

MARKET BRIEF ON

FRESH PINEAPPLE

**European Union Overview; with special focus on Belgium,
France, Italy, Germany, Spain, Netherlands and the United
Kingdom**

ITC



INTERNATIONAL TRADE CENTRE UNCTAD/WTO

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ABBREVIATIONS

ACP	African, Caribbean and Pacific Group of States
CFCE	Centre Français du Commerce Extérieur (French Foreign Trade Centre)
CIF	Cost, insurance and freight
CTIFL	Centre technique interprofessionnel des fruits et légumes (Inter-professional Centre for Fruit and Vegetables) , France
FAO	Food and Agriculture Organization of the United Nations
GATT	General Agreement on Tariffs and Trade
GNP	Gross national product
GSP	Generalized System of Preferences
HS	HARMONIZED COMMODITY DESCRIPTION AND CODING SYSTEM
ITC	International Trade Centre UNCTAD/WTO
LDCs	Least developed countries
MRL	Maximum residue level
MNS	Market News Service of ITC
OCAB	Office central des producteurs et exportateurs d'ananas et bananes (Central Office for Producers and Exporters of Pineapples and Bananas) (Côte d'Ivoire)
SITC	Standard International Trade Classification
SPEG	Sea Pineapple Exporters of Ghana
SPM	Sanitary and phytosanitary measures
UNCTAD	United Nations Conference on Trade and Development
VIFL	Food Technology Service
WTO	World Trade Organization

1. Product description

This market brief deals with fresh pineapple classified in the SITC Rev.3 and HS nomenclatures under the following headings:

HS	0804.30	Pineapple, fresh or dried
SITC Rev.3	057.95	Pineapple, fresh or dried

The pineapple belongs to the family Bromeliaceae (subclass Monocotyledonae). The most extensively cultivated species is *Ananas comusus*.

The pineapple is thought to have originated in South America. The main areas where the fruit is grown today are the countries of Central and South America, West Africa and tropical Asia. The wide dispersal of pineapple-growing areas shows that it is perfectly adaptable both to different temperatures and types of soil and to differences in rainfall.

Varieties

The following are the most widely exported varieties of pineapple:

- Smooth Cayenne pineapple, which makes up the bulk of exports, especially from West Africa;
- Champaka, which is a deep green colour on the outside when ripe; it is mainly grown in Central America and tropical Asia and represents a large market share in the North American and European markets;
- Victoria, which is smaller (400-500 g) but which has a more subtle taste; it mostly comes from Reunion, Mauritius and South Africa;
- MD2 or Extra Sweet, a cross between the Smooth Cayenne and the Hawaiian pineapple, which has recently been brought on to the market by the Del Monte Company; it is distinctive for its low acidity, paler flesh and a deeper external colouring, and is today the flagship product on the pineapple market.

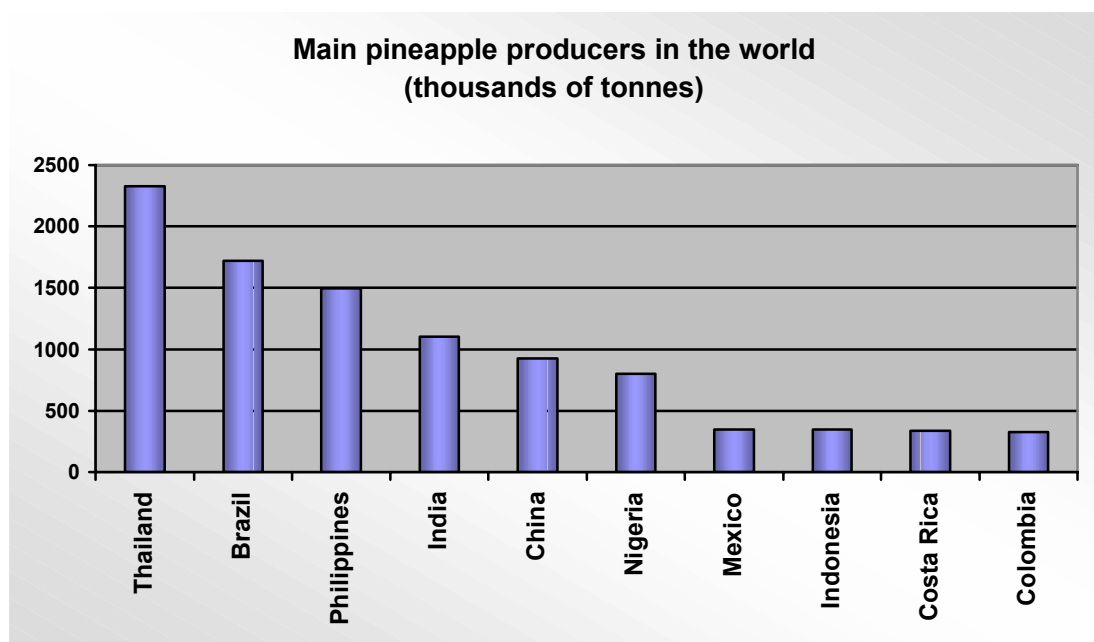
**The range of varieties
is a plus for the
industry.**

2. Production – Exports

The main producing areas are not necessarily the largest exporters, because of high local consumption.

With world-wide production of 13 million tonnes in 1999 (Source: Food and Agriculture Organization of the United Nations - FAO), pineapple is the eighth most cultivated fruit in the world. Production has grown by 1.3 million tonnes since 1990 and is two-and-a-half times higher than 30 years ago. With due allowance for variations linked to the vagaries of the weather, the volume of pineapples on the international market increases on average by 200,000 tonnes per year.

The bulk of world production is concentrated in just a few countries. Thailand and Brazil are the biggest producers, accounting for about 14% and 13% of world production with, respectively, 2.3 million and 1.7 million tonnes produced in 1999. They are followed by the Philippines (12%) and India (9%). However, these countries, which dominate world pineapple production, do not figure significantly in the European market for fresh pineapple imports. Their pineapples are either intended for domestic markets or exported in a processed form (canned and as juice). Thailand, the Philippines and, more recently, Malaysia have all focused their development efforts on the processing industry.



Source: FAO 1999.

In 1999, 77 countries were producing pineapple, but for many of them this was a very marginal activity. Two types of organizations can be observed in the producing and exporting countries:

- **Multinationals** (*Dole* or *Del Monte*). These take care of all or virtually all the tasks to be carried out between production and export. All additional work involved is carried out by a local producer on a contractual basis receiving considerable technical assistance. This is the case in the Philippines and Costa Rica.
- **Cooperation between small and medium-sized producers and large concerns.** These either grow the pineapples themselves or buy fruit harvested on farms. They band together in order to pool expensive equipment and cut the transport costs for exports. This is the case in Côte d'Ivoire and Ghana.

In the fresh pineapple sector, producers specialize in a particular type of market:

- Fresh pineapple for local consumption (for example, 99.2% of Brazil's production in 1998 was consumed locally);
- Fresh pineapple for export;
- Fresh pineapple for the processing industry.

Exports of fresh pineapple amounted to approximately 1 million tonnes in 1999 (**source:** COMTRADE) of world production. Most of the producing countries are also the main consumers and processors of their own production; the exception is Costa Rica, which exported 87.35% of its total production in 1999. In fact, only Latin America and the African, Caribbean and Pacific (ACP) group of States actually export fresh pineapple.

Supply from ACP countries increases at holiday times, particularly at Christmas and Easter, whereas supply from their competitors (Thailand, the Philippines and Costa Rica) remains constant throughout the year. The ACP export sector concentrates on the fresh fruit market, whereas competitors in other countries also undertake processing.

In order to succeed in the export market, it is very important to offer a competitive product. Countries such as Côte d'Ivoire or Cameroon rely on fresh pineapple at competitive prices, and this strategy has worked well for them so far. Today, countries such as Costa Rica or South Africa are offering products which are less competitive in terms of price but which more closely match consumer expectations, and this new strategy is changing the picture. These countries are gaining market share and their supply corresponds better with consumer demand in Europe, where people still know little about pineapple and its nutritional qualities.

3. Imports

European Union: the world's largest market for pineapple in terms of volume, value and growth.

The three biggest markets for pineapple imports are the European Union, the United States and Japan. Together, these markets absorb over 86% of world imports of pineapple, with the European Union in first position in terms of both total volume and volume per inhabitant. In 1998, European Union imports accounted for 40% of world imports by volume, with 66% coming from the ACP countries. However, the opportunities for growth in the European market are attracting newcomers envious of the success of the Central American industry.

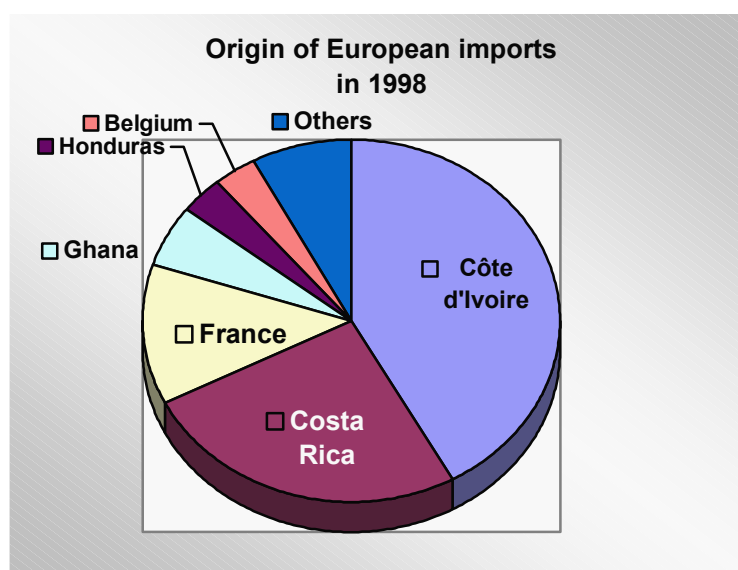
European pineapple imports by origin (metric tonnes, 1994-1998)

Country of origin	1994	1995	1996	1997	1998
Total	200 845	246 361	285 340	322 540	300 516
Including:					
Côte d'Ivoire	90 636	110 329	116 886	133 815	110 742
Costa Rica	29 507	36 891	53 224	77 178	83 141
Ghana	7 250	11 544	17 370	21 223	19 566
Honduras	3 931	4 478	10 396	9 857	10 972

Source: Comtrade 1999.

The European market is extremely dynamic; imports have fallen only three times in 10 years. The 1994-1998 period was one of the best in terms of volume, growing by 69,397 tonnes to reach 300,516 tonnes in 1998. Such growth of that sort had not been achieved since the 1984-1988 period, when imports increased by 112,790 tonnes.

Each import area has its suppliers. Europe is mainly supplied by West Africa (Côte d'Ivoire, up-and-coming Ghana and Cameroon), which have recently been joined by the Central American countries (Costa Rica and Honduras), now making steady progress. Today, imports from Côte d'Ivoire, Costa Rica and Ghana account for 85% of European imports. An increasing range of origins should nevertheless be a determining factor in the next decade.



We should note, in this context, the very high level of re-exports, estimated by FAO at around 170,000 tonnes. Within the European Union, France, Belgium and the Netherlands re-export to the other member States of the European Union, as well as to markets in Eastern Europe. That is why France and Belgium are ranked, respectively, fourth and fifth among world exporters.

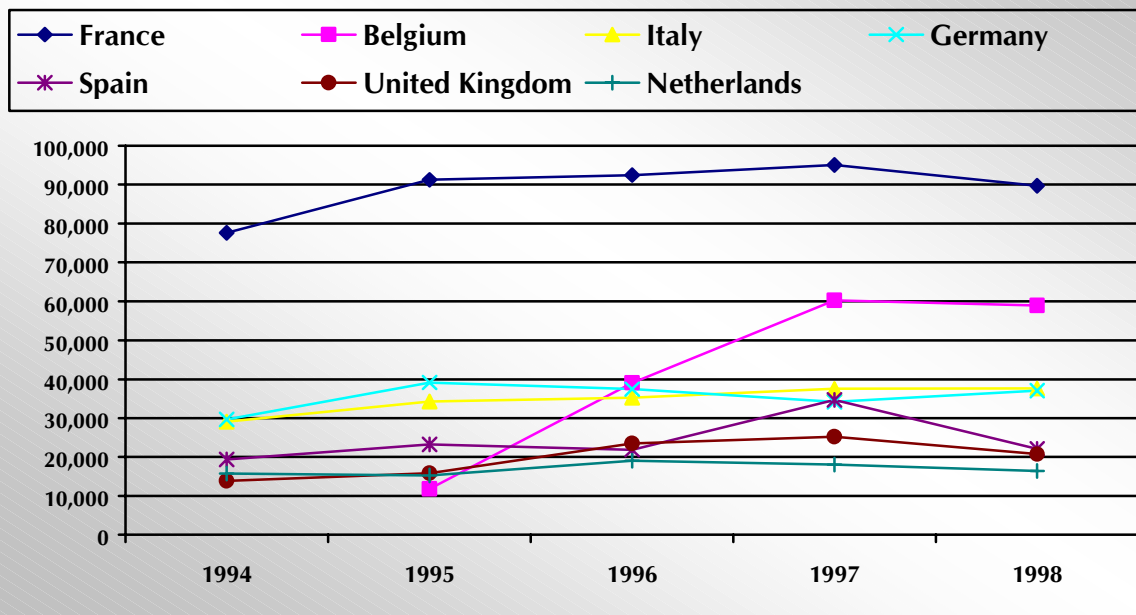
The main features of the European import market are as follows:

- Three countries supply the European markets with fresh pineapple: Côte d'Ivoire (41.9%), which dominates the French and Spanish markets, Costa Rica (25.5%), the unchallenged leader in the British market, and France (12.7%) as a re-exporter;
- Since 1993, Côte d'Ivoire has been steadily gaining market share and has confirmed its position as leader. However, its main rival, Costa Rica, is challenging its dominance and might well kick-start the recovery in the pineapple market with its Del Monte Gold (MD2) product (see the section on competition).
- Imports from European Union countries (re-exports) are slowing in the case of Germany, Spain, the United Kingdom and Belgium, whereas they are on the increase in the case of France (+ 12.2%) and Italy (+ 23.1%)¹.
- Imports from Latin America and the ACP countries are growing, with a market share of 80% in 1998, not counting re-exports from European countries of pineapple originating in these countries.

The most promising import markets will be studied country-by-country. It can be pointed out at the outset (see below) that France is by far the largest European import market and that Belgium, which has made steady progress since 1995, is now also a major importer. This is easily explained by the fact that these two countries are among the largest re-exporters in the world. Although the Netherlands is also, to a lesser extent, a re-exporter to Germany and Eastern European countries, the bulk of imports today go via France and Belgium. Imports of Germany, Italy, the United Kingdom, Spain and the Netherlands have stagnated or, at best, slightly increased in the same period, although the outlook remains positive.

¹ Some caution should be exercised in interpreting these figures as the Commodity Trade Database (Comtrade) data cover dried as well as fresh pineapple. The margin of error is minimal, however, as the market for dried pineapple is very small.

Imports of the main European markets (metric tonnes)



Source: Comtrade 1999.

4. Market characteristics

Market recovery based on the introduction of new, sweet varieties and on diversification of sources.

The main characteristic of the pineapple market as a whole is the extent to which the countries of origin target different areas of the world market:

- Asian countries (Thailand and, more recently, Indonesia and Malaysia) are leaders in the world market for pineapple juice and canned pineapple;
- The Philippines has been able to run both a successful processing industry and a fresh fruit production sector targeted at the Japanese market;
- Africa (especially Côte d'Ivoire) dominates the market for fresh fruit, although Central American countries (particularly Costa Rica) are providing new and tough competition that can no longer be ignored in the same market.

Although pineapple is the second most popular tropical fruit in terms of sales, most of the harvest goes for processing (for canned fruit and juice). Only **25%** of exports are of fresh pineapple.

In terms of variety, there has been an important development. The introduction in the market of yellower, "Gold" variety pineapples has revived the market and consumers are showing more interest. Greenish pineapples of the Champaka type are often seen as unripe fruit and consequently demand for them has fallen considerably. In contrast, "Gold" pineapples, with their deeper yellow colour, are preferred and have almost taken over the European market. These pineapples are harvested when they are already quite ripe (at the M2-M3 stage, as shown on the ripeness table on p. 13) and transported by air to the markets. They cost more than those transported by boat, but the consumer prefers them.

Contrary to expectations, there is no season for fresh pineapple; it can be savoured all year round. Nevertheless, stocks in the European Union peak during the holiday period at the end of the year (in December) and at Easter (March-April). Between 1994 and 1998, 18-25% of the yearly amount put on the market was traded in December, and 10-12% in March.

The recent trend is towards expansion in European imports, thanks to:

- Greater consumer awareness;
- Increased GNP per inhabitant;
- Demand from immigrants from the producing countries.

The market for tropical fruit is once again booming, but has its problems. Disruptions caused by the El Niño climatic phenomenon and the financial crisis in Asia have adversely affected the major exporting countries. In 1999, the market for fruit and vegetables in general was affected by poor weather conditions which had a significant negative impact both on production and consumption.

The entry into the market of new producers eager to take maximum advantage of the growing appetite of the developed countries for tropical fruit has also unsettled the major exporting countries, but confirmed that this is a market with real opportunities.

Prices for pineapple remain higher than those for the most popular fresh fruit in Europe, such as apples or oranges. Consequently, higher demands are made on quality. This demand for quality and the constantly growing competition mean that it is increasingly difficult to sell products of poor or unreliable quality. The supply and quality of pineapples from certain new supplier countries are

still too unreliable and need to be improved if those countries hope to remain on the European market. The quality aspect needs to be taken seriously, and will be further discussed below.

- **Competition: increasingly tough**

The European market for pineapples is a battlefield between West and Central African producers and producers from Central America, dominated by the banana multinationals such as *Del Monte*, *Dole* and *Compagnie Fruitière*. These companies couple their banana and pineapple exports to enable them to export smaller quantities of pineapple in the best conditions (see box).

Growth in pineapple distribution by boat relies increasingly on maritime logistics using refrigerated and palletized ships, mostly specially equipped for exporting bananas. Economies of scale and access to faster vessels are made possible by combining cargos of bananas, pineapples and, more recently, mangoes and melons. It is therefore a good idea to join forces with banana exporters in order to be able to export under the best conditions.

From its origins in South America, the international *Del Monte* company has gained a foothold in the European market by offering brightly coloured pineapples of the MD2 hybrid ("extra sweet") variety, whereas the fruit offered by the ACP countries is traditionally based on the orangy-coloured "Smooth Cayenne" pineapple.

Côte d'Ivoire is the leader in a booming market but is struggling to translate the accumulated effort over many years by all those involved in its industry into market share and income. Moreover, its product is facing competition from Latin American pineapples, which seems more attractive to European consumers because of their smaller size and which are highly rated for their more consistent quality. Since 1997, only one in three pineapples sold in France is of Côte d'Ivoire origin, as compared with one in two at the beginning of the 1990s. Nevertheless, the growing demand for "Gold"

variety pineapples offers genuine prospects for Côte d'Ivoire and for companies such as *Compagnie Fruitière* with a reputation for supplying high-quality products of this type.

Thanks to marketing support from *Del Monte* - one of the giants of the fruit business - Costa Rica has been able to expand its product supply by, in particular, launching new varieties - now copied by its competitors - on the market. The huge marketing operation surrounding the MD2 hybrid produced good results and could help the country's recovery in the European market. Central American producers' share has been growing steadily (annually by 20-30% since 1995) in a booming market. Ghana tripled its exports to the European Union between 1992 and 1997, thanks in particular to the development of high-quality maritime transport. The rapid decline of the Dominican Republic means the disappearance of one of the major players in the sector after it was not able to meet consumer demands.

Other countries of origin, such as Cameroon, are developing their exports, although they do not have the resources to oust Côte d'Ivoire or its main challenger, Costa Rica, from the top position.

- **Consumers: still too unfamiliar with this product**

- Owing to consumers' lack of knowledge about pineapple, the market is especially dependent on promotional activities and marketing to boost demand. Consumers have problems telling the difference between the different grades and origins of pineapples. For them, a pineapple is just a pineapple, and they buy whatever is available without careful consideration. This often leads to disappointment.
- In Europe, people buy pineapples on impulse, unlike apples or bananas, which they buy regularly. Price is therefore an important factor. In Germany, Italy and France, impulse buyers mainly go for the Smooth Cayenne variety (between 65 and 78%).

- The fact that pineapples are often presented in fruit baskets for Christmas or special occasions means they are seen as a luxury item. This is a misconception that must be removed.
- Consumers in Germany, France and Italy admit that they have difficulty preparing pineapple, despite the pleasure they get from eating it. They appreciate its tangy and refreshing taste and its juiciness. However, they have also expressed the need for information on how to keep the fruit and how to gauge its ripeness, as well as the need for a wider choice of varieties.

It is therefore important to educate and inform the consumer and to improve the image of pineapple so that it becomes more of a standing item on shopping lists. The lack of sales points providing information does not help in this respect. It is necessary to help the consumer by suggesting ways to use the fruit and providing recipes. One of the solutions being applied, especially in the United Kingdom, is to include pineapple in fresh ready-prepared foods such as fruit salad. This is a new and growing market line and it should help attract new consumers.

Customer profile

Consumer studies have shown that purchases of tropical fruit in the European Union are more likely to be made by people aged between 30 and 58, usually housewives.

5. Market access

Virtually no tariff barriers for the developing countries, but very high quality requirements.

- **Customs tariffs: zero, or near zero**

The common external tariff applied to imports of fresh pineapple in the European Union is 6.3%. In line with the latest arrangements under the General Agreement on Tariffs and Trade (GATT) 1994, this duty will gradually disappear. Customs tariffs differ, however, depending on the country of origin of the pineapple. Under the Generalized System of Preferences (GSP), developing countries enjoy preferential treatment:

ACP (see annex II) signatories of the Lomé Convention are exempt from customs duties on imports of pineapple into the European Union; a "EUR1" certificate of origin is required in this case;

Least developed countries (LDCs) (see annex II) are also exempt from customs duties; in this case, a certificate of origin is required;

Other developing countries enjoy a preferential rate of 5.8%, but this concerns only a limited number of pineapple-exporting countries (the Philippines, Brazil, Indonesia, Malaysia, Mauritius, China, Paraguay and India);

The overseas countries and territories are also exempt from customs duty on pineapple exports to the European Union.

Table summarizing customs tariffs under the Generalized System of Preferences

Countries concerned	Customs tariffs
ACP countries	0%
Least developed countries	0%
Developing countries	5.80%
Overseas countries and territories (LOMB)	0%

Source: Generalized System of Preferences

The customs offices of the countries of the European Union provide market reports on the wholesale prices of fresh fruit. These reports serve as a basis for a common list of average prices (expressed in Euros per 100kg pineapples), which is published every fortnight by the European Union. The rates of customs duties are applied to this list for the few countries concerned.

It should be noted that the Mediterranean countries enjoy preferential access to the European Union market.

Some countries are exempt from customs duties under bilateral agreements. It is therefore important to contact the trading institutions in a particular country to find out what agreements are in force that affect exports of fresh pineapple to the European Union markets.

- **Sanitary and phytosanitary measures: currently being formalized**

The harmonization of sanitary and phytosanitary measures (SPM) should be beneficial to trade in fresh tropical fruit in the long term. The exporting countries will also have to make some changes, however, particularly when they start phasing out the use of methyl bromide treatment methods, which have been in use for a long time, in favour of other methods. Although the period stipulated for this phase-out is longer for the developing countries (deadline: 2015) than for the developed countries (deadline: 2005), it is generally thought that if bans are introduced

The treatment methods that could replace the use of methyl bromide are:

- Immersion in hot water and
- Irradiation

But they are still expensive.

in the markets of the developed countries, imports of tropical fruits treated with methyl bromide might not be permitted. This situation could create major problems for many developing countries, particularly if the costs involved in keeping to the SPM rules (especially for investments in new processing factories) are higher than the revenue from small volumes of exports.

The European Union is clamping down on residues from pesticides in foodstuffs. Pineapple is one of the products affected by the lowering of pesticide maximum residue levels (MRLs). Ethepon, which is used, among other purposes, to trigger the skin-colouring process, is targeted.

A full list of MRLs by food product, including pineapple, can be found at the following Internet address:

**<http://www.fao.org> → Agriculture → *Pesticides management and pollution,*
- *Documents on Line***

- **Packaging and labelling: not to be neglected but to be improved**

As much importance should be given to the packaging of pineapple as to growing and preparing it. The packaging is used not only to improve the presentation of the fruit but also to provide a description of the contents and origin. A good package should be easy to handle so that the many loading and unloading operations that take place between the producer and the retailer can be carried out quickly and easily. Moreover, the packaging can also help cut loading costs.

For fresh fruit like pineapple, good ventilation and a steady, suitable temperatures are vital for ensuring the quality of the fruit upon arrival. Effective ventilation and ease of handling can only be guaranteed up to a net weight around 20 kg.

The packaging for transporting fresh pineapple has not yet been standardized. Consequently, reference should be made to international standards on the packaging of agricultural products based on units of 600 x 400 mm and 400 x 300 mm for smaller products. These units allow maximum use to be made of the freight space agreed for standard European pallets (*source: Protrade*).

The packaging should ensure the quality of the pineapple on arrival.

The walls of a cardboard box deteriorate considerably in damp air and during a long journey. It is thus important to choose a material stronger than simple cardboard for the box and to ensure that the openings are not blocked. The boxes are also waxed to protect them against the damp. Telescopic boxes are increasingly being used because of their rigidity and ease of use. Generally speaking and, to put it simply, the packaging should be designed to be stacked high in containers or lorries and to maintain the quality of the fruit until it reaches the importer.

There are different ways to pack pineapples: either upright or horizontal. The upright packing method is recommended, with gaps between the pineapples. In this way, the pineapples do not knock against each other and maintain their quality and external texture more easily.

Full information concerning the following categories should appear on every pack:

a) Identification

c) Product origin

Name and address of sender	Country of origin, processing site
(b) Nature of the product - "PINEAPPLE-ANANAS" - Name of the variety	d) Trade specifications - Class, number of fruits - Size, in net weight and as weight class - Ripeness when harvested

Source: Protrade.

It is not yet customary to indicate the ripeness and a "best before" date on the fruit itself, but to do so would meet more of the customer's needs. The choice must be made easier for them and they must be given basic information. To a lesser extent, information on preserving the fruit could be a marketing advantage.

It is recommended that retailers should be advised on how to store particular varieties. As the boxes are placed lengthways by retailers and wholesalers, the labels should be on the short side where the consumer can see them.

Size, weight and ripeness

Size is measured by the total weight of the pineapple. Pineapples vary in weight between 0.9 kg and 2.5 kg. A weight of between 1 kg and 1.5 kg is preferred for exports. There are several different weight classes (see table below). Everyone working in the sector refers to these classes, particularly for packaging. The markets for classes B and C are larger in terms of volume and price, these classes are recommended for better access to markets. Moreover, the consumer should be offered a greater choice of grade, despite the fact that purchasers tend to favour a few varieties.

Class	Weight range (grams)	Maximum difference allowed within a box* (grams)
A	1500 or more	400
B	1300 - 1500	300
C	900 - 1200	200
D	less than 900	150
Dwarf pineapples	Approx. 550	75

* Maximum weight difference between the smallest and the largest pineapple. **Source:** Protrade and OCAB.

This data is based on pineapples from Côte d'Ivoire.

In Europe, there are no directives regulating pineapple packaging, except for recycling requirements (see the section on the environment, below), but the professionals in the sector have agreed on some standards. Producers, exporters and importers have agreed on certain packaging standards by country of origin of the pineapples and by class. It is nevertheless recommended that importers should be consulted to ascertain their requirements, which can vary within the European Union.

The fruit's ripeness is an important factor, and may be crucial to its success in the market. Depending on the variety, ripe pineapples have a yellowish-white flesh, and contain about 3.5% inverted sugar, 12% sucrose and 0.7-0.9% fruit acid.

Stage of ripeness	Colour of the fruit
M1	Yellowish from the base up to 25% of the length of the fruit
M2	Yellowish for 25-50% of the length of the fruit
M3	Yellowish for 50-75% of the length of the fruit
M4	Yellowish for over 75% of the length of the fruit

Source: Protrade.

To improve the marketing of pineapple, every effort should be made to get it on to the greengrocer's or supermarket's shelf slightly before the M4 stage. Most importers require that the fruit arrives in the country at the M2/M3 stage of ripeness, no earlier and no later.

- **Quality: key requirement where improvement is still needed**

In order to meet market demand, remain competitive and get reasonable prices, it is recommended that only first-class pineapples should be exported. This is the quality required by the market and this is what consumers are used to buying. For this reason too, the flexible regulations on fruit for export should not be used as a loophole, as consumers in Europe would not buy pineapple exports of poor quality.

First class:

A first-class pineapple must be of top quality and must have all the classic features of its particular variety.

Some slight defects will be tolerated as long as they do not affect the fruit's appearance, quality or presentation in the packaging:

- Slight defects in the shape or colour
- Slight defects caused by the sun

Pineapples with other defects not tolerated at this quality level should not be exported to Europe.

It cannot be over-emphasized that any pineapple intended for the European markets must reach the importer in impeccable condition. This is an indispensable condition for breaking into the European market and developing trading relations with partners.

At its session held from 20 to 23 July 1999, the European Parliament adopted a resolution calling for the creation of a European quality label in order to protect consumers (Source: CFCE/MIFL). If this resolution enters into law, it should have a major impact on quality standards in the coming years and this means that impeccable quality is all the more crucial.

The liberalization of the world market, the decisions by the Commission of the European Union regarding market and product regulation, and the fact that consumers are becoming increasingly demanding when it comes to quality and environmental matters all mean that quality will play a key role in the years to come.

Apart from these technical considerations, new questions have now been raised about the quality criteria applied by consumers, particularly in the light of *Del Monte's* introduction of the "extra sweet" variety. Under the influence of what is available - and in particular *Del Monte Gold*, the flagship product in the market - consumers are increasingly favouring milder, sweeter pineapples, and there is a trend towards growing increasingly sweet pineapples. Experts claim that an over-sweet pineapple has no taste and that some acidity is needed to balance the sweetness. Good-quality pineapples should have a certain acidity level; Côte d'Ivoire supplies products that meet this criterion. Today's European consumers, however, largely through lack of information and awareness, prefer pineapples with a sweet, not very acidic taste. In the future, therefore, it will be vital to raise the awareness of consumers so that they can appreciate the quality of the fruit. In the meantime, in order to meet market expectations, it is necessary to offer a sweet-tasting, good-looking fruit.

The consumer judges the quality of a pineapple on the basis of:

- Its sweetness and
- Its appearance.

Regardless of whether or not these are sound criteria, producers should bow to market demands until consumers become more discriminating.

The external appearance of the fruit is another factor that allows the consumer to judge the quality of the pineapple. As consumers are ill-informed, they see the external appearance as a quality criterion, and so they will choose a fruit with no outer defects. Importers bow to consumers' demands and inevitably pass them on to producers.

- **Environment: Environment-friendly European Union regulations**

European environmental regulations are becoming very demanding and have to be taken seriously by exporters. The environmental standards not only affect the chemical fertilizers used, but also pesticides and packaging materials.

Packaging is subject to strict environmental standards in the European Union. As from 2001, between 50 and 65% of the weight of packaging must be recovered, pursuant to the European directive on packaging waste - Directive 94/62/EC (**source:** Official Journal, <http://europa.eu.int/eur-lex/en/oj/index.html>). Of this, 25% must be recycled, with a minimum of 15% by weight for each material used. These rules will apply to European markets but exporters must also meet these requirements as of now in order to ensure they have a place in the market.

6. Distribution

The importance of high-volume retailing.

In the tropical fruit sector, specialized importers act as an interface between the producing areas and the requirements of the retail distributors in the destination markets. They fall into several categories: straightforward importers, “one-stop” importers, brokers, the central purchasing departments of supermarket chains, and wholesale importers. In all cases, they need to be identified and agreements need to be reached with them so that they can become partners through whom producers can reach the market.

The large distribution chains play a major role in the distribution of pineapples in Europe. Supermarkets have a more important role with pineapples than with most other temperate-zone fruit. Some supermarket chains have developed their own import and distribution channels. However, most do not import directly from the country of origin but go through an intermediary, so that specialized importers are still the preferred interface for exporters.

Supermarkets dominate pineapple distribution in Europe and dictate their requirements. However, the preferred interface for small exporters is still the specialized importer.

Because of their size, the supermarkets and their central purchasing departments dictate the laws of the market. Importers must meet their needs if they wish to remain on their mailing lists. It is becoming more and more difficult to enter into bilateral negotiations and not be subject to the hard and fast demands of the large distributors. Moreover, maritime freight costs have increased by over 50% in two years and the large orders necessary in order to survive can only be provided by the large distribution chains.

There is a standard distribution network for fresh fruit in which each intermediary has a specific role (see the table in annex I). From producer to consumer, this distribution network is not very flexible, and only the big multinationals have their own distribution network. It is therefore important to identify all these intermediaries in order to have access to the markets in the countries of the European Union.

Unfortunately, the recovery in the European market does not benefit everyone. The major players in the pineapple business, such as the larger central purchasing departments, are seeing their market share increase, but the small specialized importers feel sidelined. It is mostly these small importers who deal with the developing countries, even though market access is more difficult for them. For example, 70% of the pineapples from Côte d'Ivoire are distributed today by five importers. These companies are involved in every stage of the supply process, from packaging to sale to the consumer.

Air transport is very expensive and only the big multinationals with their large distribution systems can afford it. The cost of maritime transport has increased in recent years and, as a way of circumventing this major obstacle, exporters are joining forces to send their products to the European market. In Ghana, for example, an association of 15 of the main exporters, the *Sea Pineapple Exporters of Ghana (SPEG)*, has chartered a ship for weekly deliveries to Europe.

7. Trade practices

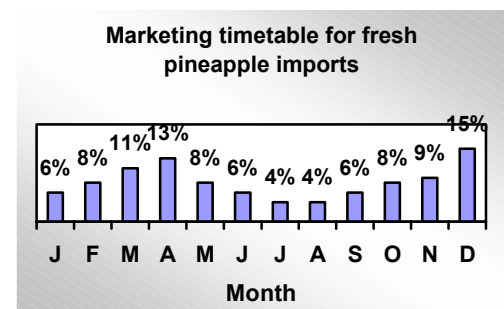
Payment by commission and seasonal marketing.

The marketing of tropical fruit in general requires more advertising and better organization than that of fruit from temperate climates, as tropical fruit is still something of a mystery to many consumers.

The marketing of fruit and vegetables over the Internet is evolving. Working jointly with *Fresh Info*, the International Trade Centre (ITC) has developed an Internet site (<http://www.fresh-marketplace.com>) where producers and buyers can meet one another. Other comparable sites are those of Fresh Produce Consortium (<http://www.freshproduce.org.uk>) or "World of Fruit" (<http://www.worldoffruit.com>). On this last site products can be promoted and transactions carried out for a commission, which pays for the site. The Internet is a tool that is well worth considering as it makes transactions easier and offers new opportunities for producers.

It is usual for exporters to receive a commission of between **6 and 8%**. For this reason, good relations with importers, wholesalers or traders and compliance with product quality requirements are crucial. This is true for all newcomers to the market, except for Extra Sweet pineapple exporters, who are given preference in negotiations because of the product's popularity. Once trust has been established with the others in the supply chain and the product has proved its potential, another rate of commission can be negotiated. In any case, the exporter must cover transport costs on a CIF basis, so that the products reach the importer with no extra charges.

The best times to enter the European market for pineapple are still the holidays at the end of the year (December) and Easter (March-April), although there are opportunities throughout the year. At these times pineapple sales are boosted by the fall-off in deliveries of local fruit and the marketing opportunities are greater.



Source: CTIFL.

8. Prices

Falling prices: negotiations to halt the downward spiral.

The price of pineapple, as a perishable fruit, fluctuates throughout the year, even though the supply is increasingly dependable. Since 1983, world prices dropped considerably, from 800 euros/tonnes in 1983 to 550 euros/tonnes in 1996 (**Source:** CTIFL). The trend eased around the beginning of the 1990s but pineapple prices were still falling. After 1996, the trend was reversed and prices rose with the revival of European consumer interest in pineapple and, particularly, the improved quality of the fruit. Nineteen hundred and ninety six was the year when the flagship product *Del Monte Gold* and the new "Gold" varieties were introduced into the European market, which confirms their importance in the market recovery. Since 1998, the trend has been reversed again, and in the years to come international prices for pineapple will at best stay at their current level.

The main reason for this fall in price is the growing competition in European markets. The larger number of producers and the wider product range are also factors, and some producers who cannot absorb this fall are bound to disappear.

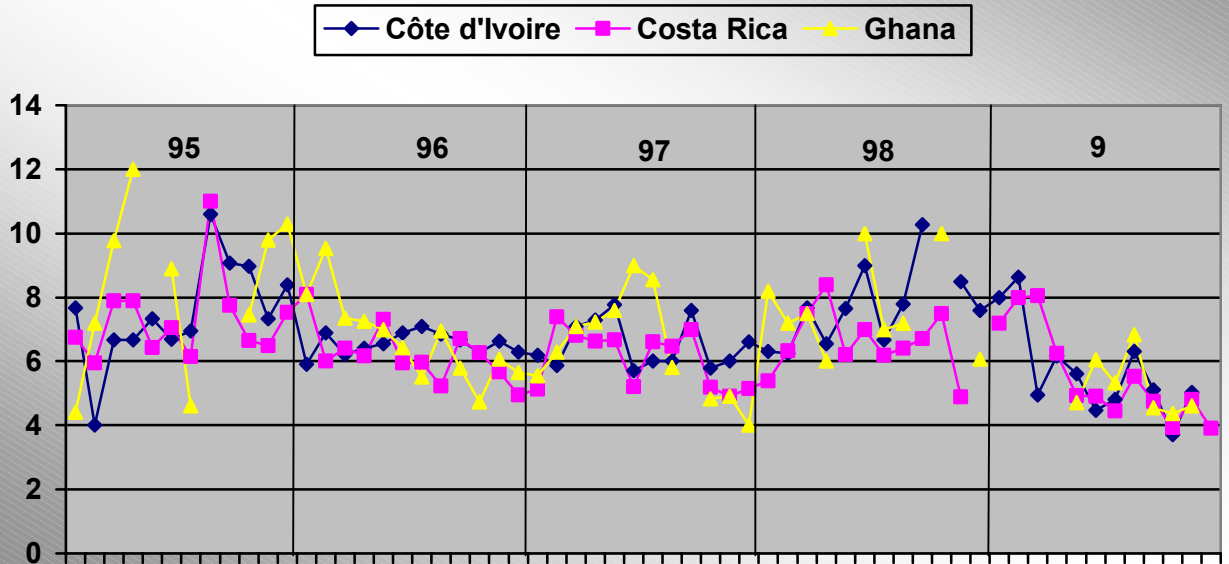
This fall has given rise to doubts about the economic viability of air transport for exports. Today, air transport can only be used for top-quality pineapples which can be marked up accordingly. The drop in prices is also disappointing when compared with world prices for other fruit products. The revenue generated by the pineapple industry has fallen or, at best, stagnated since 1983, whereas food prices in general have risen.

The fall in prices is worrying for everyone involved, despite the recovery in the market, and if it goes unchecked the outlook will be bleak for many of those in the pineapple business. Discussions are under way between producers, exporters and importers in an attempt to find solutions. In Côte d'Ivoire, for example, OCAB - the Central Office for Producers and Exporters of Pineapples and Bananas - began talks in 1999 with European importers in order to keep prices at a certain level.

Every week, ITC publishes pineapple import prices in 13 European countries, including, from the European Union, Belgium, Denmark, Finland, France, Germany, the Netherlands, Spain, Sweden and the United Kingdom. A monthly newsletter on fresh fruit and vegetables provides further information on products, markets, new legislation, new technology, statistics and charts on price changes (see the example for the British market below). All this information is available on subscription from the Market News Service (MNS) site, under the heading "Fresh fruit and vegetables" (<http://www.intracen.org/mns>).

Example of an MNS chart: United Kingdom

Average wholesale price for pineapple in the British market on import by the country of origin (in pounds sterling per kilogramme between 1995 and 1999)



Source: MNS.

9. Market prospects

Prospects for growth and opportunities but some producers are likely to suffer as a result of the growth in the number of producer countries.

If the fresh pineapple business is to have a bright future, especially in Africa, production needs to be better organized to ensure that it is not only competitive but also efficient. As far as demand is concerned, apart from the economic factors, it is essential to improve the packaging, transport and promotion of the product if the aim is bigger markets. Exporters should also form strategic alliances to ensure the better penetration and the broad and effective distribution of their products.

FAO forecasts that there will be a sustained increase in demand for fresh tropical fruit. Imports of fresh pineapple are expected to grow by 35% for the period 1995-2005.

In the European Union, this growth should be backed up by several factors:

- Cuts in customs duties for the last countries affected by them and existing preferential agreements;
- The trend towards healthy eating and the nutritional qualities of pineapple;
- The improved purchasing power of immigrants who are already familiar with these fruits.

Europe is likely to remain the world's largest import market; between now and 2005 shipments in this region should rise to 47% of the traded volumes of fresh tropical fruit.

There are some new production processes that could bring about changes in the market. For example, Ghanaian farmers have introduced organic production methods with reduced use of pesticides and chemicals but which mean that the fruit grows more slowly. Nevertheless, the improvement in quality makes up for the longer production times and should go a long way towards meeting the needs of the market. Pineapple quality has improved but is still not completely satisfactory, and this kind of production gives the sector a new image.

Real potential will be opened up by pursuing a promotional policy that combines attention to prices, consumer education and a marketing strategy based on a quality product. Providing the importer with better information about the fruit is part of this effort, but other actions can be undertaken by producers and exporters. Simple things such as an indication of ripeness, a "best before" date and, to a lesser extent, information on how to keep the fruit can help consumers make their choice and make their purchases less impulsive.

The growing range of producers should continue to be a key factor in the next decade. The export market will have to be divided up anew among the traditional suppliers and newcomers such as Togo, Thailand and South Africa. This expansion in producers will cause some players to drop out as there will not be room for everyone, but it also means that there are considerable prospects for the developing countries. Some Central and South American countries are extremely ambitious. Moreover, the wider range of grades and varieties available should both stimulate fresh pineapple sales among existing buyers and attract new buyers.

10. Certification (quality control) - the example of Côte d'Ivoire

The example of Côte d'Ivoire illustrates the procedures to be followed by intermediaries in the supply chain in order to ensure a competitive, high-quality fresh product, ready to be put on the market.

In the case of Côte d'Ivoire, the world's leading exporter, the quality of the pineapples is controlled systematically before they leave the country and when they arrive in the various European ports (Port Vendres, Antwerp, Dover, etc.).

Pre-shipment quality control takes several forms:

- At the loading station: internal and external inspection of the fruit, for ripeness, translucence and price index. One or two boxes are removed from every pallet;
- On the quayside: same inspection as that carried out in the loading station, with five boxes per pallet removed at random from approximately 8% of the pallets;
- Bureau Veritas (an official OCAB agency): inspection on the quayside of 20% of the pallets to check compliance with Ivorian standards for exported pineapples;
- In the laboratory: internal and external inspection of the fruit, for levels of acidity and ripeness index. One box per grade, per station.

For quality control in Europe, two pallets are checked for each grade, brand and loading station for each consignment. Two packages per pallet are checked, or a maximum of 100 packages per consignment. The internal and external qualities of the fruit, as well as price indexes (and sometimes levels of acidity), are systematically checked.

Inspection by suppliers upon arrival:

Filling in of suppliers' specifications check list, with details of the specific characteristics for each variety (grade, colour, ripeness, packaging, shipping).

Product certification:

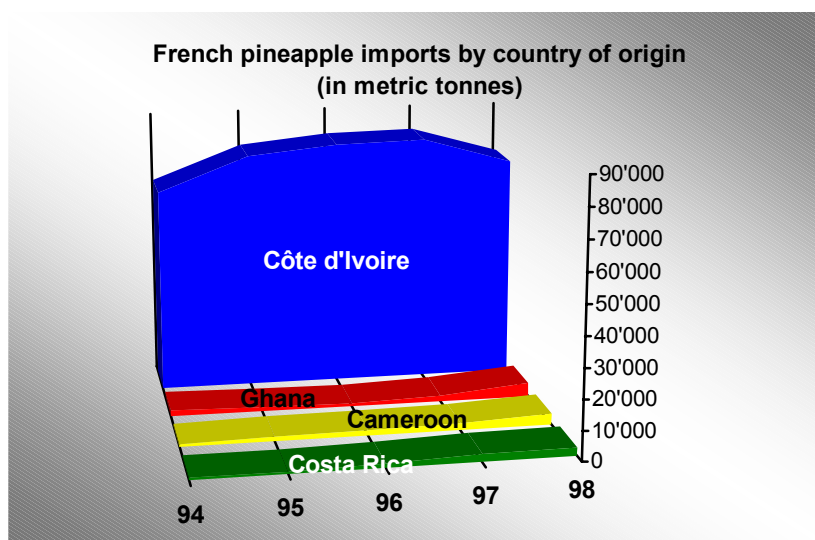
- Checking palletization, packaging and presentation, and package weight;
- Checking the main quality criteria: colour, grade, appearance, inspection of external defects and assessment of internal quality;
- Measurement of factors affecting quality: temperature, sugar levels, firmness index.

11. Selected Markets

A. FRANCE

European market for imports and distribution

France is by far the largest market in the European Union for fresh pineapple. A substantial portion of its imports, however, are re-exported to other European countries. Côte d'Ivoire has a virtual monopoly on pineapple supplies in France, which is explained by the historical and political links between the two countries. In 1998, Côte d'Ivoire's market share was 88.1% by value and it continues to grow each year, despite a slight fall in imports in 1998. Its imports still amounted to 74,300 tons in 1998. However, competitors such as Ghana (5.1%), Cameroon (4.4%) and Costa Rica (3.2%) are making considerable inroads into the French market, with average growth of respectively, 23.4%, 44.6% and 54.8% for the period 1994-1998. These figures confirm the trend for the market to favour a greater range of producer countries.



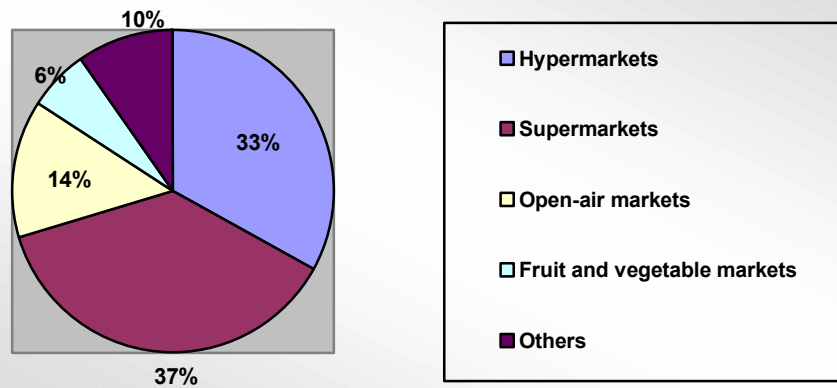
Source: COMTRADE 1999.

The growing number of suppliers has led to keener competition in the French market. Consumption grew rapidly from the early 1980s onwards and the slowdown in growth since 1995 appears to have been temporary, as economic circumstances in 1999 was conducive to a market recovery. Of all the countries of Europe, France still has the highest consumption of tropical fruit (particularly because of its large foreign community originating from tropical countries).

Over 95% of French households buy fresh pineapple, albeit not on a regular basis. Nevertheless, consumption per inhabitant has fallen sharply since 1990, from 1.35 kg per inhabitant to 1 kg in 1998. Impulse buying is very widespread in France, where 75% of the decisions to buy fresh pineapple are made in the shop. Grade B and C fruit are in greatest demand and account for 75% of the market. They always command the highest price per kilo on the ordinary market.

Supermarkets hold the lion's share of the market for fresh pineapple, with 70%. Interestingly, the dominance of high-volume retailers is more pronounced in the tropical fruit sector than in the fresh fruit sector in general (58%).

Pineapple distribution networks in France



Source: CTIFL.

Most imports of fresh fruit and vegetables pass through Rungis (to the south of Paris, <http://www.rungisinternational.com>), where most of the importers, wholesalers and central purchasing departments are based. It is an ideal place for making contacts and deals and has a sizeable infrastructure: exporters to France cannot afford to ignore it. In the pineapple sector, specialized traders control the import market and redistribution to other parts of the supply chain, including supermarkets. Most re-exports to other European Union countries come from Rungis, making this market a strategic entry point to the French and European markets.

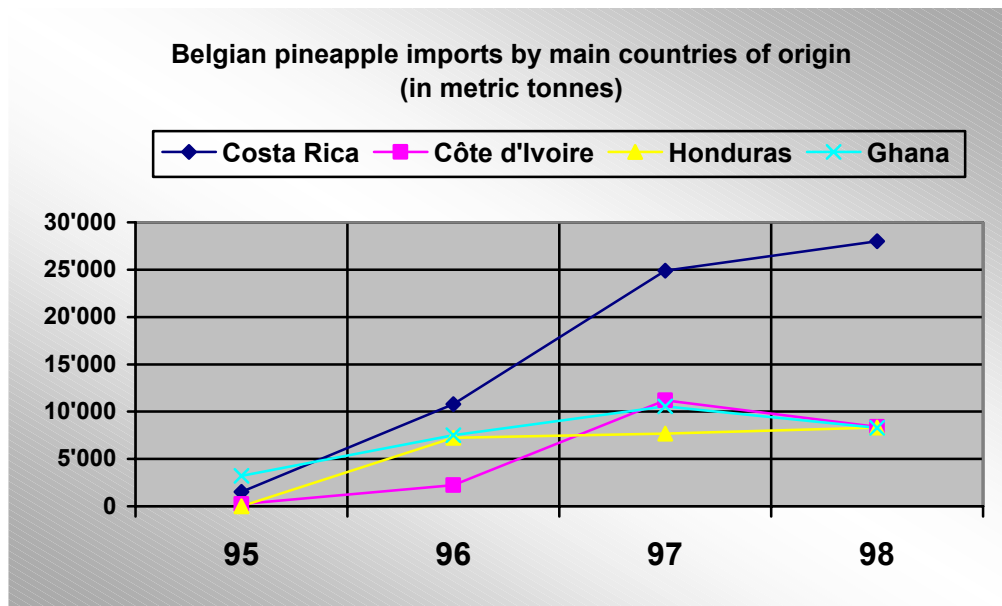
According to FAO, France should remain the most important importing country in the European Union until 2005. Fresh pineapple imports should reach 132,000 tons in 2005, although the annual growth rate is unlikely to exceed 2%.

B. BELGIUM

Second most important route into European markets

Belgium is, surprisingly, the second largest European importer of pineapples after France, with almost 20% of European imports. This is due not to heavy local consumption or demand linked to a processing industry but to the country's role as a European re-exporter. Belgium is particularly well endowed with transport facilities and a considerable volume of European imports of fresh fruit pass through the port of Antwerp, together with the ports of Rotterdam and Dieppe. Only 23% of the imported fruit is consumed by the Belgians; the rest going for export, making Belgium the fourth largest exporter in the world.

Belgium's main supplier is Costa Rica, with a 47.5% market share in 1998, thanks in particular to the introduction into the market of the *Del Monte Gold* product. Its other suppliers are Côte d'Ivoire (14.2%), Honduras (14.1%) and Ghana (14.1%), whose progress is slower than Costa Rica's but still encouraging. Exporting to Belgium gives indirect access to the markets in the Netherlands, Italy and the United Kingdom, which are the main markets for re-exports.



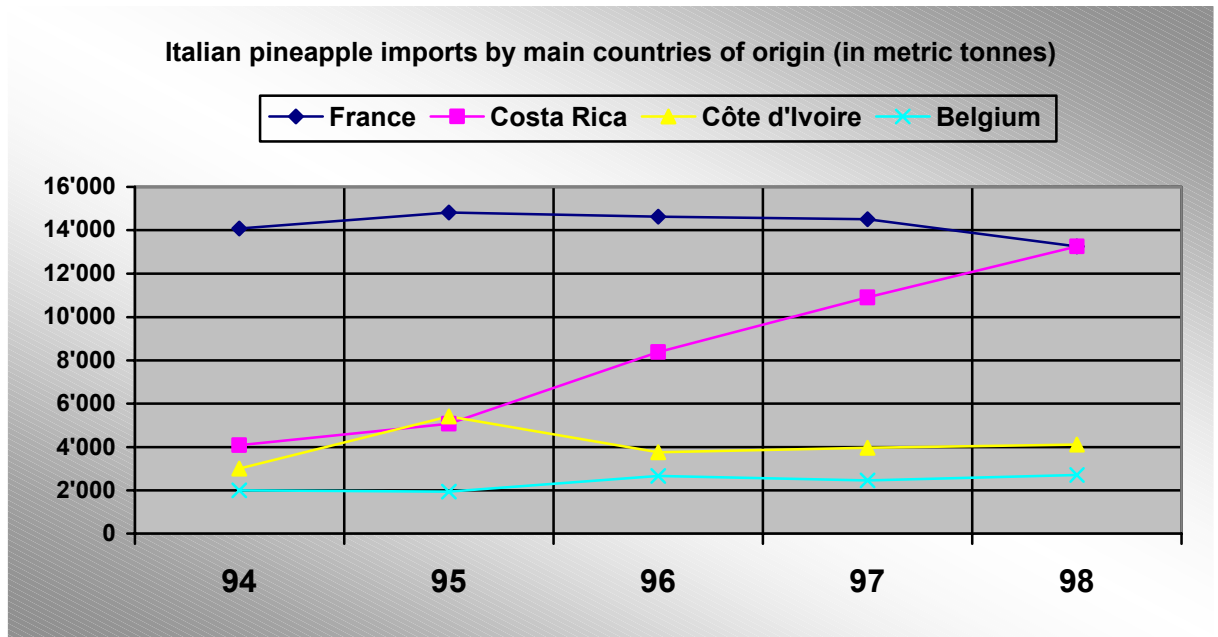
Source: Comtrade 1999.

Belgium's role as a route into European markets cannot be totally ignored, but it should not be a focus for growth for small producers in developing countries. It is actually the large export organizations that use this way to break into the European market. Large-scale growth should go through Belgium in the long term, but it is difficult to get into this market at the first go.

C. ITALY

Scope for small players and consumers

Italy is Europe's third largest pineapple importer, accounting for 12.5% of imports. Its main suppliers are France (with a 36.9% of market share in 1998), Costa Rica (35.3%), Côte d'Ivoire (10.9%) and Belgium (7.2%), which together account for over 90% of imports. Costa Rica and its flagship product, the *Del Monte Gold*, are climbing strongly with growth of 36.6% in the period 1994-1998, and its imports have overtaken those of Côte d'Ivoire, which used to dominate the market, although the imports from France are in fact indirect imports from Côte d'Ivoire.



Source: Comtrade 1999.

Almost 95% of the imports are for local consumption. Surprisingly, supermarkets account for only 30% of distribution, well below the European average. Consumers are still in the habit of buying in street markets (32%) or in specialized shops (37%). This trend is likely to change in the coming years, but until relatively recently only *Coop Italia* had a dedicated import service.

The outlook for pineapple consumption in Italy is good. It has risen continuously since 1993, reaching almost 0.8 kg per inhabitant in 1998. This is higher than the European average (0.65 kg per inhabitant) and puts Italy in second place in the table of European countries in terms of consumption. Purchases are mostly concentrated around Christmas, with 74% of sales being made in winter.

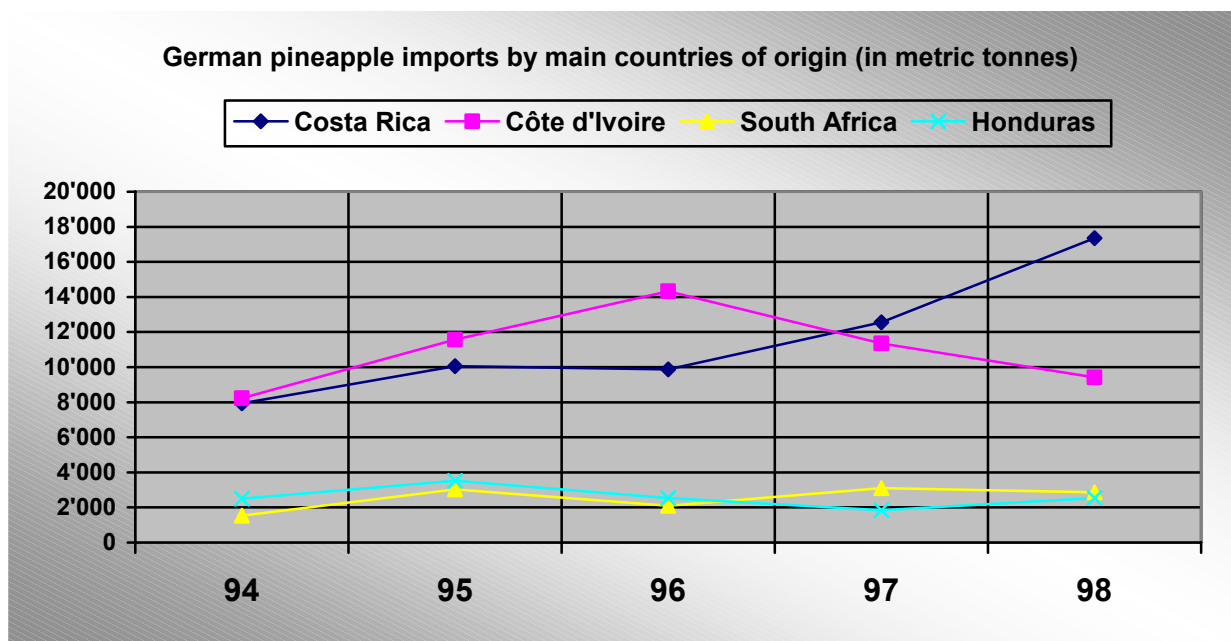
Direct imports are limited because of low volumes and the reluctance of Italian buyers to take import risks (involving payment and disputes). In fact, over 50% of Italian imports come from European Union countries, mostly France. Because of health-regulation problems, buyers prefer specialist importers, ripeners or panellists. Large groups are being formed, however, to make stronger direct contact with foreign suppliers in response to the need to broaden the product range.

Because of its distribution set-up - through street markets and greengrocers - the Italian market offers attractive opportunities for small producers and exporters from all around the world. Although this set-up is likely to change slightly in the future, for the moment it remains the best route for breaking into the market.

D. GERMANY

Disappointing consumption, but a market with strong potential

Germany is the fourth largest pineapple importer in Europe, accounting for 12.3% of imports by volume. Its main suppliers are Costa Rica and Côte d'Ivoire, with a market share of 46.9% and 25.4% respectively in 1998. Imports from South Africa have been growing steadily for several years, with an increase of 13.5% for the period 1994-1998. Costa Rica has also become the market leader here, displacing Côte d'Ivoire, with an increase of 19.6% over the same period. The outlook for the pineapple market is encouraging and imports should reach 50,000 tonnes in 2005, with growth of 3.7%, which is above the European average of 3.3%. This increase in imports is probably accounted for by greater volumes of fruit intended for re-export, however, as local consumption is falling.



Source: Comtrade 1999.

German consumption is disappointing given the market's strong potential. It fell from 0.5 kg per inhabitant in 1993 to 0.45 kg in 1998 and, although this is a small decline, it demonstrates a trend in the German market that is below the European average. Sales are concentrated in the summer period, when 70% of purchases are made, compared with 24% in winter.

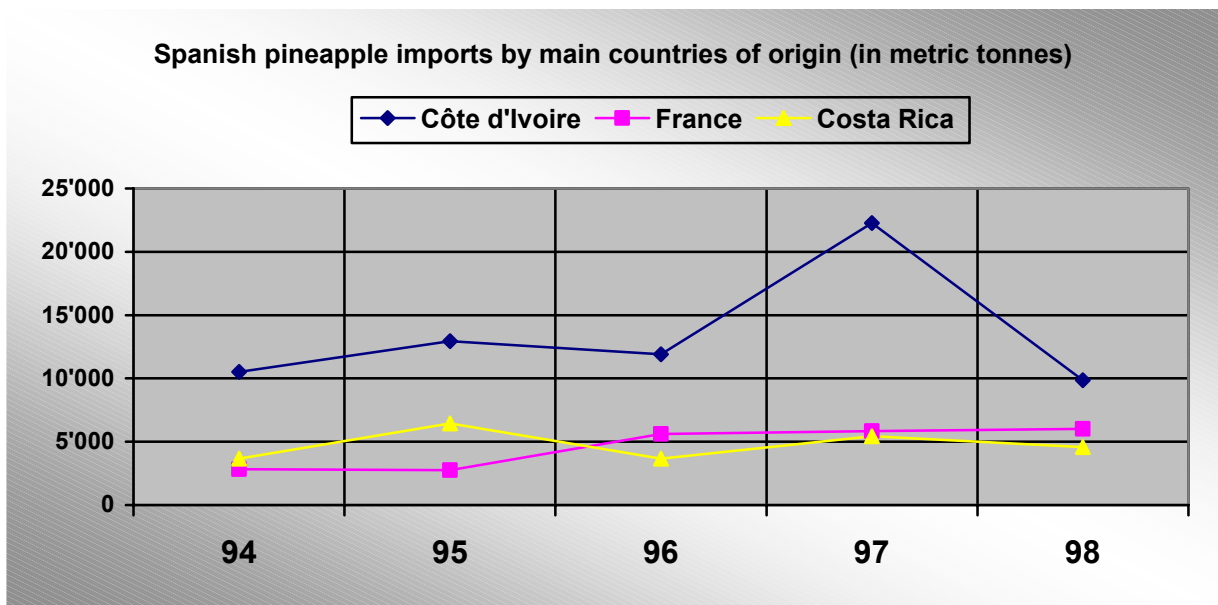
German consumers mostly prefer yellow pineapples, with low acidity, that do not turn brown inside. For this reason, imports tend to be limited to *Del Monte* pineapples transported by air. This trend means that access to the German market will be easier for producers of "Gold-type" sweet pineapples.

Tropical fruit distribution is dominated by high-volume retailers and the big chains. The leading chain is Edeka Gruppe, which has a 20% share of the German market, and it is followed by *Markant/Spar* (16.5%), *Aldi* (15.5%) and *REWE-Handelsgruppe* (12%). Despite the influence of these big chains on imports, they work through specialist importers who are totally integrated into their supply network. These traders remain the key contact points for new exporters to the German market.

E. SPAIN

Growing sector, but growth rate slowing

Spain is Europe's fifth largest importer, accounting for 7.3% of total imports in 1998. The significant feature of Spanish imports is that 44.6% originate from Côte d'Ivoire and 27.3% from France. Given that 90% of French imports and perhaps an even higher proportion of its re-exported fruit also originate from Côte d'Ivoire, the Spanish market is virtually totally supplied by Côte d'Ivoire. Costa Rica is making only very slight inroads, with a 2.8% increase in market share over the period 1994-1998, while all other countries are losing share. In addition, Spain is increasingly favouring imports via France (growth of 25.5% over the period 1994-1998), rather than direct imports. This trend could well spread beyond Spain in years to come. European Union requirements relating to non-tariff barriers, such as phyto-sanitary regulations, are very rigid, rendering import procedures very complex for European markets. As a result, Spain prefers to import pineapples from France, which come at a slightly increased price but meet European Union standards, without the hassle of conducting their own standard-checking procedures.



Source: Comtrade 1999.

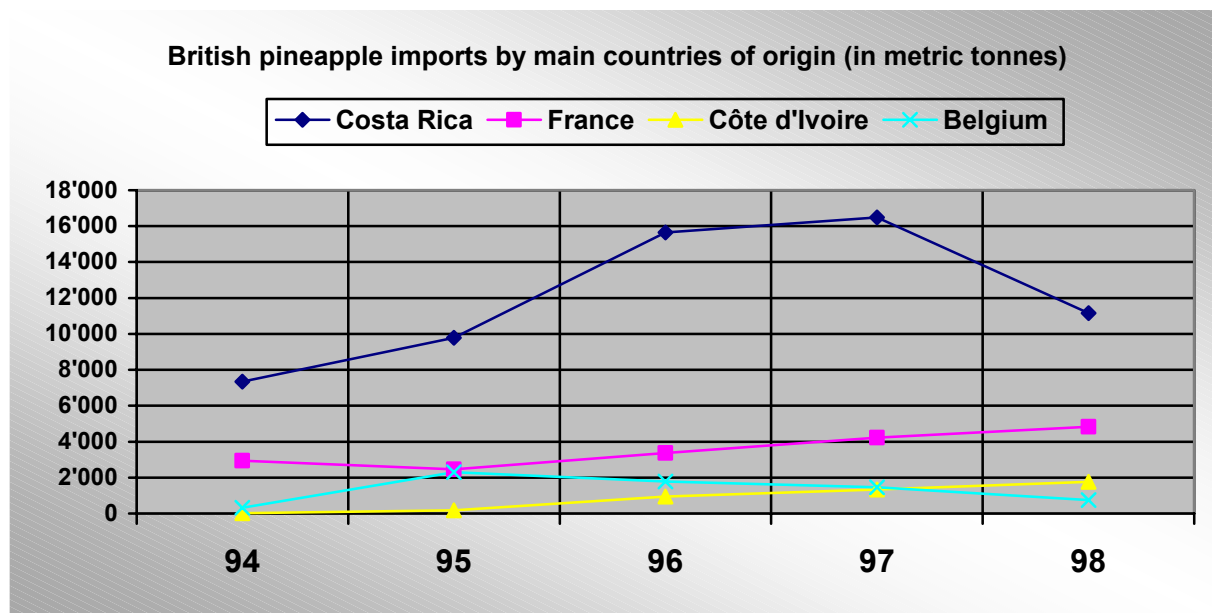
The pineapple market peaked in 1997 with 34,122 imported tonnes but has fallen off since 1998. Imports are unlikely to exceed 25,000 tonnes per year between now and 2005, with a growth rate of 0.1%. The main reason for this is stagnation in consumption over the last 20 years, the very slight increase in consumption not matching general European trends. For all that, consumption remains relatively regular, at 0.62 kg per person in 1998.

Spanish import and consumption levels are below expectation for a market of this size. The economic recovery and the development of this sector should, however, offer potential for newcomers in the business. The market's strong potential is attributable to its Latin traditions and its considerable size, but so far nothing is being done to develop this potential.

F. UNITED KINGDOM

Strong potential and growth of new sectors

The fresh pineapple market is not yet very developed in the United Kingdom, which accounted for less than 7% of European imports in 1998. Over 90% of its imports come from just two countries: Costa Rica, with direct imports or via Belgium, and Côte d'Ivoire with direct imports or via France. Costa Rica dominates this up-and-coming market. Prospects for growth are good, with an average increase of 13% over the period 1994-1998 for most suppliers. Imports are expected to exceed 30,000 tonnes in 2005, with an annual growth rate 3.4% higher than the European average.



Source: Comtrade 1999.

The British are not big pineapple buyers. With an annual consumption of 0.5 kg per person, they are below the European average (0.65 kg per person). Imports are on the increase but, as noted by the marketing manager of a large British fruit distributor, household penetration is weak at a mere 2.5% (number of homes buying pineapples). These figures paint an economically unsatisfactory picture but one with significant potential. Pineapple sales have never actually declined and imports grew by 10.9% over the period 1994-1998. This is due to the growing demand for pineapples from the fresh-fruit preparation industry. Not everyone knows how to prepare a fresh pineapple and major British distributors have stepped in to exploit this new market for prepared fresh fruit.

Supermarkets dominate the distribution of fresh pineapples, with 82% of the market share, representing a 4% growth in 1998. Wholesalers have a large share, which fluctuates between 15% and 20% according to the season. The London region is the main market, although pineapples are available all over the country.

The Central American variety *Del Monte Gold*, launched on the market in 1996, accounts for some 60% of the British fresh pineapple market today. While it has done well in Europe in general, it has been particularly successful in the United Kingdom, where its market share has grown by 25% since its launch. Cayenne Lisse "Gold" pineapples from West Africa (Côte d'Ivoire and Ghana) are also popular in the United Kingdom, having increased by 30% in 1999 to the detriment of the Champaka variety, which has lost its position as market leader and is now struggling to stay in the market at all. "Victoria" Small Queen pineapples from South Africa are also very popular. The quality factor is more important in the British market than in other European markets.

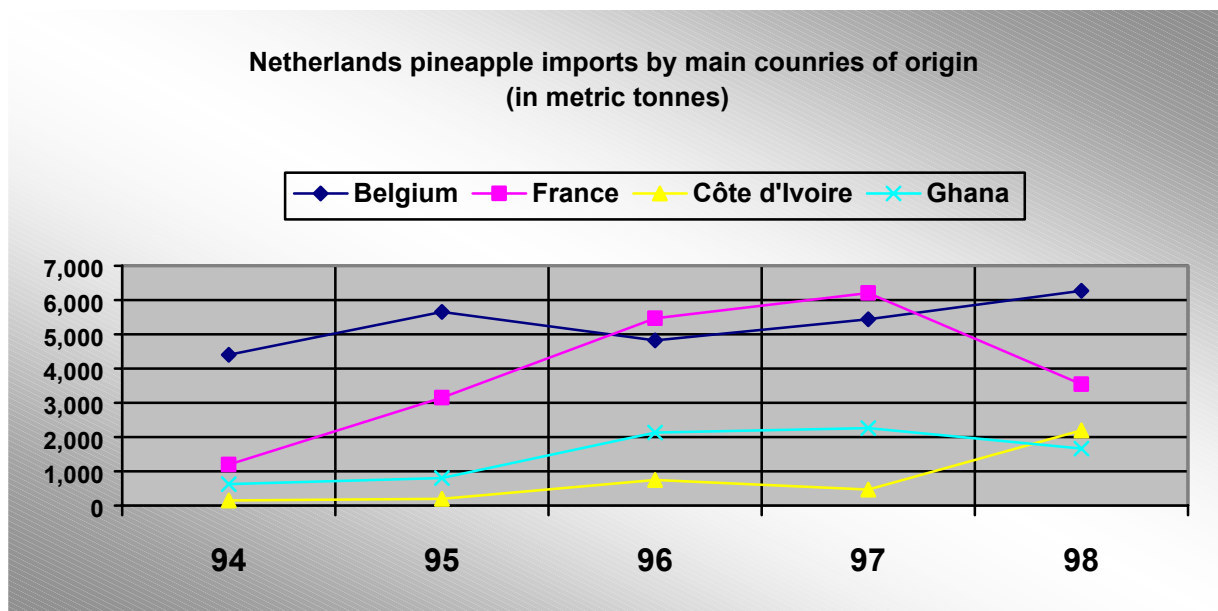
The British market is of particular interest because of its rapidly growing fresh fruit salad sector. The aim of this sector is not merely to supply the British market but also to cover the European

market. *Sainsbury's*, the United Kingdom's second largest supermarket chain, has invested heavily in this line and is already anticipating strong growth in these value-added products. *Sunblush* has taken over various companies specializing in the preparation of fresh fruit and its subsidiary company *Frutera* is a pineapple supplier. Development of this very promising sector provides a new opportunity for pineapples in the United Kingdom and possibly in Europe as a whole.

G. NETHERLANDS

Port of Rotterdam set to play a bigger role

The Netherlands accounts for 5.4% of European imports of pineapples. In 1998, its main suppliers were Belgium (38.4%) and France (21.7%) - as re-exporters - and Côte d'Ivoire (13.4%) and Ghana (10.2%). France, Côte d'Ivoire and Ghana are strengthening in the Netherlands' markets to the detriment of Belgium. Most imports do not come directly from the producing countries, which is surprising for a country with extensive commercial infrastructure, such as the port of Rotterdam. Recent investments in the port designed to enhance the fruit and vegetable trade should, however, change that scenario. Looking forward, Netherlands' imports should grow to some 30,000 tonnes in 2005, at a growth rate of 3.4%, slightly above the European mean.



Source: Comtrade 1999.

In 1998, the Netherlands was the seventh largest importer in Europe, but also the seventh largest exporter in the world. Some 85% of its imports are actually intended for re-exporting to two main countries, Germany and the Russian Federation, with other destination countries constituting only a negligible proportion. Importers generally deal with wholesalers and local retailers in the other countries. We should note, however, the growth in exports to Belgium (increase of 69% over the period of 1994-1998), which represents a new trend.

For some years now, pineapples have been transiting through the port of Antwerp, but this trend is likely to change and they will transit through Rotterdam's *FruitPort*, following investments to make it more competitive. Large-scale shipments of pineapples through Rotterdam are strengthening the Netherlands' status as a re-exporter and is providing cheaper pineapples for the Netherlands market.

Fruit Trade (<http://www.fruittrade-nl.com>) is a useful site for exports to the Netherlands market. It provides a complete list of importers, assistance for the development of trade relations with importers in the sector and a facility for promoting products over the Internet.

ANNEX I

DISTRIBUTION CHAIN

Function/Stage	Operator	
Production Harvest Transport to packing station	Producer	
Processing Sorting Washing, grading, classification Labelling Palletting	Producer-exporter	
Transport to place of shipment Transporter	Local transporter	
Shipment Administrative and legal procedures Loading	Transit	
International transport Sea and, less often, air transport	Major international companies	
Off-loading Administrative procedures	Transit	
Overland transport	Local transport by truck	
Placing on market	Importer	Wholesaler-importer
Wholesale stage	Wholesaler	Hypermarkets Supermarkets
Retail stage	Greengrocers Street markets	
Consumer		

ANNEX II

LDCs and ACP countries

Least Developed Countries (LDCs)

Afghanistan	Liberia
Angola	Madagascar
Bangladesh	Malawi
Benin	Maldives
Bhutan	Mali
Burkina Faso	Mauritania
Burundi	Mozambique
Cambodia	Myanmar
Cape Verde	Nepal
Central African Republic	Niger
Chad	Rwanda
Comoros	Samoa
Democratic Republic of Congo	Sao Tome and Principe
Djibouti	Sierra Leone
Equatorial Guinea	Solomon Islands
Eritrea	Somalia
Ethiopia	Sudan
Gambia	Togo
Guinea	Tuvalu
Guinea Bissau	Uganda
Haiti	United Republic of Tanzania
Kiribati	Vanuatu
Lao People's Democratic Republic	Yemen
Lesotho	Zambia

African, Caribbean and Pacific States (ACP)

Angola	Liberia
Antigua and Barbuda	Madagascar
Bahamas	Malawi
Barbados	Mali
Belize	Mauritania
Benin	Mozambique
Botswana	Namibia
Burkina Faso	Niger
Burundi	Nigeria
Cameroon	Uganda
Cape Verde	Papua New Guinea
Central African Republic	Rwanda
Chad	Saint Kitts and Nevis
Comoros	Saint Lucia
Congo	Saint Vincent and the Grenadines
Côte d'Ivoire	Samoa
Djibouti	Solomon Islands
Dominica	Sao Tome and Principe
Dominican Republic	Solomon Islands
Eritrea	Sengal
Ethiopia	Seychelles
Fiji	Sierra Leone
Gabon	Somalia
Gambia	South Africa
Ghana	Sudan
Grenada	Suriname
Guinea	Swaziland
Guinea-Bissau	United Republic of Tanzania
Equatorial Guinea	Togo
Guyana	Tonga
Haiti	Trinidad and Tobago
Jamaica	Tuvalu
Kenya	Vanuatu
Kiribati	Zambia
Lesotho	Zimbabwe

Annex III

EUROPEAN UNION IMPORTS OF FRESH OR DRIED PINEAPPLE (HS 080430) BY COUNTRY OF ORIGIN

(V: value in thousands of United States dollars; Q: quantity in metric tonnes; Share: market share (percentage); Trend 1994-1998)

ORIGINS	1994		1995		1996		1997		1998		Value		Quantity	
	V	Q	V	Q	V	Q	V	Q	V	Q	Share 98	Trend	Share 98	Trend
WORLD	293717	200845	296872	246361	390772	285340	425066	322540	387614	300516	100.0	9.6	100.0	11.4
COTE D'IVOIRE	137549	90636	137489	110329	177018	116886	185473	133815	162262	110742	41.9	6.5	36.9	6.1
COSTA RICA	49917	29507	46920	36891	66298	53224	97929	77178	99007	83141	25.5	23.4	27.7	32.4
FRANCE	32800	23982	37992	30575	52236	36543	53603	37751	49201	34819	12.7	12.2	11.6	10.0
GHANA	9230	7250	11978	11544	22510	17370	26620	21223	21105	19566	5.4	27.8	6.5	29.6
HONDURAS	5716	3931	6703	4478	14950	10396	12856	9857	13427	10972	3.5	26.6	3.7	32.9
BELGIUM-LUX	12205	8158	15179	10957	16386	11967	14537	10925	12615	10624	3.3	0.2	3.5	5.4
SOUTH AFRICA	3239	3110	3630	4736	3651	3951	4807	5039	4640	5334	1.2	10.5	1.8	12.1
CAMEROON	1221	822	1821	1569	3531	2421	4155	2825	6769	4658	1.7	53.0	1.6	50.1
NETHERLANDS	2322	2524	3110	3354	4224	4610	3459	3699	3498	4205	0.9	9.7	1.4	11.8
GERMANY	5331	3443	4871	4283	6113	5427	4596	3797	4474	4033	1.2	-4.0	1.3	2.0
REUNION	854	1944	1075	2766										
SPAIN	5691	3946	8082	5955	4772	4550	5965	5285	2566	2516	0.7	-17.3	0.8	-9.7
DOMINICAN REP.	8019	5408	8326	6123	12702	9207	2413	2003	2079	1945	0.5	-32.6	0.6	-27.1
THAILAND	855	1943	694	1546	590	1754	619	1400	799	1675	0.2	-2.5	0.6	-3.9
ITALY	856	680	718	689	1873	1434	2185	1178	1387	1383	0.4	23.1	0.5	21.6
NICARAGUA							1340	869						
MAURITIUS	94	132	246	515	213	471	244	520	342	661	0.1	29.3	0.2	38.2
TOGO	39	63	15	25	166	303	88	143	360	569	0.1	86.5	0.2	84.7
GUINEA	655	1021	564	1042	399	523	406	528	539	568	0.1	-7.0	0.2	-16.9
BENIN	838	1361	1215	2298	892	1448	322	505	350	506	0.1	-26.4	0.2	-29.5
ECUADOR	185	134	104	90	153	102	153	149	508	413	0.1	27.1	0.1	31.8
UNI. KINGDO	152	103	286	890	186	663	296	751	126	328	0.0	-3.3	0.1	24.0
CENT. AF. REP.	1	4	5	14	12	32	19	31	165	252	0.0		0.1	
COLOMBIA	69	113	459	397	201	208	14	65	191	184	0.0	-13.8	0.1	-7.9
KENYA	114	61	90	77	67	80	130	187	153	171	0.0	10.0	0.1	34.2
UNI.STATES AM.	49	62	36	69	65	73	61	107	84	138	0.0	17.3	0.0	22.7
BRAZIL	14575	9316	2958	2449	271	172	164	207	143	124	0.0	-70.3	0.0	-67.1

Source: Comtrade, 1999

Imports of fresh or dried pineapple (HS 080430) in the main European markets

(V: value in thousands of United States dollars; Q: quantity in metric tonnes; Share: market share (percentage); Trend 1994-1998)

IMPORTING COUNTRIES	ORIGIN	1994		1995		1996		1997		1998		Value		Quantity	
		V	Q	V	Q	V	Q	V	Q	V	Q	Share 98	Trend	Share 98	Trend
		FRANCE	WORLD	117761	77681	112079	91266	141651	92459	142875	95124	131892	89710	100.0	4.8
	COTE DIVOIRE	109300	68097	103713	79321	130688	82224	129673	82787	116205	74370	88.1	3.5	82.9	2.2
	GHANA	1409	1884	900	1389	677	939	1875	1946	3815	4562	2.9	31.3	5.1	23.4
	CAMEROON	1094	754	1799	1532	2585	1768	3368	2275	5730	3912	4.3	48.3	4.4	44.6
	COSTA RICA	637	638	548	654	1316	1476	2681	2529	2948	2878	2.2	59.2	3.2	54.8
BELGIUM-LUX	WORLD			12819	11823	56225	39054	82324	60295	72660	58990	100.0		100.0	
	COSTA RICA			857	1515	15933	10779	33285	24883	33444	28005	46.0		47.5	
	COTE DIVOIRE			311	225	3358	2241	16126	11204	11629	8402	16.0		14.2	
	HONDURAS			0	2	10195	7253	9684	7666	9595	8308	13.2		14.1	
	GHANA			4181	3213	11189	7524	14510	10566	9968	8299	13.7		14.1	
ITALY	WORLD	42126	29092	43547	34228	47917	35189	50833	37503	47487	37560	100.0	4.0	100.0	6.2
	FRANCE	19310	14075	19130	14810	20881	14624	20608	14512	19242	13847	40.5	0.7	36.9	-0.5
	COSTA RICA	7858	4088	6711	5067	12160	8389	14942	10892	15052	13243	31.7	23.4	35.3	36.6
	COTE DIVOIRE	3710	3006	6230	5415	5718	3761	5690	3959	5588	4112	11.8	7.6	10.9	3.2
	BELGIUM-LUX	2474	2000	2375	1936	3112	2667	3131	2449	3304	2703	7.0	8.9	7.2	8.7
GERMANY	WORLD	39000	29651	44298	39176	46879	37411	41050	34155	39603	37019	100.0	-0.5	100.0	3.1
	COSTA RICA	13941	7932	13441	10063	14526	9873	16498	12561	19503	17352	49.2	9.2	46.9	19.6
	COTE DIVOIRE	9723	8230	11568	11576	17122	14324	13219	11347	9859	9421	24.9	1.6	25.4	2.5
	SOUTH AFRICA	1271	1536	1872	3037	1715	2106	2842	3095	2270	2863	5.7	17.1	7.7	13.5
	HONDURAS	3476	2508	5474	3518	3968	2544	2813	1851	3702	2537	9.3	-5.3	6.9	-6.0
	GHANA	2890	2212	3706	3462	4708	3926	3737	3040	2726	2348	6.9	-1.1	6.3	-0.1
SPAIN	WORLD	26292	19328	28542	23250	30055	21838	34122	34622	29555	22080	100.0	4.2	100.0	6.9
	COTE DIVOIRE	13846	10514	14804	12932	16861	11914	18047	22260	14247	9856	48.2	2.6	44.6	4.2
	FRANCE	3730	2822	3264	2750	8247	5624	8621	5846	9298	6026	31.5	32.3	27.3	25.5
	COSTA RICA	5596	3669	9361	6442	4339	3672	5932	5446	4132	4584	14.0	-10.1	20.8	2.8
	CAMEROUN					130	91	453	317	903	584	3.1	*	2.6	*
UNI. KINGDOM	WORLD	22322	13851	20880	15800	25393	23484	31329	25229	30579	20727	100.0	10.9	100.0	13.6
	COSTA RICA	12616	7345	12284	9780	14432	15643	20184	16492	18714	11152	61.2	13.7	53.8	14.5
	FRANCE	4498	2941	3337	2467	5092	3376	5313	4222	7003	4834	22.9	14.5	23.3	16.5
	COTE DIVOIRE	28	18	231	180	1340	940	1721	1341	2038	1773	6.7		8.6	
	BELGIUM-LUX	591	325	3891	2292	2880	1788	2404	1462	1232	748	4.0	10.4	3.6	12.9
NETHERLANDS	WORLD	27825	15697	19628	15254	25648	19029	24838	18043	19249	16357	100.0	-4.9	100.0	2.5
	BELGIUM-LUX	7532	4405	7860	5658	6377	4827	7011	5441	7118	6275	37.0	-2.2	38.4	6.9
	FRANCE	1644	1196	3651	3149	7546	5467	8636	6203	4837	3544	25.1	35.2	21.7	33.0
	COTE DIVOIRE	253	146	232	197	1194	745	571	467	2108	2200	11.0	67.3	13.4	87.6
	GHANA	1128	624	973	800	2959	2135	2919	2266	1914	1661	9.9	24.1	10.2	35.0

Source: Comtrade, 1999

Annex IV

Useful Addresses

INTERNATIONAL ORGANIZATIONS OF STANDARDIZATION

International Standardisation Institute (ISO)

Rue de Varembe 1
P.O.Box 56
CH-1211 Geneva 20
Switzerland
Tel: (41) 22 7490111
Fax: (41) 22 7333430
E-mail: central@iso.ch
Internet: <http://www.iso.ch>

UN/ECE

Trade Division - Agricultural Standards Unit
Palais des Nations
1211 Geneva 10
Switzerland
Tel: (41) 22 9172457
Fax: (41) 22 9170037
E-mail: hans.hansll@unece.org

Joint FAO / WHO Food Standards Programme

CODEX Alimentarius Commission ESN Division
Via delle Terme di Caracalla
00100 Rome
Italy
Tel: (39) 06 57054390
Fax: (39) 06 57054593
E-mail: codex@fao.org
Internet: <http://www.fao.org>

EUROPEAN UNION

Comité Européen de Normalisation (CEN)

Third Countries Unit
Rue de Stassart 36
B-1050 Bruxelles
Belgium
Tel: (32) 2 5500811
Fax: (32) 2 5500819
E-mail: infodesk@cenorm.be
Internet: <http://www.cenorm.be>

SGS European Quality Certification Institute

E.E.V.S.
P.O.Box 200
3200 AE Spijkenisse

The Netherlands
Tel: (31) 181 693750
Fax: (31) 181 693582

BELGIUM

Belgisch Instituut voor Normalisatie (IBN)

Avenue de la Brabançonne 29
1000 Bruxelles
Belgium
Tel: (32) 2 7380105
Fax: (32) 2 7334264
E-mail: info@ibn.be
Internet: <http://www.ibn.be>

FRANCE

Association Française de Normalisation (AFNOR)

Tour Europe
92049 Paris la Défense Cedex
France
Tel: (33) 142915555
Fax: (33) 142915656
E-mail: webmaster@email.afnor.fr
Internet: <http://www.afnor.fr>

GERMANY

Deutsches Institut für Normung eV (DIN)

Burggrafenstrasse 6
10787 Berlin
Germany
Tel: (49) 3026010
Fax: (49) 3026011263
Internet: <http://www.din.de>

ITALY

Ente Nazionale Italiano di Unificazione (UNI)

Battistotti Sassi 11B
20133 Milan, Italy
Tel: (39) 2 700241
Fax: (39) 2 70106106
E-mail: uni@uni.com
Internet: <http://www.unicei.it>

NETHERLANDS

Nederlands Normalisatie Instituut (NNI)

P.O.Box 5059

2600 GB Delft

The Netherlands

Tel:(31) 15 2690390

Fax: (31) 15 2690190

Internet: <http://www.nni.nl>

SPAIN

Asociación Española de Normalización y Certificación (AENOR)

Calle Genova 6

28004 Madrid

Spain

Tel: (34) 14326036

Fax: (34) 13103695

Internet: <http://www.aenor.es>

Email:info@aenor.es

UNITED KINGDOM

British Standards Institution (BSI)

British Standards House

389 Chiswick High Road

London W4 4AL

United Kingdom

Tel: (44) 20 89969001

Fax: (44) 20 89967001

E-mail: info@bsi.org.uk

Internet: <http://www.bsi-global.com>

PRICE INFORMATION SOURCES

Market News Service

International Trade Centre UNCTAD/WTO (ITC)
Palais des Nations
1211 Geneva 10
Switzerland
Tel: (41) 22 7300111
Fax: (41) 22 7300572
E-mail: mns@intracen.org
Internet: <http://www.intracen.org/mns>

FRANCE

Services des Nouvelles des Marchés (SNM)

3, rue Barbet de Jouy
75007 Paris
France
Tel: (33) 149554575
Fax: (33) 145517302
E-mail: cat@snm.agriculture.gouv.fr
Internet: <http://www.snm.agriculture.gouv.fr>

GERMANY

Zentrale Markt- und Preisberichtsstelle für Erzeugnisse der Land-, Forst- und Ernährungswirtschaft GmbH (ZMP)

Rochusstrasse 2
53123 Bonn
Germany
Tel : (49) 22897770
Fax : (49) 2289777300
E-mail : info@zmp.de
Internet : <http://www.zmp.de>

PROFESSIONAL TRADE ASSOCIATIONS

EUROPEAN UNION

**European Association of
Fresh Produce Importers
CIMO**

Avenue de Broqueville 272
P.O.Box 4
1200 Brussels, Belgium
Tel: 32 2 7771580 - Fax: 32 2 7771581
E-mail: sectretariat@cimbo.be
Internet: <http://www.cimbo.be>

EUCOFEL

**European Union of the Fruit and Vegetable
Wholesale, Import and Export Trade**

29, rue Jenneval
1000 Brussels, Belgium
Tel: 32 2 7361584 - Fax: 32 2 7321747
E-mail: eucofel.fruittrade.org@skynet.be

COLEACP

**Association interprofessionnelle de promotion
des fruits tropicaux, légumes hors saison,
fleurs, de la filière ACP-UE**

5, rue de la Corderie, Centra 342
94586 Rungis Cedex, France
Tel: 33 1 41 800210 - Fax: 33 1 41 800219
E-mail: coleacp@coleacp.org
Internet: <http://www.coleacp.org>

ASEIMPAC

**Association Européenne des Importateurs d'Ananas
de Côte d'Ivoire**

643, r. de la Tour Administrative-Centra 248 94576
94576 Rungis Cedex - France
E-mail: info@aseimpac.com
Internet: <http://www.subweb.com/aseimpac>

BELGIUM

**National Fruit and Vegetables Importers, Exporters
and Wholesalers Union**

Quai des Usines 112-154
1000 Brussels, Belgium
Tel: 32 2 2159050
Fax: 32 2 2156863

FRANCE

**Association Française des Comités Economiques
Agricoles de Fruits et Légumes -AFCOFEL**

4 bis rue de Cléry
75002 Paris
Tel: 33 1 44823000
Fax: 33 1 44853001

**Fédération Française des Importateurs de Fruits et
Légumes - FFIL**

Rue de la Corderie 3, Centra 403
94616 Rungis Cedex
Tel: 33 1 45607280
Fax: 33 1 46753631
E-mail: ffifl.fruitimportersfed@wanadoo.fr

**Association Interprofessionnelle des Fruits et
Légumes Frais - INTERFEL**

Rue du Faubourg Poissonnière 60
75010 Paris
Tel: 33 1 49491515
Fax: 33 1 49491516
E-mail: infos@interfel.com
Internet: <http://www.interfel.com>

GERMANY

**Zentralverband des Deutschen Früchte-
Importe und Grosshandels E.v.**

Association allemande d'importateurs et de
distributeurs de fruits
Schedestrass 11
53113 Bonn, Germany
Tel: 49 228911450
Fax: 49 228213265
Email: zentralverband.fruchtimport@t-online.de

ITALY

Associazione Nazionale Exportatori Importatori Ortofrutticoli e Agrumari ANEIOA

Via Sabotino 46
00195 Rome
Tel: 39 6 37515147
Fax: 39 6 3723659
E-mail: aneoiarm@tin.it
Internet: <http://www.web-tin.it/aneioa>

NETHERLANDS

The Greenery International B.V

Organisation pour le Marketing et la Vente
P.O.Box 70588
5201 CZ Hertogenbosch
Tel: 31 73 6499999
Fax: 31 73 6494400
E-mail: greentime@thegreenery.com
Internet: <http://www.thegreenery.com>

Nederlandse Vereniging voor de Fruits en Groentenimporthandel

Bezuidenhoutseweg 82
2594 AX La Haye
Tel: 31 70 3832870
Fax: 31 70 3475253
E-mail: import@fruittrade-nl.com

SPAIN

Federación Española de Asociaciones de Productores Exportadores de Frutas - FEPEX

Miguel Angel n°13 - 4°
28010 Madrid, Spain
Tel: 34 1 3191050
Fax: 34 1 3103812
E-mail: fepex@fepex.es
Internet: <http://www.fepex.es>

UNITED KINGDOM

Fresh Produce Consortium

266-270 Flower Market
New Covent Garden Market
Londres SW8 5NB
Tel: 44 (0)20 6273391
Fax: 44 (0)20 4981191
E-mail: info@freshproduce.org.uk
Internet: <http://www.freshproduce.org.uk>

TRADE FAIRS AND PUBLICATIONS

FRANCE

Salon International de l'Alimentation (SIAL)

1 rue du Parc

92300 Levallois-Perret

France

Tel: 33 1 49685498 - Fax: 33 1 47313782

E-mail: sial@sial.fr

Internet: <http://www.sial.fr>

Fruitrop CIRAD-FLHOR

12 Square Pétrarque

75116 Paris

Tel: 33 1 53702165 - Fax: 33 1 53702170

E-mail: denis.loillet@cirad.fr

Internet: <http://www.cirad.fr>

GERMANY

Fruit Logistica 2001 (10-12 January 2001)

Hesse Berlin Gmbh

Messedamm 22

14055 Berlin

Tel: 49 30 30380 - Fax: 49 30 30382325

Internet: <http://www.fruitlogista.de>

Anuga Food Tech (13-17 October 2001)

Messeplatz 1

50679 Cologne

Tel: 49 221 8210 - Fax: 49 221 8212574

E-mail: info@kolnmesse.de

Internet: <http://www.koelnmesse.de>

Fruchthandel

Dr Wolf Verlag, P.O. Box 105551

40046 Düsseldorf

Tel: 49 211 991040 - Fax: 49 211 663122

E-mail: fhmagazin@aol.com

ITALY

Italia Fruit (Fruitnet Publication)

Giordano & Co. S.a.S.

Via Amendola, 10/1

41050 Montale Rangone

Tel: 39 059 531481 - Fax: 39 059 531481

E-mail: agroter@tsc4.com

Internet: http://212.134.177.2/fruitnet_italy/

NETHERLANDS

A.G.F. Totaal (17 - 19 September 2001)

Ahoy' Rotterdam

P.O.Box 5106

3008 AC Rotterdam

Tel: 31 10 2933300 - Fax: 31 10 2933399

Vakblad AGF

P.O: Box 90410

2509 LK

The Hague

Tel: 31 70 3850500 - Fax: 31 70 3850220

E-mail: vakblad@euronet.nl

Groeten en Fruit

Elsevier bedrijfsinformatie

P.O. Box 4

7000 BA Doetinchem

Tel: 31 314 349574 - Fax: 31 314 338939

Primeur

P.O. Box 2140

4460 MC Goes

Tel: 31 113 230621 - Fax: 31 113 230865

E-mail: primeur@zeelandnet.nl

SPAIN

Alimentaria (March 2002)

Miller Freeman

Diagonal 119, Bajos

08015 Barcelona

Tel: 34 934521102 - Fax: 34 93 4516637

E-mail: mcarreras@unmf.com

Internet: <http://www.alimentaria.com>

EUROFUIT 2000 (26-30 September 2001)

Lleida

Contact: Patricia Boerger

Tel: 34 973 70 5000 - Fax: 34 973 20 2112

E-mail: fira@firadelleida.com

Internet: <http://www.firadelleida.com>

Valencia Fruits

Hernan Cortés

46004 Valence

Tel: 34 963525301

Fax: 34 963525752

UNITED KINGDOM

IFE (25 - 28 March 2001)

11 Manchester Square Fresh RM
London W1M 5AB
Tel: +44 (0)20 7 501 3707
Fax: +44 (0)20 7 4986472
E-mail: enquiry@freshrm.co.uk
Internet: <http://www.freshrm.co.uk>

Eurofruit

Market Intelligence Ltd
1 Nine Elms Lane
London, SW8 5NQ
Tel: 44 (0)20 501 3716
Fax: 44 (0)20 498 6472
E-mail: info@eurofruit.fruitnet.com
Internet: <http://www.fruitnet.com>

Fresh Produce Journal

Lockwood Press Ltd.
1 Nine Elms Lane
London, SW8 5NN
Tel: 44 20 7 6226677
Fax: 44 20 7 7202047
E-mail: info@fpj.co.uk
Internet: <http://www.freshinfo.com>

TRADE PROMOTION BODIES AND OTHER USEFUL CONTACTS

INTERNATIONAL

International Trade Centre UNCTAD/WTO (ITC)

Palais des Nations,
1211 Geneva 10, Switzerland
Tel: 41 22 7300111
Fax: 41 22 7334439
E-mail: itcreg@intracen.org
Internet: <http://www.intracen.org>

European Commission

Directorate General for External Relations
200, rue de la Loi
1049 Brussels, Belgium
Tel: 32 2 2991111
Fax: 32 2 296931
Internet: <http://www.europa.eu.int>

International Chamber of Commerce

38, cours Albert 1er
75008 Paris, France
Tel: 33 1 49532828
Fax: 33 1 49532942
Internet: <http://www.worldchambers.com>

NETHERLANDS

Centre for Promotion of Imports from developing countries (CBI)

P.O.Box 30009
3001 DA Rotterdam
Tel: 31 10 2013434
Fax: 31 10 4114081
E-mail: cbi@cbi.nl

Central Bureau of Statistics (CBS)

P.O. Box 4000
2270 JM Voorburg
Tel: 31 70 3373800
Fax: 31 70 3877429
E-mail: infoserv@cbs.nl
Internet: <http://www.cbs.nl>

EUROPEAN UNION IMPORTERS

BELGIUM

Belbana (NV)

Moerkerksesteenweg 20
8310 Brugge
Tel: 32 50 374100
Fax: 32 50 374151
E-mail: pedro@belbana.com
Internet: <http://www.belbana.com>
Contact: M. Baltodano Pedro

Ets Gossens & Fils S.A.

CEI quai des Usines 112-154,
Magasin 44-45
1000 Brussels
Tel: 32 221 69255
Fax: 32 221 62946
E-Mail: info@primgo.be

Special Fruit NV

Wenenstraat 6
2321 Meer
Tel: 32 331 70660
Fax: 32 331 50843
E-mail: mail@specialfruit.be

Sipef

Kasteel Calesberg
2900 Schoten
Tel: 32 36419700
Fax: 32 36419722

Star Fruit Company

Quai des Usines 112-154, Magasin 35-36
1000 Bruxelles
Tel: 32 224 20876
Fax: 32 224 21208
E-mail: starfruit@euronet.be

Van Dijk Belgium (NV)

Fortsesteenweg 46
2860 St Katelijne Waver
Tel: 32. 15 556561
Fax: 32 15 556566
Contact: M. van de Castele Carlos

FRANCE

Agrisol

20Av Schumann
13002 Marseille
Tel: 33 4 91994160 - Fax: 33 4 91918071
Contact: M. Giner

Agruprim

8, Av. De la Côte d'Ivoire
Fruileg 551
94581 Rungis Cedex
Tel: 33 1 56301010 - Fax: 33 1 45600922
Contact: M. Espana, Mme Bertram

Banagrumes SA

5 rue de Montpellier
Fruileg 332 Bât D2
94622 Rungis Cedex
Tel: 33 1 45122840 - Fax: 33 1 45605234
E-mail: banagrumes@gofor.net
Internet: <http://www.fruit-distribution.com>
Contact: M. Alarcon Alain

Canavese SA

CD2 La Muscatelle B.P. 161
13675 Aubagne Cedex
Tel: 33 4 91434445 - Fax: 33 4 91270110
E-mail: canavese@wanadoo.fr
Internet: <http://perso.wanadoo.fr/canavese>
Contact: M. Blanchard Gilles

Cie Fruitiere Import

33 Bd Ferdinand de Lesseps
13014 Marseille
Tel: 33 4 91101710 - Fax: 33 4 91101700
E-mail: cfimar@wanadoo.fr
Contact: M. Gilot

Nardone et Fils S.A.

2/6 rue de Carpentras, Fruileg 301
94612 Rungis Cedex
Tel: 33 1 46860484 - Fax: 33 1 46865261

PONOMA

21, rue du Pont Neuf
75039 Paris Cedex 01
Tel: 33 140283000 - Fax: 33 140265895
Contact: Mme Durand

Rima France

3 Rue de la Corderie, Centra 333
94538 Rungis
Tel: 33 141730303 - Fax: 33 141730300
E-mail: rifa@francenet.fr
Internet: <http://www.rifafrance.com>
Contact: M. Frowein Richard

SIIM

70 rue de Chateaurenard
Fruileg 268
94582 Rungis Cedex
Tel: 33 145122960
Fax: 33 145600129
Contact: M. Omer-Decugis Louis

GERMANY

Atlanta Group

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INFORMATION SOURCES

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