin of the produce**
Country of origin and, optionally, districts where produced or the national, regional of local place names.

➔ **Commercial specifications**
- Type (Decorticated or Decorticated Peeled);
- Quality class and colour class
- Crop year (optional);
- Net weight, or the number of package units, followed by the net unit weight in the case of packages containing such units.

➔ **Official control mark (optional)**

3.2 Specimen specification for dried fruit from a Dutch manufacturer (Banana chips, sweet, brokens)

INGREDIENT DESCRIPTION

1. The sweet honey dipped banana chips shall be processed from pipe, green bananas (from the tree *Musa sapientum var.* compressa), free from damage, peeled, and cut in slices. The slices are deep-fried in fresh coconut oil, soaked in (sugar) syrup and after that again deep-fried. Addition of colorants and/or preservatives is not allowed. The product must have a constant quality.
2. It shall be a foodgrade product.
3. It shall be crispy, with a pleasant odour.
4. It shall be free flowing and free from any lumps or grittiness.
5. The colour must be yellow.
6. It shall be free of any rancid, putrid, mushy, stale of other objectionable odours of flavours.
7. It shall be free from foreign or toxic material, live infestation and rodent contamination in accordance with Good Manufacturing Practices (GMP).
8. All applicable regulations governing the Food Inspection Division of the Netherlands and EC shall be enforced (Food and Drugs Act).

PHYSICAL/CHEMICAL/MICROBIOLOGICAL SPECIFICATIONS

Constituent	Typical level	Go/No-Go limit
9. Granulation:		
- Thickness > 8 mm		max. 25
- Sieve Spec.> 16 mm	45%	min. 40%
4-16 mm	43%	min. 35%
< 4 mm	12%	max. 4%
10. Moisture	2-3%	max. 4%
11. Total fat	31%	
12. Antioxidants	Negative	Positive
13. Picking test:		
- Discoloured pieces	1%	max. 2%
- Whole slices	50%	min. 40%
- Double and broken slices	50%	max. 60%
14. Sugar	18%	max. 23%
15. Total plate count	103 cfu/g	max 5.103cfu/g
16. Enterobacteriaceae	< 100 cfu/g	max. 100 cfu/g
17. Yeast	< 100 cfu/g	max. 100 cfu/g
18. Moulds	< 100 cfu/g	max. 100 cfu/g
19. Salmonellae	Negative/25g	Absence/25g

HANDLING, TRANSPORT AND STORAGE

20. It shall be so packaged to prevent moisture pick-up and lumping and be stored in a cool dry location for a maximum period of six months after delivery.
21. Each package (shipment, or bulk delivery) shall have the following information:
    - Product name
    - Name and address of supplier
    - Net weight
    - Date of manufacture
    - Manufacturer's lot number

PACKAGING CONDITIONS

22. Pallets must be in good condition; maximum dimensions (including pallet): 120x80x100 cm height.
23. Pallets must be CHEP of EURO pallets. CHEP pallets are preferable.
24. Palletstack must be stable; overhang is not allowed.

MISCELLANEOUS

25. It shall not be adulterated of misbranded.
26. On initial evaluation, this ingredient must meet the requirement of functionality for its intended use.
27. Each plant producing this product is subject to inspection by authorised personnel.

3.3 Standard Organisations

INTERNATIONAL

EUROPEAN COMMUNITY

Comité Européen de Normalisation (CEN)

Address:	Rue Brederode 2, B-1000 Bruxelles, Belgium
Telephone:	(32) 2-5500811
Telefax:	(32) 2-5500819

International Standardisation Organisation (ISO)

Address:	P.O.Box 56, CH-1211 Geneva, Switzerland
Telephone:	(41) 22-7490111
Telefax:	(41) 22-7333430

United Nations / Economic Commission for Europe
FAO Agriculture and Timber Division

Address:	Palais des Nations, CH-1211 Geneva 10, Switzerland
Telephone:	(41) 22-9172887
Telefax:	(41) 22-9170041

Food and Agriculture Organisation of the United Nations (FAO)
Commodities and Trade Division/HACCP
Address: Viale della Terme di Caracella, 00100 Rome, Italy
Telephone: (39) 6-57054810
Telefax: (39) 6-57054495
Internet: http://www.apps.fao.org

European Commission, Directorate General XI -A-2 (Contact point EU ECO label)
Address: Rue de la Loi 200, B-1049 Brussels, Belgium
Telephone: (32) 2-2990344
Telefax: (32) 2-2990313

IFOAM (International Federation of Organic Agricultural Movements)
Address: Okozentrum Imsbach, D-66636 Tholey-Theley, Germany
Telephone: (49) 6853 5190
Telefax: (49) 6853 30110
E-mail: IFOAM@T-ONLINE.de
Internet: http://www.ecoweb.dk/ifoam

AUSTRIA
Ostereichisches Normunginstituut (ON)
Address: Heinestrasse 38, Postfach 130, A-1021 Wien, Austria
Telephone: (43) 1-21300
Telefax: (43) 1-21300650
E-mail: iro@tbxa.telecom.at

BELGIUM
Intitut Belge de Normalisation (IBN)
Address: Avenue de la Brabançonne 29, B-1000 Bruxelles, Belgium
Telephone: (32) 2-7380111
Telefax: (32) 2-7334264
E-mail: croon@ibn.be

DENMARK
Dansk Standard (DS)
Address: Kollegievej 6, DK-2920 Charlottenlund, Denmark
Telephone: (45) 39-966101
Telefax: (45) 39-966102
E-mail: dansk.standard@ds.dk

FRANCE
Association Française de Normalisation (AFNOR)
Address: Tour Europe, F-92049 Paris la Défense Cedex, France
Telephone: (33) 1-42915555
Telefax: (33) 1-4291565

GERMANY
Deutsches Institut für Normung (DIN)

Address:	Burggrafenstrasse 6, D-10787 Berlin, Germany
Telephone:	(49) 30-2601-0
Telefax:	(49) 30-26011231
E-mail:	postmaster@din.de

ITALY
Ente Nazionale Italiano di Unificazione (UNI)

Address:	Via Battistotti Sassi 11/b, 1-20133 Milano, Italy
Telephone:	(39) 2-700241
Telefax:	(39) 2-70106106
E-mail:	webmaster@uni.unicei.it

SPAIN
Associacion Española de Normalizacion y Certificación (AENOR)

Address:	Génova 6, E-28004 Madrid, Spain
Telephone:	(34) 1-4326000
Telefax:	(34) 1-3104976

SWEDEN
Standardiseringen I Sverige (SIS)

Address:	St Eriksgatan 115, Box 6455, S-113 82 Stockholm, Sweden
Telephone:	(46) 8-6103000
Telefax:	(46) 8-307757
E-mail:	info@sis.se

SWITZERLAND
Swiss Association for Standardization (SNV)

Address:	Mühlebachstrasse 54, CH-8008 Zürich, Switzerland
Telephone:	(41) 1-2545454
Telefax:	(41) 1-2545474

UNITED KINGDOM
British Standards Institution (BSI)

Address:	389 Chiswick High Road, London W4 4AL, United Kingdom
Telephone:	(44) 181-9969000
Telefax:	(44) 181-9967400
E-mail:	info@bsi.org.uk

THE NETHERLANDS
Food and Drugs Act
Food Inspection Services
(Keuringsdienst van Waren)

Address:	Baan 74, 3011 CD Rotterdam, The Netherlands
Telephone:	(31) 10 4020800
Telefax:	(31) 10 4130869

Productschap voor Groenten en Fruit
Commodity Board for Fruits and Vegetables

Address:	Bezuidenhoutseweg 82, 2594 AX Den Haag, The Netherlands
Telephone:	(31) 70-3832870
Telefax:	(31) 70-3475253

Nederlands Normalisatie Instituut (NNI)

Address:	P.O.Box 5059, 2600 GB Delft, The Netherlands
Telephone:	(31) 15-2690390
Telefax:	(31) 15-2690190
E-mail:	info@nni.nl
Internet:	http://www.nni.nl

SKAL
Contactpoint for Skal Certification / Inspectorate for organic production methods

Address:	P.O. Box 384, 8000 AJ Zwolle, The Netherlands
Telephone:	(31) 38-4268181
Telefax:	(31) 38-4213063
E-mail:	skal@euronet.nl

Stichting Milieukeur
Contactpoint for the EU Ecolabel and for the Milieukeur label

Address:	Eisenhowerlaan 150, 2517 KP Den Haag, The Netherlands
Telephone:	(31) 70-3586300
Telefax:	(31) 70-3502517

APPENDIX 4 IMPORT TARIFFS FOR DRIED FRUIT AND EDIBLE NUTS

Import tariffs for dried fruit and edible nuts (April 1999)
Tariff as a percentage of CIF value, excluding duties and VAT

Dried Fruit	HS code	GCT %	GSP %
Bananas	0803 0090	16.7 - 17.3	0
Dates	0804 10	8.4 - 9.1	0
Figs	0804 2090	8.3 - 8.7	0
Currants, raisins, sultanas	0806 20	2.5 - 2.6	0
Apricots	0813 10	5.8 - 6.1	0
Prunes	0813 20	10 - 10.4	0
Apples	0813 30	4 - 4.8	0
Peaches (incl. nectarines)	0813 4010	5.8 - 6.1	0
Pears	0813 4030	6.7 - 6.9	0
Papayas	0813 4050	2.3 - 2.7	0
Tamarind fruit	0813 4060	1 - 2	0
Cash.apples, lychees, jack/passion fruit	0813 4070	1 - 2	0
Other dried fruit	0813 4095	3 - 3.6	0
Mixtures of dried fruit without prunes	0813 5012	4.7 - 5.3	0
Mixtures of dried fruit with prunes	0813 5019	10 - 10.4	0

Edible nuts	HS code	GCT %	GSP %
Groundnuts	1202	0	0
Coconuts, paranuts, cashew nuts	0801	0	0
Almonds, in shell, bitter	0802 1110	0	0
Almonds, in shell, other	0802 1190	5.8 - 6.1	0
Almonds, shelled, bitter	0802 1210	0	0
Almonds, shelled, other	0802 1290	4.1 - 4.7	0
Hazelnuts, in shell	0802 21	3.3 - 3.5	0
Hazelnuts, shelled	0802 22	3.9	0
Walnuts, in shell	0802 31	4.7 - 5.3	0
Walnuts, shelled	0802 32	5.6 - 6.1	0
Chestnuts	0802 40	5.8 - 6.1	0
Pistachios	0802 50	1.7	0
Pecan nuts	0802 9010	0	0
Pine nuts	0802 9050	2	0
Macadamia (Australian) nuts	0802 9060	2	0
Other nuts	0802 9085	2	0
Mixtures of nuts	0813 5031	4.7 - 5.3	0

Note: the GCT tarifs mentioned varies in the different periods of import during the year.

Source: Belasting Dienst Douane 1999

APPENDIX 5 SOURCES OF PRICE INFORMATION

The Public Ledger

Address:	69-77 Paul Street, London EC2A 4LQ, United Kingdom
Telephone:	(44) 171-553 1000
Telefax:	(44) 171-553 1941
E-mail:	pleditorial@llplimited.com
Internet:	http://www.public-ledger.com

Man Producten B.V.
(Major trading company of edible nuts and spices; publisher of edible nut market report)

Address:	Weena 612-614, 3012 CN Rotterdam, The Netherlands
Telephone:	(31) 10 2801380
Telefax:	(31) 10 4147425
E-mail:	mail@manproducten.nl

Catz International B.V.
(Importer of dried fruits, bakery products, nuts and spices)

Address:	P.O. Box 180, 3000 AD Rotterdam, The Netherlands
Telephone:	(31) 10 4113440
Telefax:	(31) 10 4118913
E-mail:	info@catz.nl

International Trade Center (UNCTAD/WTO)
Market News Service (MNS) - Fresh fruits and vegetables
Division of Product and Market Development

Address:	Palais des Nations, CH-1211 Geneva 10, Switzerland
Telephone:	(41) 22-7300111
Telefax:	(41) 22-730 05
E-mail:	MSN@INTRACEN.ORG
Internet:	http://www.unic.org/itc

Food and Agriculture Organisation of the United Nations (FAO)
Commodities and Trade Division
FAO Quarterly bulletin of statistics (on Internet)

Address:	Viale della Terme di Caracella, 00100 Rome, Italy
Telephone:	(39) 6-57054810
Telefax:	(39) 6-57054495
Internet:	http://www.apps.fao.org/default.htm

APPENDIX 6 TRADE ASSOCIATIONS

EUROPEAN UNION
FRUCOM
Der Hamburger Börse e.V

Address:	Grosse Bäckerstrasse 4, D-20095 Hamburg, Germany
Telephone:	(49) 40 3747190
Telefax:	(49) 40 37471919

INC (International Nut Council)

Address:	Goretti Guasch, Boule 2, E-43201 Reirs, Spain
Telephone:	(34) 977 331416
Telefax:	(34) 977 315028
E-mail:	inc@readysoft.es
Internet:	http://www.readysoft.es/inc

BELGIUM
BELGAFOOD

Address:	Leopoldplaats 10 bus 3, B-2000 Antwerp, Belgium
Telephone:	(32) 2 5373060
Telefax:	(32) 2 5394026

DENMARK
Danish Chamber of Commerce

Address:	Borsen, DK-1217 Copenhagen, Denmark
Telephone:	(45) 33950500
Telefax:	(45) 33325216

FINLAND
The Finnish Food Marketing Association

Address:	Mannerheimvägen 76A, PB 150, Fin-00251 Helsinki, Finland
Telephone:	(358) 0 441651
Telefax:	(358) 0 441674

FRANCE
Syndicat National des Commerces et Industries des Fruits Secs
Société Brousse Vergez S.A.

Address:	Quai de la Joliette 2, BP 33, F-13471 Marseille République Cédex 1, France
Telephone:	(33) 4 91577100
Telefax:	(33) 4 91548603

GERMANY
WAREN-VEREIN
Der Hamburger Börse e.V

Address:	Grosse Bäckerstrasse 4, 20095 Hamburg, Germany
Telephone:	(49) 40 3747190
Telefax:	(49) 40 37471919

ITALY
ANEIOA
Associazione Nazionale Esportori Importatori Ortofrutticolli e Agrumari

Address:	Via Sabottino 46, I-00195 Rome, Italy
Telephone:	(39) 06 37515147
Telefax:	(39) 06 3723659

SWEDEN
Food and Agricultural Policy Council of Swedish Retail and Wholesale Trade
Handelns Samarbetsorgan

Address:	Box 5512, S-11485 Stockholm, Sweden
Telephone:	(46) 8 6661117
Telefax:	(46) 8 6626548

UNITED KINGDOM
National Dried Fruit Association

Address:	15 Trim Rosecourt, 49-50 Prince Albert Road, London NW8 7LD, United Kingdom
Telephone:	(44) 171 7227488
Telefax:	(44) 171 7222009

CENTA, Combined Edible Nut Trade Association

Address:	62 Wilson Street, GB-London EC2A 2BU, United Kingdom
Telephone:	(44) 171 7820007
Telefax:	(44) 171 7820939

British Peanut Council

Address:	12 Haconsfield, Hethersett, Norwich, Norfolk NR9 3AW, United Kingdom
Telephone:	(44) 603 810793
Telefax:	(44) 603 810793

THE NETHERLANDS

Nederlandse Vereniging voor de Handel in Gedroogde zuidvruchten, specerijen en aanverwante artikelen
The Netherlands Dried Fruit Trade Association

Address:	Bezuidenhoutseweg 82, 2594 AX Den Haag, The Netherlands
Telephone:	(31) 70 3833011
Telefax:	(31) 70 3475253

Nederlandse Vereniging van Verwerkers van Consumptie-Grondnoten
The Dutch Groundnut/Peanut Processors Association (DGA)
c/o Van Spaendonck Association Management

Address:	P.O. Box 90154, 5000 LG Tilburg, The Netherlands
Telephone:	(31) 13 5944689
Telefax:	(31) 13 4637411

Productschap voor Groenten en Fruit
The Community Board for Fruits and Vegetables

Address:	P.O. Box 90410, 2509 LK Den Haag, The Netherlands
Telephone:	(31) 70 3850100
Telefax:	(31) 70 3475253

Dutch Peanut Council

Address:	P.O. Box 190, 3000 AD Rotterdam, The Netherlands
Telephone:	(31) 10 4042111
Telefax:	(31) 10 4042333

APPENDIX 7 TRADE FAIR ORGANISERS

ISM
K`ln Messe

Frequency:	Annual
Address:	Messeplatz 1, D-50679 K`ln, Germany
Telephone:	(49) 221 8210
Telefax:	(49) 221 8212574
E-mail:	ism@koelnmesse.de
Internet:	http://www.koelnmesse.de/ism

ANUGA
K`ln Messe

Frequency:	Biennial
Address:	Messeplatz 1, D-50679 K`ln, Germany
Telephone:	(49) 221 8210
Telefax:	(49) 221 8212574
E-mail	anuga@koelnmesse.de
Internet:	http://www.koelnmesse.de

SIAL

Frequency:	Biennial
Address:	39, Rue de la Bienfaisence, 75008 Paris, France
Telephone:	(33) 1 42894687
Telefax:	(33) 1 42894694
Internet:	http://www.sial.fr

INTERSUC

Frequency:	Annual
Address:	22, Rue Bergere 75009 Paris, France
Telephone:	(33) 1 42851820
Telefax:	(33) 1 40160145

ALIMENTARIA
Prosema

Frequency:	Biennial
Address:	Ronda Universidad 14, 4 A 08007 Barcelona, Spain
Telephone:	(34) 93 4520722
Telefax:	(34) 93 4516637

IBA
Central Association of German Bakery Trade
Frequency: Annual
Address: Bondorferstrasse 23, D-53604 Bad Honnef, Germany
Telephone: (49) 2224 7704-0
Telefax: (49) 2224 7704-40

EXPO FOOD
Fierra Internazionale di Milano
Frequency: Annual
Address: Largo Domodossola 1, Milan, 20145 Italy
Telephone: (39) 02 654184
Telefax: (39) 02 654822

BIOFACH
Sunder & Rottner
Frequency: Annual
Address: Von-Volmarstrasse 4, D-91154 Roth, Germany
Telephone: (49) 9171 4011
Telefax: (49) 9171 4016

AGF TOTAAL
Rotterdam, The Netherlands
Frequency: Annual
The Community Board for Fruits and Vegetables
Address: P.O. Box 90410, 2509 LK Den Haag, The Netherlands
Telephone: (31) 70 3850100
Telefax: (31) 70 3475253

ROKA
Koninklijke Jaarbeurs Utrecht
Frequency: Annual
Address: P.O. Box 8500, 3503 RM Utrecht, The Netherlands
Telephone: (31) 30 2955911
Telefax: (31) 30 2940379

HORECAVA
RAI
Frequency: Annual
Address: Europaplein 8, 1078 GZ Amsterdam, The Netherlands
Telephone: (31) 20 5491212
Telefax: (31) 20 6464469

FOOD INGREDIENTS (France, Germany, Hungary and other places)

Frequency:	Annual
Address:	Miller Freeman B.V., PO Box 200, 3600 AE Maarssen, The Netherlands
Telephone:	(31) 346 559444
Telefax:	(31) 346 573811
E-mail:	exponl@ibm.net
Internet:	http://www.mfbv.com/food

IFE

Frequency:	Biennial
Address:	11 Manchester Square, London W1M 5AB, United Kingdom
Telephone:	(44) 171 4861951
Telefax:	(44) 171 4138251

APPENDIX 8 TRADE PRESS

INTERNATIONAL

The Cracker
INC (International Nut Council)
Address: Goretti Guasch, Boule 2, E-43201 Reirs, Spain
Telephone: (34) 977 331416
Telefax: (34) 977 315028
E-mail: inc@readysoft.es
Internet: http://www.readysoft.es/inc

The Clipper
AgroPress Inc.
Address: Aeschengraben 16, CH-4051 Bazel, Switzerland
Telephone: (41) 61 2721170
Telefax: (41) 61 2721 126
E-mail: adve@agropress.com
Internet: http://www.agropress.com

Eurofruit
Market Intelligence Ltd.
Address: 1 Nine Elms Lane, London SW8 5NQ, United Kingdom
Telephone: (44) 171 5013700
Telefax: (44) 171 4986472
E-mail: subs@mi.fruitnet.com
Internet: http://www.fruitnet.com/eurofruit/

International Trade Center (UNCTAD/WTO)
Market News Service (MNS) Fresh fruits and vegetables
Division of Product and Market Development
Address: Palais des Nations, CH-1211 Geneva 10, Switzerland
Telephone: (41) 22-7300111
Telefax: (41) 22-730 05
E-mail: MSN@INTRACEN.ORG
Internet: http://www.unic.org/itc

International Food Ingredients
Miller Freeman B.V
Address: P.O. Box 200, 3600 AE Maarssen, The Netherlands
Telephone: (31) 346 559444
Telefax: (31) 346 573811

Confection
Kennedey's Publications Ltd.
Address: 12 Blackstock Mews, London N4 2BT, United Kingdom
Telephone: (44) 171 3546800
Telefax: (44) 171 3545372
E-mail: mail@kennedys.co.uk

UNITED KINGDOM
The Grocer
Wm.Reed Publishing Ltd
Address: Broadfield Park, Crawley, W.Sussex RH 11 9RT, United Kingdom
Telephone: (44) 1293 613400
Telefax: (44) 1293 613156

GERMANY
Lebensmittel Zeitung
Deutscher fachverlag GmbH
Address: D-60264 Frankfurt Am Main, Germany
Telephone: (49) 69 759501
Telefax: (49) 69 75 951760

Fruchtenhandel
Dr. R. Rolf M. Wolf Verlag GmbH
Address: Lindenstrasse 12, P.O. Box 105551, 40046 Düsseldorf, Germany
Telephone: (49) 21 199104
Telefax: (49) 21 1663162

FRANCE
LSA - Libre Service Actualite
Address: 26, Rue d' Oradour-sur-Glane, 75504 Paris Cedex 15, France
Telephone: (33) 1 44 250600
Telefax: (33) 1 44 250613

FLD
Address: 5, Rue Pierre Curie, P.O. Box 14, 93351 Le Bourget Cedex, France
Telephone: (33) 4 8371048
Telefax: (33) 4 8371146

SPAIN
Alimarket Revista
Address: O'Donnel 18, 28009 Madrid, Spain
Telephone: (34) 91 5778225
Telefax: (34) 91 4313727

ITALY
Nuova Distributione
Address: Via Creta 56, 25124 Brescia, Italy
Telephone: (39) 30 220261
Telefax: (39) 30 225868

BELGIUM
Distributie Vandaag
Address: Mariannestraat 34, 1180 Brussel, Belgium
Telephone: (32) 2 3459923
Telefax: (32) 2 3460204

THE NETHERLANDS
Food Magazine / Distrifood
Elsevier Bedrijfsinformatie B.V.
Address: Postbus 9000, 6800 DA Arnhem, The Netherlands
Telephone: (31) 26 3209903
Telefax: (31) 26 3270238
E-mail: food@ebi.nl
Internet: http://www.ebi.nl/food

Primeur
Address: Grote Markt 15b, 4461 AH Goes, The Netherlands
Telephone: (31) 113 230621
Telefax: (31) 113 230865
E-mail: primeur@zeelandnet.nl

APPENDIX 9 TRADE PROMOTION ORGANISATIONS

INTERNATIONAL
International Trade Center (ITC)
Market News Service (MNS)
Division of Product and Market Development

Address:	Palais des Nations, P.O. Box 10, 1211 Geneva 10, Switzerland
Telephone:	(41) 22-7300111
Telefax:	(41) 22-730 05
E-mail:	itcreg@intracen.org
Internet:	http://www.intracen.org

AUSTRIA
Austria Federal Economic Chamber

Address:	Wiener Hauptstrasse 63, 1045 Vienna, Austria
Telephone:	(43) 1-501050
Telefax:	(43) 1-50206250
E-mail:	hotline@wkoe.wk.or.at
Internet:	http://www.wk.or.at

DENMARK
The Danish Import Promotion Office for products from developing countries (DIPO)

Address:	Danish Chamber of Commerce, Børsen, 1217 Copenhagen K, Denmark
Telephone:	(45) 33-950500
Telefax:	(45) 33-325216
E-mail:	dok@commerce.dk

FRANCE
COLEACP

Address:	5 Rue de la Corderie, Centra 342, 94586 Rungis Cedex, France
Telephone:	(33) 1-41800210
Telefax:	(33) 1-41800219
E-mail:	coleacp@coleacp.org
Internet:	http://www.coleacp.org

GERMANY
GTZ/PROTRADE, German Agency for Technical Cooperation

Address:	Dag-Hammerskjöld-weg 1-5, P.O. Box 5180, 65726 Eschborn, Germany
Telephone:	(49) 6196-790000
Telefax:	(49) 6196-797414
E-mail:	postmaster@gtz.de

BFAI, Federal Office of Foreign Trade Information, Germany
Berlin Office

Address:	Scharnhornstrasse 36, P.O. Box 650268, 13302 Berlin, Germany
Telephone:	(49) 30-20145200
Telefax:	(49) 30-20145204

Köln Office

Address:	Agrippastrasse 87-93, P.O. Box 100522, 50455 Köln, Germany
Telephone:	(49) 221-20570
Telefax:	(49) 221-2057212
E-mail:	106035.377@compuserve.com

ITALY
ICE, National Institute for Foreign Trade

Address:	Via Liszt 21, 00144 Rome, Italy
Telephone:	(39) 6-59921
Telefax:	(39) 6-59926900
E-mail:	sitoece@ice.it
Internet:	http://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) 10-2013434
Telefax:	(31) 10-4114081
E-mail:	cbi@cbi.nl
Internet:	http://www.cbi.nl

NORWAY
The Norwegian Agency for Development Cooperation (NORAD)

Address:	Tolbugaten 31, P.O. Box 8034 Deo, Oslo, Norway
Telephone:	(47) 22-314400
Telefax:	(47) 22-314403
E-mail:	postmottak@oslo.norad.telemax.no

SWEDEN
The Swedish International Development Cooperation Agency (SIDA)
Department for Infrastructure & Economic Cooperation

Address:	S-105 25 Stockholm, Sweden
Telephone:	(46) 8-6985000
Telefax:	(46) 8-208864

SWITZERLAND
OSEC, Swiss Office for Trade Promotion

Address:	Stampsenbachstrasse 85, 8035 Zürich, Switzerland
Telephone:	(41) 1-3655151
Telefax:	(41) 1-3655221
E-mail:	info.zurich@osec.ch

APPENDIX 10 OTHER USEFUL ADDRESSES

INTERNATIONAL

International Chamber of Commerce

Address:	38, cours Albert 1er, 75008 Paris, France
Telephone:	(33) 1-49532828
Telefax:	(33) 1-49532942
Internet:	http://www.ecib.com

Food and Agriculture Organisation of the United Nations (FAO)
Commodities and Trade Division

Address:	Viale della Terme di Caracella, 00100 Rome, Italy
Telephone:	(39) 6-57054810
Telefax:	(39) 6-57054495
Internet:	http://www.apps.fao.org

EUROPE

European Commission, Directorate General for External Relations

Address:	Rue de la Loi 200, 1049 Brussels, Belgium
Telephone:	(32) 2-2991111
Telefax:	no general telefax number

European Commission, Directorate General XI -A-2 (fruits and nuts)

Address:	Rue de la Loi 200, 1049 Brussels, Belgium
Telephone:	(32) 2-2990344
Telefax:	(32) 2-2990313

Association of the European Chambers of Commerce and industry

Address:	Rue Archimède 5, P.O. Box 4, B-1000 Brussels, Belgium
Telephone:	(32) 2-2310715
Telefax:	(32) 2-2300038
E-mail:	eurocham@mail.interpac.be

Bureau for official EU publications

Address:	Rue Mercier 2, L-2985 Luxembourg, Luxembourg
Telephone:	(352) 499281
Telefax:	(325) 495719
E-mail:	alexander.von-witzleben@opoce.cec.be

Eurostat, Statistical Bureau of the European Union

Address:	Rue Alcide de Gasperi, L-2920 Luxembourg, Luxembourg
Telephone:	(352) 4301-34567
Telefax:	(352) 4301-3015
E-mail:	agnesn@eurostat.datashop.lu

Corporate Intelligence Group (CIG)

Address:	48 Bedford Square, London WC1B 3DP, United Kingdom
Telephone:	(44) 171-6969006
Telefax:	(44) 171-6969004
Internet:	http://www.cior.com

THE NETHERLANDS

CBI

Centre for the Promotion of Imports from developing countries

Address:	P.O. Box 30009, 3001 DA Rotterdam, The Netherlands
Telephone:	(31) 10-2013434
Telefax:	(31) 10-4114081
E-mail:	cbi@cbi.nl
Internet:	http://www.cbi.nl

Belasting Dienst Douane (Customs)

Dept. External and Internal Communication

Address:	P.O.Box 50964, 3007 BG Rotterdam, The Netherlands
Telephone:	(31) 10-2904949
	Special information number (31) 800-143
Telefax:	(31) 10-2904875
Internet:	http://www.douane.nl

Centraal Bureau voor de Statistiek (CBS)

Central Bureau of Statistics

Address:	P.O.Box 4481, 6401 CZ Heerlen, The Netherlands
Telephone:	(31) 70-3373800
Telefax:	(31) 70-3877429

Food and Drugs Act

Food Inspection Services
(Keuringsdienst van Waren)

Address:	Baan 74, 3011 CD Rotterdam, The Netherlands
Telephone:	(31) 10 4020800
Telefax:	(31) 10 4130869

Ministry of Agriculture

Address:	Bezuidenhoutseweg 73, 2500 EK The Hague, The Netherlands
Telephone:	(31) 70-3786868
Telefax:	(31) 70-3786123

Ministry of Economic Affairs (EVD - Trade Information)
(to be mainly contacted through the internet)

Address:	Bezuidenhoutseweg 181, 2500 EC The Hague, The Netherlands
Telephone:	(31) 70-3798933
Telefax:	(31) 70-3797878
E-mail:	evd@evd.nl
Internet:	http://www.evd.nl

Environmental regulations (Ministry of VROM)

Address:	Rijnstraat 8, 2515 XP The Hague, The Netherlands
Telephone:	(31) 70-3394638
Telefax:	(31) 70-3391296

Stichting Verpakking en Milieu (SVM)
Foundation for Packaging and Environment

Address:	P.O. Box 95598, 2509 CN The Hague, The Netherlands
Telephone:	(31) 70-3819091
Telefax:	(31) 70-3819016

Greenbuss®
c/o CBI, Centre for the Promotion of Imports from developing countries

Address:	P.O. Box 30009, 3001 DA Rotterdam, The Netherlands
Telephone:	(31) 10-2013434
Telefax:	(31) 10-4114081
E-mail:	greenbuss@cbi.nl
Internet:	http://www.cbi.nl

Fair Trade

Address:	Beesdseweg 5, P.O. Box 115, 4100 AC Culemborg, The Netherlands
Telephone:	(31) 345-545151
Telefax:	(31) 345-521423
E-mail:	ellie@fairtrade.antenna.nl

APPENDIX 11 LIST OF DEVELOPING COUNTRIES

Please note that the OECD list of developing countries, as applied in this market survey, may include countries that are usually not considered as developing countries (e.g. South Korea). The countries indicated with * are ACP countries.

Afghanistan
Albania
Algeria
Angola
Anguilla
Antigua and Barbuda *
Argentina
Armenia
Aruba
Azerbaijan
Bahrain
Bangladesh
Barbados *
Belize *
Benin *
Bhutan
Bolivia
Bosnia & Herzegovina
Botswana *
Brazil
Burkina Faso *
Burundi *
Cambodia
Cameroon *
Cape Verde *
Central African Republic *
Chad *
Chile
China
Colombia
Comoros *
Congo *
Cook Islands
Costa Rica
Côte d'Ivoire *
Croatia
Cuba
Djibouti *
Dominica *
Dominican Republic *
Ecuador
Egypt
El Salvador
Equatorial Guinea *
Eritrea *
Ethiopia *
Fiji *
French Polynesia
Gabon *
Gambia *
Georgia
Ghana *
Gibraltar
Grenada *
Guatemala
Guinea *
Guinea-Bissau *
Guyana *
Haiti *
Honduras
India
Indonesia
Iran
Iraq
Jamaica
Jordan
Kazakstan
Kenya
Kiribati
Korea, Rep. of
Korea, South
Kyrghyz Rep.
Laos
Lebanon
Lesotho *
Liberia *
Libya
Macao
Macedonia
Madagascar *
Malawi *
Malaysia
Maldives
Mali *
Malta
Marshall Islands
Mauritania *
Mauritius *
Mayotte
Mexico
Micronesia, Fed. States of
Moldova
Mongolia
Montserrat
Morocco
Mozambique *
Myanmar
Namibia *
Nauru
Nepal
Netherlands Antilles
New Caledonia
Nicaragua
Niger *
Nigeria *
Niue
Northern Marianas
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 Gren. *
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
Virgin Islands (UK)
Wallis & Futuna
Western Samoa *
Yemen
Yugoslavia, Fed. Rep.
Zaire *
Zambia *
Zimbabwe *

APPENDIX 12 LIST OF NETHERLANDS IMPORTERS

3.1 Importers / packers/ traders

Alimenta Commodities Ltd.
(Importer of groundnuts)
Address: Veerkade 9, 3001 KG Rotterdam, The Netherlands
Telephone: (31) 10 4044610
Telefax: (31) 10 4111319

B.V.L. Baljet & Zn
(Importer of dried fruits and Edible nuts)
Address: Westerstraat 244, 1015 MT Amsterdam, The Netherlands
Telephone: (31) 20 6245421
Telefax: (31) 20 6266783
Telex: 14206 BALZO NL

Baukje Bakprodukten B.V.
(Importer of Edible nuts for bakeries)
Address: P.O. Box 604, 7440 VH Rijssen, The Netherlands
Telephone: (31) 548 519800
Telefax: (31) 548 519772

Van den Bergh en Jurgens B.V.
(Importer of Peanuts)
Address: P.O. Box 160, 3000 AD Rotterdam, The Netherlands
Telephone: (31) 10 4394911
Telefax: (31) 10 4394455

C.Buttner & Co
(Trader in dried fruits and spices from Thailand)
Address: De Korf 54, 2924 AH Krimpen aan de IJssel, The Netherlands
Telephone: (31) 180 550055
Telefax: (31) 180 550432

Catz International B.V.
(Importer of dried fruits, bakery products, nuts and spices)
Address: P.O. Box 180, 3000 AD Rotterdam, The Netherlands
Telephone: (31) 10 4113440
Telefax: (31) 10 4118913
E-mail: info@catz.nl

Felix Cohen B.V.
(Importer/agent of dried fruits and edible nuts)
Address: P.O. Box 50, 4920 AB Made, The Netherlands
Telephone: (31) 162 684120
Telefax: (31) 162 686536

Daarnhouwer & Co's Handelsmij B.V.
(Importer of hazelnuts, almonds, coffee, tea, cocoa)
Address: P.O. Box 2037, 1500 GA Zaandam, The Netherlands
Telephone: (31) 75 6318300
Telefax: (31) 75 6318532

Desimo B.V.
(Small importer of dried fruits and bakery ingredients)
Address: P.O. Box 279, 8901 BB Leeuwarden, The Netherlands
Telephone: (31) 58 227325
Telefax: (31) 58 2124756

Van Dijk Food Products
(Manufacturer of peanut paste for sauce and peanut butter)
Address: 2E Industrieweg 8, 3411 ME Lopik, The Netherlands
Telephone: (31) 348 558911
Telefax: (31) 348 558755

Finma B.V.
(Importer (Turkish) hazelnuts, other nuts and dried fruit)
Address: Schuttevaerweg 9B, 3044 BA Rotterdam, The Netherlands
Telephone: (31) 10 4154310
Telefax: (31) 10 4155267

Global Trading & Agency B.V.
(Broker in dried fruits and nuts)
Address: Neerpolderseweg 100, 3381 JV Giessenburg, The Netherlands
Telephone: (31) 184 618211
Telefax: (31) 184 618321
E-mail: globaltr@worldaccess.nl

Gloe & Co B.V.
(Importer/wholesaler of dried fruits, edible nuts, fish and vegetable conserves)
Address: P.O. Box 5155, 2900 ED Capelle aan de IJssel, The Netherlands
Telephone: (31) 10 4582333
Telefax: (31) 10 4588807

Green Food Int. B.V.
(Importer organic nuts, seeds)
Address: Prins Hendrikweg 19, 3771 AK Barneveld, The Netherlands
Telephone: (31) 342 423220
Telefax: (31) 342 423321

Imko Ned Products B.V.
(Importer/wholesaler of dried fruit and nuts, manufacturer of Klijn and private branded nuts and peanut butter)
Address: P.O. Box 29, 7000 AA Doetinchem, The Netherlands
Telephone: (31) 314 370214
Telefax: (31) 314 370299

Jas & Junius B.V.
(Trader in dried tropical fruit and nuts)
Address: P.O. Box 404, 1180 NB Amstelveen, The Netherlands
Telephone: (31) 20 6436412
Telefax: (31) 20 6432127
E-mail: jasenjun@euronet.nl

Horizon Natuurvoeding B.V.
(Organic dried fruits and nuts)
Address: P.O. Box 77, 3400 AB IJsselstein, The Netherlands
Telephone: (31) 30 6887730
Telefax: (31) 30 6887142

King Nuts & Raaphorst
(Importer of dried fruits, edible nuts)
Address: P.O. Box 1044, 2410 CA Bodegraven, The Netherlands
Telephone: (31) 172 632222
Telefax: (31) 172 632233

E.Klinkenberg Noten B.V.
(Broker and trader in edible nuts; publisher of "The Klinkenberg Nut Weekly")
Address: Nieuwe Haven 25, 1411 SG Naarden, The Netherlands
Telephone: (31) 35 6947822
Telefax: (31) 35 6948269

Leenersan-Poortman B.V.
(Importer of nuts for the bird food market
Address: P.O. Box 889, 3300 AW Dordrecht, The Netherlands
Telephone: (31) 78 164255
Telefax: (31) 78 210669

Man Producten B.V.
(Major trading company of edible nuts and spices; publisher of edible nut market report)
Address: Weena 612-614, 3012 CN Rotterdam, The Netherlands
Telephone: (31) 10 2801380
Telefax: (31) 10 4147425
E-mail: mail@manproducten.nl

Maarten Catz Merch. B.V. (MCM)
(Importer of dried fruits, processed fruits etc.)
Address: P.O. Box 140, 3100 AC Schiedam, The Netherlands
Telephone: (31) 10 4739444
Telefax: (31) 10 4739849

J.J. Makreel, Firma
(trader and broker in groundnuts)
Address: De Pinckart 54, 5670 AA Nuenen, The Netherlands
Telephone: (31) 40 2840304
Telefax: (31) 40 2840810

Menken Orlando B.V.
(Importer of dried fruits and edible nuts)
Address: Kerketuinenweg 35, 2504 AL Den Haag, The Netherlands
Telephone: (31) 70 3082222
Telefax: (31) 70 3214456

Natuproducts B.V.
(Importer and manufacturer of organic dried fruits and edible nuts)
Address: P.O. Box 376, 3840 AJ Harderwijk, The Netherlands
Telephone: (31) 341 464211
Telefax: (31) 341 431589

Orlando Pinda's Noten en Zuidvruchten B.V.
(Importer of dried fruits and edible nuts)
Address: Kerketuinenweg 35, 2504 AL Den Haag, The Netherlands
Telephone: (31) 70 3660919
Telefax: (31) 70 3214456

Polak & Co B.V.
(Importer/wholesaler of dried fruits, edible nuts, processed and canned nuts)
Address: P.O. Box 29101, 3001 GC Rotterdam, The Netherlands
Telephone: (31) 10 4110190
Telefax: (31) 10 4125938

Pijlstra B.V.
(Small importer of dried fruits and edible nuts)
Address: P.O. Box 2655, 2940 AD Lekkerkerk, The Netherlands
Telephone: (31) 180 661377
Telefax: (31) 180 662822

Rhumveld Winter & Konijn B.V.
(Importer of dried fruits, edible nuts and vegetables; publish their own newbulletin "The Chronicle")
Address: P.O. Box 29216, 3001 GE Rotterdam, The Netherlands
Telephone: (31) 10 2330900
Telefax: (31) 10 2330574
E-mail: rwk@rhumveld.com
Internet: http://www.rhumveld.com

Rene B.V., Pinda Industrie
(Manufacturer of dried fruits, edible nuts and vegetables)
Address: P.O. Box 29, 4140 AC Leerdam , The Netherlands
Telephone: (31) 345 638585
Telefax: (31) 345 618782

E.van de Sandt B.V.
(Agent for dried fruits, processed fruits and nuts)
Address: P.O. Box 1027, 3000 BA Rotterdam, The Netherlands
Telephone: (31) 10 4182020
Telefax: (31) 10 4610665

Stolp International B.V.
(Importer/wholesaler of bakery products, dried fruits and edible nuts)
Address: P.O. Box 28, 3750 GA Bunschoten, The Netherlands
Telephone: (31) 33 2991711
Telefax: (31) 33 2984224

Swartberg Levensmiddelen Fabriek B.V.
(Manufacturer of peanut butter)
Address: Sluisjesdijk 96-102, 3008 PC Rotterdam, The Netherlands
Telephone: (31) 10 4293400
Telefax: (31) 10 4293902

Tradin Agricultural Int. B.V.
(Importer (organic) luxury nuts – macadamias, cashews)
Address: Huizermaatweg 17, 1273 NA Huizen, The Netherlands
Telephone: (31) 35 5287000
Telefax: (31) 35 524366

J.H. Verstegen B.V.
(Importer tropical dried fruit, spices, edible nuts, coconut)

Address:	P.O. Box 127, 9700 AC Groningen, The Netherlands
Telephone:	(31) 50 5413321
Telefax:	(31) 50 5420887

Weno B.V.
(Importer/wholesaler of dried fruits and edible nuts)

Address:	P.O. Box 98, 2678 ZH De Lier, The Netherlands
Telephone:	(31) 174 515784
Telefax:	(31) 174 515419

Handelsmij. Willem van de Schalk
(Agent almonds and other nuts and dried fruits)

Address:	P.O. Box 21101, 3001 AC Rotterdam, The Netherlands
Telephone:	(31) 10 4116140
Telefax:	(31) 10 4047924

3.2 Processors

Calvé B.V.
(Leading importer and manufacturer of peanut butter and peanuts; part of Van Den Bergh Nederland, Unilever)

Address:	Nassaukade 3, 3000 AD Rotterdam, The Netherlands
Telephone:	(31) 10 4394272
Telefax:	(31) 10 4394455

Douwe Egberts Nederland/Duyvis
(Packer/processor peanuts and coated peanuts; part of the USA Sara Lee group of companies)

Address:	Business Unit Duyvis, Keulsekade 143, 3532 AA Utrecht, The Netherlands
Telephone:	(31) 30 979111
Telefax:	(31) 30 972330

Duyvis B.V.
(Factory and purchasing division for the brand Duyvis peanuts of Douwe Egberts)

Address:	P.O. Box 4 , Koog a/d Zaan, The Netherlands
Telephone:	(31) 75 6514736
Telefax:	(31) 75 6169101

General Biscuits Nederland B.V.
(Biscuit, cake and pastry industry)
Address: P.O. Box 8068, 3301 CB Dordrecht, The Netherlands
Telephone: (31) 78 6524524
Telefax: (31) 78 6515158

Go-Tan B.V.
(Manufacturer of Asian foods)
Address: Spoorstraat 57, 4041 CL Kesten, The Netherlands
Telephone: (31) 8886 2144
Telefax: (31) 8886 2193

Mars B.V.
(Chocolate industry)
Address: P.O. Box 31, 5460 BB Veghel, The Netherlands
Telephone: (31) 413 383685
Telefax: (31) 413 351670

Marvelo B.V.
(Importer/packer for Albert Heijn Supermarkets)
Address: P.O. Box 3073, 1500 HD Zaandam, The Netherlands
Telephone: (31) 75 6593270
Telefax: (31) 75 6598228

Nestlé Nederland B.V.
(Cocoa and chocolate industry)
Address: P.O. Box 12365, 1112 TA Diemen, The Netherlands
Telephone: (31) 20 5699323
Telefax: (31) 20 5699789

Iglo-Ola (Unilever)
(Ice cream industry)
Address: P.O. Box 9910, 3506 GX Utrecht, The Netherlands
Telephone: (31) 30 2635522
Telefax: (31) 30 2635711

Den Hertog Diepvriesspecialiteiten B.V.
(Ice cream industry)
Address: P.O. Box 10, 3248 ZG Melissant, The Netherlands
Telephone: (31) 187 602544
Telefax: (31) 187 602877

Peeters Produkten B.V.
(Chocolate/paste industry)

Address:	P.O. Box 6, 4700 AA Roosendaal, The Netherlands
Telephone:	(31) 165 553088
Telefax:	(31) 165 536025

CPC Benelux B.V.
(Breakfast cereals)

Address:	P.O. Box 62, 1200 AB Hilversum, The Netherlands
Telephone:	(31) 35 5829211
Telefax:	(31) 35 5824136

Honig Foods
(Cereal and bakery products)

Address:	P.O. Box 45, 1540 AA Koog aan de Zaan, The Netherlands
Telephone:	(31) 75 6539222
Telefax:	(31) 75 6701369

Quaker Oats B.V.
(Breakfast cereals)

Address:	Stationsweg 43, 3331 LR Zwijndrecht, The Netherlands
Telephone:	(31) 78 6255795
Telefax:	(31) 78 6197277

Unilever N.V.
(Multinational food manufacturer)

Address:	P.O. Box 760, 3000 DK Rotterdam, The Netherlands
Telephone:	(31) 10 2174000
Telefax:	(31) 10 2174798

Van Welzen Bakkerijen B.V.
(Bakery products)

Address:	P.O. Box 67, 2410 AB Bodegraven, The Netherlands
Telephone:	(31) 172 619324
Telefax:	(31) 172 612306