EU MARKET SURVEY 2003

FRESH FRUIT AND VEGETABLES

CENTRE FOR THE PROMOTION OF IMPORTS FROM DEVELOPING COUNTRIES

EU MARKET SURVEY 2003

FRESH FRUIT AND VEGETABLES

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Update of ‘EU Market Survey Fresh Fruit and Vegetables’ (2002) and ‘EU Strategic Marketing Guide Fresh Fruit and Vegetables’ (2001).

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REPORT SUMMARY

This EU market survey profiles the EU market for fresh fruit and vegetables and consists of three parts. Part A provides EU market information, highlighting the major national markets within the EU and providing statistical market information on consumption, production and trade, and information on trade structure. The selected EU markets are: The Netherlands, Germany, France, the UK, Italy and Spain. Part B covers the requirements of the EU market in terms of product quality, packaging, labelling and social, health & safety and environmental standards.

After having read Parts A and B, it is important for an exporter to analyse the target markets, sales channels and potential customers in order to formulate marketing and product strategies. Part C subsequently aims to assist (potential) exporters in developing countries in their export-decision-making process.

Exporters are advised to consult CBI's Export Planner, a guide that shows how to set up export activities systematically, before using the marketing guidelines in this publication.

Consumption
The fruit and vegetable assortment for the European consumer includes an enormous variety of products from all over the world, delivered on the basis of the supply calendars of the grower and the seasonal supply of the European home-grown production. According to Euromonitor data, total EU consumption of fresh fruit amounted to 25 million tonnes in 2001, while vegetable consumption (including potatoes) amounted to around 29 million tonnes. Italy, Germany and France, together accounting for around half of total consumption, dominate the EU market for fresh fruit and vegetables. The market for fresh fruit and vegetables is saturated and consumption levels in 2001 were about the same as in the previous years.

Characteristics of the present-day European consumer:
- Health food
- Organic food
- Food safety, quality and environment-consciousness
- Convenience
- Exotics

Production in the EU
Most countries in the EU have extensive domestic production of fruit and vegetables. However, the temperate climate of northern Europe limits the production of various fruit and vegetables. Production in greenhouses partly compensates for the restrictive climatic conditions, but, for bananas and a wide range of exotics, there exists a big and developing market, which cannot, or only insufficiently, be supplied by domestic (European) production. EU production is substantial for some products like citrus fruit and apples. However, at the same time the production is season-bound, offering opportunities for suppliers from outside the EU to supply the European market in its off-season periods, although improved storage and distribution has enabled producers to reduce the negative influence of the seasons.

The total EU production of fresh fruit amounted to almost 31.3 million tonnes in 2001, a decrease of 6 percent since 1999. The leading EU producers of fruit are by far Italy (10.8 million tonnes) and Spain (10.8 million tonnes). Total EU production of fresh vegetables amounted to around 50.5 million tonnes in 2001, representing an increase of 3 percent compared to 1999. Also in the case of fresh vegetables, Italy (14.7 million tonnes) and Spain (12 million tonnes) are the leading supplying EU member countries.

Imports
Fruit
In 2001, total imports by EU member countries of fresh fruit amounted to more than € 14.4 billion, representing an increase of 9 percent since 1999. In terms of volume, imports by EU member countries decreased by 2 percent, reaching 18.5 million tonnes in 2001. Imports from outside the EU into the member states (so-called extra-EU imports) amounted to € 5.3 billion / 7.8 million tonnes.

Germany is the major market for fresh fruit accounting for 23 percent of total imports (in value) by EU member countries in 2001, followed by the United Kingdom (17%) and France (14%).

The leading imported fresh fruit product within the fresh fruit category is bananas, accounting for 21 percent of total fruit imports (in value) by EU member countries. Other key products are apples (11%), grapes (10%), oranges (9%) and mandarins (7%). In 2000, the leading supplier of fresh fruit to the EU was Spain, supplying 20 percent of imports (in value) by EU member countries, followed by Italy (10%), The Netherlands (7%), France (7%) and Belgium (7%).

More than seventy countries from all continents are responsible for the immense product flow directed at the European countries. In 2001, developing countries supplied the EU with 35 percent of the total imported value of fresh fruit. Developing countries play a major role in the supply of papayas, tamarinds & lychees, pineapples, bananas, dates, guavas & mangoes and passion fruit to the EU. In 2001, these countries supplied more than half of total imports (in value) by EU member countries of these products. The leading developing countries exporting fresh fruit to the EU are South Africa and Latin-American countries like Costa Rica, Ecuador, Chile, Colombia, Argentina and Brazil. Other leading non-Latin-American countries are Côte d'Ivoire, Turkey, Morocco and Cameroon.

Vegetables
Although smaller than fruit, the imports of fresh vegetables by EU member countries still amounted to € 7.8 billion / 8.7 million tonnes in 2001. Compared to 1999, this represented an increase of 18 percent in terms of value and 6 percent in terms of volume.

The largest fresh vegetable importing EU country was Germany, accounting for 32 percent of total imports by EU member countries (in terms of value) in 2001, followed by the United Kingdom (22%) and France (14%) and The Netherlands (9%). The leading supplier of fresh vegetables to the EU was by far Spain, supplying 34 percent of the total imported value.

The leading imported fresh vegetable product is tomato, accounting for a quarter of total vegetable imports by EU member countries. Other leading products are capsicum/pimienta (13%), lettuce/chicory (11%) and onions (9%).

Whereas Latin-American countries dominate the extra-EU import of fruit, African countries are important extra-EU suppliers of vegetables in particular to France, Italy and the UK. Nevertheless, vegetable imports are, to a larger extent than fruit imports, dominated by intra-EU trade. Developing countries play a significant role in the supply of peas & beans and sweet maize, supplying respectively 55 and 51 percent of total imports (in value) by EU member countries.

Exports
In 2001, total exports by EU member countries of fresh fruit amounted to almost € 10.3 billion, representing an increase of 13 percent since 1999. In terms of volume, exports amounted to 13.8 million tonnes in 2001.

The leading EU exporting countries, Spain and Italy, by virtue of climatic conditions, exported large quantities of fruit. The leading fresh fruit products exported by EU member countries are apples, bananas, grapes, oranges and mandarins.

As from 1999, exports of fresh vegetables by EU member countries increased by 18 percent in value and by 5 percent in volume, amounting to € 7.5 billion / 9 million tonnes in 2001. Spain and The Netherlands are the leading exporters, together accounting for 66 percent of total EU exports (in value) in 2001. Contrary to the Spanish exports, which consist mainly of domestic produce, the largest part of the Netherlands exports consists of re-exports. Major exported fresh vegetable products by EU member countries are tomatoes and capsicum.

Re-exports
Increasing internationalisation, which is also particularly the case in the European Union, marks the fruit and vegetables trade. A total of nearly € 22.3 billion of fresh fruit and vegetables was imported by EU member countries in 2001, whereas exports amounted to € 17.8 billion in the same year.
The major share of imports and exports was transported to other destinations, partly as re-exports, partly as transit trade.
The sharp growth in re-exports and transit trade for fruit and vegetables can partly be attributed to the new markets, which have opened up in Eastern Europe, such as Russia, Czech Republic, Slovenia and Slovakia.
The Netherlands and Belgium account for a large share of the re-exports and transit trade, though Germany and France also increasingly fulfil this function.

Trade structure
A strong tendency towards concentration and consolidation can be noticed in the horticultural trade, both on the buyers' and suppliers' level. As a result, the demand for consistent volumes and qualities of fresh produce increases, causing firms to introduce procurement methods that manage the supply chain more efficiently.
Importers, trade fairs and increasingly the Internet are valuable sources for finding trading partners in the EU. Appendix 6 of this survey lists contact details of trade fair organisers.

Opportunities for exporters
Leading fresh fruit products from developing countries are papayas, tamarinds, lychees, pineapples, bananas, dates, guavas, mangoes, passion fruit and figs. However, in the trade of fresh vegetables, developing countries play an important role only in supplying peas & beans, sweet maize and baby corn. Opportunities for developing country exporters in the EU fresh fruit and vegetable market could lie in the trade of exotics and off-season fresh fruit and vegetables. If trade in lesser-known exotic products is considered, marketing strategies should specifically take into account ethnic minorities familiar with these products. The organic food market is also particularly interesting for growers in developing countries, since much of their production is already organic or can easily be changed to organic. Moreover, although exporters to the EU are not obliged to have an HACCP (Hazard Analysis Critical Control Point) system and their system will not be subject to control by the food inspection service in the importing country, the adopting of an approved HACCP system, or working according to a similar principle of quality

control, will be a very positive argument in export business.

For information on current CBI Programmes and training & seminars, and for downloading market information and CBI News Bulletins, please refer to CBI's Internet site www.cbi.nl.

INTRODUCTION

This CBI survey consists of three parts: EU market information (Part A), EU market access requirements (Part B) and export marketing guidelines (Part C).

Market Survey

Part A **EU Market Information** *(Chapter 1-8)*	**Part B** **EU Market Access Requirements** *(Chapter 9)*
Product characteristics Introduction to the EU market Consumption and production Imports and exports Trade structure Opportunities for exporters	Quality and grading standards Environmental, social and health & safety issues Packaging, marking and labelling Tariffs and quotas

Part C
Export Marketing Guidelines: Analysis and Strategy

External Analysis *(Chapter10)*	**Internal Analysis** *(Chapter 11)*

Decision Making
(Chapter 12)

Target markets and segments
Positioning and improving competitiveness
Suitable trade channels and business partners
Critical conditions and success factors

Marketing Tools
(Chapter 13)

Matching products and product range
Building up a trade relationship
Drawing up an offer
Handling the contract
Sales promotion

Chapters 1 to 8 (Part A) profile the EU market for fresh fruit and vegetables. The emphasis of the survey lies on those products, which are of importance to developing country suppliers. The major national markets within the EU for those products are highlighted.

The markets of selected EU countries are highlighted, since their markets are relatively more important than those of other EU countries in terms of production, consumption, imports and exports. By analysing these aspects of the market, the competing countries and countries offering opportunities for developing countries are determined. This survey focuses mainly on The Netherlands, Germany, France, UK, Italy and Spain. The survey also includes contact details of trade associations and other relevant organisations.

Whereas Part A provides EU market information, Chapter 9 (Part B) describes the requirements, which have to be fulfilled in order to gain market access for the product sector concerned. It is furthermore of vital importance that exporters comply with the requirements of the EU market in terms of product quality, packaging, labelling and social, health & safety and environmental standards. These issues are therefore covered in Part B.

After having read Parts A and B, it is important for an exporter to analyse the target markets, sales channels and potential customers in order to formulate marketing and product strategies. Part C subsequently aims to assist (potential) exporters in developing countries in their export-decision-making process.

After having assessed the external (Chapter 10) and internal environment (Chapter 11), the (potential) exporter should be able to determine whether there are interesting export markets for his company.
In fact, by matching external opportunities and internal capabilities, the exporter should be able to identify suitable target countries, market segments and target product(s) within these countries, and possible trade channels for exporting the selected products (Chapter 12).

Chapter 13 subsequently describes which marketing tools can be used to build up successful business relationships.

The survey is interesting for starting exporters as well as exporters already engaged in exporting (to the EU market). Part C is especially interesting for more experienced exporters starting to export to the EU and exporters looking for new EU markets, sales channels or customers. Starting exporters are advised to read this publication together with the CBI's Export Planner, a guide that shows systematically how to set up export activities.

Part A

EU market information

A

1 PRODUCT CHARACTERISTICS

1.1 Product groups

The assortment of imported fresh fruit and vegetables can be classified according to the following table. Please refer to Appendix 1 for a complete list of the products selected in this survey.

FRESH FRUIT

A Temperate
- apples / pears
- grapes
- deciduous fruit (peaches, nectarines, apricots, cherries, etc.)
- berries (strawberries, raspberries, blueberries, etc.)
- melons / water melons
- etc.

B Tropical and subtropical (incl. exotics)
- bananas
- citrus fruit
- pineapples
- avocados
- mangoes
- lychees
- papayas
- others: passion fruits, carambolas, durian, dates, figs, etc.

FRESH VEGETABLES

A Temperate
- tomatoes
- onions / shallots / garlic
- beans & peas
- asparagus
- courgettes
- eggplants
- capsicum
- sweet maize
- etc.

B Tropical and subtropical
- cassava
- arrowroot
- yams
- sweet potatoes
- dasheen
- breadfruit
- etc.

Temperate fruit and vegetable products
The temperate fruit and vegetables assortment offered to the European consumers consists of products, which are not, or only occasionally, supplied from outside Europe. Some remarks need to be made regarding a number of major vegetables products:

Potatoes
Potatoes are only superficially discussed in this survey, because there is hardly any opportunity for suppliers from developing countries to the European countries. The advanced preservation techniques applied in Europe make sure that the selling season extends almost throughout the year. The Netherlands, France and Germany are the leading potato exporters in Europe. The European import of potatoes is limited to the so-called firstling potatoes, which can be regarded as forerunners of the main harvest of the European potato season. As for the early, or firstling, potatoes, Israel, Malta, Cyprus, Egypt and Morocco play a part during the European spring.

Onions
The export possibilities for suppliers of onions grown in developing countries are also remote. In general, there is an abundant supply of European onions. Suppliers in The Netherlands, Spain, France, Belgium and Italy fill the European market for an important part. During the European spring and early summer, there is some import into the European market from New Zealand, Argentina, Poland, China, Chile and Australia.

Others
There is also a number of other products, which will find only limited opportunities in the European fresh produce market. In general, this is applicable to leaf vegetables, with the exception of the specific, so-called

Asian vegetables. Other product varieties which have hardly any chances on the European market are for instance tomatoes, cabbage varieties, cauliflower, cucumbers and the like. The self-supplying degree of the EU member states for these products is very high. Only occasionally, for instance in cases of bad harvests or drastically reduced yields, are these products imported from outside the EU, but even then in relatively small quantities. Products grown in greenhouses, under glass or plastic, generally have sufficient protection against severe weather influences. When there are problems in production and harvesting in certain regions in Europe, neighbouring European countries will be the first suppliers to fill the gaps.

Tropical and subtropical fruit and vegetable products

The main imported product group within this category consists of citrus fruit. The citrus assortment on the European Union market consists of numerous varieties of oranges, mandarins, grapefruit and lemons. The most important orange varieties are Valencias, Navels and Salustianas, for which there is a great demand. As for the mandarin varieties, the Clementines are particularly popular. Many new citrus fruit varieties have been introduced, with great appreciation for the so-called "easy-peelers". In the case of grapefruit, the red and pink varieties are the most popular in the increasing market for the consumption of grapefruit.

Exotics

The exotics assortment consists of an extremely varied number of products, which have become reasonably well known on the European market during the past twenty years. These products originate in tropical and sub-tropical countries where they are considered as ordinary products. On the European market, they are, however, regarded as special products because of their - seen through European eyes-exotic character.

Due to quick and successful introduction on EU markets, some of these products can hardly be considered as exotics anymore. This can be seen as a positive development for exporters in developing countries. Consumers have become accustomed to these products, which have now gained a common place in the shops and on shopping lists, such as pineapples, bananas, kiwi fruits, avocados and mangoes. On the other hand, there are many other exotic varieties which are less, or only vaguely, known to the consumer. However, the supply as well as the number of supplying countries of exotics is still increasing.

Off-season products

The assortment of imported off-season products consists of those fruit and vegetable varieties, which are shipped mostly from overseas countries to the European markets during the European winter period. Apples and pears are the main fruit varieties of the off-season products. Developing countries in particular play an important role in the supply of peas & beans. Other off-season products are: snowpeas (mangetout), capsicum (sweet pepper), courgettes, melons, grapes, peaches and nectarines. In addition, during the European spring/summer period large quantities of citrus fruit are imported into the European market from the southern hemisphere. Therefore, from a European point of view, citrus fruit also belongs to the off-season assortment. For products which keep well, like apples, the seasons of the northern and southern hemisphere more or less follow each other, or there is partly an overlap of the respective supply periods. It has to be noted, however, that overlapping periods occur more frequently than before. This is due to improved growing techniques and improvement in the storage life of the product. This means that the off-season period, in which the EU is highly dependent on suppliers from outside Europe, is becoming shorter. However, the demand in this period is increasing.

Mushrooms

Mushrooms and truffles make up a very particular market segment among the vegetable products. Although there is a strong demand in the European markets, there are only limited opportunities (mainly special products) for suppliers from outside Europe.

Conclusion

It can be concluded that the opportunities for fruit and vegetable producers in developing countries on the European market can mainly be found in products which are not grown anywhere in Europe, i.e. tropical and subtropical products (exotics) and the so-called off-season products.

1.2 Customs/statistical product classification

On January 1, 1988, a unified coding system was introduced to harmonise the trading classification systems used world-wide. This system is called the Harmonised Commodity Description System (HS) and was developed by the World Customs Organisation (WCO). The system covers about 5,000 commodity groups, each identified by a six-digit code, arranged in a legal and logical structure and is supported by well-defined rules to achieve uniform classification. More than 179 countries and economies use the system as a basis for their Customs tariffs and for the collection of international trade statistics. After the six-digit code, countries are free to use further subheadings. The trade data of Eurostat uses an eight-digit system. Most codes, however, end with two zeros, i.e. effectively only using 6 digits. In some countries even 10 digits are sometimes used.

Table 1.1 HS code classification of fresh fruit and vegetables

HS codes	Products
Fresh Vegetables	
0702	tomatoes
0703	onions, garlic, leek
0704	cabbage, cauliflower, sprouts
0705	lettuce, chicory
0706	carrots, celeriac, horseradish
0707	cucumbers, gherkins
0708	peas, beans
0709	artichokes, asparagus, eggplants, celery, mushrooms, truffles, capsicum, spinach, olives, capers, fennel, sweet maize, courgettes
Fresh Fruit	
0803	bananas
0804	dates, figs, pineapples, avocados, guavas, mangoes, mangistan
0805	citrus fruit (oranges, mandarins, clementines, tangerines, lemons, grapefruit)
0806	grapes
0807	melons, papayas
0808	apples, pears
70809	apricots, cherries, peaches, nectarines, plums
0810	strawberries, raspberries, blackberries, mulberries, red / white / black currants, kiwi fruits, jackfruit, lychees, passion fruit, starfruit

Table 1.1 gives the four-digit list of the main HS codes for fruit and vegetables. The varieties of fresh fruit and vegetables discussed in this report are covered by Chapters 6 and 7 of the Harmonised System. Please refer to Appendix 1 for a more detailed HS code classification.

2 INTRODUCTION TO THE EU MARKET

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

In 2002, the size of the EU population amounted to 379.4 million; the average GDP per capita was approximately € 21,023 in 2002.
Within Western Europe - covering 15 EU member countries as well as Iceland, Liechtenstein, Norway and Switzerland - more than 20 million enterprises are active. Small and medium-sized enterprises (SMEs) accounted for the lion's share. In 2000, the average turnover per enterprise of SMEs and large enterprises amounted to € 600 thousand and € 255 million respectively.

EU Harmonisation
The most important aspect of the process of unification (of the former EC countries), which affects trade, is the harmonisation of rules in the EU countries. As the unification allows free movement of capital, goods, services and people, the internal borders have been removed. Goods produced or imported into one member state can be moved around between the other member states without restrictions. A precondition for this free movement is uniformity in the rules and regulations concerning locally produced or imported products. Although the European Union is already a fact, not all the regulations have yet been harmonised. Work is in progress in the fields of environmental pollution, health, safety, quality and education. For more information about harmonisation of the regulations visit AccessGuide, CBI's database on non-tariff trade barriers at www.cbi.nl/accessguide

Monetary unit: Euro
On 1 January 1999, the Euro became the legal currency within twelve EU member states: Austria, Belgium, Finland, France, Germany, Greece, Italy, Ireland, Luxembourg, The Netherlands, Spain, and Portugal. In 2002, circulation of Euro coins and banknotes replaced national currency in these countries. Denmark, United Kingdom and Sweden have so far decided not to participate in the Euro.

The most recent Eurostat trade statistics quoted in this survey are from the year 1999. In this market survey, the Euro/€ is the basic currency unit used to indicate value.

Trade figures quoted in this survey must be interpreted and used with extreme caution. The collection of data regarding trade flows has become more difficult since the establishment of the single market on 1 January 1993. Until that date, trade was registered by means of compulsory customs procedures at border crossings, but, since the removal of the intra-EU borders, this is no longer the case. Statistical bodies like Eurostat 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. The threshold varies considerably from country to country, but it is typically about € 100,000. As a consequence, although figures for trade between the EU

Overview 15 EU countries, 2002

Population	379.4 million
Area	31,443,000 km^2
Density	83 people per km^2
Languages	15 (excl. dialects)
GDP/capita	€ 21,023
Currencies	€, UK£, DKr., SKr.
Exchange	€ 1 = US$ 0.99

Source: The World Factbook 2002

Population and GDP of selected EU countries, 2002

Countries/category	Population in millions	Age 15-64	GDP (€ billion)
Germany	83.3	68%	2,206
France	59.8	65%	1,556
UK	59.8	66%	1,485
Italy	57.7	67%	1,416
Spain	40.1	68%	836
The Netherlands	16.0	68%	417

and the rest of the world are accurately represented, trade within the EU is generally underestimated.

Furthermore, the information used in this market survey is obtained from a variety of different sources. Therefore, extreme care must be taken in the qualitative use and interpretation of quantitative data, both in the summary and throughout the text, as well as in comparisons of different EU countries with regard to market approach, distribution structure, etc.

For more information on the EU market, please refer to the CBI manual “Exporting to the European Union”.

This survey focuses on the 6 major EU markets for fresh fruit and vegetables. These are Germany, France, the United Kingdom, The Netherlands, Italy and Spain. These EU member countries are highlighted, because of their relative importance in terms of consumption, production, imports and exports.

3 CONSUMPTION

3.1 Market size

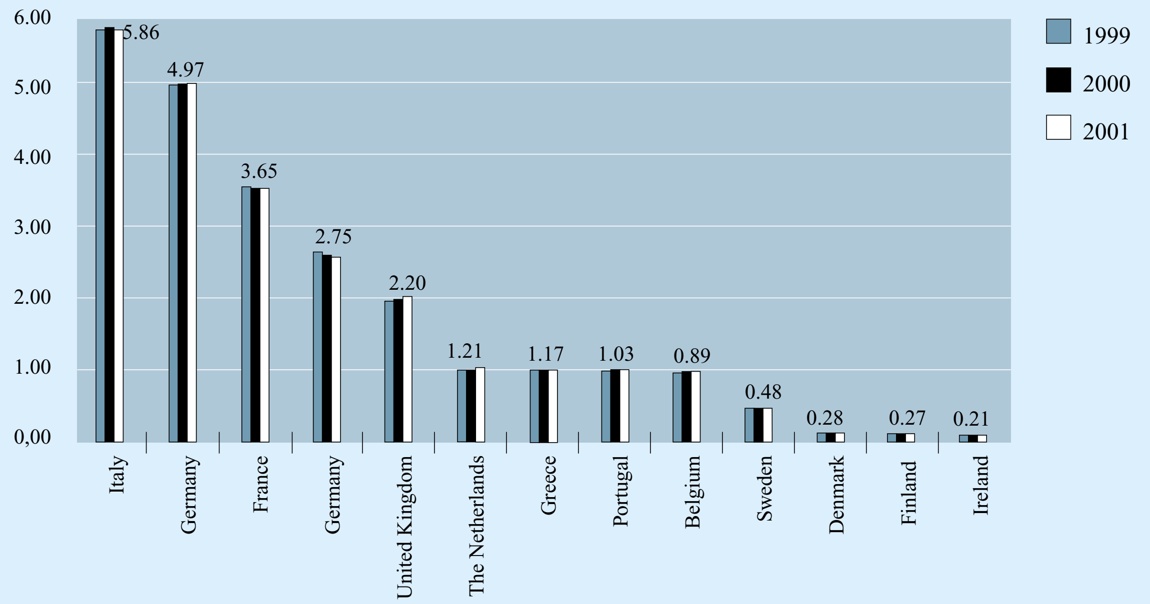
The European Union market

The maturity of the national fresh produce markets in the EU is reflected by the stable consumption statistics for both fruit and vegetables. Please note that the figures displayed in Figure 3.1 and Figure 3.2 are Euromonitor data. In some cases, these differ significantly from the figures presented by national organisations. Figures presented by the national organisations cannot be compared, as they are derived from different sources. Euromonitor is the only organisation presenting EU overall and individual-country comparable figures.

Fruit

According to Euromonitor, total fruit sales in the EU amounted to 25 million tonnes in 2001. More than 30 percent of the fruit sales consisted of citrus fruit, which was consumed relatively more in Mediterranean countries like France, Spain, Italy and Greece. The major EU fruit market is Italy with a consumption of almost 6 million tonnes, followed by Germany with 5 million tonnes, and, at a considerable distance, France, Spain, and the United Kingdom. Consumption of fruit over recent years has been quite stable.

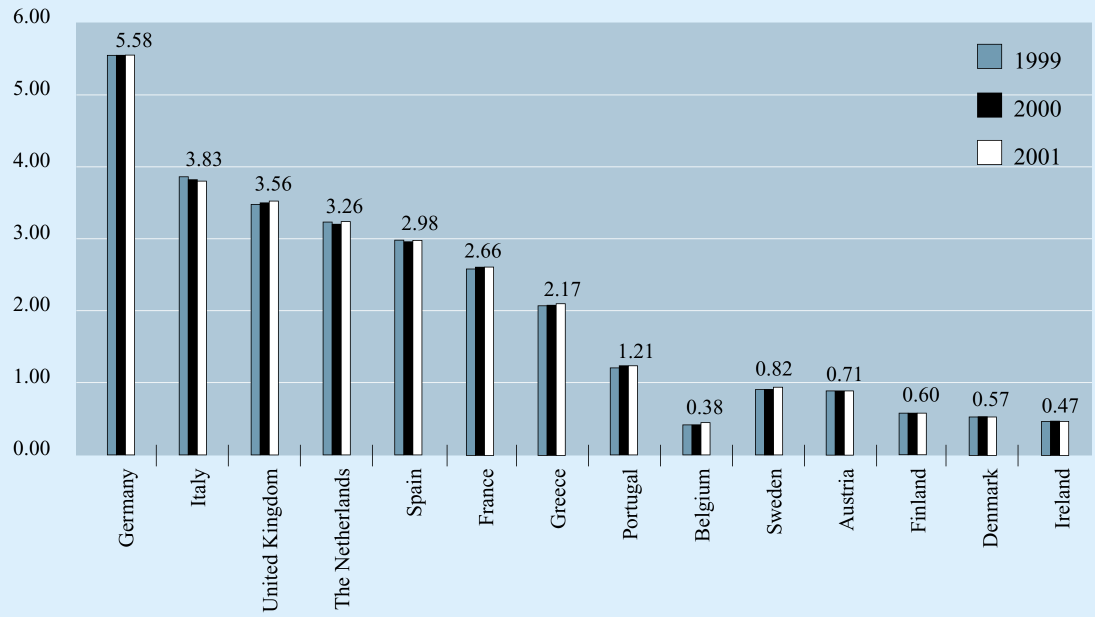
Figure 3.1 Volume sales of fruit in the EU, 1999-2001 million tonnes



Source: Euromonitor, 2003

Vegetables
In 2001, total vegetable sales (including potatoes) in the EU amounted to more than 29 million tonnes, which was about the same volume as in the previous years. More than half of total vegetable consumption consisted of potatoes, while tomatoes accounted for around 10 percent of vegetable consumption. The major EU vegetable market is Germany with a consumption of 5.6 million tonnes, followed by Italy, the United Kingdom and The Netherlands. Vegetable sales in these EU markets remained more or less stable during the period 1999-2001, with the United Kingdom being the biggest growth market (+3.2%).

Figure 3.2 Volume sales of vegetables in the EU, 1999-2001
millions tonnes



Source: Euromonitor, 2003

Germany
According to the German organisation ZMP, per capita consumption of fresh fruit and vegetables in Germany was estimated at 173 kg in the period April 2001 until March 2002, representing a decrease of 11 percent compared to the preceding period.

Fruit
Total fruit consumption in Germany was estimated at 6.8 million tonnes in 2001/02, representing an decrease of 20 percent compared to the preceding period. This decline in fruit consumption was largely caused by a 30 percent increase in apple consumption, although most of the other fruit consumption also made a significant contribution. The decline in overall fruit consumption was triggered by several factors, although the fruit prices, which were unjustly experienced by consumers as increasing, and the lack of confidence related to the introduction of the Euro are viewed as the main causes.

The leading fruit species consumed in Germany was apples, which accounted for one third of total fruit consumption in 2001/02, followed by bananas (13%), berries (8%), oranges (7%) and pears (7%).

Vegetables
In the period 2001/02, total vegetable consumption in Germany was estimated at almost 7.5 million tonnes, representing a relatively small decrease compared to the preceding period. The major vegetable product consumed in Germany was tomatoes (1.44 million tonnes in 2001/02), and the various cabbage varieties

(810 thousand tonnes in 2001/02). In 2001/02, the largest increases occurred in the consumption of mushrooms, beans, peas and spinach.

Table 3.1 Consumption of fresh fruit and vegetables in Germany, 1999-2002
1,000 tonnes

	1999/00	2000/01[1]	2001/02[1]		1999/00	2000/01[1]	2001/02[1]
total fruit	**7,808**	**8,447**	**6,803**	**total vegetables**	**7,522**	**7,605**	**7,455**
apples	2,771	3,283	2,294	tomatoes	1,473	1,534	1,439
bananas	907	985	899	cabbages	1,001	929	810
berries	538	518	522	carrots	512	527	522
oranges	505	559	459	onions	496	535	522
pears	554	679	453	cucumbers/gherkins	496	491	475
prunes	460	480	408	lettuce	273	255	226
grapes	355	320	295	mushrooms	176	174	188
clementines	333	337	277	beans	169	164	176
peaches	328	308	266	peas	99	91	120
cherries	273	277	243	asparagus	114	119	115
lemons	134	132	133	leek	96	85	84
grapefruit	91	69	61	spinach	62	65	77
apricots	54	47	34	celery	57	53	47
other fruit	*505*	*454*	*460*	*other vegetables*	*1,646*	*1,736*	*1,828*
				cultivation for own consumption	*854*	*847*	*826*

[1] provisional
note: the annual data in table 3.1 cover the periods from April until March.
Source: ZMP, 2003

France

Fresh fruit and vegetables enjoy a very positive perception among French consumers. French consumers regard these products as safe and the purchase of fresh fruit and vegetables is considered a pleasant activity. Total fresh fruit and vegetable consumption amounted to 2.66 million tonnes in 2001, indicating household consumption of almost 148 kg. This represented a decrease of 7 percent compared to the preceding year. According to Interfel, the total number of French households amounted to around 23 million.

Fruit

After an increase between 1999 and 2000, average household consumption of fresh fruit decreased by 9 percent between 2000 and 2001, amounting to 81.2 kg in the latter year. The most popular fresh fruit species were apples, oranges and bananas, together accounting for 45 percent of total fruit sales in 2001. Of these fruit species, only apple consumption increased continuously, whereas the consumption of the other two fluctuated during the survey period. During the past few years, exotic fruit species like lychees and mangoes gained more popularity, although their sales still account for a small share of total fruit sales.

Vegetables

In 2001, average household consumption of fresh vegetables in France amounted to almost 67 kg, which represented a decrease by 4 percent since 1999. Tomatoes were the most popular fresh vegetable, accounting for a share of 20 percent of total vegetable sales, followed by carrots (12%) and lettuce (9%).

Table 3.2 Household consumption of fresh fruit and vegetables in France, 1999-2001
kg per year

	1999	2000	2001		1999	2000	2001
total fruit	**85.6**	**88.8**	**81.2**	**total vegetables**	**69.0**	**69.3**	**66.5**
apples	16.1	16.5	16.8	tomatoes	14.1	13.4	13.5
oranges	10.3	11.3	10.7	carrots	8.6	8.4	8.2
bananas	9.9	9.9	9.1	lettuce	6.9	6.7	6.1
clementines	6.6	6.9	6.4	endive	5.1	5.7	5.3
melons	6.3	6.7	5.9	cabbages	4.6	4.6	4.3
peaches	6.2	6.4	5.6	courgettes	3.7	4.1	3.8
grapes	4.2	4.9	4.5	onions	3.4	3.6	3.5
pears	4.7	4.7	4.5	leek	3.2	3.5	3.2
grapefruit	4.3	5.6	3.4	cucumbers	3.2	3.0	3.0
strawberries	2.3	2.3	2.1	beans	1.7	1.9	1.5
lemons, limes	2.0	2.0	1.9	peppers	1.4	1.3	1.3
kiwi fruits	1.7	2.0	1.9	radish	1.4	1.4	1.2
avocados	1.6	2.2	1.8	artichokes	1.2	1.1	1.2
apricots	2.4	2.0	1.3	mushrooms	1.1	1.1	1.1
pineapples	1.5	1.0	1.1	eggplant	0.9	1.0	0.9
lychees	0.2	0.2	0.2	asparagus	0.9	0.9	0.9
mangoes	0.2	0.2	0.2	garlic	0.6	0.6	0.6
other fruit	*4.0*	*4.0*	*3.6*	*others*	*6.9*	*7.0*	*6.5*

Source: Interfel, Bilan Fruits & Légumes 2000 & 2001 (2001, 2002)

The Netherlands

According to a survey published by the Commodity Board for Horticulture, one of the major trends in The Netherlands is the growing demand for convenient and time-saving ways of preparing meals. This trend applies in particular to vegetables and is expressed by the growing demand for prepacked and semi-prepared vegetables. In 2002, an average Netherlands household purchased 93 kilograms of fresh fruit and 72 kilograms of fresh vegetables (Commodity Board). In 2002, total consumption of fresh fruit and vegetables amounted to almost 1.2 million tonnes.

Fruit

Total household purchases of fresh fruit in The Netherlands amounted to 654 thousand tonnes in 2002, compared to 691 thousand tonnes in 1999. The most popular fruit species in The Netherlands remain apples, oranges and bananas, accounting for about two thirds of total fruit consumption. Other important fruit species were mandarins, melons and pears. In recent years, kiwi fruits have gained more popularity, climbing up to number 8 of the fruit top 10 in 2002.

In terms of value, the total fresh fruit consumption amounted to € 978 million in 2002, compared to € 856 million in 1999. Prepacked fruit accounts for over half of total fruit consumption. Prepacked fruit is mostly purchased in supermarkets, whereas greengrocers and markets sell relatively small amounts of prepacked fruit.

Vegetables

In 1999, total consumption of fresh vegetables (excluding potatoes) in The Netherlands amounted to 512 thousand tonnes, while in 2002, consumption amounted to about 504 thousand tonnes. Domestically grown products like cauliflower, onions/shallots and tomatoes dominate the consumption of vegetables. Cucumbers and carrots are also popular vegetable species. Together, the top 5 vegetables accounted for 40 percent of total vegetable purchases in 2002.
In 2002, consumption of fresh vegetables amounted to € 1,042 million, compared to € 876 million in 1999. Prepacked vegetables accounted for more than 50 percent of total vegetable sales.

Table 3.3 Consumption of fresh fruit and vegetables in The Netherlands, 1999-2002
1,000 tonnes

	1999	2002		1999	2002
total fruit	**690.7**	**653.5**	**total vegetables**	**511.7**	**503.5**
fruit top 10:			*vegetables top 10:*		
apples	185.6	174.5	cauliflower	51.4	43.3
oranges	164.5	156.7	onions/shallots	44.4	41.7
bananas	102.2	102.4	tomatoes	40.9	41.2
mandarins	54.8	57.3	cucumbers	39.7	39.9
pears	38.7	34.5	carrots	36.7	36.9
melons	25.4	20.7	lettuce	31.6	31.7
grapes	20.4	18.1	chicory	24.5	29.3
kiwi fruits	15.3	17.3	green beans	20.8	19.8
grapefruit	22.8	14.7	leek	20.3	18.7
strawberries	14.7	13.6	endive	19.7	17.9
			selected others:		
			broccoli	17.9	17.3
			white mushrooms	15.7	16.0
			peppers	13.0	14.3

Source: Interfel, Bilan Fruits & Légumes 2000 & 2001 (2001, 2002)

United Kingdom

As shown in Figure 3.1, the total UK consumption of fresh fruit and vegetable amounted to 3.56 million tonnes in 2001. The per capita consumption of fresh fruit and vegetables in the United Kingdom amounted to 76.8 kg in 2000, which meant a slight increase of 1 percent compared to the preceding year (National Food Survey).

Fruit

In 2000, the British consumed almost 38.7 kg of fresh fruit per person, which was 1.7 kilogram more than in 1999. The most popular fruit species was bananas, followed by apples. Together, fresh banana and apple consumption represented more than half of total fruit consumption. Apples and citrus fruit other than oranges showed the largest increase in consumption in 2000.

Vegetables

In 1999, per capita consumption of fresh vegetables in the United Kingdom amounted to 38.1 kg, representing a decrease of 0.6 kg since 1999. The most popular vegetables were carrots representing 15 percent of total vegetable consumption, followed by tomatoes and onions. The composition of the fresh vegetable consumption in 2000 remained more or less the same as in 1999.

Table 3.4 Per capita consumption of fresh fruit in the United Kingdom, 1999-2000
kg per year

	1999	2000		1999	2000
total fruit	**37.0**	**38.7**	**total vegetables**	**38.7**	**38.1**
bananas	10.5	10.7	carrots	5.7	5.7
apples	8.8	9.4	tomatoes	5.2	5.0
other citrus fruit	3.7	4.2	onions	5.0	5.0
stoned fruit	3.1	3.0	cauliflower	4.2	4.1
oranges	2.6	2.8	leafy salads	3.0	3.1
pears	2.2	2.4	cabbages	2.7	2.5
grapes	2.3	2.2	mushrooms	1.8	1.9
soft fruit other			cucumbers	1.9	1.9
than grapes	1.0	1.1	turnips	1.3	1.4
rhubarb	0.1	0.1	beans	1.2	1.1
other fresh fruit	*2.7*	*2.8*	brussels sprouts	0.9	0.8
			peas	0.3	0.3
			other fresh vegetables	*5.5*	*5.3*

Source: National Food Survey 1999 and 2000

Italy

In 2001, total sales of fresh fruit and vegetable (excluding potatoes) in Italy amounted to more than 8.4 million tonnes, which represented a per capita consumption of 145 kg.

Fruit

Per capita consumption of fresh fruit in Italy amounted to 85 kg in 2001, making it one of the highest fruit consumption levels in Europe. Total fruit sales amounted to almost 5 million tonnes in 2001. Apples were by far the most popular fruit product, accounting for 21 percent of total sales, followed by oranges (14%), bananas (11%), pears (9%) and watermelon (8%).

Vegetables

Total Italian consumption of fresh vegetables (excluding potatoes) fluctuates at around 3.5 million tonnes, which amounts to an annual 60 kg on a per capita base. In 2001, fresh tomatoes made up about 22 percent of total vegetable sales, followed by onions (9%), courgettes (8%) and carrots (7%).

Table 3.5 Volume sales of fresh fruit and vegetables in Italy, 1999-2001
1,000 tonnes

	1999	2000	2001		1999	2000	2001
total fruit	**5,032**	**5,037**	**4,903**	**total vegetables**	**3,480**	**3,480**	**3,479**
apples	1,018	1,030	1,006	tomatoes	770	775	762
oranges	724	724	711	onions	331	328	310
bananas	540	547	523	courgettes	285	283	285
pears	461	459	448	carrots	232	235	237
watermelons	362	367	368	peppers	224	222	221
peaches	290	287	277	artichokes	211	212	208
lemons	275	271	255	eggplant	221	215	207
table grapes	229	233	248	cauliflower	117	117	115
clementines	220	226	214	*other vegetables*	*1,089*	*1,092*	*1,134*
melons	185	187	188				
mandarins	152	146	123				
nectarines	79	90	92				
kiwi fruits	78	76	78				
strawberries	59	61	61				
other fruit	*361*	*331*	*309*				

Source: CSO Centro Servizi Ortofrutticoli, 2003

Spain

Total fresh fruit and vegetable (excluding potatoes) consumption in Spain amounted to more than 5.7 million tonnes in 2001, which represented a per capita consumption of about 145 kg.

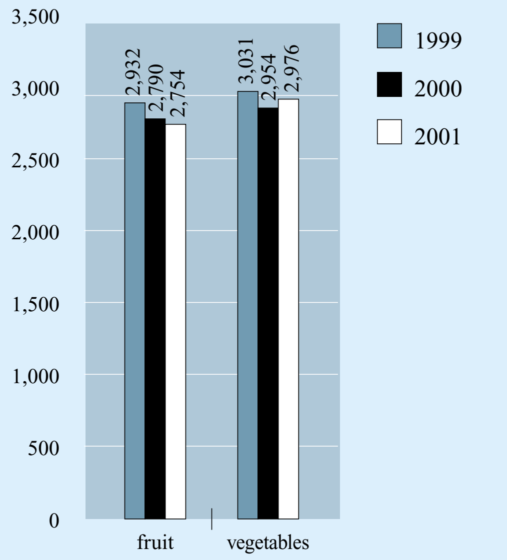
Fruit

According to Euromonitor data, per capita consumption of fresh fruit in Spain amounted to 75 kg in 2001, making it one of the highest fruit consumption levels in Europe (the other being Italy at 85 kg/capita). Citrus fruit sales accounted for about one third of total fruit sales.

Vegetables

In 2001, total Spanish consumption of fresh vegetables amounted to almost 3 million tonnes, representing a per capita consumption of about 70 kg. Fresh tomatoes make up around 15 percent of total vegetable sales.

Figure 3.3 Volume sales of fresh fruit and vegetables in Spain, 1999-2001
1,000 tonnes



Source: Euromonitor, 2003

3.2 Market segmentation

Segmentation of the fresh fruit and vegetable market is possible with the help of the product classification as presented in Section 1.1 of this survey. This classification reveals the following market segments:
- domestically produced fruit and vegetables (temperate fruit and vegetable products);
- well-known products not, or only sporadically, produced in northern Europe;
- exotics (tropical/subtropical products);
- off-season products.

Please refer to Chapter 1 for a description of the different segments.
The market for fresh fruit and vegetables can also be segmented according to:
- consumer market (retail shops, supermarkets, groceries), and
- out-of-home market (restaurants, business canteens, gas stations, institutions, fast-food chains).

In The Netherlands, it is estimated that the consumer market segment is currently holding about 65 percent of the total market and the out-of-home segment 35 percent. However, the latter segment is expected to expand in the near future due to the proportional increase of the ageing population (more institutions) and single households and a growing prosperity. The same development can also be expected for other EU member countries.

Another segmentation of the market for fruit and vegetables can also be made according to whether the products are grown by organic[1] farming or by conventional farming. This is particularly important since the demand for organic food is increasing in the EU member countries and these can offer interesting market opportunities for developing countries exporters. Organic products still account for onlya small share of the total food consumption, although most markets for organic fruit and vegetables experienced strong growth rates during the last years of the 1990s. Particularly high growth rates have been observed in the United Kingdom and Italy. In the period 1998-2000, organic fruit and vegetable retail sales in Italy showed annual growth rates up to 85 percent.

Because of its nature, organic production is highly suitable for small and medium-sized farmers working in areas, which may not be suitable for large-scale food production. For in depth information about organic fresh fruit and vegetables, please refer to the FAO study

[1] The Basic Standards of IFOAM (International Federation of Organic Agriculture Movements) represent the world-wide consensus of what is organic. The EU Regulation for organic food is based on the IFOAM standards. Uniform standards for organic food production and labelling throughout the EU were established by the passing of Council Regulation (EEC) 2092/91. This regulation and subsequent amendments establish the main principles for organic production at farm level and the rules that must be followed for the processing, sale and import of organic products from third (non-EU) countries.

"World Markets for Organic Fruit and Vegetables - Opportunities for Developing Countries in the Production and Export of Organic Horticultural Products" which can be downloaded at www.fao.org/docrep/004/y1669e/y1669e00.htm#Contents. The study shows that sales of organic fruit and vegetables in a number of EU countries have grown fast at annual rates ranging between 20 and 30 percent. Particularly high growth rates have recently been observed in the United Kingdom and France.

For more information on organic production and its certification, please contact SKAL, Ecocert, Soil Association or other EU inspection organisations; refer to Appendix 3.6 for contact details of these organisations. Please also refer to CBI's EU Market Survey "Organic Food Products" for more detailed information.

3.3 Consumption patterns and trends

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

A number of trends affecting European consumer demand for fresh fruit and vegetables can be distinguished in the past few years. These include:

Health food
European consumers have a strongly increased interest in a healthy life and, consequently, in the consumption of health food. Health food refers to food products, which are low in fat and have limited sugar and salt content; this includes functional foods, which have specific health-promoting properties and food products with added vitamins and minerals or bacteria, which support the intestinal function. Fresh fruits and vegetables are generally associated with health foods. This is because fruit and vegetables contain vitamins and natural antioxidants, which are supposed to have properties preventive to heart diseases and cancer.

Organic food
Since European consumers have recently experienced several food scares, many people are concerned about the safety of food, as well as the effects of intensive farming on the countryside and on the environment in general. These factors, combined with the increasing awareness of the importance of diet and nutrition, have intensified interest in organic foods, which are grown according to principles laid down in Directive EC 2092/91 (for detailed information, refer to www.cbi.nl/accessguide). The demand for organic food is booming in several EU member countries and this can offer interesting market opportunities for developing countries' exporters. Organic products still account for a small share of the EU's total food consumption, although the market for organic products experiences strong growth rates. Sweden, The Netherlands and the United Kingdom are the major growth markets, with expected annual growth rates of over 20 percent.

More information on the above can be found in CBI's EU Market Survey "Organic Food Products".

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

As a result of several food scares (BSE / mad cow disease, dioxine) consumers increasingly pose questions on the production process and demand open, honest, and informative labelling. This has resulted in a discussion in the fruit and vegetable industry about "tracking and tracing". With good chain management and control within the chain, distributors are able to supervise all kinds of aspects of fresh fruit and vegetables such as plant material, growth, harvest, storage, distribution and processing. As mentioned in the box below highlighting key consumption trends, the consumer demands open, honest, and informative labelling. The fruit and vegetable industry is increasingly paying attention to chain management and labelling systems with which products can be traced back to the producer.

Safe Quality Food (SQF), which was originally developed in Australia, has recently been introduced in the EU. SQF aims at chain certification and combines quality concerns, HACCP and Tracking & Tracing in its certification requirements.

The European Commission also recognises the importance of food safety and set up the European Food Safety Authority (EFSA) in January 2002. Please also refer to Appendix 3.6 for Internet links to programmes and practical information concerning food safety regulations within the EU.

Convenience
European people (including women) are working more and more and have busy social lives. Moreover, the number of single households increases. Less time is left for the preparation of a full meal and, as a result, demand for products requiring extensive preparation has declined, while the opportunities for easy to prepare, semi-prepared, catered and processed products are increasing. The high cost of labour in Europe constantly encourages the shift towards adding value in the country of production. In the fresh fruit and vegetables sector, this has led to prepacked products and consumer packs containing (semi-)prepared vegetables such as sliced runner beans, topped and tailed 'mangetout' peas and mixed packs of fruit and vegetables for stir-fry meals. Prepared vegetables (cut, washed, scraped or pre-cooked) are particularly popular among younger consumers.

Exotics
A remarkable increase can be seen in the consumption of exotic fruits and off-season products. Until the 1970s, there was hardly any consumption of exotics, though small quantities were imported to meet the demand of ethnic minority groups. The increase in ethnic minorities living in the EU is considered to be responsible for the initial increases in sales of all kinds of tropical fruits. Once the products were on the shelves, other groups were inclined to buy them. Consumption of a wide scale of varieties of exotics like mangoes, papayas, passion fruit and avocados has increased slowly but steadily over the last decades. In their search for products with more added value, major importers in The Netherlands are now promoting lesser-known exotics like kumquats, rambutan and mangosteen. Complying with the demand for convenience, they provide the exotics in easy recognisable packages, containing small amounts and with practical product information. This makes it easier for European consumers to become familiar with these relatively new and unknown products. Supermarkets are increasingly interested in selling exotics in such standardised packages.

Key Consumption Trends to 2010

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

Source: Food Marketing, October 1999

4 PRODUCTION

Most countries in the EU have extensive domestic production of fruit and vegetables. However, the temperate climate of northern Europe limits the production of various fruits and vegetables. Production in greenhouses partly compensates for the restrictive climatic conditions, but, for bananas and a wide range of exotics, there exists a big and developing market, which cannot, or only insufficiently, be supplied by domestic (European) production. There is a large production of citrus fruit and apples in the EU but at the same time the production is season-bound, offering opportunities for suppliers from outside the EU to supply the European market in off-season periods. However, improved storage and distribution has enabled producers to reduce the negative influence of the seasons.

A decrease in the number of fruit and vegetables growers can be noticed in Northern European countries. This development is partly caused by the trend towards consolidation at buyers' level, and partly by the fact that more and more suppliers find it hard to conform to the European regulations for agricultural production. As a consequence, growers have to change their production to large-scale production or consolidate in order to stay in the market.

Buyers of larger volumes are the power behind consolidation at the supplier level, forcing shippers to attempt to match the scale of their customers in order to serve them efficiently. These large-scale suppliers have sufficient financial resources and backing, and can bear the costs and risks associated with producing crops in several regions or countries over extended periods.

Fruit

In 2001, the total production of fresh fruit in the EU amounted to 31.3 million tonnes, a decrease of 6 percent since 1999. Remarkable (in the cases of Greece, The Netherlands and Belgium even very substantial) is the decrease in production in the EU member countries between 1999 and 2001, except for Spain and some of the smaller producing countries. In 2001, Italy and Spain were the leading EU producers, together accounting for almost 70 percent of total EU fruit production. Other large producers of fresh fruit in the European Union are France, Greece and Germany.

In 2001, the harvest of apples decreased to 7.6 million tonnes, although it remained the main fruit product grown in the EU. With 2.1 million tonnes in 2001, the production of pears is also considerable. The production of peaches in the EU amounted to 2.9 million tonnes in 2001, representing a decrease of 6 percent compared to 1999.

In 2001, the production of citrus fruit within the EU amounted to 10 million tonnes. The two leading citrus fruit producing countries in the European Union are

Table 4.1 Production of fruit in the EU, 1999-2001
1,000 tonnes

Country	1999	2000	2001		1999	2000	2001
Italy	11,051	10,970	10,765	**Total EU 15**	**33,300**	**32,500**	**31,300**
Spain	10,708	10,213	10,752	*of which:*			
France	3,751	3,734	3,387	apples	8,406	8,255	7,566
Greece	3,305	3,147	2,615	oranges	6,144	5,845	5,863
Germany	1,330	1,443	1,190	peaches	3,123	3,073	2,921
Portugal	930	869	837	small citrus fruits[1]	2,855	2,566	2,483
The Netherlands	759	744	590	pears	2,339	2,365	2,141
Belgium	760	741	469	lemons	1,459	1,600	1,578
United Kingdom	351	294	324	nectarines	1,190	1,201	1,200
Austria	226	233	220	strawberries	925	905	848
Denmark	52	53	53	prunes	620	642	673
Sweden	34	39	36	apricots	633	552	505
Finland	20	22	23	cherries	460	496	395
Ireland	20	20	21	kiwi fruits	453	523	373
Luxembourg	5	6	3	*other*	*4,690*	*4,480*	*4,755*

[1] these include mandarins, clementines and satsumas
Source: ZMP, 2003

Spain and Italy, together accounting for almost 88 percent of total EU citrus fruit production in 2001. Except for lemons, which increased by 18 percent, the EU production of the various citrus fruits decreased moderately (oranges) to strongly (mandarins and grapefruit) between 1999 and 2001. In 2001, the estimated harvest of oranges within the EU amounted to 5.9 million tonnes, which makes it one of the major fruit species grown in the EU. In that same year, EU growers produced 2.5 million tonnes of small citrus fruits (mandarins, clementines and satsumas), and 1.6 million tonnes of lemons. The importance of grapefruit is relatively insignificant, with estimated production amounting to only 42 thousand tonnes in 2001.

Between 1995 and 2000, the kiwi fruit production in the EU was characterised by fluctuations varying from 315 to over 520 thousand tonnes. Kiwi fruit production in 2001 amounted to 400 thousand tonnes, representing a considerable decrease compared to the record production level in the previous year.

According to FAO data, there is a small banana production in the EU, amounting to about 446.6 thousand tonnes in 2002, of which Spain accounted for more than 90 percent.

Vegetables
Total EU production of fresh vegetables was estimated at 50.5 million tonnes in 2001, representing a decrease of 3 percent compared to 1999. Please note that ZMP also includes melons and watermelons in the production figures for vegetables, although in this market survey these products are considered as fruit species. Besides being the leading EU producers of fresh fruit, Italy and Spain also dominate the EU production of fresh vegetables, together accounting for over half of total EU production. In 2001, total Italian production of vegetables amounted to 14.7 million tonnes, which represented an increase of 9 percent compared to the preceding year. Spain is the second largest producing country, responsible for a production of 12 million tonnes in 2001.

Production figures for selected fresh vegetable species grown in the EU are listed in Table 4.2 for the period 1999-2001. Tomatoes are by far the leading product group grown in the EU, which makes this product not very interesting for exporters from developing countries. Leading tomato producers in the EU are Italy and Spain, together accounting for over two thirds of total EU production. Spain and The Netherlands are the leading EU producers of onions, while France, the United Kingdom and Italy produce most of the carrot supplies. The leading EU producers of asparagus are Spain, Germany and Italy.

Table 4.2 Production of vegetables in the EU, 1999-2001
1,000 tonnes

Country	1999	2000	2001[1]		1999	2000	2001[1]
Italy	15,289	16,178	14,656	**EU 15**	**52,218**	**51,962**	**50,474**
Spain	12,137	11,787	11,952	*of which:*			
France	6,370	6,166	6,121	tomatoes	16,059	15,749	14,876
Greece	4,047	4,221	4,186	(water-)melons	4,089	4,131	3,964
The Netherlands	3,928	3,789	3,711	onions	3,937	4,019	3,887
Germany	2,914	3,014	2,866	carrots	3,643	3,456	3,554
United Kingdom	2,923	2,503	2,665	lettuce	2,589	2,580	2,527
Portugal	1,575	1,503	1,511	capsicum	1,707	1,786	1,841
Belgium	1,537	1,345	1,360	green beans	1,085	1,084	1,065
Austria	553	522	526	mushrooms	883	897	893
Ireland	249	249	249	artichokes	828	892	848
Sweden	249	235	238	eggplants	598	658	664
Finland	245	243	235	garlic	261	266	262
Denmark	200	196	196	asparagus	210	221	222
Luxembourg	2	2	2	*other*	*16,329*	*16,223*	*15,871*

[1] estimated
Source: ZMP, 2003

The most important fruit and vegetable growing regions in the EU, where the value of fruit and vegetable production represents more than 2.5 percent of the EU total production and more than 25 percent of the value of total agricultural production in the region, are the following:

Region	**Country**	**Share of EU** (in %)	**Share of region** (in %)
Emilia Romagna	Italy	4.3	27
Lazio	Italy	2.5	37
Campania	Italy	3.9	43
Apulia	Italy	4.3	42
Sicily	Italy	5.9	53
Communidad Valenciana	Spain	4.6	67
Andalusia	Spain	4.6	30
Murcia	Spain	2.5	64
Provence Alpes Côte D'Azur	France	2.9	46
Kentriki Ellada	Greece	2.6	29

Source: CIMO, 2000

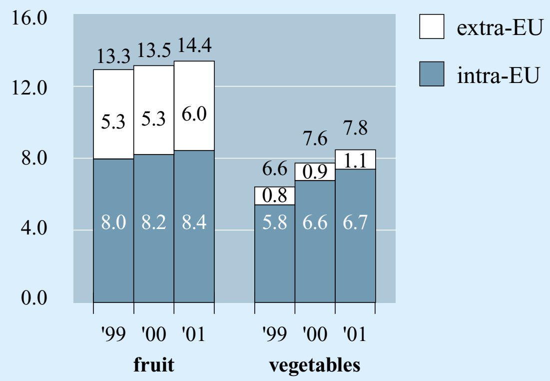
5 IMPORTS

5.1 Total imports

The European Union market

Large quantities of fruit and vegetables are traded in the European Union, not only between the EU member states, but also with other countries outside the EU. From Figure 5.1 it becomes clear that the imports of fresh fruit by EU member countries are markedly higher than the fresh vegetable imports. Moreover, statistics covering the years 1999 to 2001 show an upward trend in both the intra- and extra-EU imports of fresh fruit and fresh vegetables.

Figure 5.1 Imports of fresh fruit and vegetables by EU member countries, 1999-2001
€ billion



Source: Eurostat, 2002

Fruit

In 2001, total imports by EU member countries of fresh fruit amounted to more than € 14.4 billion, representing an increase of 9 percent since 1999. In terms of volume, imports by EU member countries decreased by 2 percent, reaching 18.5 million tonnes in 2001. Imports from outside the EU into the member states (so-called extra-EU imports) amounted to € 6 billion / 7.8 million tonnes.

Leading suppliers of FRESH FRUIT to the EU (share of the imported value in 2001)

Spain (20%), Italy (10%), The Netherlands (7%), France (7%), Belgium (7%), South Africa (6%), Costa Rica (4%)

Table 5.1 Imports of fresh fruit by EU member countries, 1999-2001
€ million / 1,000 tonnes

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total	**13,267**	**18,792**	**13,497**	**18,942**	**14,444**	**18,481**
Intra EU	**7,990**	**11,119**	**8,169**	**11,453**	**8,405**	**10,638**
Extra-EU	**5,277**	**7,673**	**5,328**	**7,488**	**6,039**	**7,843**
Germany	3,420	4,904	3,388	4,944	3,330	4,396
United Kingdom	2,158	2,658	2,256	2,691	2,385	2,862
France	1,790	2,388	1,860	2,434	2,029	2,455
The Netherlands	1,378	2,027	1,401	1,965	1,644	2,012
Belgium	1,429	2,168	1,486	2,254	1,531	2,149
Italy	930	1,443	926	1,360	1,025	1,315
Spain	465	748	454	779	525	735
Austria	370	598	382	637	437	599
Sweden	398	529	420	554	428	526
Portugal	260	439	267	473	351	515
Denmark	208	306	207	295	242	314
Finland	181	237	175	229	199	236
Ireland	126	151	139	159	159	167
Greece	116	158	96	133	117	168
Luxembourg	39	38	40	34	42	32

Source: Eurostat, 2002

The leading EU importer of fresh fruit was Germany, accounting for 23 percent of total imports by EU member countries (in terms of value) in 2001, followed by the United Kingdom (17%), France (14%), The Netherlands (11%), Belgium (11%) and Italy (7%).

Vegetables
Although smaller than fruit imports, the imports of fresh vegetables by EU member countries still amounted to almost € 7.8 billion / 8.7 million tonnes in 2001. Compared to 1999, this represented an increase of 18 percent in terms of value and 6 percent in terms of volume.

The leading suppliers of fresh vegetables to the EU are by far Spain and The Netherlands, together supplying 60 percent of imports (in value) by EU member countries in 2001.

Leading suppliers of FRESH VEGETABLES to the EU (share of the imported value in 2001)

Spain (34%), The Netherlands (26%), Italy (7%), France (7%), Belgium (5%), Germany (3%), Morocco (3%)

The largest fresh vegetable importing EU country was again Germany, accounting for 32 percent of total imports by EU member countries (in terms of value) in 2001, followed by the United Kingdom (22%), France (14%) and The Netherlands (9%). Belgium and Italy followed at a distance, accounting for 5 and 4 percent respectively.

Table 5.2 Imports of fresh vegetables by EU member countries, 1999-2001
€ million / 1,000 tonnes

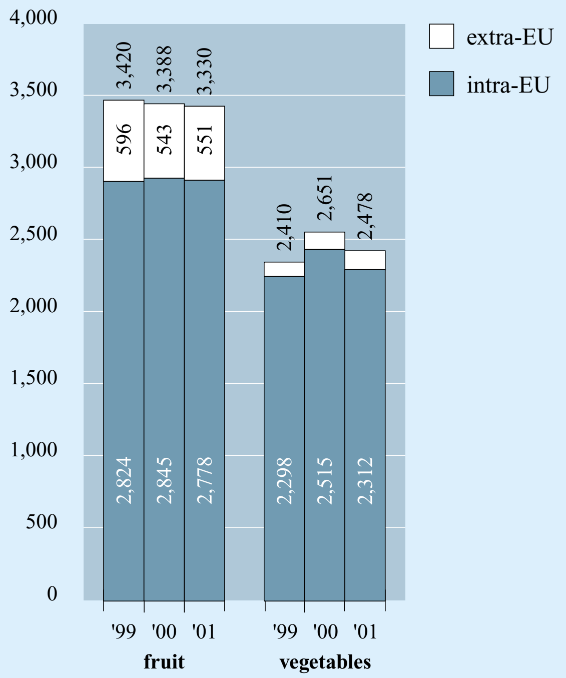
	1999		2000		2001	
	value	volume	value	volume	value	volume
Total	**6,640**	**8,268**	**7,564**	**8,476**	**7,820**	**8,740**
Intra EU	**5,801**	**7,366**	**6,618**	**7,602**	**6,730**	**7,713**
Extra-EU	**839**	**901**	**946**	**874**	**1,090**	**1,027**
Germany	2,410	2,897	2,651	2,881	2,478	2,601
United Kingdom	1,350	1,247	1,561	1,249	1,742	1,487
France	929	1,254	1,052	1,306	1,125	1,413
The Netherlands	465	658	659	741	674	799
Belgium	318	832	341	840	372	850
Italy	282	299	308	327	318	334
Austria	214	235	238	241	279	285
Sweden	224	240	254	238	268	254
Denmark	136	154	142	152	150	147
Ireland	73	91	82	91	97	106
Spain	63	108	81	135	93	147
Finland	75	74	82	71	87	72
Portugal	50	126	58	139	73	175
Luxembourg	30	26	32	24	35	23
Greece	21	27	23	41	27	48

Source: Eurostat, 2002

Germany

Germany is the largest import market in the European Union for both fresh fruit and fresh vegetables. In 2001, total imports of fresh fruit and vegetables into Germany amounted to € 5.8 billion / 7 million tonnes, which represented a decrease of 4 percent in value and 11 percent in volume compared to the preceding year.

Figure 5.2 Imports of fresh fruit and vegetables into Germany, 1999-2001 € million



Source: Eurostat, 2002

Fruit

Though its fresh fruit imports dropped by 3 percent in value and 10 percent in volume between 1999 and 2001, Germany remained the leading EU importer of fresh fruit, with imports amounting to € 3.3 billion / 4.4 million tonnes in the latter year. The other EU member countries supplied most of the imported products, but about 17 percent of the imported value in 2001 originated in non-EU countries.

Leading suppliers of FRESH FRUIT to GERMANY (share of the imported value in 2001)

Spain (24%), Italy (21%), Belgium (13%), The Netherlands (12%), France (8%), Ecuador (4%), Greece (3%), Colombia (2%), Panama (2%)

Traditionally, Germany is the main *banana* consuming country of the European Union. It was in Germany where consumers protested most strongly against the introduction of the banana market regulation in 1993 (see Section 9.2). In 2001, total imports amounted to almost 1.1 million tonnes, representing a total value of € 701 million. More than half of the bananas are supplied through re-exports from other EU member countries, all bananas being supplied by developing countries. Other important suppliers are mainly Latin-American countries like Ecuador, Colombia, Panama and Costa Rica.

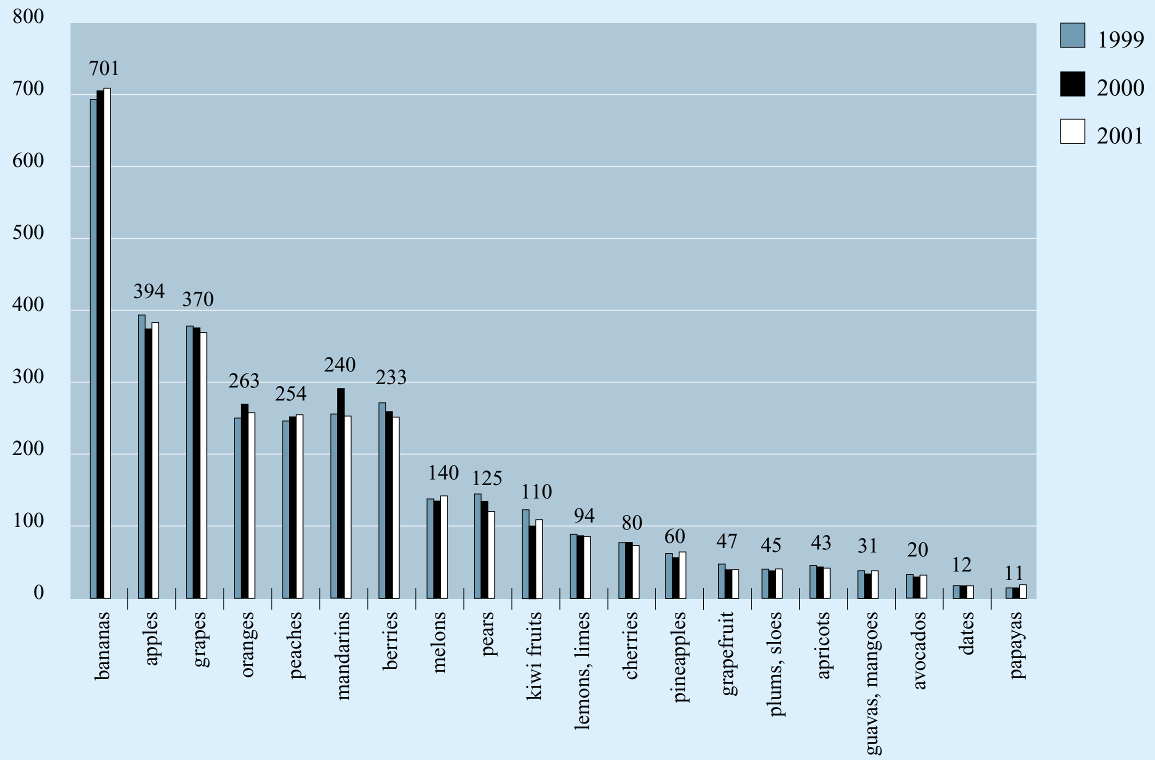
Besides bananas, other leading products imported into Germany are *apples, grapes* and *citrus fruit*. Imports of citrus fruit amounted to € 648 million in 2001, representing a total volume of almost 1.3 million tonnes. The leading imported citrus fruit are oranges, closely followed by mandarins. Most citrus fruit (in terms of value) was supplied by Spain (68%), followed by The Netherlands (12%, re-exports), Italy (5%), Belgium (4%) and Greece (3%). Only 4 percent of total citrus fruit imports into Germany was supplied by developing countries.

Some major tropical fruits are *kiwi fruits* and *pineapples*. Kiwi fruit imports amounted to € 110 million / 109 thousand tonnes in 2001, representing a decrease of 13 percent in value, but an increase of 7 percent in volume since 1999. During the same period, total German pineapple imports increased by 15 percent in value, but decreased by 18 percent in volume, amounting to € 60 million / 60 thousand tonnes in 2001. In terms of value, pineapples accounted for only about 2 percent of total German fresh fruit imports.

As from 1999, German imports of fresh papayas increased by 35 percent in value and by 44 percent in volume, amounting to almost € 11 million / 5 thousand tonnes in 2001. Almost half of the total imported value was supplied by developing countries.

Tamarinds & lychees, passion fruit and *figs*, none of which are displayed in Figure 5.3, together represented less than 1 percent of total German imports (in value) in 2001.

Figure 5.3 Imports of selected fresh fruit products into Germany, 1999-2001
€ million



Source: Eurostat, 2002

Vegetables
After an increase of 10 percent between 1999 and 2000, German fresh vegetable imports increased by 7 percent, amounting to € 2.5 billion in 2001. In terms of volume, imports decreased by 10 percent during the survey period, reaching 2.6 million tonnes in 2001. About 7 percent of the total imported value originated outside the European Union. Developing countries supplied less than 2 percent. The primary reason for the minor importance of developing countries is the fact that fresh vegetable imports mainly consist of traditional products like *tomatoes, cucumbers, lettuce, onions* and *carrots*, which are almost entirely supplied by the other EU member countries.

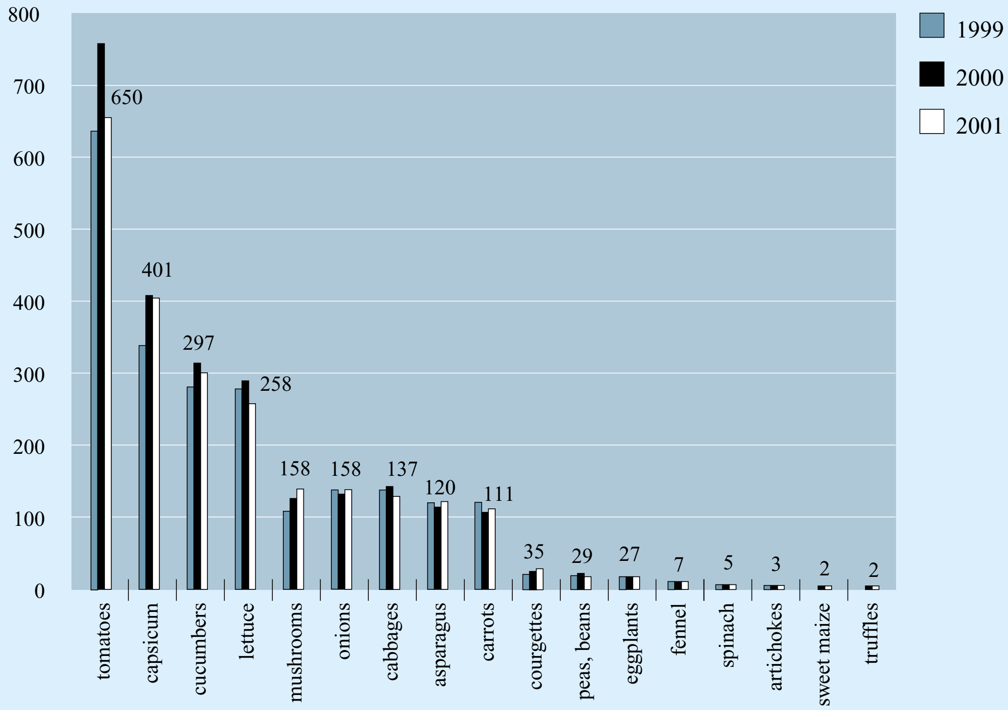
Leading suppliers of FRESH VEGETABLES to GERMANY
share of the imported value in 2001

The Netherlands (39%), Spain (26%), Italy (12%), Belgium (6%), France (6%), Greece (3%), Poland (2%), Turkey (1%)

Compared to the overall EU average, German imports relatively large amounts of cucumbers and gherkins, with imports amounting to almost € 297 million / 406 thousand tonnes in 2001.
In the same year, total *pea and bean* imports amounted to € 29 million / 29.5 thousand tonnes, which meant a decrease in terms of both value and volume compared to the preceding year. Only 23 percent of the imported value was supplied by developing countries, which was far below the EU average of 55 percent.

Germany is a relatively large producer, consumer, and importer of *asparagus*. Between 2000 and 2001, the imports increased by 16 percent in value and by 2 percent in volume, amounting to €120 million / 36 thousand tonnes in the latter year. It is estimated that less than half of all German consumption of asparagus is met by domestic production. Most Germans still

Figure 5.4 Imports of selected fresh vegetables products into Germany, 1999-2001
€ million



Source: Eurostat, 2002

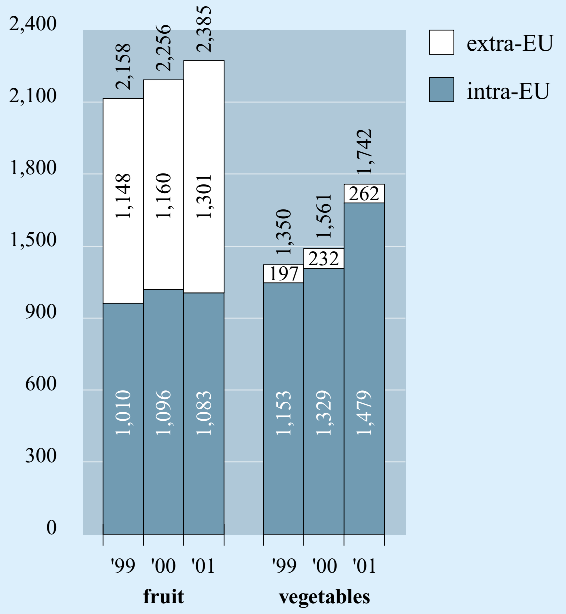
prefer white asparagus to green, but green asparagus is growing in popularity.

Between 1999 and 2001, German imports of *mushrooms* increased by 29 percent in value and by 34 percent in volume, reaching € 158 million / 70 thousand tonnes in 2001. However, less than 3 percent of the imported value was supplied by developing countries.

United Kingdom

After Germany, the United Kingdom is Europe's second largest importer of fresh fruit and vegetables, with imports amounting to € 4.1 billion / 4.3 million tonnes in 2001, representing an increase of 18 percent in value and of 11 percent in volume since 1999. It should be noted that, since the UK is not part of the European Monetary Union, developments in the imports are also influenced by the £ / € exchange rate. By contrast, the other member countries highlighted in this survey are in fact part of the EMU, and hence share the same legal currency, the Euro.

Figure 5.5 Imports of fresh fruit and vegetables into the United Kingdom, 1999-2001
€ million



Source: Eurostat, 2002

Fruit

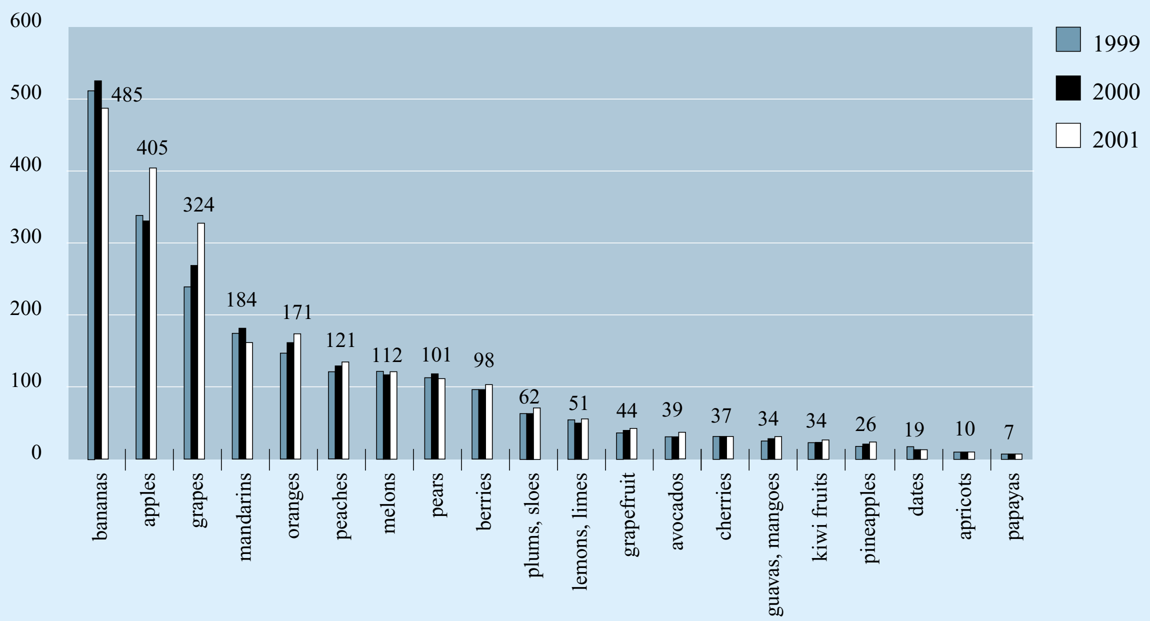
In 2001, UK imports of fresh fruit increased to € 2.4 billion / 2.9 million tonnes, of which more than half was sourced outside the EU. About 45 percent of fruit imports was supplied by developing countries.

Leading suppliers of FRESH FRUIT to the UK (share of the imported value in 2001)

Spain (17%), South Africa (12%), France (10%), The Netherlands (6%), Italy (5%), Chile (4%), Costa Rica (4%)

Bananas are the leading fruit product imported into the UK, representing a share of 20 percent of total fruit imports (in value) in 2001. In the same year, imports amounted to € 485 million / 745 thousand tonnes. Leading suppliers are Costa Rica, France (re-exports), Colombia, Cameroon, Belgium (re-exports), and Jamaica. Other leading import products are *apples* and *grapes*, for both of which the United Kingdom increased its imports considerably during the survey period (1999-2001).
Between 1999 and 2001, UK imports of *citrus fruit*

Figure 5.6 Imports of selected fresh fruit products into the United Kingdom, 1999-2001
€ million



Source: Eurostat, 2002

increased by 16 percent in value and by 4 percent in volume, reaching € 453 million / 690 thousand tonnes in the latter year. The dominant supplier is Spain, accounting for nearly 40 percent of the imported value, followed at a distance by South Africa, Turkey, Israel and Morocco.

Kiwi fruits and *pineapples* each represent only a small share of total fruit imports, although imports of these products increased considerably in terms of both value and volume between 1999 and 2001. In the latter year, UK imports of kiwi fruits amounted to € 34 million / 33 thousand tonnes, whereas pineapples imports reached € 26 million / 33 thousand tonnes.

As from 1999, total *mango* and *guava* imports increased by 41 percent in value and by 19 percent in volume, amounting to € 34 million / 27 thousand tonnes in 2001. The Asian ethnic communities in the United Kingdom prefer very sweet Indian and Pakistani mango varieties. For example, Indian Alphonse mangoes are popular with the South Asian community, while Julie mangoes from St. Lucia appeal to people of Caribbean descent.

Vegetables

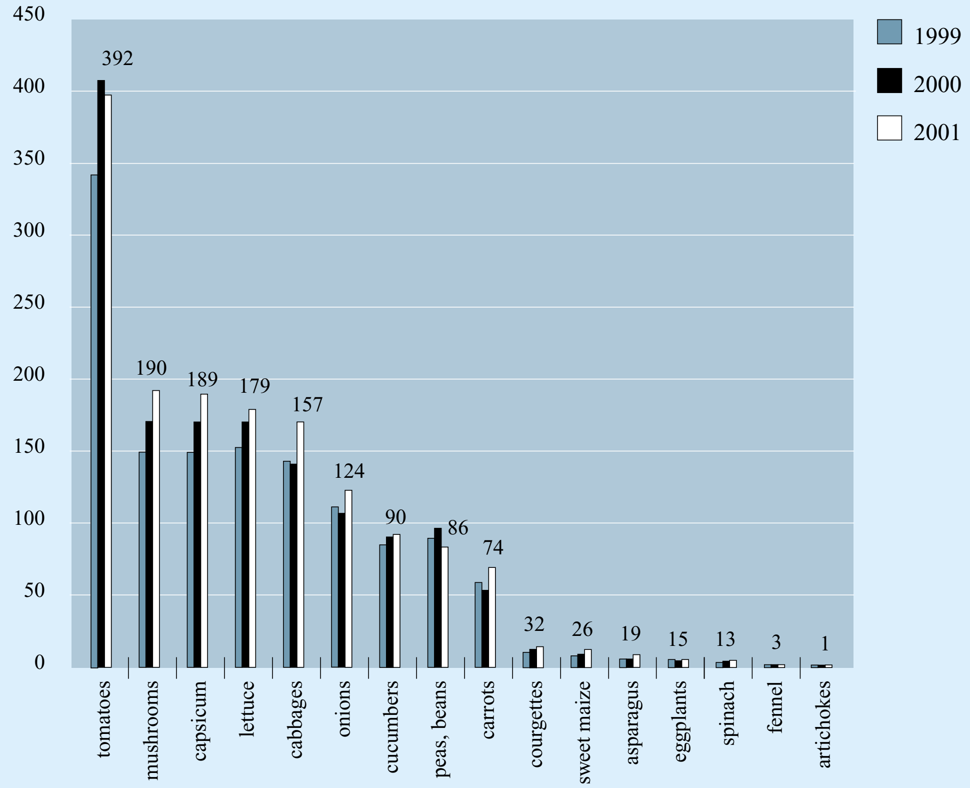
Between 1999 and 2001, total fresh vegetable imports into the United Kingdom increased by 29 percent in value and by 19 percent in volume, reaching more than € 1.7 billion / 1.5 million tonnes in 2001. In the same year, developing countries supplied 12 percent of total vegetable imports (in value).

Leading suppliers of FRESH VEGETABLES to the UK (share of the imported value in 2001)

Spain (39%), The Netherlands (24%), Ireland (8%), France (7%), Kenya (5%), Italy (3%)

Traditionally, products like *tomatoes, lettuce, cabbages* and *onions* are very popular products, of which the imports have increased considerably since 1999. *Capsicum* and *mushrooms* are also major import products, each representing 11 percent of total vegetable imports (in value) to the United Kingdom in 2001.

Figure 5.7 Imports of selected fresh vegetable products into the United Kingdom, 1999-2001| € million

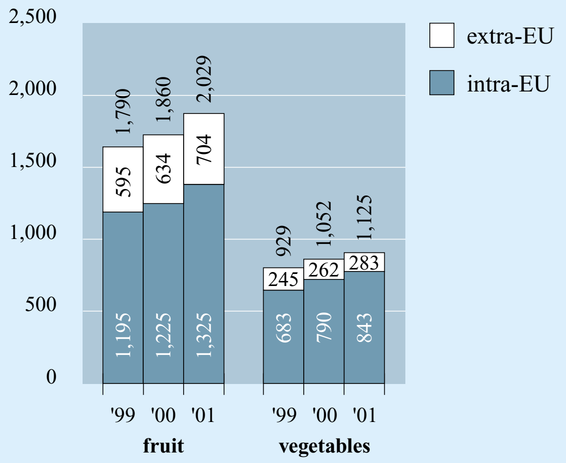


Source: Eurostat, 2002

France

France is the third leading EU importer of fresh fruit and vegetables. In 2001, total fruit and vegetable imports amounted to almost € 3.2 billion / 3.9 million tonnes, representing an increase of 16 percent in value and of 6 percent in volume since 1999.

Figure 5.8 Imports of fresh fruit and vegetables into France, 1999-2001
€ million



Source: Eurostat, 2002

Fruit

Since 1999, volume imports of fresh fruit into France increased by 13 percent in value and by 3 percent in volume, reaching € 2 billion or almost 2.5 million tonnes in 2001. Of the imported value, 28 percent was supplied by developing countries.

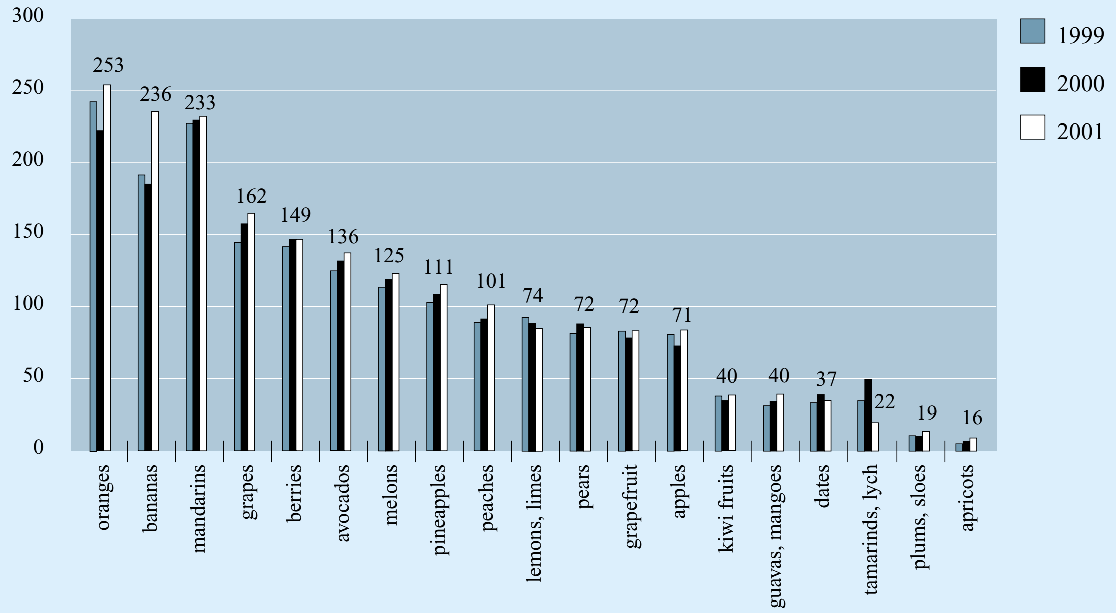
Leading suppliers of FRESH FRUIT to FRANCE share of the imported value in 2001

Spain (40%), Côte d'Ivoire (10%), Italy (10%), Belgium (7%), The Netherlands (5%), Morocco (5%), Israel (5%)

The major fresh fruit product imported into France is *citrus fruit*, with imports amounting to € 639 million / 910 thousand tonnes in 2001. Mandarins and oranges are the most popular citrus fruit, together accounting for a quarter of total fruit imports (in value) in 2001. Unlike most EU member countries, *bananas* are not the main fresh fruit product imported into France. Imports of bananas into France amounted to € 236 million / 380 thousand tonnes in 2001, nevertheless representing a considerable increase compared to the preceding year.

Avocados and pineapples are an interesting market segment in France, since both are imported in relatively large amounts, compared to other EU member countries.

Figure 5.9 Imports of selected fresh fruit products into France, 1999-2001
€ million



Source: Eurostat, 2002

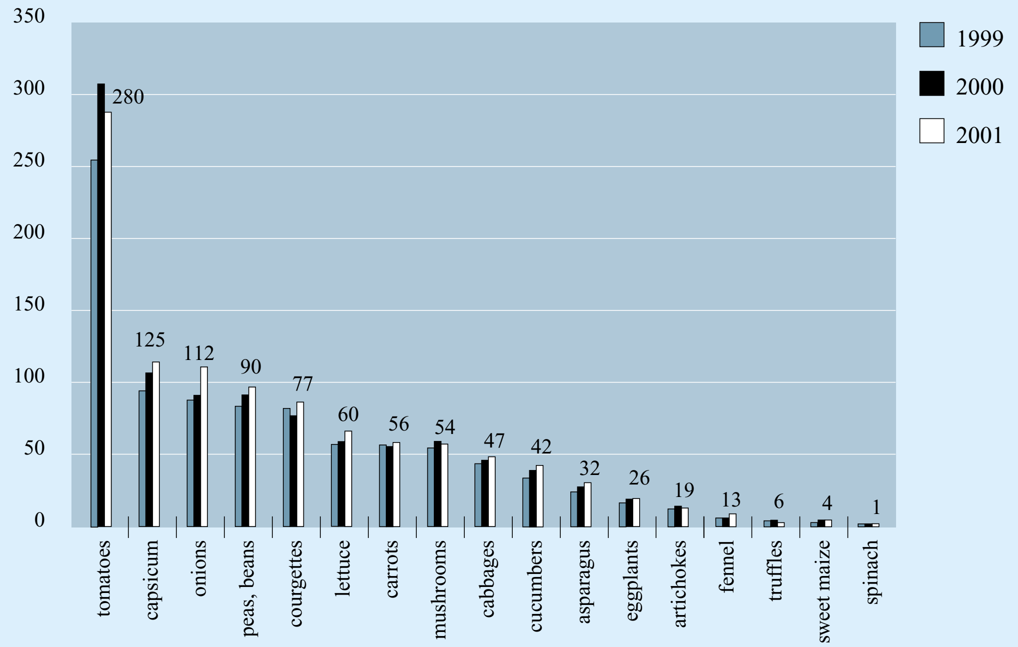
Vegetables
After Germany and the United Kingdom, France is the third largest fresh vegetable importing country in the European Union. In 2001, total imports reached 1.4 million tonnes, representing a value of more than € 1.1 billion. Since 1999, imports increased by 21 percent in terms of value, and by 13 percent in terms of volume. Around 20 percent of the total imported value was supplied by developing countries, which is a relatively high share by overall EU standards.

Leading suppliers of FRESH VEGETABLES to FRANCE
share of the imported value in 2001

Spain (43%), Morocco (15%), The Netherlands (11%), Belgium (10%), Italy (7%), Israel (3%)

French imports are characterised by well-known products like *tomatoes, onions, carrots* and other domestically produced products. Nevertheless, French imports of *peas & beans, courgettes, artichokes, eggplants* and *truffles* are relatively high compared to other EU member countries. After tomatoes, *capsicum* is the second leading vegetable imported into France, accounting for € 125 million / 112 thousand tonnes in 2001. With the exception of tomatoes, the values of all the imported leading fresh vegetable products increased continuously between 1999 and 2001.

Figure 5.10 Imports of selected fresh vegetable products into France, 1999-2001
€ million

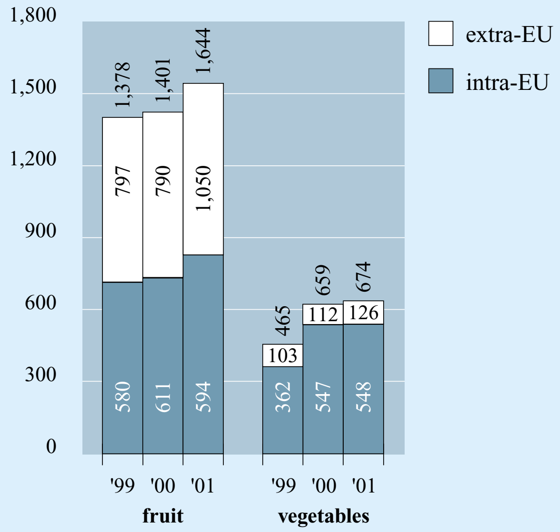


Source: Eurostat, 2002

The Netherlands

The Netherlands ranks among the leading EU importers of fresh fruit and vegetables, accounting for almost € 2.3 billion / 2.8 million tonnes in 2001. The significance of the imports from developing countries depends on the product (exotics) and season (off-season products). The role of countries outside the EU is much more pronounced in the supply of fresh fruits than of fresh vegetables.

Figure 5.11 Imports of fresh fruit and vegetables into The Netherlands, 1999-2001
€ million



Source: Eurostat, 2002

Fruit

Between 1999 and 2001, fruit imports into The Netherlands increased by almost 20 percent in value, amounting to € 1.6 billion in the latter year. In terms of volume, imports remained fairly stable, fluctuating around 2 million tonnes. In 2001, more than half of the Netherlands fruit imports was sourced extra-EU.

Leading suppliers of FRESH FRUIT to THE NETHERLANDS
share of the imported value in 2001

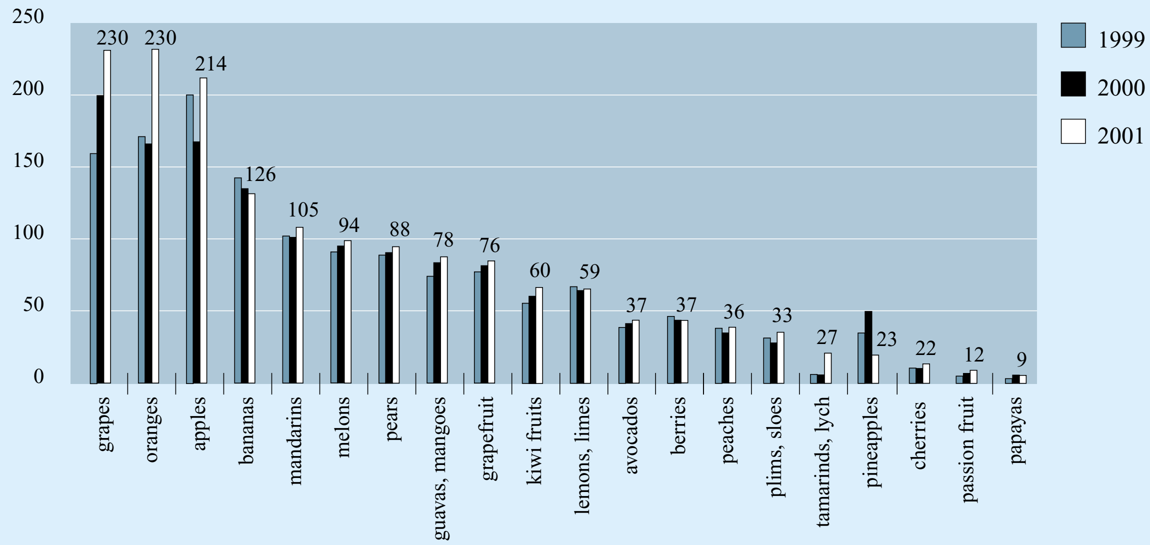
South Africa (17%), Spain (11%), Chile (10%), Belgium (10%), Brazil (9%), Argentina (6%), France (6%)

Between 2000 and 2001, the imported values of the leading three fresh fruit products (*grapes, oranges* and *apples*) increased considerably. Compared to other EU member countries, banana imports into The Netherlands play a relatively minor role, representing a share of 8 percent of total fresh fruit imports. In 2001, banana imports amounted to € 126 million / 177 thousand tonnes.

Next to oranges, *mandarins* and *grapefruit* are also popular citrus fruit species. In 2001, total citrus fruit imports amounted to € 484 million / 780 thousand tonnes, representing an increase of 22 percent in value since 1999. In terms of volume, citrus fruit imports remained more or less stable.

As from 1999, *guava* and *mango* imports increased by a quarter in terms of value, reaching € 78 million (62 thousand tonnes) in 2001. Guava and mango imports

Figure 5.12 Imports of selected fresh fruit products into The Netherlands, 1999-2001
€ million



Source: Eurostat, 2002

represented 5 percent of total fruit imports, which was relatively high compared to the EU average. Imports of other tropical fruit like *kiwi fruit, avocados, tamarinds, lychees* and *passion fruit* also increased considerably. Most of these fruit products are mainly sourced in developing countries.

Vegetables

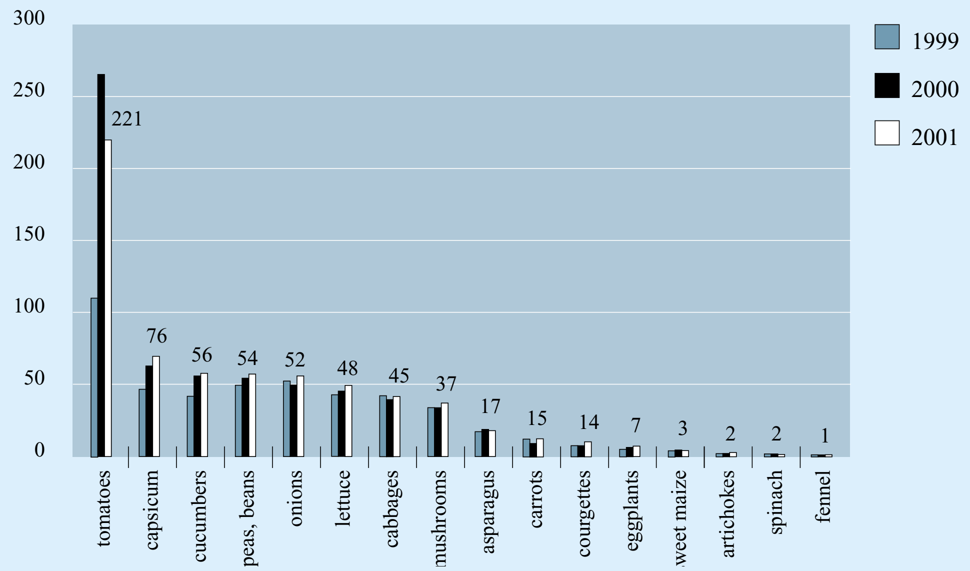
Since 1999, imports of fresh vegetables into The Netherlands increased considerably: 45 percent in value and 21 percent in volume, amounting to € 674 million / 799 thousand tonnes in 2001. As is the case for most of the other EU member countries, the largest share of Netherlands imports of fresh vegetables originated in other EU countries (mainly Spain), whereas less than 20 percent was imported from outside the EU in 2001.

Leading suppliers of FRESH VEGETABLES to THE NETHERLANDS
share of the imported value in 2001

Spain (56%), Belgium (9%), Germany (8%), France (5%), Israel (4%), Italy (2%)

As can be seen in Figure 5.13, *tomato* imports fluctuated considerably between 1999 and 2001, although it remained, by far, the leading fresh vegetable product imported into The Netherlands. Other major imported products are *capsicum, cucumbers* and *peas & beans*, all of which showed a steady increase in the imported values.

Figure 5.13 Imports of selected fresh vegetable products into The Netherlands, 1999-2001
€ million

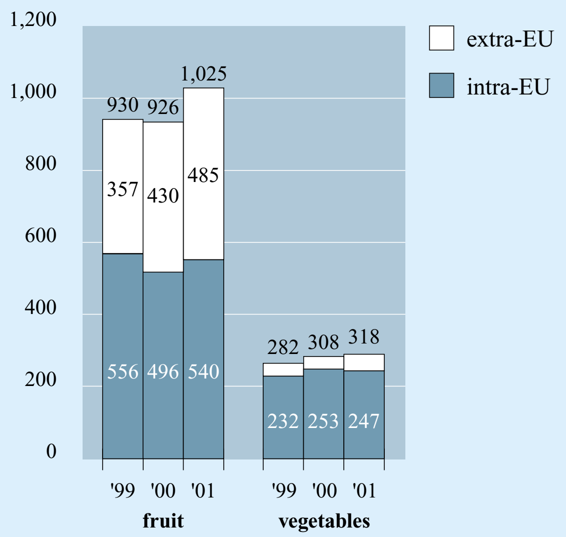


Source: Eurostat, 2002

Italy

In comparison to Germany and France, Italy imports rather modest quantities of fresh fruit and vegetables. In 2001, fresh fruit and vegetable imports into Italy amounted to more than € 1.3 billion / 1.65 million tonnes, representing an increase by 11 percent in value, but a decrease by 5 percent in volume since 1999. Italian producers are relatively well capable of supplying the Italian market. Because of the climatic circumstances in Italy, the cultivation of products like citrus fruit and kiwi fruits is possible. In North European countries, these products have to be imported from southern hemisphere countries or South European countries like Spain, Greece and Italy. Nevertheless, there is a market in Italy for exporters in developing countries in the supply of exotics and off-season products.

Figure 5.14 Imports of fresh fruit and vegetables into Italy, 1999-2001
€ million



Source: Eurostat, 2002

Fruit

As from 1999, Italian imports of fresh fruit increased by 14 percent in value but decreased by 9 percent in volume, reaching more than € 1 million / 1.3 million tonnes in 2001. Imports from non-EU countries accounted for nearly half of total imports, which is well above the EU average. Almost all products originating outside the EU are supplied by developing countries.

Leading suppliers of FRESH FRUIT to ITALY share of the imported value in 2001

Spain (25%), Ecuador (12%), France (10%), Argentina (6%), Costa Rica (5%), Belgium (5%)

Also in Italy, *bananas* take up the lion's share of the fresh fruit import market. In 2001, 38 percent of Italian fresh fruit imports (in value) consisted of fresh banana imports. Between 1999 and 2001, banana imports increased by 18 percent in value, but decreased by 5 percent in volume, reaching € 386 million / 571 thousand tonnes in 2001. After an increase between 1999 and 2000, *citrus fruit* imports into Italy recovered somewhat, amounting to € 171 million / 242 thousand tonnes in 2001. In the same year, citrus fruit imports accounted for 17 percent of total Italian fresh fruit imports in terms of value.

Imports of *pineapples* increased considerably, reaching € 60 million / 71.2 thousand tonnes in 2001, representing an increase of 25 percent in value since 1999. Although Italian imports of *guavas & mangoes* and *avocados* show a steady increase, imports remain moderate compared to other EU member countries. In 2001, imports of guavas & mangoes amounted to € 3 million / 2.1 thousand tonnes while the imports of avocados amounted to € 4.6 million / 3.2 thousand tonnes.

Vegetables

Between 1999 and 2001, Italian fresh vegetable imports increased by 12 percent in both value and volume, reaching € 318 million / 334 thousand tonnes in 2001. The share of the imported value originating in developing countries amounted to 12 percent, which is above EU average.

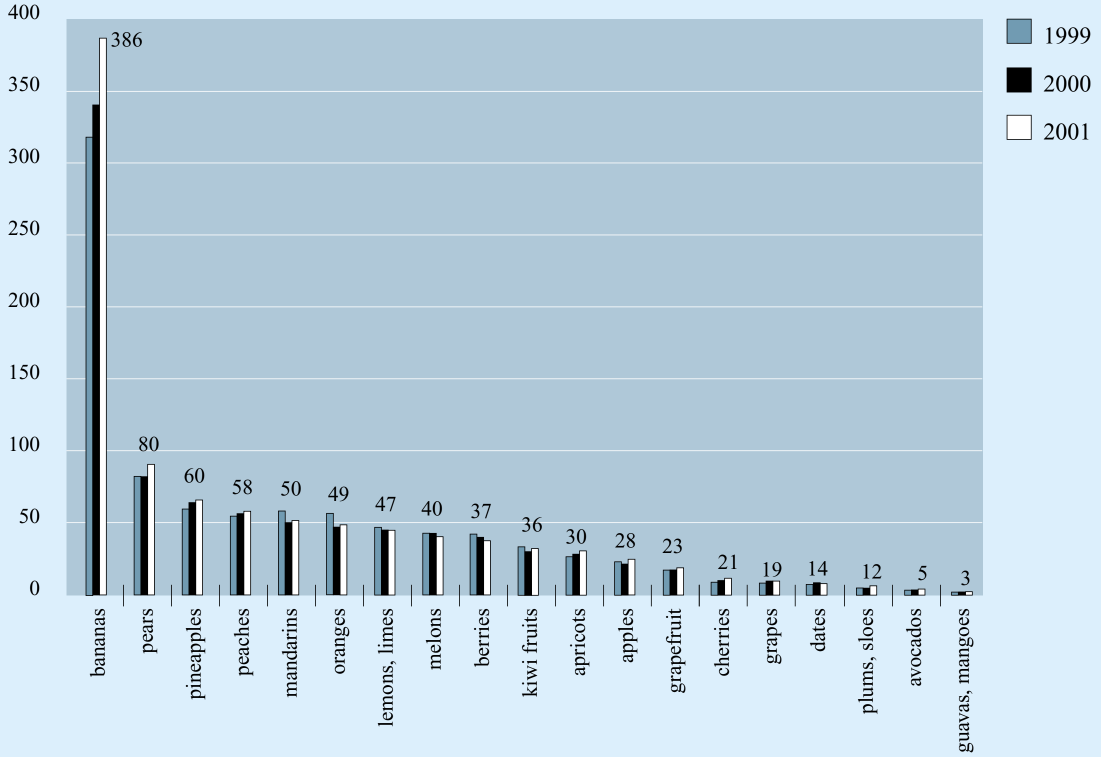
Leading suppliers of FRESH VEGETABLES to ITALY share of the imported value in 2001

Spain (33%), France (18%), The Netherlands (14%), Germany (7%), Romania (4%), Fed. Rep. Yugoslavia (3%)

In 2001, *capsicum, tomatoes* and *mushrooms* were the three main products imported into Italy. These products take up a relatively high share in total fresh vegetable imports. There has been a remarkable increase in *onion* and *mushroom* (value) imports (+67% and + 31% respectively) since 1999, amounting to € 53 million / 88 thousand tonnes and € 51 million / 15 thousand tonnes respectively in 2001. Other imported products, which increased in terms of value, are *peas & beans* (+56%), *cabbages* (+34%), *asparagus* (+32%), *eggplants* (+126%), *truffles* (90%), *spinach* (+52%) and *fennel* (+52%).

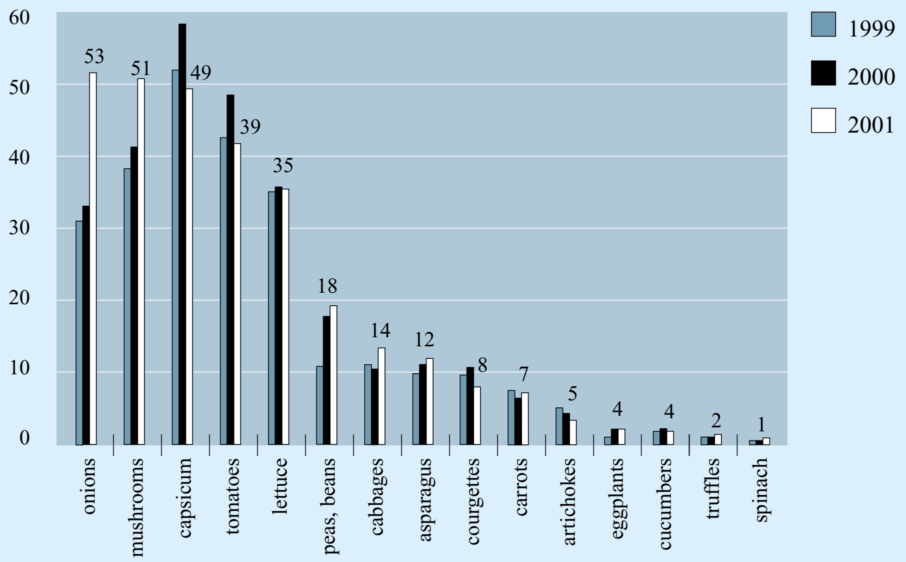
Tomato imports fluctuated considerably. As Italy is a major tomato producer itself, tomato imports merely function as a supplement to domestic produce. As a consequence, imports of tomatoes depend strongly on the domestic harvest.

Figure 5.15 Imports of selected fresh fruit products into Italy, 1999-2001
€ million



Source: Eurostat, 2002

Figure 5.16 Imports of selected fresh vegetable products into Italy, 1999-2001
€ million



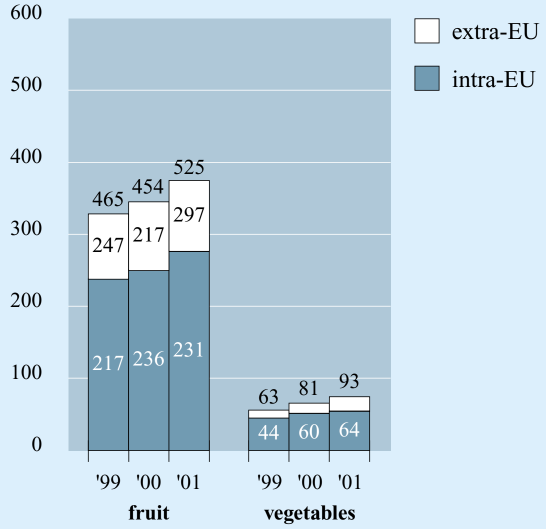
Source: Eurostat, 2002

Spain

Although Spain is a relatively small importer of fresh fruit and vegetables, this country can prove interesting for developing country exporters. Unlike most of the other leading importers, which re-export a large part of their imports, the quantities imported into Spain are almost entirely consumed in the domestic market. It should be noted, however, that Spain, next to Italy, is the leading EU grower of fresh produce, serving a large part of the domestic needs for fresh fruit and vegetables. Nevertheless, there is still a market for exporters in developing countries in the supply of exotics and off-season products.

In 2001, Spain imported a total of 882 thousand tonnes of fresh fruit and vegetables, representing a value of € 618 million.

Figure 5.17 Imports of fresh fruit and vegetables into Spain, 1999-2001
€ million



Source: Eurostat, 2002

Fruit

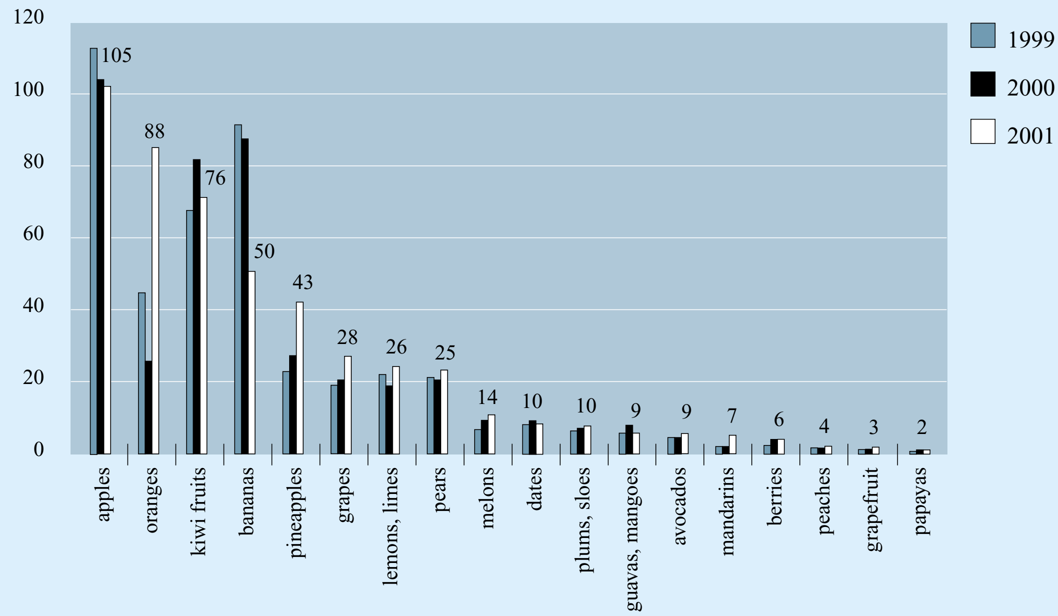
After a small decrease between 1999 and 2000, imports of fruit into Spain increased by 16 percent, amounting to € 525 million in 2001. In terms of volume, imports fluctuated in the opposite direction, amounting to 735 thousand tonnes in 2001. About 56 percent of the imported value was sourced outside the EU.

Leading suppliers of FRESH FRUIT to SPAIN share of the imported value in 2001

France (22%), Argentina (10%), Chile (9%), Italy (9%), Costa Rica (7%), South Africa (6%)

Apples are the leading fresh fruit product imported into Spain, accounting for 20 percent of total fruit imports (in value). Because of the extensive domestic cultivation of fruit, the composition of Spanish imports differs substantially from those of other EU countries.

Figure 5.18 Imports of selected fresh fruit products into Spain, 1999-2001
€ million



Source: Eurostat, 2002

Vegetables

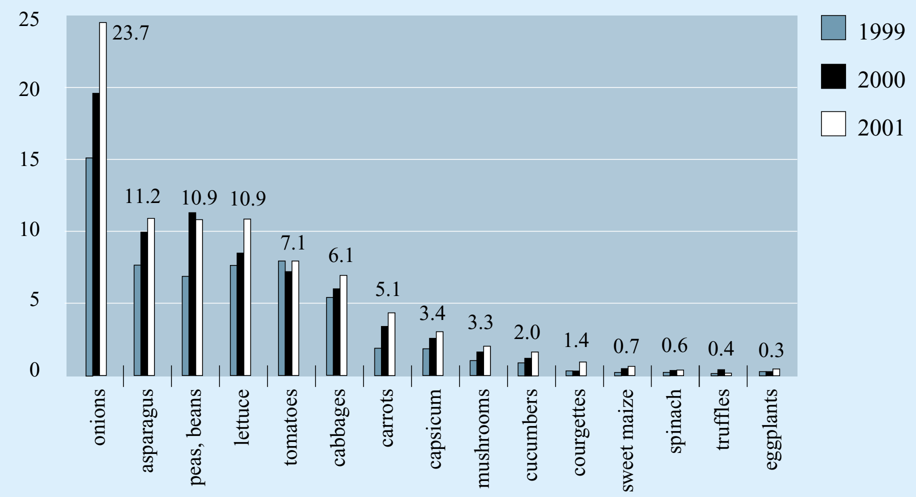
As from 1999, Spanish imports of fresh vegetables increased by about 50 percent in value and by almost 40 percent in volume, amounting to € 93.2 million / 147 thousand tonnes in 2001. Almost 30 percent of the imported value originated in developing countries, which is relatively high by EU standards.

Leading suppliers of FRESH VEGETABLES to SPAIN
share of the imported value in 2001

France (38%), Morocco (14%), The Netherlands (13%), Peru (11%), Belgium (4%), Germany (4%)

Onions, asparagus, peas & beans and *lettuce* are the leading products imported into Spain, together accounting for over 60 percent of total vegetable imports (in value) in 2001.

Figure 5.19 Imports of selected fresh vegetable products into Spain, 1999-2001
€ million



Source: Eurostat, 2002

5.2 Imports by product group

Fruit
In 2001, total imports of fresh fruit by EU member countries amounted to over € 14.4 billion / 18.5 million tonnes. As can be seen in Figure 5.20, bananas, apples, grapes and several citrus fruits are the most popular import products within the fresh fruit category.

Leading suppliers of bananas to the EU share of the imported value in 2001

Belgium (15%), Ecuador (13%), Costa Rica (13%), Colombia (12%), Panama (7%), France (6%), Cameroon (5%)

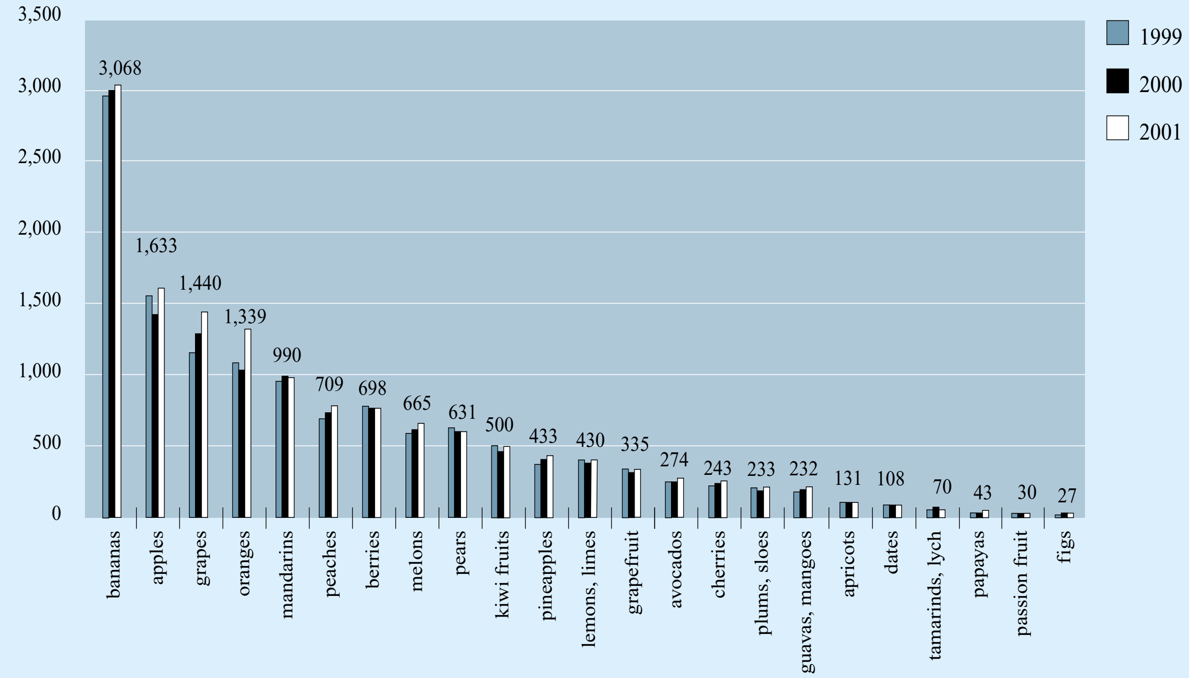
Bananas
Traditionally, the leading fresh fruit product imported into the European Union is bananas. In 2001, the total import of bananas by EU member countries amounted to almost € 3.1 billion, representing a decrease of 4 percent compared to 1999. In terms of volume, imports of bananas first increased by 4 percent between 1999 and 2000, but then decreased by 5 percent, amounting to nearly 4.8 million tonnes in 2001. Banana imports enter the European Union markets directly as well as indirectly via Belgium, France and The Netherlands.

Apples, grapes, berries, pears
Other important fresh fruit products are apples, representing 11 percent of total fruit imports by EU member countries, grapes (10%), berries (5%) and pears (4%). In 2001, apple imports amounted to almost € 1.6 billion / 2.4 million tonnes, while grape imports were € 1.4 billion / 1.1 million tonnes, berry imports € 698 million / 444 thousand tonnes and pear imports € 631 million / 844 thousand tonnes.

Leading suppliers (share of the imported value in 2001) to the EU of:

apples	France (24%), Italy (14%), New Zealand (11%), The Netherlands (10%), South Africa (8%)
grapes	Italy (27%), South Africa (16%), The Netherlands (9%), Chile (9%) Spain (8%), Greece (8%)
berries	Spain (45%), The Netherlands (9%), Belgium (9%), Italy (7%), Morocco (6%), France (5%)
pears	The Netherlands (18%), Argentina (15%), Italy (15%), Belgium (12%), Spain (12%)

Figure 5.20 Imports of selected fresh fruit products into the EU, 1999-2001 € million



Source: Eurostat, 2002

Citrus fruit
When grouped together, citrus fruit forms the leading import product group in both terms of value and volume, with imports by EU member countries amounting to more than € 3.1 billion / 4.8 million tonnes in 2001. As from 1999, citrus fruit imports increased by 9 percent in value but decreased by 2 percent in volume. The leading EU importers of citrus fruit are Germany (21%), France (20%), The Netherlands (15%) and the UK (14%).

European production of citrus fruits takes place in the Mediterranean countries Spain, Italy, and Greece. The harvest period in these countries is October to May. During a long period of the year, the EU countries are dependent on the supply of citrus fruit from outside Europe. Spain is one of the world's leading suppliers of citrus fruit, with a share of about 30 percent of total Spanish exports of agricultural products.
Because of the strongly improved storage life of the product, the selling seasons of the citrus producing and exporting countries have become longer. Where formerly the supply periods of the various countries more or less followed each other, we now more often see overlapping periods and, as a result, also increasing competition. Because of the improvement in the growing techniques, some countries are able to harvest earlier and later so that the supply season is extended. This also affects the competitive position of other supplying countries.

In general, in the field of citrus, and notably where oranges, mandarins and lemons are concerned, there is a plentiful supply on the European market. This means that the supplying countries will have to export products which, on a qualitative level, can compete with the produce of the leading suppliers, who have made a more or less standardised product out of varieties, sizes and packaging of citrus fruit.

Please note that, although The Netherlands is listed as a leading supplier of citrus fruit to the other EU member countries, this only concerns re-exports, which are originally supplied by other countries.

Leading suppliers of citrus fruit to the EU: share of the imported value in 2001

oranges	Spain (44%), South Africa (13%), The Netherlands (7%), Morocco (6%), Argentina (3%)
mandarins	Spain (68%), Morocco (6%), Turkey (4%), South Africa (4%), The Netherlands (3%)
lemons, limes	Spain (45%), Argentina (19%), The Netherlands (11%), Turkey (4%), South Africa (4%)
grapefruit	USA (21%), The Netherlands (13%), South Africa (13%), Israel (11%), Belgium (8%)

Peaches, melons, cherries

Although peaches and nectarines are imported in large quantities by the EU member countries, this product group is not particularly interesting for developing country exporters, since 95 percent of imports is provided by the other EU countries (mainly Spain and Italy). In 2001, total peach and nectarine imports amounted to € 709 million / 77 thousand tonnes.

As from 1999, melon (including watermelon) imports by EU member countries increased by 15 percent in value, but decreased by 3 percent in volume, reaching € 665 million / 1.1 million tonnes in 2001. The leading EU importer of melons is Germany, accounting for 21 percent of the imported value in 2001, followed by France (19%), the UK (17%) and The Netherlands (14%).

Between 1999 and 2001, cherry imports increased by 16 percent in value but decreased by 13 percent in volume, reaching € 243 million / 124 thousand tonnes in the latter year. The leading EU importer of cherries is by far Germany, accounting for one third of value imports in 2001. Other leading EU importers are Austria (17%), the UK (15%), The Netherlands (9%) and Italy (8%).

Leading suppliers of peaches, melons and cheries to the EU: share of the imported value in 2001

peaches	Spain (39%), Italy (37%), France (11%), Greece (3%), The Netherlands (2%), Chile (1%)
melons	Spain (49%), The Netherlands (8%), Brazil (8%), Costa Rica (7%), France (6%), Italy (5%)
cherries	Turkey (34%), Spain (13%), Italy (7%), France (5%), Hungary (5%), The Netherlands (4%)

Kiwi fruits, pineapples, avocados

After decreasing by 5 percent (in value) between 1999 and 2000, kiwi fruit imports increased by 9 percent, amounting to € 500 million in 2001. In terms of volume, imports increased by 14 percent during the survey period, reaching 486 thousand tonnes in 2001. The leading EU importer of kiwi fruits is Germany, accounting for 22 percent of value imports in 2001, followed by Belgium (20%), Spain (15%) and The Netherlands (12%).

Other relatively significant imported exotics are pineapples and avocados. Since 1999, pineapple imports by EU member countries increased by 38 percent in value and by 3 percent in volume, amounting to € 433 million / 540 thousand tonnes in 2001. France is the leading EU importer of pineapples, accounting for over a quarter of the total imported value, followed by Belgium (18%), Germany (14%) and Italy (14%). During the same period, avocado imports increased by 17 percent in value and by 18 percent in volume, reaching € 274 million / 188 thousand tonnes in 2001. The major EU importer of avocados is France, accounting for half of avocado imports (in value) in 2001, followed by the United Kingdom (14%) and The Netherlands (14%).

Leading suppliers of kiwi fruits, pineapples, avocados to the EU: share of the imported value in 2001

pineapples	Costa Rica (26%), Côte d'Ivoire (25%), France (14%), Ghana (7%), Belgium (7%)
avocados	South Africa (20%), Spain (19%), Israel (19%), France (9%), The Netherlands (9%), Mexico (8%)
kiwi fruits	New Zealand (31%), Italy (25%), Belgium (18%), Chile (9%), France (6%), The Netherlands (6%)

Plums & sloes, guavas & mangoes, apricots, dates
In 2001, imports by EU member countries of plums and sloes amounted to € 233 million / 332 thousand tonnes, representing an increase of 22 percent in value and 52 percent in volume compared to the preceding year. The leading EU importer of sloes and plums is the United Kingdom, accounting for 27 percent of the imported value in 2001, followed by Germany (19%), The Netherlands (14%) and Belgium (10%).

Mango and guava imports by EU member countries are increasing steadily every year, both in terms of value and volume, while suppliers around the world are stepping up production. In 2001, total guava and mango imports by EU member countries amounted to € 232 million / 190 thousand tonnes. About a third of this value was imported by The Netherlands, 17 percent by France, 15 percent by the United Kingdom and 13 percent by Germany. The world's top supplying countries (in Latin America and Africa) have benefited from the shift towards sea freight, delivering the fruit in the right condition.
In 2001, apricot imports by EU member countries amounted to € 131 million / 107 thousand tonnes. Developing countries supplied only 11 percent of the imported value.

Between 1999 and 2000, imports of dates by EU member countries increased by 9 percent in terms of value, after which they decrease by 7 percent, amounting to € 108 million in 2001. In terms of volume, imports remained more or less stable, fluctuating around 61 thousand tonnes. The leading EU importer of dates is France, accounting for 34 percent of total value imports in 2001, followed by the UK (18%), Italy (13%) and Germany (11%). More than 60 percent of the total imported value is supplied by developing countries. The most important time for date sales in the EU is during the Islamic Ramadan month.

Leading suppliers of plums, sloes, guavas, mango, apricots and dates to the EU: (share of the imported value in 2001)

plums, sloes	Spain (23%), South Africa (18%), Chile (11%), Italy (10%), France (8%)
guavas, mango	Brazil (28%), The Netherlands (15%), Israel (6%), Côte d'Ivoire (6%), France (6%)
apricots	Spain (41%), France (26%), Greece (7%), Italy (6%), Turkey (6%), South Africa (4%)
dates	Tunisia (44%), Israel (16%), France (10%), Algeria (10%), Iran (6%), USA (5%)

Tamarinds & lychees, papayas, passion fruit, figs
Although the imported quantities of tamarinds, lychees, papayas, passion fruit and figs are relatively small, these product groups can be interesting for developing country exporters. Not only is the European consumer becoming more familiar with these tropical fruits, thus raising consumption, but most of EU imports of these products is supplied by developing countries.

In 2001, EU imports of tamarinds and lychees amounted to some € 70 million / 31 thousand tonnes, of which the lion's share (more than 70 percent) was imported from developing countries. The remainder consisted mainly of re-exports (primarily from France and The Netherlands), although Spain, a minor producer, also exports to other EU member countries. In 2001, The Netherlands was the largest EU importer of tamarinds and lychees, accounting for 39 percent of total imported value. Most of the remaining imports went to France, Germany, the UK and Belgium. In Germany, as is the case with much of its fresh fruit imports, the major part of the domestic requirements is met by re-exports from other EU members, most notably The Netherlands and France.

In 2001, papaya imports by EU member countries amounted to € 43 million / 23 thousand tonnes, representing an increase of 37 percent in value and 31 percent in volume since 1999. About 75 percent of the imported value originated in developing countries. The leading EU importers of papayas are Germany (25%), The Netherlands (20%), the UK (17%) and Portugal (13%).

EU imports of passion fruit amounted to some € 30.3 million / 9.8 thousand tonnes in 2001, of which about 60 percent was imported from developing countries. In the same year, the leading EU destination of passion fruit consignments was The Netherlands (mostly for re-exports), accounting for 39 percent of total EU passion fruit imports (in value), followed by Germany (20 %), France (13%).

In 2001, fresh fig imports by EU member countries amounted to € 27.3 million / 16.3 thousand tonnes, representing an increase in both terms of value and volume. The leading EU destinations are France, Germany, The Netherlands and Austria, together accounting for 77 percent of the total imported value.

Leading suppliers of tamarinds, lychees, papayas, passions fruit and figs to the EU:
share of the imported value in 2001

tamarinds/ lych.	Madagascar (53%), France (14%), South Africa (10%), The Netherlands (9%), Thailand (5%)
papayas	Brazil (63%), The Netherlands (13%), Ghana (5%), USA (3%), Thailand (3%), Spain (2%)
passion fruit	Malaysia (32%), The Netherlands (27%), Zimbabwe (8%), Kenya (7%), Colombia (5%)
figs	Turkey (32%), The Netherlands (15%), Spain (13%), Italy (11%), Brazil (11%), Belgium (4%)

Vegetables
In 2001, total imports by EU member countries of fresh vegetables amounted to almost € 7.8 billion / 8.7 million tonnes. Figure 5.21 shows that tomatoes, capsicum, lettuce and onions are the leading fresh vegetable products imported by EU member countries.

Tomatoes, capsicum, onions
The most important fresh vegetable product imported by EU member countries is tomatoes (considering that potatoes are not included in this survey), reaching an import level of € 1.85 billion / 1.95 million tonnes in 2001. In the same year, Germany accounted for 35 percent of the imported value, followed by the UK (21%), France (15%) and The Netherlands (12%).

Most noticeable is the relatively large - and still increasing - amounts of capsicum imported into the EU, although only 5 percent of the imported value is supplied by developing countries. Capsicum imports by EU member countries amounted to more than € 1 billion / 700 thousand tonnes in 2001. Capsicum used to be traditionally better known in southern Europe than in the northern member states. However, since the early 1980s, capsicum has also been widely accepted in dishes in many northern European households.
Another major imported fresh vegetable product is onions. In 2000, imports amounted to € 691 million / 1.4 million tonnes. Germany is the leading EU importer, accounting for 23 percent of the imports, followed by the UK (18%) and France (16%). Developing countries supplied 11 percent of the imported value.

Leading suppliers (share of the imported value in 2001) to the EU of:

tomatoes	Spain (42%), The Netherlands (32%), Italy (7%), Belgium (6%), Morocco (6%), France (3%)
capsicum	Spain (40%), The Netherlands (39%), Israel (5%), France (3%), Turkey (3%), Hungary (2%)
onions	The Netherlands (26%), Spain (21%), France (10%), Belgium (9%), Italy (7%), New Zealand (6%)

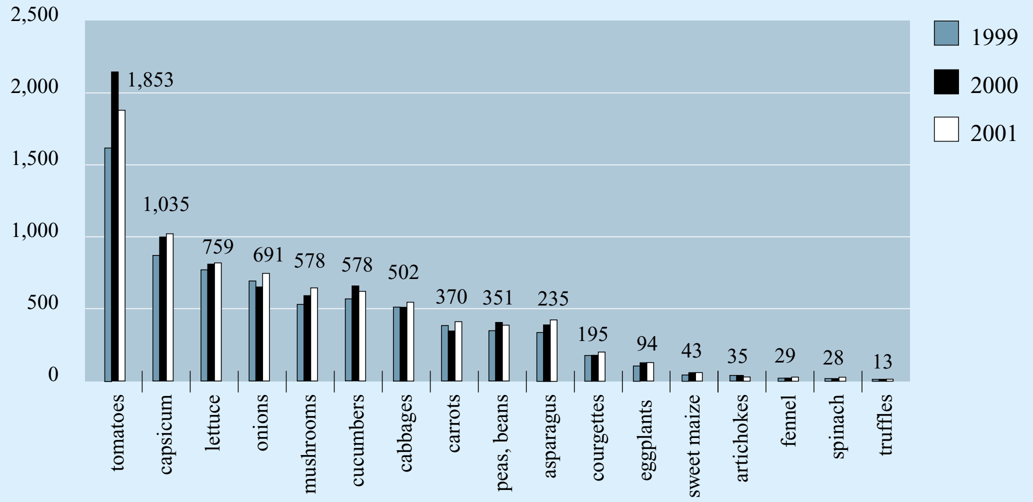
Peas and beans
After an increase of about 19 percent in value and of 14 percent in volume between 1999 and 2000, pea and bean imports by EU member countries decreased by 3 (value) and 8 percent (volume), amounting to € 351 million / 332 thousand tonnes in 2001. About 55 percent of the imported value was supplied by developing countries. In 2001, France was the leading EU importer of peas and beans, accounting for 26 percent of the imported value, followed by the UK (24%), The Netherlands (15%), Belgium (12%), Germany (8%) and Italy (5%).
French beans supplied to Europe have provided a major source of revenue for Africa and African growers. This business has been soaring, thanks to investments in modern transportation and refrigeration facilities. African exports are likely to remain high, accounting

for most of the European supply from December to May. Snow peas began as a speciality item, but are now increasingly becoming mainstream due to their year-round availability. Snow peas, sometimes referred to as 'mangetout', are especially popular with caterers and restaurants.

Leading suppliers of peas and beans to the EU share of the imported value in 2001

Kenya (21%), Spain (16%), Morocco (14%), France (9%), The Netherlands (9%), Egypt (7%), Italy (3%), Guatemala (3%)

Figure 5.21 Imports of fresh vegetable products into the EU, 1999-2001 € million



Source: Eurostat, 2002

Mushrooms, truffles
In 2001, total imports of fresh and chilled mushrooms by EU member countries amounted to € 578 million / 243 thousand tonnes, representing an increase of almost 30 percent in both value and volume since 1999. Major EU importers of mushrooms are the United Kingdom and Germany, together accounting for 60 percent of imports. The Netherlands is by far the leading EU producer of mushrooms. With the opening up of the Eastern European countries, these countries, and particularly Poland, are becoming worthy competitors for the Netherlands mushroom trade. Some of the Netherlands growers have even moved (part of) their businesses to an Eastern European country.
The imports by EU member countries of truffles are much smaller. In 2001, total imports amounted to € 12.7 million / 149 tonnes. France is, by far, the leading EU importer, accounting for almost half of the total imported value, followed by Italy (17%) and Germany (13%).

Leading suppliers to the EU of: share of the imported value in 2001

mushrooms	The Netherlands (29%), Ireland (23%), Poland (10%), Belgium (6%), Germany (4%)
truffles	Spain (31%), Italy (28%), France (26%), China (6%), Croatia (3%), Germany (2%)

Asparagus, courgettes, eggplants
Between 1999 and 2001, asparagus imports by EU member increased by 21 percent in terms of value, but decreased by 15 percent in terms of volume, reaching € 235 million / 78 thousand tonnes in 2001. Most European countries get their asparagus imports from Greece and Spain. The strong increase in asparagus imports since the late 1980s has mainly been supplied by these two countries. The main Spanish and Greek seasons run concurrently from March to June, and it is during this period (especially April and May) that EU fresh asparagus imports are at their highest levels. Europeans generally prefer asparagus with large stalks, and (with the exception of the United Kingdom) have traditionally consumed white, rather than green, asparagus. In the past few years, green asparagus has also gained popularity on the mainland European market, to the point where most off-season fresh asparagus imports are of green, rather than white, varieties. The leading EU importer of asparagus is Germany, accounting for about half of total asparagus imports (in value), followed by France (14%), the UK (8%) and The Netherlands (7%).

In 2001, imports by EU member countries of courgettes amounted to € 195 million / 211 thousand tonnes, representing an increase of 19 percent in value and 23 percent in volume since 1999. The leading EU importer of courgettes is by far France, accounting for 40 percent of the total imported value, followed by Germany (18%) and the UK (17%).

During the survey period (1999-2001), eggplant imports by EU member countries increased by 20 percent in value and by 9 percent in volume, reaching € 94 million / 92.5 thousand tonnes in 2001. the main EU importers of eggplants are Germany and France, together accounting for 56 percent of the total imported value.

Leading suppliers (share of the imported value in 2001) to the EU of:

asparagus	Spain (34%), Greece (27%), Peru (12%), The Netherlands (9%), France (5%), Hungary (3%)
courgettes	Spain (69%), The Netherlands (7%), Morocco (7%), France (7%), Italy (6%), Turkey (1%)
eggplants	Spain (52%), The Netherlands (32%), Turkey (4%), France (4%), Italy (3%), Germany (1%)

Sweet maize
About half of the imports by EU member countries of sweet maize is supplied by developing countries. Between 1999 and 2001, imports increased by 42 percent in value but decreased by 5 percent in volume, amounting to € 42.6 million / 26.1 thousand tonnes in 2001. The leading EU importer is by far the United Kingdom, accounting for more than 60 percent of the imported value.

Leading suppliers of sweet maize to the EU share of the imported value in 2001

Thailand (37%), USA (13%), France (10%), Spain (8%), Morocco (6%), Israel (6%)

Baby corn
Baby corn is used primarily in Asian cuisine, and consumption of this product is highest in communities with large numbers of Asian immigrants. Thailand is the undisputed leading supplier and exports both fresh and canned baby corn. Very limited statistics are available at both the import and the export end.

Asian vegetables
Asian vegetables, including karela (bitter melon), dudhi (long squash), fuzzy squash, valore (long bean), turia (chinese okra), oriental eggplant, lemon grass and others are highly appreciated by the Asian ethnic market in Europe. Karela and valore are the items most demanded, followed by oriental eggplant. Import figures are not readily available but it appears that the United Kingdom, because of its large Asian population, is the largest European market and Kenya the largest supplier. Other suppliers include Surinam, Ghana, Zambia, Zimbabwe, Uganda, Thailand, Pakistan and India.

5.3 The role of the developing countries

In general, developing countries play a far less pronounced role in the supply of fresh vegetables than in the supply of fresh fruit.

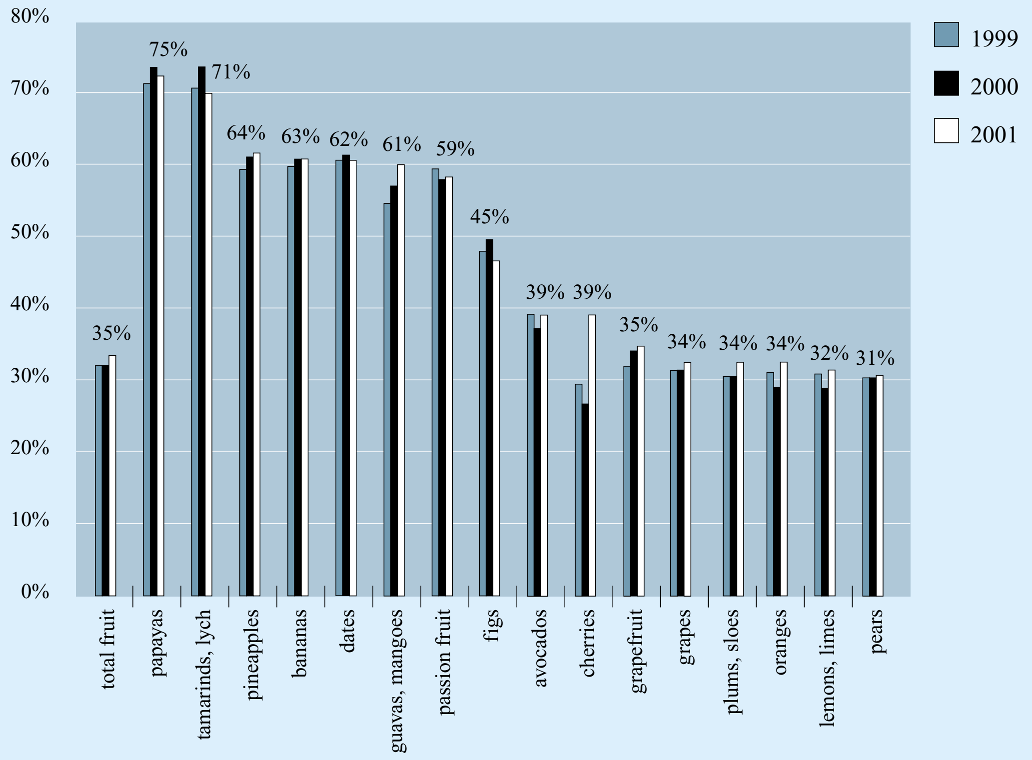
Fruit
In 2001, fresh fruit imports by EU member countries originating in developing countries amounted to € 5.1 billion / 6.8 million tonnes, representing an increase of 17 percent in value and of 3 percent in volume since 1999. The share of developing countries in imports by EU member countries also increased during the same period, up to 35 percent in value and 37 percent in volume. More than seventy countries from all continents are responsible for the immense product flows directed at the European countries. The leading developing countries exporting fresh fruit to the EU are South Africa and Latin-American countries like Costa Rica, Ecuador, Chile, Colombia, Argentina and Brazil. Other leading non-Latin-American countries are Côte d'Ivoire, Turkey, Morocco and Cameroon. For a detailed list, please refer to Appendix 2.

Leading developing country suppliers to the EU
% of total 2001 imports from developing countries

		Total share DC
papayas	Brazil (84%), Ghana (7%), Thailand (3%), Côte d'Ivoire (1%)	**75%**
tamarinds, lych.	Madagascar (75%), South Africa (14%), Thailand (7%), Mauritius (1%)	**71%**
pineapples	Costa Rica (41%), Côte d'Ivoire (40%), Ghana (11%), Honduras (3%)	**64%**
bananas	Ecuador (21%), Costa Rica (20%), Colombia (18%), Panama (11%), Cameroon (8%), Côte d'Ivoire (7%)	**63%**
dates	Tunisia (70%), Algeria (15%), Iran (10%)	**62%**
guavas, mangoes	Brazil (45%), Côte d'Ivoire (10%), Pakistan (8%), South Africa (8%), Peru (6%)	**61%**
passion fruit	Malaysia (55%), Zimbabwe (13%), Kenya (12%),Colombia (9%)	**59%**
figs	Turkey (70%), Brazil (24%), Peru (4%)	**45%**
avocados	South Africa (52%), Mexico (20%), Kenya (20%), Peru (4%)	**39%**
cherries	Turkey (89%), Chile (5%), Argentina (4%)	**39%**
grapefruit	South Africa (38%), Turkey (21%), Argentina (12%), Cuba (9%), Honduras (7%)	**35%**
grapes	South Africa (47%), Chile (26%), Turkey (7%), Argentina (6%), Brazil (5%)	**34%**
plums, sloes	South Africa (54%), Chile (33%), Argentina (7%), Turkey (4%)	**34%**
oranges	South Africa (39%), Morocco (18%), Argentina (10%), Brazil (9%), Uruguay (6%), Zimbabwe (6%)	**34%**
lemons, limes	Argentina (61%), Turkey (11%), South Africa (11%), Brazil (9%), Uruguay (5%)	**32%**
pears	Argentina (49%), South Africa (29%), Chile (17%), Turkey (4%)	**31%**
apples	South Africa (37%), Chile (33%), Argentina (19%), Brazil (7%), China (2%)	**23%**
melons	Brazil (34%), Costa Rica (33%), Morocco (14%), Panama (5%), Honduras (4%)	**22%**
total fruit	South Africa (16%), Costa Rica (11%), Ecuador (8%), Chile (7%), Colombia (7%)	**35%**

DC = Developing countries

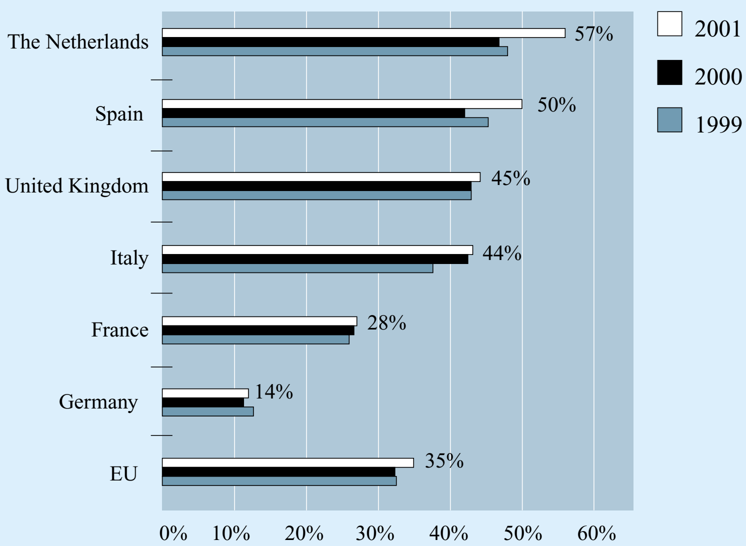
Figure 5.22 Share of developing countries in imports of selected fresh fruit into the EU, 1999-2001
% imported value



Source: Eurostat, 2002

Developing countries play a major role in the supply of papayas, tamarinds & lychees, pineapples, bananas, dates, guavas & mangoes and passion fruit to the EU. In 2001, these countries supplied more than half of total imports (in value) by EU member countries of these products. Figure 5.23 shows that the share of developing countries in imports of fresh fruits into The Netherlands is larger than in other selected EU member countries.

Figure 5.23 Share of developing countries in imports of fresh fruit into the selected EU countries, 1999-2001
% of imported value



Source: Eurostat, 2002

Vegetables

Whereas Latin-American countries dominate the extra-EU import of fruit, African countries play a more important role in the extra-EU import of vegetables into France, United Kingdom and The Netherlands. Nevertheless, vegetable imports are, notably more than fruit imports, dominated by intra-EU trade.

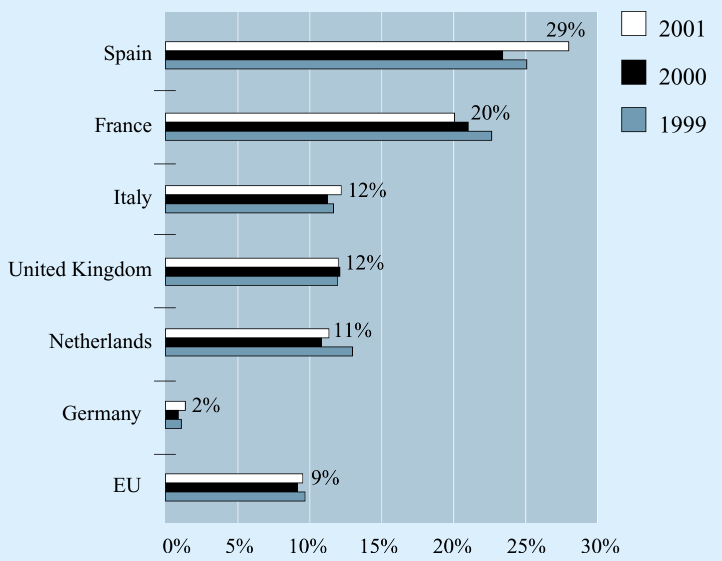
In 2001, the EU imported € 687 million / 612 thousand tonnes of fresh vegetables from developing countries, which represented an increase of 23 percent in value and 15 percent in volume since 1999.

Figure 5.24 reveals that developing countries play a relatively more important role in Spain and France than in other EU countries. Please note that the share of developing countries in overall EU imports of fresh vegetables increased slightly in 2001.

The leading fresh vegetable exporter among the developing countries is Morocco, followed by Kenya, Turkey, Egypt and Thailand.

Peas / beans and sweet maize are, by far, the leading fresh vegetables supplied by developing countries to the EU. As shown in Figure 5.25, between 1999 and 2001, the share of developing countries in imports of peas / beans, sweet maize, asparagus, truffles, eggplants and cucumbers increased.

Figure 5.24 Share of developing countries in imports of fresh vegetables into the selected EU countries, 1999-2001
% of imported value



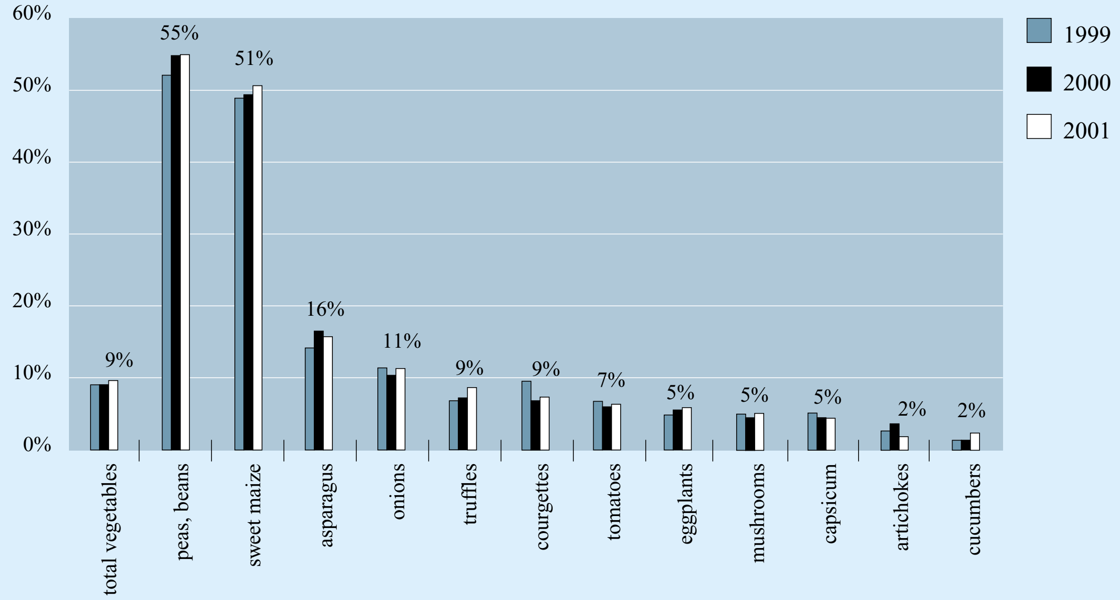
Source: Eurostat, 2002

Leading developing country suppliers to the EU
% of total 2000 imports from developing countries

		Total share DC
peas, beans	Kenya (38%), Morocco (25%), Egypt (12%), Guatemala (6%), Senegal (5%)	**55%**
sweet maize	Thailand (73%), Morocco (11%), Zambia (6%), Zimbabwe (5%)	**51%**
asparagus	Peru (76%), Thailand (9%), Chile (4%), South Africa (4%), Morocco (3%)	**16%**
onions	Argentina (38%), China (16%), Chile (13%), Egypt (8%), Turkey (6%)	**11%**
truffles	China (68%), Croatia (27%), Macedonia (4%)	**9%**
courgettes	Morocco (84%), Turkey (13%), Egypt (2%)	**9%**
tomatoes	Morocco (90%), Turkey (7%), Senegal (2%)	**7%**
eggplants	Turkey (83%), Thailand (8%), Kenya (2%), Dominican Republic (2%)	**5%**
mushrooms	Fed. Rep. Yugoslavia (50%), Turkey (13%), Bosnia & Herzegovina (12%)	**5%**
capsicum	Turkey (64%), Morocco (15%), Kenya (4%), Thailand (3%), Jordan (2%)	**5%**
artichokes	Egypt (92%), Tunisia (5%), Turkey (2%)	**2%**
cucumbers	Turkey (71%), Jordan (18%), Morocco (10%)	**2%**
cabbages	Turkey (36%), China (32%), South Africa (17%), Thailand (6%)	**1%**
total vegetables	Morocco (29%), Kenya (18%), Turkey (10%), Egypt (5%), Thailand (5%)	**9%**

DC = Developing countries

Figure 5.25 Share of developing countries in imports of selected fresh vegetables into the EU, 1999-2001
% of imported value



Source: Eurostat, 2002

6 EXPORTS

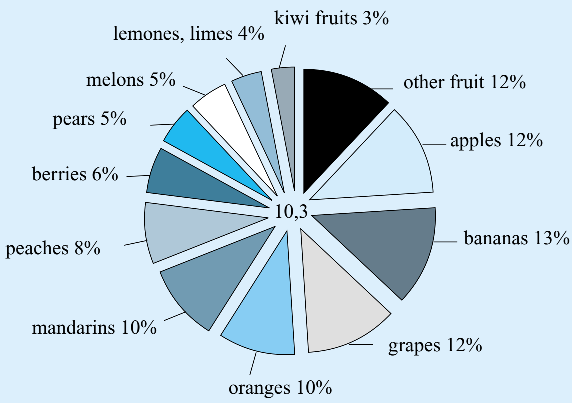
Fruit
In 2001, total exports by EU member countries of fresh fruit amounted to almost € 10.3 billion, representing an increase of 13 percent since 1999. In terms of volume, exports first increased by 4 percent between 1999 and 2000, after which they decreased by the same percentage, reaching 13.8 million tonnes in 2001.

The leading EU exporting countries, Spain and Italy, by virtue of climatic conditions, exported large quantities of fruit. In 2001, Spain was the leading EU exporter of fresh fruit produce, accounting for 30 percent of the exported value, followed by Italy (19%). Other major EU exporters are Belgium, The Netherlands and France. It should be noted, however, that most of the exports from The Netherlands and Belgium concerns re-exports.

Leading destinations were Germany (30%), France (12%), the UK (10%), The Netherlands (7%) and Italy (5%). Main destinations outside the European Union are Eastern Europe and, to a lesser extent, the USA. In 2001, only 16 percent of the exported value of fresh fruit by EU member countries was transported to countries outside the EU.

The two most important European fresh fruit products exported are apples and bananas. In 2001, these products together accounted for about a quarter of total fruit exports (in value). However, banana exports consist mostly of re-exports, since banana production

Figure 6.1 EU exports of fresh fruit, 2001
% of total value, value in € billion



Source: Eurostat, 2002

Table 6.1 Exports of fresh fruit by EU member countries, 1999-2001
€ million / 1,000 tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**9,075**	**13,883**	**9,713**	**14,398**	**10,266**	**13,780**
Intra EU	**7,931**	**11,602**	**8,286**	**11,682**	**8,626**	**10,910**
Extra-EU	**1,144**	**2,281**	**1,427**	**2,716**	**1,639**	**2,870**
Spain	2,818	4,493	3,321	5,233	3,109	4,500
Italy	1,712	2,711	1,789	2,708	1,947	2,645
Belgium	1,577	2,164	1,531	1,992	1,590	1,928
The Netherlands	1,044	1,438	1,100	1,399	1,276	1,401
France	1,085	1,585	1,176	1,657	1,264	1,543
Greece	365	838	321	782	466	1,047
Germany	274	364	236	311	275	324
Austria	70	108	93	132	131	152
Portugal	26	55	42	72	73	101
United Kingdom	58	74	55	59	65	73
Sweden	18	23	19	21	27	26
Ireland	18	19	17	16	22	19
Denmark	5	6	7	10	11	15
Luxembourg	2	2	3	2	5	5
Finland	2	2	3	3	2	2

Source: Eurostat, 2002

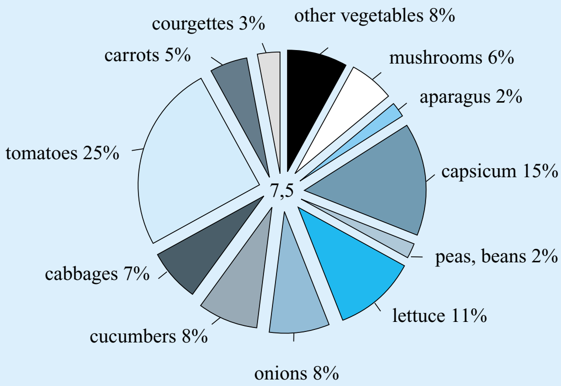
within the EU is very limited. Besides apples and bananas, the export of grapes, oranges and mandarins takes up a major role in the EU trade. Other exotics only play a minor role in EU exports, mainly comprising re-exports.

Vegetables
As from 1999, exports of fresh vegetables by EU member countries increased by 18 percent in value and by 5 percent in volume, amounting to € 7.5 billion / 9 million tonnes in 2001. Spain and The Netherlands are the leading EU exporters, together accounting for 66 percent of total EU exports (in value) in 2001. Contrary to the Spanish exports, which consist mainly of domestic produce, the largest part of the Netherlands exports is made up of re-exports.

Other exporters of fresh vegetables are France, Italy and Belgium. The fresh vegetables exported by the EU countries are mainly traded within the EU itself. Only about 12 percent is exported to countries outside the EU. Leading extra-EU destinations are the USA, East-European countries (Poland, Russia and Czech Republic), Japan and Canada.

Tomatoes and capsicum are the leading European export products, together accounting for 40 percent of total vegetables exports (in value) in 2001. Other major exports products are lettuce, onions, cucumbers and cabbages. For more detailed statistics of the various fresh vegetable products exported by the EU, please refer to Appendix 2.

Figure 6.2 EU exports of fresh vegetables, 2001
% of total value
value in € billion



Source: Eurostat, 2002

Table 6.2 Exports of fresh vegetables by EU member countries, 1999-2001
€ million / 1,000 tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**6,314**	**8,549**	**7,068**	**8,817**	**7,501**	**8,986**
Intra EU	**5,583**	**7,443**	**6,261**	**7,577**	**6,584**	**7,693**
Extra-EU	**731**	**1,106**	**807**	**1,240**	**918**	**1,293**
Spain	2,051	3,030	2,432	3,230	2,523	3,264
The Netherlands	2,128	2,623	2,411	2,724	2,456	2,770
Italy	603	854	616	766	705	831
France	619	853	628	808	702	810
Belgium	476	627	515	664	550	662
Germany	121	211	144	248	158	222
Ireland	83	39	89	43	123	54
Greece	78	72	68	52	93	74
Austria	60	105	67	121	77	117
United Kingdom	55	91	50	99	59	103
Portugal	20	23	24	32	29	50
Denmark	8	13	12	20	12	19
Sweden	6	5	6	6	8	8
Finland	2	1	3	2	3	1
Luxembourg	3	2	3	1	3	2

Source: Eurostat, 2002

Re-exports

Increasing internationalisation, which is also particularly the case in the European Union, marks the fruit and vegetable trade. A total of nearly € 22.3 billion of fresh fruit and vegetables was imported by EU member countries in 2001, whereas exports amounted to € 17.8 billion in the same year. The major share of imports and exports was transported to other destinations, partly as re-exports, partly as transit trade. In the case of re-export, the products are declared at the national Customs, whereas for transit trade the products enter the country, but there is no formal declaration at Customs.

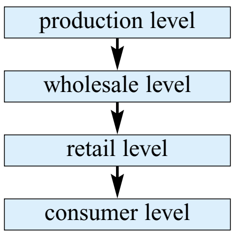
The sharp growth in re-exports and transit trade for fruit and vegetables can partly be attributed to the new markets, which have opened up in Eastern Europe, such as Russia, Czech Republic, Slovenia and Slovakia. The Netherlands and Belgium account for a large share of the re-exports and transit trade, though Germany and France also increasingly fulfil this function.

7 TRADE STRUCTURE

The strong tendency in the horticultural trade towards concentration and thinking and operating in 'straight lines' is continuing. The method of direct trading lines between producers/exporters and large retail chains is, in some European countries, partly eroding the function of the specialised importers. This leads to those same importers functioning to a certain extent as logistics service providers, quality controllers and co-ordinators of the stream of goods.

7.1 EU trade channels

From the producer to the consumer, fresh fruit and vegetables exported to the EU pass through four sales levels:



For a detailed diagramme of these sales channels, see Figure 7.1.

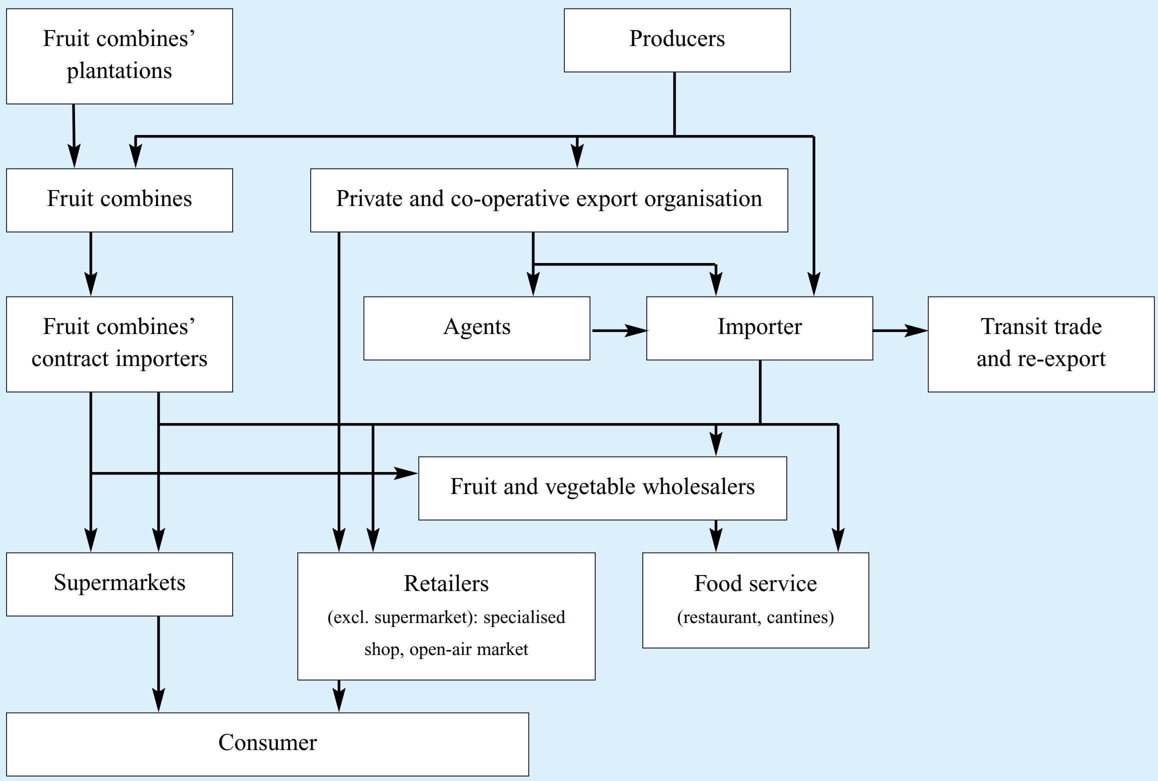
Production level *parties involved / scope of work*

Producer
- fresh fruit production
- pre-harvest treatment
- first processing level
- quality control
- large-scale packaging

Private and co-operative export organisation
- goods treatment (washing, sorting, etc.)
- packaging goods for export, often in customer's packaging (with price tags)
- sales and marketing in their own name or on behalf of their members

Fruit combines (plantations)
- fresh fruit production, in some cases buying from other producers
- quality control
- packaging goods for the exporter
- sale of goods for the exporter in their own name to contract importers

Figure 7.1 Distribution network of the fresh fruit and vegetables trade in the European Union



Wholesale level
Most importers (importing wholesalers) take care of the import formalities and process the imported goods for further distribution in the importing country or for re-export to other countries. They also perform additional tasks such as ripening bananas, portioning and packaging fresh fruit for self-service, or repalletising goods on to different sized pallets. In most cases, importers have long-standing contacts with their suppliers. Importers also advise the suppliers on issues such as quality, size and packaging. In some cases, importers also make use of agents.

Specialised agents function as intermediaries for establishing contacts between exporters and importers. They do not trade products on their own account. They maintain contacts with foreign suppliers and procure produce for their customers, who are generally wholesalers. Most agents work on the basis of a commission on the sales price.

Fruit combines run their own plantations and buy additional products from private producers if necessary. They mostly run their own fleets of ships. The combines' businesses are mainly situated in North, Central and South America. The significance of the fruit combines and their contract importers is expected to increase in the future, because professional marketing directed at consumers and retailers is becoming more important.

In Europe, the strong growth of large retail chains reflects the strong tendency in the trade towards concentration and thinking and operating in 'straight lines'. The method of direct trading lines between producers/exporters and the large retail chains is, in some European countries, partly eroding the function of the specialised importers. This leads to those same importers functioning partly as logistics service providers, quality controllers and co-ordinators of the stream of goods. In general, the importers still play an individual and specific role in the chain, because they have a strong relationship with their suppliers and because they play an indispensable role as collectors of a broad package of products.

The present situation in the European distribution structure forces fruit and vegetable exporters in developing countries to be highly aware of and attentive to the demands set by the large retail chains on the import trade and to cater fully to them. The leading implication here is that the large retail chains aim at trade on a large scale. This demands uniform quality and volume on the side of the exporter.

At the same time, large catering establishments have moved towards centrally controlled systems of purchasing, which are more economic in terms of both time and money because of direct supply from the producer sector.

This consolidation of buyers is occurring throughout the food distribution system. As a result, demand for consistent volumes and qualities of fresh produce increases, causing firms to introduce procurement methods that manage the supply chain more efficiently. Buyers are increasingly developing partnerships with preferred suppliers, in order to ensure availability of produce, which meets their specifications on a week-in, week-out basis. Buyers of larger volumes are the power behind consolidation at the supplier level, forcing shippers to attempt to match the scale of their customers in order to serve them efficiently.

The emergence of larger scale suppliers implies that only a limited number of firms has sufficient financial resources and backing, and is able to bear the costs and risks associated with producing crops in several regions or countries over extended periods.

For example, a number of Spanish growers is producing in more than one region of Spain, as well as in the Canary Islands and in Morocco, in order to extend seasons. Consistency of supply over extended seasons has, in and of itself, become a source of strategic competitive advantage for many shippers.

Another example of these developments is the merging of nine Netherlands fruit, vegetable and mushroom auctions into 'The Greenery' in 1995.

Retail level
Marketing and sales to the public are the most important functions at the retail level. The structure of the retail trade for fruit and vegetables offers the consumer the possibility to make a choice from various points of sale, the most important being:
- specialised fruit and vegetables shops;
- hyper / supermarkets;
- open-air markets;
- producers/farmers.

The traditional trade channels, i.e. the markets and greengrocers, continue to sell a significant share of the fresh products in most of the key markets. This is particularly true for Italy and Spain, where large supermarket and hypermarket chains have not made the same inroads as in the northern European markets. In France and the United Kingdom, multiples are taking an increasing share of the sale of fresh fruit and vegetables. Hypermarkets and supermarkets are also at the forefront of the increasing sales of pre-packed produce. The fruit and vegetables product assortment in the supermarkets and hypermarkets has become very diversified. A lot of effort goes into the design of the fresh produce departments to appeal to the consumer, both in terms of convenience and product variety. Supermarket organisations have also increasingly penetrated the function of the specialised wholesale trade for fruit and vegetables and have founded their own distribution centres in order to collect the products and supply their own stores. Apart from that, a tendency can be noticed whereby the fruit and vegetables departments of the superstores try to imitate the typical characteristics of the (small) specialist shop.

Supermarket chains increasingly seek to ensure their supplies through direct contact with growers and grower associations, especially for bulk tropical fruit and vegetables, which already have a considerable market. This has resulted in sellers of fresh fruit and vegetables facing fewer, but larger buyers. The growing market share of big supermarket chains and their increasing international co-operation have major implications for exporters of fresh fruit in developing countries. Because of this growth in supermarkets, spurred on by changes in shopping habits - consumers increasingly prefer one-stop shopping and superstores - fruit is increasingly channelled through large and sophisticated handling companies, skilled in all aspects of importation and distribution.

Major distributors in the EU include the following companies:

- Fyffes (United Kingdom/Ireland);
- Scipio / Atlanta Group (Germany);
- Dole Fresh Fruit Europe Ltd. Co. (Germany);
- Pomona (France).
- Geest (United Kingdom)
- The Greenery (The Netherlands)
- Del Monte Fresh Produce (Europe)

Germany

The German port of Hamburg, with its large fruit terminals, functions as a major point of entry for fresh products. The growing importance of Scandinavian and East-European markets can be seen as the major reason for the development of Hamburg as a centre of fruit distribution. Of all the northern ports, Hamburg's turnover in bananas has expanded at the fastest rate. Another major German port for fresh fruit (closely situated to Hamburg) is Bremerhaven.
Nevertheless, the German trade in fresh fruit and vegetables is also characterised by large quantities of products, which have entered the EU at the ports of Rotterdam (The Netherlands) and Antwerp (Belgium).

At the retail level, the discount stores and hypermarkets account for more than 60 percent of the fresh fruit and vegetables sold to German consumers. The wholesale grocers have a full-scale infrastructure for the purchase, intermediate storage and regional distribution of the goods. The individual retail stores order their goods from the wholesaler's central (or regional) offices on a daily basis. In turn, the wholesalers order (or buy) the same day or the next morning from their suppliers (importers) and often deliver the same day.

Table 7.1 Retail distribution of fresh fruit and vegetables in Germany, 2001
Market share in %

sales outlet	fruit	vegetables
discount stores	37.6	42.5
hypermarkets	25.5	28.5
supermarkets	11.1	12.4
(weekly) markets	8.2	6.0
growers	8.4	3.1
street stalls	3.6	2.9
other outlets	5.7	4.8

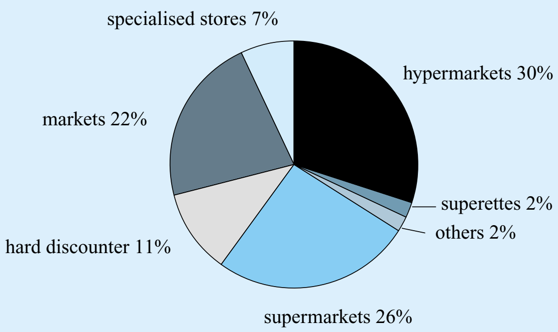
Source: ZMP, 2003

France

France has one of the most highly developed distribution systems for fresh fruit and vegetable products in the world. From the farmer, to the retailer and to the consumer there is an extensive network of transportation and distribution channels, which assures consumers of receiving the final product in good quality and at the proper time.

Usually, French imports from developing countries are brought in via the northern French port of Le Havre, or via the Belgian port of Antwerp and The Netherlands port of Rotterdam. Imports from the Mediterranean and African countries come through the southern port of Marseilles. Imports from other EU and European countries are often brought in by trucks through the world's largest wholesale food market at Rungis, which

Figure 7.2 Retail distribution of fresh fruit and vegetables in France, 2001
% of volume



Source: Interfel, 'Bilan Fruits & Légumes 2001' (2002)

is located about 12 kilometres south of Paris.
Besides the market at Rungis, important wholesale markets in France are located at Lyon, Marseilles, Nice, Bordeaux, Nantes and Lille. Two types of wholesale markets can be distinguished: consumption markets and production markets. At consumption markets (Rungis), wholesalers and importers supply both local and foreign produce to cities and urban districts. At the production markets, local produce is supplied to the surrounding regions.

In France, hypermarkets play a major role in the sales of fresh fruit and vegetables at retail level. Almost a third of the French consumption is purchased at these outlets. The importance of hypermarkets is still increasing, while the role of hard discounters is also growing. This growth takes place at the cost of markets, supermarkets and superettes (small neighbourhood supermarkets).

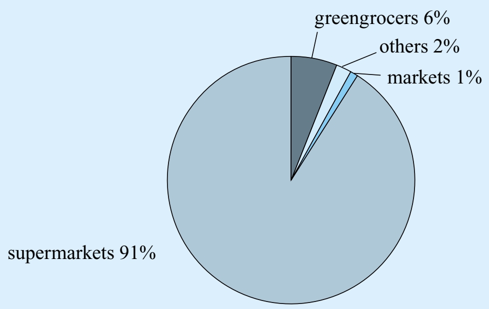
The Netherlands

The import trade in The Netherlands, as far as its location is concerned, is strongly concentrated in Rotterdam and the surrounding area. Offices, storage firms and export companies, port facilities, service companies in the field of transport, dispatch and survey, make the Rotterdam port area a dynamic and efficient transfer and distribution centre. Moreover, the distance between the Port of Rotterdam and Amsterdam 'Schiphol' International Airport is only about 60 kilometres. As far as the Port of Rotterdam is concerned, fruit is the spearhead. Rotterdam's great advantage is the concentration of haulage companies, fruit traders, Customs, inspection companies, and auctions.
Co-operation between a number of import companies established in Rotterdam has resulted in fruit terminals and cold-stores being located at the Merwe Port of Rotterdam, in order to realise a more efficient supply and transport of fruit and vegetables. South of Rotterdam, there is another concentration of international trade companies in the field of vegetables and fruit, to be found at the 'Freshworld Barendrecht'.

The Greenery
As a result of an initiative launched in 1995, nine Netherlands fruit, vegetable and mushroom auctions joined forces and merged into 'The Greenery'. In collaboration with exporters and dealers, The Greenery oversees the process of bringing the products to the market. The flow of products is co-ordinated from a central point instead of various auctions. The most important international target markets for the products handled by The Greenery include Germany, United Kingdom, Scandinavia, France, USA and Japan. In 1998, two leading import/export companies, the 'Van Dijk Groep' (The Netherlands) and the Dutch fresh produce division of the 'Perkins Group' were taken over by the Greenery. More recently, the 'Minnaar Group', which has offices in both The Netherlands and the United Kingdom, was also taken over. This has given the Greenery direct access to supermarkets in the United Kingdom.

The tendency in the horticultural trade towards concentration is also reflected in the construction of a business unit ' Sales Operations'. The Greenery and its business companies joined forces in this business unit to accomplish more involvement of the business companies in the net yield of growers, better co-ordination in the sales and purchasing activities, and better co-ordination in general. There are, however, limitations to concentration attempts, as was experienced by The Greenery and Co-operation Fruitmasters in their intended co-operation in the form of Fruit-XL. After an investigation, the Netherlands Competition Authority (NMa) concluded that a possible collaboration between the two companies might hinder competitiveness in the Netherlands market, after which the co-operation was ended.

Figure 7.3 Retail distribution of fresh fruit and vegetables in The Netherlands, 2002 % of volume

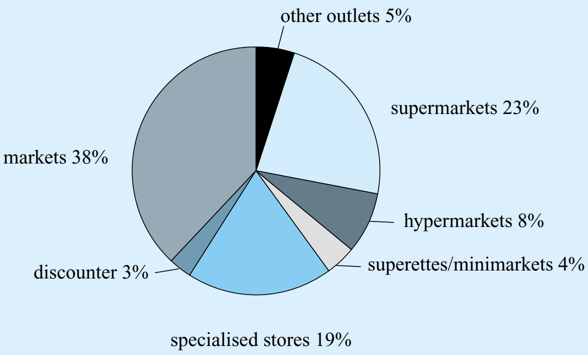


Source: Vakblad AGF, April 2003

During the past fifteen to twenty years, big shifts have taken place in the market shares of these points of sale. The supermarkets have gained a considerable market share within rather a short period, to the detriment of greengrocers. The market share of the supermarkets stood at around 91 percent in 2002. The open-air market has a relatively weak position. Buying fruit and vegetables in the supermarket is especially attractive for the consumer from the convenience angle: i.e. shopping for all consumer goods at the same time at the same location. According to consumer research, this turns out to be the major advantage of the supermarket. The market share of the greengrocers has steadily decreased to 6 percent in 2002.

Italy
At the wholesale level, the Italian trade structure for fruit and vegetable corresponds to a large extent to the trade structure of the other European countries. Nevertheless, one can say that the role of the wholesale markets is fairly limited compared to, for example, France. Their function as a meeting place for traders has been taken over by the trade fairs and trade exhibitions.

Figure 7.4 Retail distribution of fresh fruit and vegetables in Italy, 2001
% of total sales



Source: CSO Centro Servizi Ortofrutticoli, 2003

One of the main characteristics of the Italian fruit and vegetables trade structure is the fact that the traditional trade channels, i.e. the markets and greengrocers, continue to account for a significant share of the fresh produce sales. Just as in other South European countries like Spain and Greece, large supermarket and hypermarket chains have not yet made the same inroads as in the northern European markets. Nevertheless, the market share of the supermarkets and hypermarkets is increasing.

Hypermarkets are more common in the north of Italy, than in the south. The regional differences within Italy are also illustrated by the fact that traditional retail outlets and the so-called 'superettes' (i.e. small neighbourhood supermarkets) are more common in the South. Supermarkets are equally spread over the entire country.

United Kingdom

Some of the major distributors in the European Union are UK-based enterprises. Besides supplying the UK market, trading companies like Albert Fisher, Fyffes and Geest also serve many other EU countries with fresh produce.

Multiples accounting for an increasing share of the fresh fruit and vegetables trade in the United Kingdom. Around 70 percent of total trade at retail level is sold in supermarkets.

Many importers of fresh fruit and vegetables have in-house distribution networks and warehousing facilities, while smaller importers contract out. Many importers of fresh produce importers have controlled atmosphere warehousing facilities and even packing houses, responding to the growing retail demand for pre-packaged, and sometimes trimmed, fruits and vegetables.

Spain

Just like in most other EU member countries, Spain's food distribution sector has reached maturity and is becoming more concentrated and specialised, with greater market power held by fewer companies. The number of supermarkets and hypermarkets in Spain is continuously increasing while the number of traditional food outlets is decreasing. However, many consumers still prefer to purchase fresh products like fresh fruit and vegetables at neighbourhood supermarkets and traditional outlets. As a reaction, hypermarkets offer convenient products (prepared, sliced, cut) and high-quality fresh fruit and vegetables.

Most fresh produce is distributed through 22 public wholesale markets located around Spain. In the large cities, the big grocery retail chains have their own buyers, who buy and receive fresh product from wholesale companies, forwarding them to their supermarkets.

7.2 Distribution channels for developing country exporters

The most interesting distribution channels for developing country exporters of fresh fruit and vegetables are importers. Importers not only have experience and knowledge of the international market, they also have strong relationships with suppliers and buyers all over the world. In regard to serving supermarket organisations the importer will now more and more emphasise his function as co-ordinator of the stream of goods to final destinations. He has to play a more specialised role as quality controller and also as logistics service provider. Therefore, developing country exporters are advised to contact and co-operate with specialised importers for the distribution of their products. This applies especially to cases where it concerns tropical fruit varieties and off-season products. Besides that, importers do not only focus on the demand of the home market. Because of their favourable, geographical location, many EU importers have the possibility to export imported products to all other European countries.

Developing-country exporters of organically grown products (see also Section 9.1.1 of this survey) can get themselves listed as suppliers on www.green-tradenet.de and on www.greentrade.net, two Internet site where suppliers and buyers of organic products come together on a market place. Suppliers can specify their offer and company name. Please refer to Appendix 9 for full contact details of Green Trade Net and GreenTrade.
The Internet site www.europages.com is another good source for finding contact details and information on the activities of importers. The most interesting contacts at Europages can be found under the category Agriculture & Livestock, subcategory Fruits and Vegetables. These, and other sources on which buyers and sellers can meet online, are listed below.

Internet sites

online marketplace for organically grown products	www.green-tradenet.de
online marketplace for organically grown products	www.greentrade.net
online source of importers in the EU	www.europages.com
B2B marketplace for the food and agriculture industry	www.foodtrader.com
marketplace for sellers and buyers of fresh produce	www.agromarketplace.com
Freshinfo fresh produce marketplace	www.freshinfo.com
Agribuys	www.agribuys.com
FoodMarketExchange.com	www.foodmarketexchange.com

Trade fairs are also important meeting points for developing countries' exporters and EU importers. A trade fair is a good opportunity for personal contact between business partners. Please refer to Section 13.5 and Appendix 3.4 for more information on trade fairs.

8 OPPORTUNITIES FOR EXPORTERS

Fresh fruit and vegetables have to compete with a range of processed foods, which offer quick, easy and simple solutions to the lack of time in preparing meals confronting today's consumer in the EU. Competition facing developing-country exporters seems even harder, since only 9 percent of fresh vegetable and 35 percent of fresh fruit imports (in value) by EU member countries was supplied by developing countries in 2001. According to the trade statistics, developing countries have a strong position in the trade of fresh fruit like papayas, tamarinds, lychees, pineapples, bananas, dates, guavas, mangoes and passion fruit, all of which more than half of imports is supplied by developing countries. In the trade of fresh vegetables, developing countries play an important role only in peas & beans, sweet maize and baby corn, although asparagus is also increasingly supplied by developing countries.

Our advice in order to be successful in the competitive fruit and vegetable market follows below.

Trading exotics and off-season products
The production of some categories, for example bananas, is overwhelmingly in the hands of (large) multinational companies. This means that developing country exporters should seek market segments in which small amounts of the product can be traded and in which they are able to compete. In this sense, market opportunities in the EU for developing country exporters lie in the production of tropical and subtropical products (exotics) which are hardly grown in Europe, off-season fruit and vegetables (like strawberries and asparagus) and in the production of organically grown products (see below). In their search for products with more added value, major importers in The Netherlands are now promoting lesser known exotics like kumquats, rambutan and mangosteen. Complying with the demand for convenience, they provide the exotics in easy recognisable packages, containing small amounts and with practical product information. This makes it easier for consumers to become familiar with these relatively new and unknown products. Supermarkets are increasingly interested in selling exotics in these standardised packages.

Ethnic minorities are responsible for a significant share in the market for exotics. If trade in lesser-known exotic products is considered, marketing strategies should specifically take into account minorities familiar with these products.

Go 'organic'
Healthy, natural and organic products are occupying an increasingly stronger position in the EU. Many developing countries have a potential comparative advantage in meeting demand for many organic foods in major markets. Firstly, due to climatic constraints, some products cannot be grown profitably in the cooler, mostly industrialised, countries as demonstrated by tropical fruits and off-season fruits and vegetables. Secondly, in a number of developing countries, traditional production systems may be more attuned to the production of organic foods than the more intensive input production systems usually found in developed countries. As there are traditional systems that do not use agro-chemicals but do maintain soil fertility in sustainable ways, conversion to organic agriculture may be easier, and require less investment than for farmers in countries with highly intensive agriculture. Finally, the fact that organic farming tends to be labour intensive may give a comparative advantage to developing countries, where labour costs are relatively lower than in developed countries (see also Section 3.2). For more information on organic production, please also refer to CBI's EU Market Survey *"Organic Food Products"*.

Adopt HACCP
Although exporters to the EU are not obliged to apply an HACCP (Hazard Analysis Critical Control Point) system and their system will not be subject to control by the food inspection service in the importing country, adopting an approved HACCP system, or working according to a similar principle of quality control, will be a very positive argument in export business. More information on HACCP and its adoption is provided in Section 9.1 of this market survey.

Work according to EurepGap standards
Working according to EurepGap standards will be a very positive argument in export business. The EurepGap Protocol was launched by a group of leading European food retailers in 1999. As from 1 January 2004, the leading European supermarket chains will trade only fresh fruit and vegetables, which comply with EurepGap standards. In the EU, several projects have been launched, in which developing country exporters are guided through the process towards EurepGap certification. For more information please refer to Section 3.3 and to www.eurep.org

Part B

Market access requirements

B

9 REQUIREMENTS FOR ACCESS

Since CBI's AccessGuide is an important instrument providing the greater part of the information described below, this chapter will only deal briefly with the relevant issues within this subject. References to relevant information sources will be made.

AccessGuide

AccessGuide is CBI's database dedicated to European non-tariff trade barriers, specially developed for companies and business support organisations in developing countries. Registered companies and organisations have unlimited access to AccessGuide information.

Exporters in developing countries wishing to penetrate the European Union should be aware of the many requirements of their trading partners and EU governments. Standards that are being developed through legislation, codes, markings, labels and certificates with respect to environment, safety, health, labour conditions and business ethics are gaining importance. Exporters need to comply with legislation in the EU and also have to be aware of the many market requirements. AccessGuide provides clear information on these standards and their implications.

For more information please refer to www.cbi.nl/accessguide

9.1 Non-tariff trade barriers

9.1.1 Quality and grading standards

The quality of the product is the key to successful penetration of the European Union market. Following the harmonisation of rules and regulations in the EU since January 1993, uniform quality regulations apply EU-wide. Generally, one can say that the European market sets high demands on quality. Please refer to www.europa.eu.int/eur-lex/en/index.html for the complete text of the directives and regulations mentioned in the sections below.

EU Quality Standards

The marketing standards for quality and labelling of fruit and vegetables are laid down in basic regulation EC 2200/96 (of 28 October 1996), in the framework of the Common Agricultural Policy (CAP). Products that do not comply with these standards are barred from the market. The box given below presents an overview of the fresh fruit and vegetable products, which are subject to the quality standards as laid down in the above-mentioned regulation.

Fresh fruit and vegetables subject to EC Marketing Standards as laid down in regulation EC 2200/96

Fruit

apples, apricots, avocados, cherries, clementines, grapes, kiwi fruits, lemons, mandarins, melons, nectarines, oranges, peaches, pears, plums, satsumas, strawberries, watermelons

Vegetables

artichokes, asparagus, beans, brussels sprouts, cabbage, carrots, cauliflower, garlic, celery, courgettes, cucumbers, eggplants, iceberg lettuce, leeks, lettuce / endives, mushrooms (cultivated), peas, spinach, sweet peppers, tomatoes, onions, witloof chicory

Source: DEFRA Internet site, 2003

With the aid of colour cards, measuring instruments and precise descriptions, the grower is able to grade and group his products very effectively. One such instrument, for example, measures the firmness of a tomato. For a detailed description of the standards for products subject to Regulation EC 2200/96, please refer to www.defra.gov.uk/hort/hmi/common/standard.htm

Besides EU regulations, importers of fresh fruit and vegetables have their own quality standards. The EU requirements must therefore be seen as indicative for the quality that is demanded by the European importers. The care and handling between harvest and delivery to the country of import is often one of the weakest points in the relationship between producer and importer. The UN standards apply in the case of a product, which is not covered by the EU quality standards.

Please refer to Appendix 3 of this market survey for contact details of the standards organisations. These organisations are able to inform you of the quality standards that apply to the various products.

Certificate of origin

In June 2001, the EU Commission adopted Commission Regulation (EC) 1148/2001. Under this regulation, all import consignments of fresh fruit and vegetables from countries outside the EU and subject to the EC Marketing Standards will require a recognised Certificate of Conformity before they are allowed to enter the EU market. For more information about the Certificate of Conformity, please refer to www.defra.gov.uk/hort/hmi.htm

9.1.2 Trade-related environmental, social and health & safety issues

Environmental aspects of products have become a major issue in Europe in recent periods. Depending on the product group in question, environmental aspects may play a vital role in preparing for exports to the European market. Exporters of fresh fruit and vegetables to the EU must be aware of the health and environmental considerations of European customers and try to satisfy these customer needs by offering products which comply with both legislative and market requirements.

Environmental issues

MRLs

Imports of fresh fruit and vegetables to the EU have to comply with the regulations for Maximum Residue Levels (MRLs) of a large number of pesticides. The maximum levels for pesticide residues in and on certain products of plant origin, including fruit and vegetables, are laid down in Council Directive 90/642/EEC. For a comprehensive overview of the approved levels of pesticides, please refer to the box with useful Internet links.

Financial instruments in the EU

Besides legislation, one of the instruments of the EU to promote environmentally sound products is the awarding of (tariff) preferences or the levying of so-called 'environmental taxes' on products. An example of preferential systems is the General System of Preferences (GSP) encouragement regime (see Section 9.2). On the other hand, various financial instruments are being used in the EU to discourage the entrance of polluting products to the market. This happens through the establishment of specific taxes, like the so-called 'ecotax'.

Sustainable development for businesses

Issues such as (environmental) Life Cycle Assessment (LCA) of products, Cleaner Production (CP) and Ecodesign have all become important tools for companies to improve on the environmental performance of their products and production processes.

Organic production and Ecolabels

The hallmarks for environmentally sound products are normally referred to as Ecolabels. Such a hallmark indicates that the product (including its full production process) has a reduced impact on the environment, compared to similar products. Examples are the EU Ecolabel, the Netherlands Milieukeur, the German Blue Angel and the Scandinavian White Swan.

Labels referring to the organic production of fruit and vegetables could also be considered ecolabels. The EKO quality label is the label in The Netherlands that guarantees the organic origin and quality of agricultural products. EU standards for organic food production and labelling are laid down in Council Regulation (EEC) 2092/91. This regulation and subsequent amendments establish the main principles for organic production at farm level and the rules that must be followed for the processing, sale and import of organic products from third (non-EU) countries. For more information, please refer to the CBI EU Market Survey "Organic Food Products" or to www.cbi.nl/accessguide

Besides the product-oriented labels, there are also so-called fair trade labels, like the labels of the Max Havelaar Foundation and TransFair International.

Environmental standards

The Ecolabelling procedures are purely aimed at the products and indicate that the product with a label has a reduced impact on the environment. If a manufacturer wants to indicate to external parties that he is manufacturing in an environmentally sound way, then he can comply voluntarily with the following standards:

- ISO 14001
- EMAS.

Social issues

With a growing social awareness in the EU, social issues are becoming increasingly important in international trade. But, occupational health and safety should not only be important with regard to demands on the EU market. The issue is also essential to attract better-motivated personnel with respect to productivity, product quality, and therefore, a better position on the trade market.

Social Accountability 8000 (SA8000) is a universal management system for companies seeking to guarantee the basic rights of their workers. The standard is applicable to all industries and is based on the international accepted ILO Conventions.

Useful Internet sites

CBI's AccessGuide	www.cbi.nl/accessguide
EU pesticide residues legislation	http://europa.eu.int/comm/food/fs/ph_ps/pest/index_en.htm
European Plant Protection Organisation (EPPO)	www.eppo.org
Pesticides Initiative Programme	www.coleacp.org/fo_internet/en/pesticides/index.html

Health and safety issues
Not only the European Commission acknowledges the growing importance of health and safety issues, as can be discerned from several developments initiated by the demand side of the supply chain. With respect to the fresh fruit and vegetable sector, EurepGap is considered one of the most important of these initiatives. Other health and safety issues are Phytosanitary regulations and plant protection, HACCP and ISO 9000.

Phytosanitary regulations and plant protection
In general terms, the international standard for phytosanitary measures was set up by the International Plant Protection Committee (FAO) in order to protect the import of agricultural goods which might have or carry with them plant diseases or insects. In the EU these rules are laid down in the consolidated EU Directive 2002/89. With respect to fresh fruits and vegetables, the main object of this Directive is to prevent the EU crops from contact with phytosanitary harmful organisms from imported consignments.

Article 13 is the crux of the Directive and authorises the Plant Protection Service to inspect a large number of fruit and vegetables upon arrival in the EU. The annex specifies these plant products, while excluding the following products from inspection: strawberry, grape, melon, kiwi, onion, garlic and avocado. The inspection consists of a physical examination of the consignment on phytosanitary risk, identification and validity of the covering phytosanitary certificate. The phytosanitary certificate is an official document that certifies that the products described have been inspected according to appropriate procedures, are considered to be free from quarantine pests and conform to the current regulations of the importing country. If the imports of fresh fruit and vegetables do not comply with the requirements, these consignments may not enter the EU market.

Requirements of the phytosanitary certificates:
- shall bear the official text in conformity with the FAO model (see Annex VI A and VI B);
- shall be drawn up in one of the official languages of the European Community;
- shall be filled in completely, and either entirely in capital letters or entirely in typescript; if an annex is used, the phytosanitary certificate shall bear the words: “see annex” and the annex shall bear the words: “annex to phytosanitary certificate number ... “ and the annex must be authorised by stamp of the organisation and signature;
- shall be stamped and signed by an authorised officer of the Plant Protection Service;
- shall be issued not more than 14 days before leaving the country;
- shall indicate the origin and the destination of the plants or plant products;
- shall indicate, besides the name of the produce, the botanical names of the plants
- number and description of packages;
- net weight;
- authenticated copies or duplicates of the phytosanitary certificate shall only be issued with the indication of “COPY” or “DUPLICATE”. (Annex VI A VI B). A photocopy or fax copy or e-mail copy is not acceptable.

EurepGap
A code for fresh fruit and vegetables which is gaining ground in Europe is EurepGap (see also Section 3.3). The Euro-Retailer Produce Working Group (EUREP) has developed the Good Agricultural Practice standards. The Working Group has responded to increasing consumer interest in food safety and environmental issues. The framework of EurepGap requires companies to have a good management system in place to deal with quality, hygiene and environmental matters. Please refer to CBI’s AcessGuide for additional information on EurepGap. Although EurepGap standards are yet not common practice in all the EU member states, it is expected that they will be increasingly accepted and applied in the future, particularly by the large supermarket chains.

HACCP and ISO 9000
The need for good quality management takes on increasing importance. Two systems to demonstrate reliability of your quality control system are:
- HACCP
- ISO 9000.

Although not directly an obligatory standard for producers of fresh fruit and vegetables, exporters must be aware of the fact that in the field of processed fruit

Useful Internet sites

AccessGuide	www.cbi.nl/accessguide
EUR-LEX (official documents and legislation)	www.europa.int/eur-lex
Environment Directorate General	www.europe.eu.int/comm/environment
SKAL	www.skal.com
Max Havelaar Foundation	www.maxhavelaar.nl
TransFair International	www.transfair.org

and vegetables, HACCP and ISO 9000 are strongly increasing in importance in Europe. Please refer to CBI's AccessGuide at www.cbi.nl/accessguide and to ISO's Internet site www.iso.ch for detailed and up-to-date information.

The Hazard Analysis Critical Control Point (HACCP) system is applicable to companies that process, treat, pack, transport, distribute or trade foodstuffs. Although exporters to the EU are not obliged to have an HACCP system and their system will not be subject to control by the food inspection service in the importing country, the fact that they have an approved HACCP system, or work following a similar principle of quality control, will be a very positive argument in export business. Importers sometimes even require exporters to work with HACCP.

The ISO 9000 standards provide a framework for standardising procedures and working methods, not only with regard to quality control but also to the entire organisation. This means that quality, health, safety and environmental management programmes become strongly interwoven with the overall ISO management plan. ISO 9000 does not specifically address product safety and quality, but it is a guarantee that you always do things the same way. One has to bear in mind that the decision to become ISO 9000 certified means a firm commitment, which will draw on the company's human and financial resources and which unavoidably will continuously add procedures and paper work. Nevertheless, manufacturers, which have obtained an ISO 9000 series certificate, possess an important asset. The certification may be a vital factor in the selection process applied by trade partners in Europe.

For detailed information about the above-mentioned issues, please refer to CBI's AccessGuide or to other relevant organisations

9.1.3 Packaging, marking and labelling

Requirement in terms of packaging and labelling are subject to the marketing standards established by the European Union. For detailed information concerning packaging, marking and labelling for various fruit and vegetable species, please refer to www.defra.gov.uk/hort/hmi/common/standard.htm

Packaging

Packaging is used to protect the produce against mechanical damage and to create a more favourable microclimate. It is another essential factor in determining the product's quality, since it both represents the product and protects it. Special transport packaging is necessary to ensure that fresh fruit and vegetables arrive in perfect condition at their destination. Packaging plays an important role in the retail presentation of the product, but in trading circles packaging has a technical function as well. The box or crate should not only be strong and easy to handle, but also of an eye-catching and attractive design, providing useful information about the contents.

It is possible to distinguish three packaging methods for fresh fruit and vegetable products:

unpacked
In self-service stores selling loose goods, the consumer selects, packs, weighs and labels the product. This method of presentation is suitable for products that do not damage easily, like apples and citrus.

partly packaged
Products sold either in open trays, open bags or nets, open carrier bags or in open baskets, boxes or crates.

finished packages
Sealed nets or bags, sealed carrier bags, trays or baskets sealed in plastic foil, and in closed boxes and crates.

There are no important statutory obligations at European Union level for the packaging of fresh fruit and vegetables. Nevertheless, it is recommended to comply with the wishes of the importer, who knows the demands of his buyers. This goes for the packaging material, as well as for the sizes of the packaging.

Size

Where the sizes of the packaging are concerned, the general standards, which are common in practice, should be taken into account. One should adapt to the generally accepted sizes of the cartons:

- 60 by 40 cm; and
- 40 by 30 cm

The preference for these sizes has to do with the size of pallets and roll containers, which are used for the distribution of the multifarious vegetable and fruit assortment to the supermarkets.

Packaging waste

The European Commission presented the Export Packaging Note in October 1992, in line with the effort of the European Union to harmonise national measures concerning the management of packaging and packaging waste. The packaging note was followed by a Directive in December 1994 (94/62/EC). The directive emphasises the recycling of packaging material. No later than 30 June 2001, the member states (excluding Ireland, Portugal and Greece) were required to reprocess between 50 and 65 percent of the packaging waste. Member states are allowed to set higher percentages as objectives, as long as intra-EU trade is not hampered.

Exporters in developing countries targeting the European market have to be aware of these agreements and take appropriate measures in order to become or remain interesting trade partners for European businesses. The environmental requirements will be transposed to the exporter. That means that packaging (transport packaging, surrounding packaging and sales packaging) materials should be limited and be re-usable or recyclable. Otherwise, the importer will be confronted with additional costs, thus reducing the competitiveness of the exporter.

Since changes in the environmental policy follow each other at a rapid pace, exporters are advised to ask the importer about the latest regulations or requirements related to packaging. For more information about environmental regulations concerning packaging, please also refer to CBI's AccessGuide and ITC.

Mixed packaging

In order to stimulate the consumption of exotic fruit, experiments have been made with mix-packing of exotics. Different exotic products are packed in one carton as saleable units, from which the consumer can make a choice in the shop. Practice teaches that the importer or wholesaler can best make the composition of these exotic-mix cartons. It is only in the final distribution link that the mix cartons show advantages. The assembling and shipment of these mixed exotics in the exporting country must be dissuaded, because some fruits do not go together very well. The discharge of ethylene from one fruit accelerates the ripening of the other, while there are also fruits, which can influence one another as to taste or smell. An additional disadvantage is formed by the aspect of extra packaging costs, which makes the already relatively expensive exotic product even more expensive.

Labelling

Labels should at least contain the country of origin, date of packaging and the name of the producer, so as to ensure full traceability back to the grower. In the case of citrus fruit, for example, the following information has to be included in the label on the packaging:

- Name, address (code) of the packer/exporter
- Name of the product, variety and type (e.g. seedless clementines)
- Country of origin (optional production area)
- Class
- Sorting
- Group number
- Number of fruits per row or layer (in case of closed pack)
- Preservation method

For more information about regulations concerning packaging methods and labelling, please also refer to CBI's AccessGuide at www.cbi.nl/accessguide

9.2 Tariffs and quota

Access for fruit and vegetables to the European market is regulated through the EU basic regulation EC 2200/96, this regulation covers amongst other things:

- a list of products to which quality standards apply;
- the entry-price system;
- duties.

An overview of EU legislation on fruit and vegetables is available at www.europa.eu.int/eur-lex/en/lif/reg/en_register_036054.html

Customs duties

In general, all goods, including fresh fruit and vegetables, entering the EU are subject to import duties. External trade conditions in the European Union are mostly determined by EU regulations. In the case of fresh fruit and vegetables, the level of the tariffs depends on:

- the country of origin
- the product.

The GSP grants developing countries tariff preferences. In June 2001, the European Commission adopted a proposal for revision to the Generalised Scheme of Tariff Preferences (GSP) for the years 2002 to 2004. The regulation is designed to simplify the GSP regime and target the benefits more effectively. It also intends to improve the effectiveness of special incentives to promote core labour and environmental standards. The new Regulation complements and fully incorporates the recent "Everything But Arms" (EBA) initiative in favour of Least Developed Countries. In order to benefit from GSP treatment, exporters have to provide a 'Form A' certificate or EUR 1 certificate (ACP countries), which is issued by the appropriate authorities in the respective country.
Please also refer to Appendix 1 for a detailed overview of Customs duties per product. For more information

Useful Internet sites

Generalised Scheme of Tariff Preferences	http://europa.eu.int/comm/trade/miti/devel/ngsp_reg.htm
Netherlands Custom Services	www.douane.nl/taric-nl
TARIC Database	http://europa.eu.int/comm/taxation_customs/dds/en/tarhome.htm

about Customs duties and GSP, please contact the European Commission or Customs in the country of destination. For contact details, please refer to www.wcoomd.org

Banana market regulation

On 1 July 1993, the controversial banana market regulation came into force. As from that moment, importers of traditional '*dollar bananas*' (a term referring to bananas originating in Latin America and produced by multinationals like Dole, Chiquita and Del Monte) were only entitled to import up to a limited amount of bananas into the EU. Since then, the regulation has been revised on several points.

The new banana import regime in the EU, as agreed upon in May 2001, is a two-step process towards a tariff-only system that should enter into force no later than 1 January 2006. During the transitional period 2001-2005, bananas will continue to be imported into the EU under a tariff-rate quota system.
As from 1 January 2002, the following tariff quotas apply:

- A bound quota A of 2,200,000 tonnes at € 75 duty per tonne
- An autonomous quota B of 453,000 tonnes at € 75 duty per tonne
- An additional quota C of 750,000 tonnes

Non-traditional ACP bananas will have access within these quotas at zero duty. Traditional ACP states are those listed in the Annex to Regulation 404/93.

For more information on the new banana import regime, please refer to Commission Regulation (EC) n° 896/2001, Council Regulation (EC) n° 2587/2001, and Commission Regulation (EC) n° 349/2002, which can be obtained from http://europa.eu.int/eur-lex/en/index.html

Entry-price system

In principle, the price setting of products in a free market is established on the basis of demand and supply. However, in the EU the price setting for imported fruit and vegetables is regulated following the so-called entry-price system, which became operational as from 1995. The entry-price system establishes an EU entry (i.e. minimum) price. If a product's import price lies under this entry-price, a duty is imposed (depending on the difference between the two prices). It is possible for an importer to clear a shipment through Customs using either the invoice value or a set value. The entry-price system applies to tomatoes, cucumbers, courgettes, apples and lemons the entire year and to other products (artichokes, other citrus fruit, table grapes, pears, apricots, cherries, peaches, nectarines and plums) during certain periods.

Following the entry-price system, the value of every imported 'party' (the terminology used in the official documents) must in principle conform to the entry price. If a 'party' is imported at a price under the entry-price, an extra agricultural duty will be applied in addition to the Customs duty. With this agricultural duty the price ranges between 100 and 102 % of the entry price. The agricultural duty is applied as follows:

- When the value of the imported party is between 92 and 94 percent of the entry-price, 8 percent of the entry-price will be added to the normal Customs duty;
- When the value of the imported party is between 94 and 96 percent of the entry-price, 6 percent of the entry-price will be added to the normal Customs duty;
- When the value of the imported party is between 96 and 98 percent of the entry-price, 4 percent of the entry-price will be added to the normal Customs duty;
- When the value of the imported party is between 98 and 100 percent of the entry-price, 2 percent of the entry-price will be added to the normal Customs duty.

Parties, which are imported at less than 92 percent of the entry-price, will be penalised by an extra levy, known as the maximum tariff equivalent. For apples and pears the limit is set at 86 percent and for lemons at 84 percent of the entry price.

The full details of the entry-price system can be found in Commission Regulation (EC) n° 3223/94, available at http://europa.eu.int/eur-lex/en/lif/reg/en_register_036054.html

Value Added Tax (VAT)

Although fiscal borders between EU countries were, in theory, eliminated from 1 January 1993 onwards, in

Table 9.1 VAT rates (in %) applied to foodstuffs in the EU, May 2002

	Super Reduced Rate	Reduced Rate	Standard Rate
Belgium	-	6	21
Denmark	-	-	25
Germany	-	7	16
Greece	-	8	-
Spain	4	7	-
France	-	5.5	19.6
Ireland	4.2	12.5	21
Italy	4	10	-
Luxembourg	3	-	-
The Netherlands	-	6	-
Austria	-	10	-
Portugal	-	5/12	17
Finland	-	17	-
Sweden	-	12	25
United Kingdom	-	-	17.5

Source: European Commission (2003)

practice, harmonisation of VAT (tax levied at consumer sales' level) rates has not yet been achieved. Table 9.1 summarises the VAT rates applied in the different EU member states for foodstuffs in general. Please refer to the Ministry of Finance of the respective country for specific information on the relevant rate applied to fresh fruit and vegetables.

Thus far, the previous two parts of this market survey - Part A and Part B - provided market information on the EU market for fresh fruit and vegetables and on the requirements for market access. The next part - Part C - aims at assisting (potential) exporters in developing countries in their decision-making process as to whether to export or not.

Part C

Export marketing guidelines: analysis and strategy

PART C:

Export marketing guidelines: analysis and strategy
How do you get involved in the international marketplace? How much time and money will it take? Should you make exporting part of your business plan? These are common concerns of producers who are aware of the importance of international trade, but are not sure if exporting is for them. That is what Part C is all about: to help you evaluate whether to get involved in international business, and learn how to go about exporting.

The first Chapters 10, 11 and 12 aim at assisting potential exporters in the **decision-making process** whether or not to export. By matching opportunities in the market with the capabilities of the company, exporters will be able to get a first impression of the potential of the market they initially choose to identify suitable export products, target countries, market segments, and possible trade channels.

Subsequently, Chapter 13 provides sector-specific knowledge and sources to enable the exporter to further investigate what to export, to which markets, through which channels, and at what prices. In other words, which **marketing tools** can be used to build a successful business relationship?

Keep in mind that the export marketing process is integrated; each individual part is inter-linked.

The information provided in the previous parts of this survey is an essential ingredient in conducting the analysis and formulating a well defined export strategy. Where applicable, reference will be made to the relative sections in Parts A and B.

For general information on export marketing and how to conduct market research, please refer to CBI's *'Export Planner'* and CBI's new manual on market research.

10 EXTERNAL ANALYSIS

The external analysis or market audit assists the exporter to identify market opportunities, suitable sales channels and much more relevant information on the market and the external environment.

10.1 Market developments and opportunities

As a first step towards the identification of the most suitable export markets, the exporter needs to research the importance of potential markets and understand the ongoing developments that shape the European fresh fruit and vegetable market structure. This should be done by means of systematic market research, involving a preliminary screening of potential markets followed by a more detailed assessment of the targeted markets. Markets should be researched using primary as well as secondary data sources. Primary market research consists of a company collecting data directly from the foreign marketplace through interviews, surveys, and other direct contact with market participants. In general, European fresh fruit and vegetable importers are quite willing to give information on market developments. Primary research has the advantage of being tailor-made to meet your company's needs and provide answers to specific questions, but this data collection can be very time-consuming and expensive.

In order to obtain a global scan of the market, most companies make use of secondary data sources such as trade statistics, to focus their marketing efforts. This type of research is a valuable and relatively easy first step for a company to take. Specific market developments as described in Chapters 3, 4, 5, 8 and 9 of this market survey for instance should be used as a starting point for your export market research.

Keep in mind that, already in the early stages of market research, it is important to focus on your product group. For instance, the market for bulk and storable products, like apples, differs completely from the market characteristics of ethnic tropical fruits. There is no use putting effort into the analysis of the European market for all products if you are specialised in a certain product.

Section 3.3 identifies a number of general consumption patterns and trends. It is important to assess the implications and opportunities of important general trends like health food, convenience, and exotics for your products and situation.

Off-season products
An off-season range offers particular opportunities for exporting to the EU. This means that you export certain kinds of fruits and vegetables to the EU during seasons in which they are not (or only in small quantities) available due to the local climate (see box below). There is an all-year round demand for most products which domestic producers can only satisfy in part or not at all.

Results of the research inform the company of the largest markets for its product, niche markets, the fastest growing markets, market trends and outlook, market conditions and practices, and competitive firms and products. Based on all the information, a company must decide which markets are the most promising.

During the market assessment you should not only focus on large markets, but also try to find out whether there are interesting niche markets. Niche markets, like ethnic fruits and vegetables, might present interesting export opportunities, particularly for starting exporters from developing countries.

When are products off-season in the European Union?

product	March - April	May - July	August - October	November - February
Avocado	✗			✗
Carambola	✗		✗	✗
Citron	✗			✗
Guava and mango	✗			✗
Melon	✗			✗
Orange			✗	
Papaya	✗			✗
Passion fruits	✗			✗
Pepino	✗		✗	✗
Pineapple	✗	✗		✗
Pitahaya	✗		✗	✗
Tamarind	✗		✗	✗

Questions that need to be answered:

- Market size: What is the (estimated) market size for your potential export products? Try first to focus on your product group, then on your specific products.
- Market development: How has the total market volume developed during the past 3-5 years? If there is no information on your specific products or varieties, then try to obtain information on the development of markets for related products.
- Imports: How have imports developed during the past 3-5 years? Again, there probably is no information on all specific products available.
- Are importers and potential business partners in the EU interested in new suppliers of your particular products?

Where to find information?

- ⓘ The market information described in **Part A of this market survey** can be very useful as a starting point for your export market research. Where applicable, the sources for this market information are also mentioned in the specific chapters.
- ⓘ For more general information and a list of the European **national trade statistics bureaus**, you can use the EU statistics bureau **Eurostat**: http://europa.eu.int/comm/eurostat
- ⓘ In some cases, **trade associations and commodity boards** are able to assist you with more specific information on product trends. For a list of trade associations, please refer to Appendix 3.4.
- ⓘ **Trade press**
- ⓘ Useful sources of information on market developments are (international) **trade magazines** which can be relevant for exporters who want to develop a better insight into the EU markets. Some of the most interesting magazines for exporters of fresh fruit and vegetables are:
  - L'Echo (French)
  - Eurofruit (English, sections in other languages)
  - FLD (French)
  - Foodnews (English)
  - Fresh Produce Journal (English)
  - Fruchthandel (German)
  - Fruitrop (French, English)
  - International Fruit World (English)
  - Primeur (Dutch, French)
  - Valencia Fruits (Spanish)
  - Vakblad AGF (Dutch)

  Appendix 3.6 presents a more extensive list of names and addresses of publishers.

Market access requirements

Quality: non-tariff barriers and standards

As Section 9.1 of this survey already showed, the European market sets high demands on quality. In most cases, European retail outlets (supermarkets, specialised shops, weekly markets) sell only first quality products. However, not every sales outlet demands first quality goods. An exception is the processing industry, which also uses second quality fruit for products, such as jams, fruit juices and fruit pulps.

A wide array of non-tariff barriers which could be applicable to exporters of fresh fruit and vegetables were described in that same section. It is important to determine which standards and regulations apply to your particular situation.

Compulsory standards like the regulations on Maximum Residue Levels (MRLs) should of course always be met. In the case of non-compliance, your products will be taken out of the market and in some cases even a fine could be imposed.

However, not all standards are compulsory or widely recognised by your potential customers. For instance, there is a lot of talk about EurepGap, which is an initiative of mainly (UK-based) supermarket chains. These standards, however, are not (yet) common practice in all channels.

The so-called shelf ripeness (ripeness at the retail outlet) is a major quality issue for many products. Shelf ripeness is of course primarily influenced by the moment products are picked and by the way they ripen during shipment (product characteristics, duration, climatic conditions). The ideal shelve ripeness can vary per product and per trade channel. While some channels (in many cases supermarkets) prefer fairly raw products, other channels like those supplying ethnic markets prefer riper products. It is important for you, together with your importer, to determine the ideal ripeness.

Questions that an exporter should answer are:

- What standards are set on the quality of products (EC Marketing standards, (informal) trade standards)?
- What standards are required on the quality of your company's management and production process (ISO, HACCP, EurepGap)?
- To what degree do phytosanitary regulations and plant protection regulations (EPPO) apply to the products?
- What is the importance of environmentally sound production methods (Organic production and Ecolabelling)?

Keep in mind that regulations and standards are continuously changing. Therefore, we recommend that you check the up-to-date situations with importers or the relevant organisations.

Where to find information?

- ⓘ Sections 9.1 of this survey gives information on quality standards; trade-related environmental, social and health & safety issues; and packaging, marking and labelling. This section also provides Internet sites like CBI's AccessGuide that can be of assistance to obtaining product specific information.
- ⓘ For information on trade-related environmental issues, please refer to Section 9.1.3.
- ⓘ Other potentially useful information sources are colleague exporters and European importers.

Tariff barriers
Two different parties are involved in the payment of Customs duties: the party that is charged with the duties (i.e. the one that bears the financial burden) and the party which actually makes the payment.

In the EU, importers must bear the financial burden of Customs duties. However, they settle the duties with their supplier, the exporter(s) in the case that the goods were shipped on consignment conditions. The forwarding agents mostly handle all the import formalities, i.e. they collect the goods from the seaport or the airport, deal with the Customs formalities and pay the respective Customs duties on behalf, and for account of, the importer.

Questions that an exporter should answer are:

- Are there import restrictions which limit sales opportunities?
- Does the entry-price system apply to your products?
- Which import tariffs apply to your export products? Do these tariffs apply all year or only in certain periods of the year?
- Which import tariffs apply to those countries which produce the same products you are planning to export?

Where to find information?

- ⓘ Refer to Section 9.2, for information on applied import tariffs. This section also provides Internet sites that are helpful for finding product specific information.
- ⓘ Another important source of information on the level of import tariffs is your importer or forwarding agent.

10.2 Competitive analysis

Competitors and their pricing will have a direct effect on the potential success of your trade opportunities. It is therefore important to learn more about your competitive environment.

As an initial step towards understanding your competition, you should prepare a list of all the competition and then pinpoint who your main competitors are. To learn more about competition you can do secondary research study by asking customers and suppliers for their opinions. You can also prepare a list of your main competitors' strengths and weaknesses.

The fresh fruit and vegetables industry is open to new entrants and you should expect more competition. Constantly check with customers and suppliers to see if they have heard of any new businesses. These sources may also give you some insight into where and how the competition is selling its products. Which trade channels are used by your competitors, and why?

Useful information can also be found in this survey: Chapter 4 gives you insight into production of fresh fruits and vegetables in the EU; Chapter 5 describes the major suppliers from outside the EU.

Trade shows can of course be helpful for gaining contact with new customers and learning about market developments. It can however also be used to find out more about competition. Take the time to attend industry trade shows to see what your competition is like.

Producers of horticultural products in developing countries benefit from their geographic location, which offers them good climatic conditions or the possibility to supply off-season. These are often the most important factors that positively distinguish your company from competitors in other countries, particularly from competitors in Europe. Other positive factors are for example labour costs, costs of land, etc.

Needless to say, there are also factors that weaken your competitive position. European companies for instance have the advantage of being close to their customers, which in general facilitates marketing of products and communication. Another important difference is the fact that cultivation technology and inputs is readily available to European companies (see Chapter 4 in Part A).

Thanks to the development of new techniques and varieties, the storage capabilities are increasing for many fruits and vegetables. As a result, European growers are able to expand their supply period and are therefore increasingly becoming strong competitors for exporters of off-season products from the Southern Hemisphere.

Important questions to be answered are:

- How many suppliers are currently active in the market?
- Who are your main competitors? What are their strengths and weaknesses compared to your company?
- To what degree is the sector in the target market supported by the local government?

10.3 Sales channel assessment

Having assessed the prospective markets and market segments, it is now important to understand the trade structure and supply chains supplying these market segments. After the assessment of the exporter's capabilities (next chapter), this will enable the exporter to determine the most suitable sales channel. The information provided in Chapter 7 of Part A should be used as a starting point.

To successfully market your products in the EU, detailed knowledge of the various sales channels and the market participants is necessary. In the case of the international fresh fruit and vegetables trade, there are roughly three distinct sales channels through which exporting to the EU market is possible:

In some countries, different sales channels are more or less specialised in supplying different types of retail outlets. For instance, large fruit combines have their own marketing organisations, making it possible to organise special promotions together with large retail chains.

Each supply chain has its own specific conditions, which should be met by the exporter. For instance, when delivering products to importers who supply the supermarket chain, food safety and, consequently, tracking & tracing have become major issues (see also Section 11.3).

Nevertheless, it is not always possible to make a clear distinction between importers supplying supermarket chains, specialised shops, or the out-of-home market. Many European importers serve several retail types as their customers.

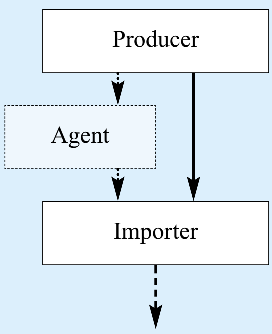
To give you an understanding of some of the potential business partners in your own country, an overview of their scope of work is given in the table below:

As a rule, exporters in developing countries and EU wholesale grocers, which deliver directly to retail shops, do not deal directly with one another. The main reason is the fact that exporters do not have the necessary infrastructure (sales offices, storage capacity, logistics). Exceptions are, for example, contacts with the retail trade's buying groups (of large supermarket chains).

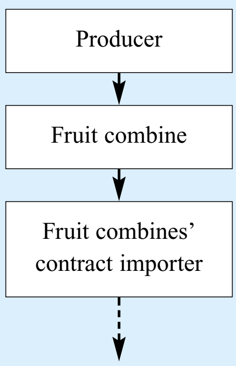
Long-term contracts or co-operation agreements between importers in Europe and producers or exporters in developing countries are not widespread. However, the importance of standards like EurepGap, traceability and year-round availability of goods is increasing. As a result, it is expected that suppliers of large European retail chains will seek to plan and secure their supply of imported produce in the future.

Direct exporting | **Indirect exporting**

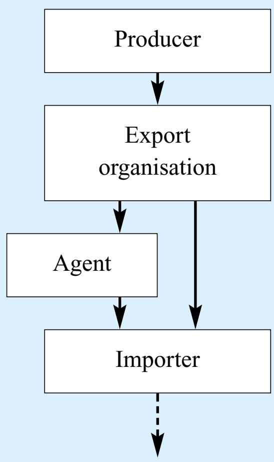
1. European importer
Selling directly to a European importer (with or without the assistance of an agent).



2. Fruit combine
Supplying a fruit combine that exports your products to the European market.



3. Export organisation
Exporting by means of a private or co-operative export organisation (including marketing boards)



Market parties in the EXPORTING country

Market party	Scope of work
Private and co-operative export organisations	• Goods treatment (washing, sorting, etc.). • Packaging of goods for export, often in customer's packaging (pricing tags, bar coding). • Sales and marketing in their own name or on behalf of their members. • Collective agreements with freight forwarders, making it possible to negotiate better services and prices.
Marketing boards	• Goods treatment (washing, sorting, etc.) and packaging. • Marketing goods under their own name. • Sales and distribution of the complete national production. • Responsibility for all marketing activities for the (compulsory) members. • Sale to a restricted number of selected importers (so-called 'panel lists').
Fruit combines (plantations)	• Production, in some cases buying from other producers. • Quality control. • Packaging goods for the exporter. • Sale of goods under their own label to contract importers.

It is also important to understand the role of the parties active in the destination country:

Market parties in the IMPORTING country

Market party	Scope of work
Agent	• Agents establish contacts between producers / export organisations and buyers in the importing country. • Agents actively offer products on behalf of third parties. • Most agents are specialised either in products or sales channels. • Usually take 2-3% commission on sales.
Importer	• In contrast to agents, importers buy and sell on their own account. They take the full risk unless it was shipped on consignment terms. • Clearing goods from Customs. • In some cases, treatment of goods or packaging. • Processing for sale. • Quality check. • Distribution of the goods. • Importer's margins are usually somewhere between 5 and 10%.
Fruit combines' contract importers	• These companies market the products of fruit combines. • Clearing goods from Customs. • In some cases, treatment of goods or packaging. • Branch offices carry out marketing and advertising for their own goods.

E-commerce

E-commerce is a relatively new method of transacting business using information technology, which allows physical processes to be replaced by electronic ones. In many cases, it is an open system, usable by all enterprises anywhere, provided an appropriate infrastructure is present, and has low barriers to entry, unlike earlier forms of electronic data interchange. In the coming years, it will therefore also have a significant impact on exporters in developing countries.

With the aim to create a broader marketplace for fresh fruit and vegetables, business-to-business (B2B) companies have proliferated. Although the number and range of e-commerce sites has grown over the last years, E-commerce has not yet become of major importance in the international fruit and vegetable trade. The development of these B2B sites can be explained by three main targets: to cut transaction costs, improve efficiency, and expand the trading horizon. Some of these sites sell any type of fresh food, seafood, meat, dairy, fruit and vegetables, this is the case of sites like www.agribuys.com, www.foodstrading.com, and www.foodtrader.com.

Important questions to be answered are:

- Which potential sales channels exist for your products in the target market?
- Which products do the different sales channels trade? What product assortment does this sales channel demand?
- What are the most important requirements of the identified sales channels? What are the conditions for an exporter to function in a specific supply chain?
- What quality standards do the sales channels demand?
- What kind of packaging is used in the various sales channels?
- What are the requirements concerning production process (environmental, ISO, MPS, EurepGap, traceability etc.)?
- What sales support material is necessary for business contact with this sales channel (price lists, quality certificates, campaign folders, sales statistics, sales brochures)?

Where to find information?

- ⓘ Refer to Chapter 7, and Section 7.2 in particular, for information on potential sales channels.
- ⓘ Section 13.2 of these marketing guidelines gives information on how to identify suitable business partners and how to further develop a business relationship.

Logistics

When transporting perishable products overseas, the exporter ideally looks for the fastest and most efficient mode(s) of transportation that will deliver the product in perfect condition at the lowest possible costs. The actual selection will be a compromise among these factors.

In the case of exports of fresh fruit and vegetables from developing countries to the EU, two types of transportation methods are used: ocean cargo and air cargo:

Ocean cargo

Ocean transportation takes longer than air freight, but the cost of transportation is usually lower.
Conditions for sea transportation have considerably improved over the last few years. The range of vessels has developed and diversified: there are reefer vessels, refrigerated containers to be found in the hold of these vessels or loaded onto container ships, which are equipped with refrigeration supply points.

The market share of refrigerated containers tends to increase. The main reasons for the growth in the use of refrigerated containers are the developing supply, the improved services, and the decreasing prices. Another advantage of container shipment is the fact that quality is easier to control. In the hold of a boat, products can affect each other's quality, because diseases and smells can spread more easily between products.

Freight rates vary, depending on the product being shipped, its value, level of service provided, destination, weight, and seasonal variations in demand for cargo space.

In some developing countries, the existence of large banana exports enables regular maritime routes to be set up on which other less voluminous or seasonal products can be transported. Usually, these goods need to be transported at a lower temperature than bananas (12-14ºC): 8ºC for mangoes, pineapples and papayas, 7ºC for green beans and 4-7ºC for melons.

The costs of a shipment are primarily calculated on the basis of the volume (length x width x height) of the shipment. Calculations on the basis of actual weight or positional weight are only rarely used.

Air cargo

Due to the fast in-transit time, air freight is mostly used for highly perishable and low volume products. However, the costs for moving products by air tend to be higher than the cost of ocean transportation. Examples of products shipped by air are green beans from Kenya and papayas from Brazil.

Products are loaded either onto passenger planes or onto cargo planes on regular routes. These can be planes operated by airline companies as well as charter planes belonging to specialised companies. On scheduled flights, exporters are dependent on the freight space offered to them per stopover.

Freight forwarders

It is a good idea to use a freight forwarder to arrange transportation services on your behalf. They can simplify the shipping process because they are familiar with import and export regulations. It is important to use a forwarder that is experienced in handling fresh fruit and vegetables or other perishables, as well as one who is experienced in the destination country. Freight forwarders can also assist you in handling all the documents.

Freight forwarders are cost effective to use, because they can negotiate the best rates with shipping and airlines. They usually operate on a fee basis paid by the exporter, and these are part of the cost price.

Cold chain

In handling perishable products, maintaining a cold chain is a major logistical issue. It determines for a large part the quality of the product as it arrives at the European retail shop. The saying is "one hour lost in departure to being refrigerated will be one day less for the sale in the destination". Check whether you and your freight forwarders are able to manage the cold chain. Make use of temperature recorders to check whether your products travel in optimal climatic conditions during their entire voyage.

Removal of field heat by the process of pre-cooling to a recommended storage temperature and relative humidity is absolutely necessary in order to maintain the quality of fruits and vegetables. The quality of most products will deteriorate rapidly if field heat is not removed before loading into the means of transport. The rate of respiration and ripening increases two to three times for every 10ºC above the recommended storage temperature.

Tracking & tracing

Consumer safety has become one of the most critical, priority issues for the fresh fruit and vegetables supply chain. Current food safety requirements have made the tracing of goods increasingly important in case of product recalls along the supply chain, but also in case of product liability aspects.

'Tracking' is about the location of products, and 'tracing' is about where the products come from. Traceability systems are used for accurate and timely identification of products, their origin, location within the supply chain and efficient recall. Furthermore, they help determine the origin of a food safety problem, comply with legal requirements and meet consumers' expectations for the safety and quality of purchased products.

Traceability is becoming a major issue for exporters when supplying European importers serving (UK-based) supermarket chains as their clients (see also EurepGap, Section 9.1.1). As a consequence, growers and exporters in developing countries delivering to this type of customers, have to participate in their controlled supply chain. This means that the grower/exporter has to put extra effort into communicating information for example on product specifications with the rest of the supply chain. Furthermore, when developing a traceability system, it is important to meet internationally accepted business standards, as this is the key to designing cost-effective and efficient traceability systems. This way, different customers and legal requirements can be satisfied. Nevertheless, in practice, the exporter should always discuss this with his importer.

Packaging

Special transport packaging is necessary to ensure that the produce travels safely from the producer to the consumer. Packaging is used to protect against mechanical damage and to create a more favourable microclimate. It is an essential factor in determining the product's quality. However, according to the way in which packaging sometimes is applied in developing countries, it can also be a risk to quality, due to bruising and less than optimum conditions of temperature and humidity.

The packaging has to satisfy conditions in the field of handling. The transportation volume must be as efficient as possible and a high level of uniformity of packaging is desirable. In order to optimise transportation, EU growers and traders generally use boxes of which the measurements are in accordance with pallet sizes.

Packaging design should take the following into account:

- Proper storage and transport;
- Standard packaging sizes;
- Recyclable materials or two-way systems; and
- Attractive and sales-promoting design.

Where the sizes of the packaging are concerned, the general standards, which are common in practice, should be taken into account. One should adapt to the generally accepted sizes:

- Boxes: 600 x 400 mm (ISO module), or 300 x 400 mm (half ISO module)
- Pallets: 1,000 x 1,200 mm (industrial palettes), or 800 x 1,200 mm (Europallets)

The exporter should always discuss the preferred type of packaging with their customer.

Important questions to be answered are:

- How often does the sales channel require delivery?
- What cycles of delivery does this channel require?
- What lot sizes does this sales channel demand?
- What formalities does the sales channel require the exporter to perform?
- What packaging methods are required?

Where to find information?

- ⓘ Freight forwarders and carriers are the best sources for obtaining freight rates. There are also companies that specialise in publishing (notably air) cargo tariffs. These publishing companies charge a fee for their services.
- ⓘ International Federation of Freight Forwarders Association (FIATA): http://www.fiata.com
- ⓘ Directory of Freight Forwarding Services: http://www.forwarders.com
- ⓘ International Air Transport Association (IATA): http://www.iata.org
- ⓘ Holland International Distribution Council (information on various aspects of using The Netherlands as a distribution centre for Europe; setting up a representative office, warehouse facilities and transport facilities, etc.): http://www.hidc.nl
- ⓘ Extensive lists of freight forwarders can be found at: http://www.cargoweb.nl and http://www.shipguide.com
- ⓘ For more information, refer to the Internet site of Euro Retailer Produce Working Group (EUREP): http://www.eurep.org

This Internet site givers information on the "Fresh Produce Traceability Guidelines" (FPT Guidelines). The guidelines provide fresh produce supply chain actors with a global traceability system. They provide a guide for fresh produce growers, packers, logistic providers, exporters/importers, and distributors as well as their customers and suppliers, seeking to introduce EAN-UCC standards to efficiently implement an internationally agreed upon traceability system.

10.4 Prices & margins

Domestic, import and export prices of fresh fruit and vegetables are dependent on several factors, such as the total supply of the products, the type of the product, its origin. In the case of commodity products like pineapples and bananas, the highly changeable harvests of fresh fruit and vegetables are an important determinant of price fluctuations of fruit and vegetables.

Prices of fresh products are set on a global level, and speculation on the harvests can cause rapid changes in the price level of the fresh fruit and vegetables. Other important factors can be the size of the order, the quality of the product and the inflation and exchange rate.

Margins in the international trade in fresh fruit and vegetables are under pressure. Margins for European importers for instance are typically below 10%. There is a number of reasons why it is not possible to give an accurate picture of the margins for all product and all parties in the import trade, wholesale and retail trade:

- The wide range in the fruit and vegetables assortment; and
- The great differences between the various product groups (temperate products and tropical, subtropical products and specialities).

Prices for fresh fruit and vegetables vary considerably. Therefore, it is recommended to monitor world markets and price movements, in order to be able to set a realistic price. Information on EU wholesale prices for fresh fruit and vegetables can be obtained from a number of sources:

Sources of price information:

ITC's Market News Service (MNS)
ITC publishes wholesale prices of various fresh fruit and vegetables (including exotics) on a weekly basis.

ZMP
This German organisation publishes an annual balance of the German and European market for fresh fruit and vegetables, including producer and import prices. In addition, information about the consumer prices is collected.

Netherlands' Commodity Board for Horticulture
This Board publishes auction and wholesale prices on a weekly basis.

INTERFEL
The French association publishes an annual balance of the French fruit and vegetables trade. This publication includes an extensive section giving prices

Individual importers and other trade parties
Trading companies can give you information on the price level of individual products.

Internet sites
There are also several Internet sites, which publish very up-to-date prices for fruit and vegetables. These sites provide agricultural market information as received from the USDA Agricultural Marketing Service (AMS), and are directly linked to price terminals at various European auctions (Hamburg, London, Paris and Rotterdam):

- **USDA International Wholesale Market Price Reports:** http://www.ams.usda.gov/fv/mncs/
- **Today's Market Prices:** http://www.todaymarket.com
- **Infoagro.com:** http://www.infoagro.com
- **Fintrac/Gain Wholesale Prices:** http://www.fintrac.com/gain/prices
- **ZMP** (retail prices Germany): http://www.zmp.de
- **SNM** (Services des Nouvelles des Marchés): http://www.snm.agriculture.gouv.fr

10.5 Product profiles

In this section, we give two examples of product profiles: mangoes and asparagus. These stand model for the product profiles the exporter should develop for his own (prospective) export products. By constructing an overview of their most important products, exporters are better able to determine which products to export to the EU.

Product profile: MANGO

1. Product information:
mango *(Mangifera indica L., of the Anacardiaceae family)*
CN/HS number: 0804 50 00

Main varieties:

- Varieties important to mango trade in the world are Haden, Tommy Atkins, Kent and Keitt.
- Asian varieties: Alphonso, Kesar, Sindhri, Langra, Toyapuri, Chausa, Desmeri, Caraball, Pico, Arumani
- African varieties: Amelie, N'gowe, Apple, Ruby, Heidi, Boribo
- Carribean varieties: Julie, Gaham, Palwie
- Other: Mabrouka, Bocado, Rosa, Ataulfa

2. Market requirements:

European quality standards
Non-existing, except for the general minimum criteria for imported fruit and vegetables into the EU (EC 2200/96).

International standards:
There are two references for mango:

- World standard of Codex Alimentarius (Stan 184-1993)
- UN/ECE standard FFV-45
  The OECD (1993) has published explanatory leaflets facilitating the common interpretation of standards from UN/ECE.

The mainstream trade requires fruits weighing 350 to 500 grams, brightly coloured (yellow/red/orange), with a good flesh/wastage ratio, fibreless, without turpentine smell, but juicy and aromatic. The ethnic markets, especially in UK, prefer smaller fruits, highly coloured, often with superior taste and flavour.

Packaging:
Mangoes are packaged in a single layer in fruit crates and cartons. Due to their great sensitivity to pressure, the fruit are sometimes wrapped in paper or padded with wood wool, bast, straw or hay.
No real packaging standard exi,sts, although a 4 kg net box (30 x 40 x 10 cm) is common. Cartons are telescopic or single piece folding. Some African

3. Market development:
Mango is one of the tropical fruits which have experienced a tremendous development in recent years. One of the main reasons is the shift from air to sea freight with bulk deliveries at competitive prices.
The mainstream demand is for fruits of count 8 and 10 or smaller size (12) per 4 kg carton. Coloured mangoes (floridian types) are preferred to the green varieties (Amelie type). Other varieties from India, Caribbean or Kenya are more in demand by the ethnic markets in the UK and in other European countries (e.g. Netherlands).

Consumption calendar:
Mangoes are supplied all year round. During the late summer (August/September) and in February, supplies are smaller than during the winter season (November/December) and May. The heaviest supply period is from May to June.
The main importing European countries are: The Netherlands, the United Kingdom, Belgium, Germany, Portugal and Spain. Portugal is one of the biggest consumer markets for mangoes in Europe. On the other hand the leading import country, The Netherlands, re-exports most of the imports to other European countries (Germany or Scandinavia).

4. Main suppliers:

Local production:
Orchards exist in Spain covering about 800 ha with an estimated production of 1,000 to 1,500 tonnes a year. Main varieties: Sensation (main export), Keitt, Tommy Atkins and Manzanilla.

Europe: Spain
Africa: South Africa, Côte d'Ivoire, United Arab Emirates, Kenya, Gambia
Asia: India, Pakistan, China
America: USA, Mexico, Brazil, Cuba, Venezuela

continued

Product profile: MANGO *continue*

suppliers use 5kg boxes.

Minimum labelling:

- Identification (name and address) of the exporter, packer and/or dispatcher
- Nature of the produce if the contents are not visible from outside
- Name of variety
- Origin of produce
- Class
- Size expressed as the minimum and maximum weight
- Number of fruit

Documentation required:

- Air-way Bill or Bill of Loading
- Phytosanitary certificate from the country of origin
- EUR 1 for ACP countries for Customs tax exemption, Form A for the other countries
- Commercial invoice in case of fixed price terms

5. Quality improvement:

Mangoes are harvested when unripe (at the pre-climacteric); they must still be green and firm-fleshed. Harvesting is done by hand or using special fruit picking poles. The greatest possible care must be taken with harvesting as even the smallest of cracks results in rapid spoilage by rotting. The stalk-cutting operation also has to be done carefully. The sap must not touch the fruit because sap-stain develops easily.

At the time of harvest, the mangoes must be capable of post-ripening, as they will otherwise not reach optimum quality. Post-ripening may be accelerated by temperatures of 25 - 30°C and treatment with ethylene.

Once harvested, any exuding latex is cleaned off and the mango is treated with hot water and fungicides in order to extend the relatively short storage life.

Where Antrhacnose disease is likely to be a problem, a well-managed pre-harvest fungal spray programme is necessary and a post-harvest hot-water fungal dip may also be desirable. Fruit fly infestation can be controlled by an integrated pest control programme and a hot water bath at harvest.

It is important for exporters to note that chemicals used post harvest should comply with EU Maximum Residue Level (MRL) regulation.

Recommended storage temperature is between +10 and +12°C with a relative humidity of 90% to 95%. The temperature during the transport must be between +8 and +10°C.

Product profile: ASPARAGUS

1. Product information:
asparagus *(Asparagus officinalis)*

Other varieties: Mac Lean, Taï So
Differing cultivation and harvesting methods result in the following three colour variants:

- Blanched or white asparagus: Blanched asparagus is grown in raised mounds. As soon as the tip peeks through the soil of the mound, the asparagus is harvested (cut). Immediate harvesting prevents the asparagus from changing colour.
- Purple asparagus: If asparagus is not cut immediately after its tip emerges from the soil, the part of the plant above ground turns purple to blue, as the pigment anthocyanin is formed by exposure to sunlight.
- Green asparagus: Green asparagus is grown in level beds where it is exposed to sunlight. Firstly, the pigment anthocyanin forms, resulting in purple colouring and then the asparagus turns green due to chlorophyll formation.

2. Market requirements:
European quality standards:
non-existing, except for the general minimum criteria for imported fruit and vegetables into the EU (EC 2200/96).

Quality requirements:
Shoots must be whole, fresh in appearance and fresh smelling, sound, free from damage by rodents or insects, practically unbruised, clean (practically free from each soil or any other dirt), free from any undue external moisture (adequately 'dried' if they have been washed), and free from foreign smell or taste.

Minimum labelling
- Identification of the exporter and/or packer
- Nature of the produce (asparagus followed by the indication white, green etc. and where appropriate, the indication short)
- Origin
- Class: Shoots in 'class I' must be well formed, they may be slightly curved. With regard to the normal characteristics of the group to which they belong, their tips must be compact. For the 'white' asparagus group, the tips may be slightly coloured before cutting and a faint pink tint appearing on the shoot after cutting is allowed, provided these colorations disappear after cooking. No woody shoots are allowed in the white asparagus group.
- Size: Shoots are sized by length and diameter. By length: above 17 cm for

3. Market development:
Asparagus is becoming a year-round product. Increasing popularity amongst consumers (retailers) and restaurants. Germany is the main market for asparagus in the EU.

4. Main suppliers:
Supply calendar:
Jan-April: imports from outside Europe i.e. Peru, Mexico
May-July: European production
Nov-Dec: imports from outside Europe i.e. Peru, Mexico
The main European suppliers are Germany, France, Netherlands, Belgium, Spain, Hungary, Greece, Poland.
The leading supplying countries outside Europe are Peru, Thailand and Mexico.

continued

Product profile: **ASPARAGUS** *continue*

long asparagus, between 12 ad 17 cm for short asparagus, under 12 cm for asparagus tips
By diameter: the diameter of shoots shall be measured at the mid-point of their length. The minimum diameter and the sizing of class I shoots (in one bundle) shall be: White asparagus: length 22 cm max. diameter 10-16 mm, > 16 mm (+10 mm) e.g. 16-26 mm, or 17-27 mm. Green asparagus: length 27 cm max., diameter 6-12 cm, > 12 cm (+8 cm) e.g. 12-20 mm, or 13-21 mm.

- Packaging: In bundles (firmly bound) of 500 g, 1 kg or 2 kg. Shoots on the outside of each bundle must correspond in appearance and size with the average of the whole bundle. Shoots must be of uniform length, each bundle may be protected by paper.

5. Quality:
The quality of asparagus cannot be determined from its colour, as this mainly depends on the cultivation and harvesting methods adopted. Signs of perfect quality are an undamaged, tight head (it must not be open) and straight growth. In addition, asparagus must not be woody or exhibit any shrivelled or discoloured cut ends.

Harvesting:
Asparagus should be harvested before the shoots can emerge, using a special asparagus knife. This approach yields shoots at least 25 cm long. Care must be taken not to injure other, still buried shoots. In order to harvest asparagus shoots with a compact tip and white or slightly purple in colour, they should be cut twice a day. If cutting is only performed once a day, some tips of the remaining shoots may open and change colour very quickly. Green asparagus is cut before the scale-like leaves of the tips separate, since a closed -non-flowering- tip is regarded as a sign of high quality. After harvesting, asparagus should be immediately deposited at collection sites in the shade, and as soon as possible placed in cold, clean water.

Post-harvesting handling:
Washing and treatment with cold water. Hydro-cooling should be employed.

- Packaging: Asparagus is packaged loose or in bundles in cartons, fruit crates, crates, trays and baskets made of wood or plastic. The content varies, depending on the type of packaging, from 500 g (trays, bundles) to 10 kg (boxes, fruit crates). During transport, the product should be covered with perforated film, to prevent drying-out and quality impairment. The possible deposition of moisture on the inside of the film does not impair quality, but rather assists in keeping the product fresh.
- Storage: It is essential to keep the asparagus cool at all logistic stages. There should also be a high relative humidity in the cooling-room (95% or above). The asparagus should be protected by covering it with moist cloths or bags of perforated plastic sheets to keep it from drying out. The storage temperature should be kept between 0° and 2° C. Temperatures below 0°C should be avoided. Asparagus already begins to freeze at -0,8°C.
- Transport: Air transport is preferred. Transport to the airport in refrigerated trucks. The interruption of cooling will cause irreversible damage. In the case of sea transport, the use of refrigerated containers with controlled atmosphere is essential.

11 INTERNAL ANALYSIS

The internal analysis or company audit is a review of the company's strength and weaknesses in terms of all company resources such as export marketing capabilities, finance, personnel, internal organisation, management, infrastructure, etc. As a result of this internal analysis, you will be able to assess to which extent your company is able to take advantage of the opportunities identified in the former chapter. Furthermore, with a thorough understanding of your company's unique capabilities, you will be able to invest in opportunities that exploit your strengths.

11.1 Product range

A product range can consist of several product groups (range width), each with several different products (range depth). Again, one product can consist of several varieties (see example).

A supplier can only select a suitable business partner when supplied with correct information about the range that he or she is able to offer. A precise review of the product range, therefore, aims at matching products offered with market opportunities. Keep in mind that varieties are sometimes known under different trade names overseas.

Questions an exporter needs to answer:

- Which products are you currently producing? How comprehensive is you product range?
- Which products do you consider to be the main products you are specialised in?
- What new products would you be able to produce?

Example of a company's product range

Product range (range width)	Products (range depth)	Varieties
tropical products	kiwi fruits	• 'Hayward' • 'Abbot'
subtropical products	melons	• Honey Dew 'Gold Rind' • Honey Dew 'Green Flesh' • Honey Dew 'Orange Flesh'
etc.		

The next step is to review product characteristics of the products and varieties on offer.

Example of product characteristics

Product	Variety	Size	Supply period	Packaging	Availability
kiwi fruits	'Hayward'	extra large	all year	300x400 mm one-way card-board box (single layers with plastic inserts)	500 kg weekly
melons	Honey Dew 'Gold Rind'	2 kg	November to February	600x400 mm two-way plastic box	5 tonnes per season
etc.					

11.2 Product standards, quality, and production capacity

A means to assess your company's potential in exporting is by examining the unique or important features of your company and products. If those features are hard to duplicate abroad, then it is more likely that you will be successful overseas. A unique selling proposition, or USP, defines what makes your business unique from every other competitor in the field. It spells out the precise niche you seek to fill, and how you aim to fill it.

Together with your prices, quality is probably the main competitive factor on which you will compete in the fresh fruit and vegetables trade. It is important to consider to which extent your company is able to deliver the quality that is required in the identified markets and sales channels.

Note that quality not only means product quality. Management quality is just as important. Delivery reliability and the ability to learn and adapt are important selection criteria for European companies looking for new (long-term) suppliers. Furthermore, keeping to the agreed quality is indispensable for building up a long-term business relationship.

Check your current quality standards with the voluntary and compulsory standards described in Chapter 9. Also refer to Chapters 8, 9 and 10 for information on the importance of the various quality standards for your product-market combinations.

Questions an exporter needs to answer:

- What management quality standards does your company fulfil (ISO)?
- What is the general level of your product quality compared to other products in the identified market? Does your product have any official quality standards?
- In case environmental labelling could significantly improve the competitiveness of your export product, which one is the most interesting for your product-markets combination?

Production capacity
Although some foreign buyers are looking for a 'spot' purchase, most importers are searching for suppliers that produce a quality product at a fair price with continued availability. If you are merely looking to market your sporadic surplus capacity, then entry into the European market will probably be a disappointment. On the other hand, if the company is willing to devote even 10 percent of its production capacity to foreign markets and the servicing of these accounts, then it can reasonably expect to build substantial and permanent trade in those markets suited to its products. However, keep in mind that, the volume of the product marketed is often not as important as the consistent and reliable supply of the product.

Questions that need to be answered:

- What quantities do you produce?
- How is the present capacity being used?
- Will new export activity hurt domestic sales?
- What will be the cost of setting up additional production capacity and is that possible at all?
- What cycles of production apply to your products? Is there a seasonal emphasis and how does this match up to the demand in the target market?
- Are there fluctuations in the annual workload for staff at the farm, packaging station or the management? When? Why?

11.3 Logistics

Availability of low-cost and high-quality freight services between your country and the destination country is a major criterion for a successful export business. Depending on your product's characteristics and trade channel's requirements, you will have to decide whether air freight or sea freight is the best way of moving your goods to the European market.
For example, in the case of papayas, the ripening process is very hard to predict and control. For that reason, it is problematical to ship papayas by ship. Usually, airfreight is used to get the papayas in the required ripeness stage at their destination.
On the other hand, (bulk) products with good storage capability are typically transported by ship, as this is more cost efficient.

Clustering
In many developing countries, exporters of fresh produce can organise themselves in exporter's associations or shipping boards to be able to negotiate time and volume rates with ocean carriers. In Côte d'Ivoire, for example, OCAB, an organisation of exporters of fresh fruit and vegetables, has been chartering boats on spot prices since 2000. It could be interesting for you to determine whether your company could hook up with other exporters in your country. Port authorities and trade publications of origin and destination countries are the best sources of current information on services provided by competing air and ocean carriers.

Questions that need to be answered:

- How often are you able to deliver?
- What lot sizes do you generally produce or are you able to produce?
- What is the preferred transportation method for your products?
- Are there cold room facilities at your production base? Are you able to maintain a cold chain during the transportation of the products (air-conditioned domestic transport, cold room facilities at the (air)port)?
- What are the typical costs of logistics? (Check with freight forwarders)
- Does your company have experience with tracking and tracing?

Points of interest when choosing the right packaging:

Have your importers ever complained about the quality of your products? Have they ever received rotten, spoiled or blemished products?
Look for possible causes:
- Unsuitable packaging material
- Insufficient ventilation during transport
- Wrong climatic conditions during transport
- Problems with the products itself (diseases for examples)
- other causes

Do you use different packaging methods for different products?
- Different products require different climatic conditions (temperature, ventilation) during transport.
- Some products need more space than others (bruising, ventilation).

In case of marine transport, different kinds of products shipped together in one container should be compatible:
- Temperature needs
- Ethylene sensitivity
- Relative humidity needs
- Airflow characteristics

Does your importer use special transport packaging?
- Perhaps you could use this special transport packaging as well? Using the wrong packaging size can have a negative effect on your business.
- Maybe you could make use of the importer's packaging know-how.
- Are the cardboard boxes including the products directly forwarded to the wholesalers?

Fully recyclable packages must be used when trading with certain business partners.
- In the case of one-way systems, use cardboard and avoid plastic foil if possible.
- Colouring materials, used for printing, should not be harmful to the environment.
- Use glue that does not harm the environment or no glue at all.
- Do not use metal clips for the cartons.
- Avoid waxed boxes or any composite packaging materials.

Useful information on packaging for marine container transport can be found at:
ⓘ (MNS) http://postharvest.ucdavis.edu/Pubs/Marine_Transport/Marine_Transport.shtml

11.4 Marketing and sales

How do you sell to current export markets? What works in one European market is likely to work in another, subject to refinement based on market intelligence and knowledge about specific trade channel requirements.

What existing contacts does the company have in the target markets - relatives, friends, suppliers, etc? It is an advantage to have some local presence in the target market that can gather information, monitor progress and follow up leads.

A serious export marketing campaign requires substantial management time to undertake it properly. Therefore, the company needs to be realistic as to how much time can be devoted to export marketing.

More information on how to make use of your marketing tools to foster your export activities will be described in Chapter 13.

Questions that need to be answered:

- Does your company have people specifically assigned to marketing and sales activities?
- Which persons do you know in the target markets?
- What sales support material is available?

11.5 Financing

Export marketing is expensive. If financial resources are limited, then marketing plans will have to be modest. It is no good developing five new markets if the company only has the money to develop one.

Questions that need to be answered:

- What amount of money can be allocated to setting up new export activities?
- What level of export operating costs can be supported?
- How are the initial expenses of export effort to be allocated?
- What other new development plans are in the works that may compete with export plans?
- Is outside capital necessary to support efforts?

11.6 Capabilities

Commitment to export

It is important to consider whether the company has people who are able to sell and develop an international business. The company should be able to generate the physical and administrative infrastructure to deal with increased activities from exporting - not only in dealing with orders but also with processing Customs and shipping documentation. If this type of infrastructure is limited, then it is a weakness in developing sustained export activities.

Questions that should be answered are:

- What kind of commitment is the top-level management willing to make to an export effort? How much senior management time should be allocated? How much could be allocated?
- What organisational structure is required to ensure that export sales are adequately serviced? Who will be responsible for the export activities (export department's organisation and staff)?
- What are the management's expectations of the effort?

Export experiences

It is important to learn from past experiences. If the company has tried and failed to penetrate and export market previously, this can be analysed to determine where things went wrong.

Questions that should be answered are:

- In which countries has business already been conducted and what were your experiences?
- From which countries have inquiries already been received and what did you do with them?
- What general and specific lessons have been learned from past export experiences?

Language skills

When dealing with European trade partners in the fresh fruit and vegetables business, English is the most frequently used language. Although most European trade partners will not be native speakers themselves, the vast majority speaks English fluently. In almost all cases, foreign language skills, particularly English, are essential when entering the European market. When dealing with France, knowledge of the French language is a distinct advantage. If you can communicate in Spanish, you have a competitive advantage if you target the Spanish market.
On the few occasions when correspondence and

documents in English will not suffice, exporters can usually find sources of translation capabilities for the more widely-used European languages. Language capability can be advantageous since it facilitates cultural and social relationships.

Questions that should be answered are:

- Which language skills are necessary when dealing in your selected markets?
- Which language capabilities are available within the export company?

12 DECISION MAKING

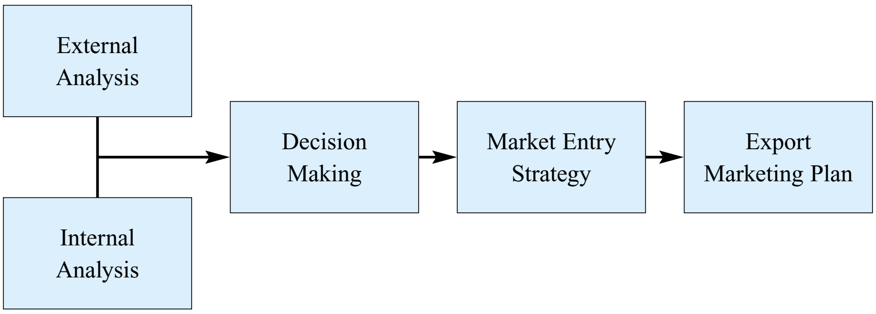
Through conducting the external analysis (market audit) and internal analysis (company audit) (Chapters 10 and 12), you will be able to come to a decision whether or not to export.

- ☑ You have identified products suitable for export development. Also, you know what modifications, if any, must be made to adapt them to overseas markets.
- ☑ You know what countries and market segments you are going to target for sales development and/or co-operation agreements.
- ☑ You have identified the best sales channel.
- ☑ You know what special challenges pertain to the selected markets (competition, cultural differences, import controls etc.) and what strategies you will use to address them.

Once a company has determined that it has exportable products, it must still consider whether the development of an export business adheres to the company objectives. In order to arrive at this conclusion the management should ask itself the following questions:

- What does the company want to gain from exporting?
- Is the goal of exporting consistent with other company goals?
- Are the benefits worth the costs or would company resources be better spent developing new domestic business?

Companies can waste a lot of time and money attempting to enter markets which do not have potential or for which their product is not suitable. To be successful in export marketing, exporters need to focus on specific products and markets and be prepared to deal with them.



If you have come to the decision to export, the next phase of the export marketing process is to draw up an Export Marketing Plan (EMP), which defines a marketing strategy, how the company is going to penetrate the identified market. The marketing strategy is designed around the information collected in the company and market audit and the marketing tools described in the next chapter.

Formulating an export marketing strategy based upon sound information and its proper assessment increases the chances that the best options will be selected, resources will be utilised effectively, and efforts will consequently be carried through to completion.

For assistance in writing an EMP, please refer to the CBI *"Export Planner"*.

13 MARKETING TOOLS

Which marketing tools can you use to successfully build your export business? This chapter will provide you with insight and give tips on how to make use of your marketing tools to promote the sales of your products and to build a favourable trade relationship.

13.1 Matching products and the product range

In the company audit (see Section 11.1), the exporter already has reviewed the company's product range and product characteristics. The aim of this review was to enable the exporter to match market opportunities with the company's products on offer. This review is also the starting point for considering possibilities to improve the exporter's product range.
In some cases, exporters may find out that the current product range does not match the identified market segment and sales channel's demand. A possible cause of this mismatch can be that there is no demand in the European market for such varieties, even if the products are successfully sold in your own country or other export markets.

Grading your export products
Importers and consumers of fruits and vegetables demand high quality fresh products in return for the high prices they pay. Growers and shippers should use the buyer's specifications for grading to monitor quality, condition, size, and maturity. While not all products have official grading standards, common sense techniques can be used to ensure the packing and transportation of only high quality items.

Sort and package produce by size and level of maturity:
- Use voluntary grading standards or buyer's specifications.
- Place only uniform sizes or amounts in each shipping container.
- Place only products with a uniform level of maturity in each container.
- Clearly mark the grade, size, weight, or count on the container.

13.2 Building up a relationship with a suitable trade partner

One of the most ominous obstacles for exporters can be to search, attract and secure a good importer or trade partner. Many avenues are available for locating trade partners. You should employ any and all, which seem appropriate for your sales channel.

How to find a potential trading partner
The best ways for exporters in developing countries to approach potential trading partners in the European fresh fruit and vegetable market are:
- Direct mail: You can write a letter, e-mail or fax directly to a European company. Most companies will probably respond that they are not interested or that they already carry a competitive line. However, only a few positive replies are needed to continue your search and evaluation and narrowing down of prospective distributors.
- Personal visits: Once you have received a number of "interested" replies, plan a trip to that market. Additionally while travelling, stop in other potential markets to assess the situation as well as attempt to make contacts. Many times a personal visit will pay for itself in terms of the benefits gained.
- Invite EU importers or potential business partners to visit your company.
- Build a network in order to extend your contacts.
- Visit international trade fairs.

How to identify the most suitable trade partner?
Evaluate the potential trade partners about which you have obtained information by using the following criteria:
- Is the information complete (full address, telephone / fax number, e-mail address, contact person)?
- Is the importer active in the country you selected?
- Could the importer be interested in your products?
- What kind of trade relation is the potential trade partner interested in (arms-length, co-operative agreement, contract basis)? Does this correspond to your preferred type of relationship?
- What is the position of the potential trade partner in the market?
- What is the financial status and credibility of the company?

Using these criteria, draw up a priority list of the contact addresses you have received.

You must use the priority list to identify the trade partners that match best your own company profile, product range and export strategy. Particularly in the case of future long-term close co-operation, it is important to get a clear picture of the company you are dealing with and understand their business activities.

For more information on how to build a business relationship, please also refer to the recently published CBI manual *"Your image builder"*.

13.3 Drawing up an offer

There are two different kinds of offers:
1. general offer or company introduction; and
2. specific offers.

(a) Drawing a general offer
- The purpose of a general offer is to make the first contact with potential trading partners not yet personally known to the supplier.
- A general offer consists of sending a short profile of your own company and a summary of your product range.
- In a personal letter, briefly introduce your company and what you have to offer.

(b) Drawing up a specific offer
A specific offer is legally binding for a certain period of time. You must therefore be capable of fulfilling the terms of contract. You should make up a specific offer only when you know the business partner personally or after you have made the initial contact.

When sending a specific offer, it should include:
- Name of the person responsible in your company;
- Exact description of the products offered;
- Price of the products offered in accordance with the Incoterms 2000 (if applicable, split up by delivery quantities or quality); and
- Possible delivery date.

In case a sample of the product is required:
- Product samples must correspond to the goods available for delivery (if they do not, this can have a lasting negative effect on business relations).
- State the treatment methods used. If possible, provide quality certificates from an internationally recognised inspection company.

Some more tips to increase the effectiveness of your offer:
- A telephone call to ask whether the offer (and the samples, if applicable) has arrived.
- An invitation to visit your company.
- Possibly propose a visit to the country of destination. In that case:
  - If necessary, hire an interpreter.
  - Ask your own consulate, business support organisation, or other intermediary for assistance in planning your visit.
- First-time exporters should start with small samples, rather than large high-value commercial shipments. An exporter should be testing whether his products meet the phytosanitary requirements, transportation routing, handling and packing methods.

Price setting
To establish an overseas price, you need to consider many of the same factors involved in pricing for the domestic market. These factors include competition; costs such as production, packaging, transportation and handling, promotion and selling expenses; and most important in the fruit and vegetable market: the demand for your product and the maximum price which the market is willing to pay.

In most cases, an exporter will have to follow market prices. However, in case of some products, like speciality products, you will be able to set your own export price. There are two common methods of calculating your price for exports:
- *Domestic Pricing* is a common but not necessarily accurate method of pricing exports. This type of pricing uses the domestic price of the product as a base and adds export costs, such as packaging, shipping and insurance. Because the domestic price already includes an allocation of domestic marketing costs, prices determined using the method might be too high to be competitive.
- *Incremental Cost Pricing* determines a basic unit cost that takes into account the costs of producing and selling products for export, and then adds a mark-up to arrive at the desired profit margin. To determine a price using this method, first, establish the 'export-base cost' by stripping away profit mark-up and the cost of domestic selling. In addition to the base cost, include genuine export expenses (export overheads, special packing, shipping, port charges, insurance, overseas commissions, and allowance for sales promotion and advertising) and the unit price necessary to yield the desired profit margin.

How you price your product is worth considerable thought and effort since it directly affects your ability to make a profit. Take some time to research the following management questions:

Questions to ask when setting your price

How much does it cost to grow your product?
- Production costs not only include costs for growing, but also for packaging, distribution and promoting your products.
- The costs of unsold products should also be included.

How will you market your product?
- Do you sell your products directly to customers in Europe?
- Are you producing on a contract basis for a European buyer?

What price do competitors charge?
- Take an industry focus on your pricing when researching what competitors are pricing.
- By walking through the steps indicated in Section 10.2 you will know the prices competitors charge. Use the competitive analysis to develop the upper limit of your price range. Be sure you compare your products to competitors.
- Competition is intense In the fruit and vegetable trade. You should therefore try to price at the lower end of the price range unless you can distinguish your product through quality or a unique selling feature.

What is the customer demand for my product?
- How unique is your product or assortment?
- To price according to demand, you have to know more about the size and nature of your customer base and their feelings about pricing.
- You will need to keep an eye on general market trends. See also Chapter 3.

Understanding how to price your product is an essential step in developing your business. You must continually monitor your price including your costs of production, your competition and your customers and be prepared to make adjustments. In competitive businesses like the fresh fruit and vegetables trade, the successful company is the one that can adapt and continue to operate profitably.

Below, you find an overview of the way you can calculate the price of your export product (for information on Incoterms see the next Section).

Export price calculation

Total costs per unit
- \+ Profit
- \+ Commissions
- \+ Domestic banking fees
- \+ Palletisation / export packing
- \+ Freight forwarding and documentation fees
- \+ USDA inspection and phytosanitary certificate fees
- \+ Other direct expenses related to special shipping requirements such as temperature recorder charges

= EXW price (Ex Works)
- \+ Inland transportation

= FAS price (Free Alongside Ship)
- \+ Terminal handling charges

= FOB price (Free On Board)
- \+ Ocean freight charges
- \+ Ancillary charges

= CFR price (Cost & Freight)
- \+ Insurance

= CIF price (Cost, Insurance, Freight)

13.4 Handling the contract

In the fresh fruit and vegetables trade, the use of written contracts is not a widespread practice. Most importers prefer to work on a trust base without written contracts. They argue that it is not efficient to put a contract together each time a deal is made. An exporter should keep in mind, however, that in case of a conflict with your importer, communication via e-mail, fax or even by a telephone, also functions as a contract, although an e-mail and a phone call is not legal tender.
In the case contracts are used, the following terms should be considered:

(a) Contract terms:
- Conclude the delivery conditions according to Incoterms 2000.
- When delivering for the first time, it is common to deliver the goods free on commission and freight-paid.

(b) Contract fulfilment:
- Procure the delivery documents in good time.
- If there is a supply agreement, comply strictly with all parts.
- If you cannot comply with any part of the agreement (e.g. delivery delays or quality problems), inform the customer clearly and in good time.
- Co-operate on a partnership basis and seek a common solution if conflicts arise.
- Fulfilling the contract should have a high priority, particularly when delivering for the first time.

Trade relations between exporter and importer are based on trust and can only be built up by meeting the high expectations of the importer. If an importer finds that the product does not meet his expectations, this will immediately backfire on the business relationship with the exporter.

Consignment basis
Arrangements on consignment basis or 'at risk' are often used in the trade of fresh fruit and vegetables. In actual fact, consignment arrangements are not sales at all, in that title to the goods never passes to the importer. Goods are consigned to the importer until sold to a third party, whereupon title is transferred.

Under consignment sale, the exporter bears the risk that prices may turn out to be less than expected, possibly resulting in a loss after transport costs are paid. Alternatively, prices and, hence, profits might be higher than expected.

Terms of payment
The determination of payment conditions for a regular export transaction is part of the package of negotiations between seller and buyer, who actually have more or less opposing interests. The seller wants to have the least possible payment guarantee. The buyer wants to be sure about quantity and quality of the goods he is buying, before he pays the agreed price.

A Letter of Credit (LC) is seldom used. It is often considered cumbersome and prevents the option of retaining the money if the consignment does not prove to be as good as expected. When relations are established, Cash Against Documents (CAD) is also a method used. However, open account is most commonly used in the fresh fruit and vegetables sector. Importers or agents generally transfer payment within 30 days.

The importer determines the import duty with the Customs, and pays a deposit. Another possibility for the importer is to pay the current levy at Customs' clearance.

- **Open account**
  The process is fast and reliable, depending on the credit worthiness of the importer. The bank carries out the transactions through swift electronic data system and the transfer costs are not very high.

- **Cash Against Documents (CAD)**
  Also known as Documents against Payment (D/P). The buyer takes possession of the goods only after payment. Although this method is not often used, it is very safe and the costs amount to one pro mille.

- **Letter of Credit (LC)**
  In other sectors, the irrevocable LC is very often used in the beginning of a business relationship when the importer and exporter do not know each other very well yet. The LC is irrevocable and will always be paid. The costs are higher when compared to the D/P method.

Terms of sale
Export terms of sale determine which costs are covered in the price of the cargo. They also indicate at what point ownership transfers to the buyer and at what point responsibility for the cargo is transferred. International commercial terms (Incoterms 2000) provide "the international rules for the interpretation of trade terms."

The most commonly used trade terms are:
- **CIF (Cost, Insurance, Freight)**
  Under this condition, for shipments to designated overseas port of import, the seller quotes a price for the goods, including insurance costs and all transportation charges, to the point of debarkation from the vessel or aircraft. The seller pays for the cost of unloading cargo at the port of destination, to the extent that this is included in the freight charges. If the charges are separate, they fall to the account of the buyer.
- **FOB (Free on Board)**
  Under this term, the seller quotes a price for goods that includes the cost of loading at the port of departure. The buyer arranges for transportation and insurance.

Other trade terms less frequently encountered are:
- **CFR (Cost and Freight)**

For shipments to designated overseas port of import, the seller quotes a price for the goods that includes the cost of transportation to the named point of debarkation. The buyer is responsible for the cost of insurance. This is referred to as C&F in the old Incoterms. The seller pays for the cost of unloading cargo at the port of destination, to the extent that it is included in the freight charges. If the charges are separate, they fall to the account of the buyer.

It is recommended that quotations to new European customers should be made on a CIF basis. However, supplier and importer are free to negotiate any other condition.

13.5 Sales promotion

One of the major critical success factors for exporters of fresh fruit and vegetables to the European Union is attention to customer requirements and the ability to maintain good relationships with their European business partners. Sales promotion revolves around developing and expanding these customer relations and thereby maintaining and increasing sales volume.

Some tips in developing customer relations:
- Take good care of existing contacts. This includes for example expressions of thanks to business partners, regular information on the company developments like product range, quality improvements, etc.
- Always reply to a letter of inquiry. If you cannot supply this contact, say so, explaining that you will get in touch with him for the next campaign.

Communication
It is advisable to commence with communication measures, which only require a small amount of planning and co-ordinating, such as revising the company's standard printed matter:
- Standardise all printed paper used outside the company (letterheads, visiting cards, fax form, etc.)
- A brochure of your company (including photos of production sites and produce) can be useful for promoting new contacts and sales.

Constant, prompt and reliable communication is a vital prerequisite for maintaining a long-term business relationship with your customers. Smaller firms should also be reachable by (mobile) phone, fax and e-mail at office hours.

Sales organisation
The term 'sales organisation' refers to the organisational system that carries out the sales of the company's products. A sales organisation usually consists of a back office and sales force, even if the sales force consists of one person.

As most sales are conducted by telephone, fax or e-mail, well-functioning sales people are an absolute

precondition for successful market participation. This also applies to smaller companies where one person has to fulfil different (sales) functions.
An essential tool used in sales is a detailed and up-to-date customer database. This database can vary from a simple collection of customer data sheets to an advanced customer relation management system. However, the customer database should at least contain the following information:
- Basic information on the customer: name, address, telephone numbers, etc.
- Changing data on the customer: data resulting from business activities with the customer, such as telephone calls, offers, sales information, etc.

The customer database should give the sales person a quick review of the most important customer information when making or answering a telephone call or planning a visit.

If possible, the database should be computerised, because this simplifies changes, updating, sorting and selection procedures, etc. If computerisation is not possible, the customer database should be on file cards (see example).

Internet
As a means of communication, Internet is generally considered to have many opportunities for companies in developing countries. The main advantages of the Internet are:
- Low cost of communication;
- Fast delivery of information;
- Independence of distance and timeline;
- Hardly any limits in size; and
- Multimedia possibilities.

Besides one-to-one communication, Internet offers opportunities for presentation, (market) research, distribution, sales and logistical improvements. If your target group consists of importers/growers in overseas countries, you can advertise for (new) customers on your Internet site, showing your company, product range and indicating the production circumstances.

Example customer data sheet

General information

Company name:	Customer no.:
Postal address:	First contact date: _ _ / _ _ / _ _ _ _
Street address	Customer class[1]: ☐ A ☐ B ☐ C ☐ D
Country:	Customer type: *(importer, agent, retailer)*
Telephone:	Other info:
Fax:	
E-mail:	
Contact name:	

Sales information
Sales realised: *(last year)*
Sales planned: *(this year)*
etc.

Contact record
No. 1
Contact date: _ _ / _ _ / _ _
Contact type: *(telephone, visit, fax, etc.)*
Information:

No. 2
Contact date: _ _ / _ _ / _ _
Contact type: *(telephone, visit, fax, etc.)*
Information:

No. 3
Contact date: _ _ / _ _ / _ _
Contact type: *(telephone, visit, fax, etc.)*
Information:

---

[1] Classify your customers by importance to your company (sales, quality of relation, etc.)

More information on this subject can be found in CBI's Export Manual *'Your Image Builder'*.

Trade fairs
Visiting and participating in a trade fair abroad can be an efficient tool for communicating with prospective customers. It provides more facilities for bringing across the message than any other trade promotional tool. It can also be an important source of information on market development, production techniques and interesting varieties.

Important motives for companies visiting European trade fairs are:
- Establishing contacts with potential customers;
- Orientation on the European market;
- Gathering information on specific subjects;

Although significant costs are involved, actually participating in a trade fair could be interesting way to give export activities an extra boost. One of the major advantages of participating in a trade fair is the ability to present your company and products in a more extensive way (3-D presentation, company video, and product displays). Furthermore you will meet people, whom you otherwise would not have met.

Fruit and vegetables trade fairs are organised in many European Union countries. The most relevant fairs for exporters in developing countries are listed in the box below. The contact addresses of theses and other trade fairs are listed in Appendix 3.4.

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

Assistance with market entry
Local business support organisations
Before approaching organisations abroad, an exporter should first contact local business support organisations (trade promotion organisations, Chambers of Commerce, etc.) and foreign representatives in his or her country in order to find out what support can be obtained locally.

Import Promotion Organisations
In most EU countries, there are organisation that promote imports from developing countries through specific export promotion programmes:
- Supplying information on: statistics and other information on national markets, regular news bulletins, importer databases, and market opportunities;
- Individual assistance: management training, testing products by display and adaptation services; and
- Establishing contacts: collective trade fair participation and selling missions.

Branch organisations
In most European countries, producers, wholesalers and often also retailers are organised in so-called branch organisations. These organisations can be of use to new exporters to the EU. An example is the Fresh Produce Consortium (UK), which can give you information on the UK wholesale markets.

Information how to reach these organisations can be found in Appendix 3.3.

Main European trade fairs

Trade fair	Where?	When?	What?
ANUGA	Cologne, Germany	biennial, 11-15 October 2003	One of the leading trade fairs for the food and beverage industry world-wide
Fruit Logistica	Berlin, Germany	annual, 5-7 February 2004	Show for international fruit trade; exotics are a special target groups
Salon International de L'Alimentation (SIAL)	Paris, France	biennial, 17-21 October 2004	Trade exhibition for the food industry
AGF-Totaal	Rotterdam, The Netherlands	biennial, 15-17 September 2003	Platform for international trade in fruit and vegetables
Alimentaria	Barcelona, Spain	biennial, 8-12 March 2004	International food and beverages exhibition
IFE	London, United Kingdom	biennial, 23-26 March 2003	International food and drink exhibition

Appendices

APPENDIX 1 DETAILED HS CODES

HS code			Description	Rate of duty Conventional	Rate of duty GSP	
07			**FRESH VEGETABLES**		**Group 1**	**Group 2**
0702			**Tomatoes***	-	-	-
0703			**Onions, shallots, garlic, leeks and other alliaceous vegetables**			
	10		Onions and shallots			
		11	Onions sets	9.6	0	6.1
		19	Other onions	9.6	0	6.1
		90	Shallots	9.6	0	6.1
	20	00	Garlic	9.6 + € 120/100 kg	0	-
	90	00	Leeks and other alliaceous vegetables	10.4	0	6.9
0704			**Cabbages, cauliflowers, kohlrabi, kale and other similar edible brassicas**			
	10		Cauliflowers and headed broccoli	9.6 min € 1.1/100kg	0	6.1
	20	00	Brussels sprouts	12	0	8.5
	90		Other:			
	90	10	White cabbages and red cabbages	12 min € 0.4/100kg	0	8.5
		90	Other	12	0	8.5
0705			**Lettuce and chicory**			
	11		Cabbage lettuce	10.4 min € 1.3/100kg	0	6.9
	19	00	Other lettuce	10.4	0	6.9
	21	00	Witloof chicory	10.4	0	6.9
	29	00	Other	10.4	0	6.9
0706			**Carrots, turnips, salad beetroot, salsify, celeriac, radishes and similar edible roots**			
	10	00	Carrots and turnips	13.6	0	10.1
	90		Other:			
		10	Celeriac “rooted celery or German celery”	13.6	0	10.1
		30	Horseradish	12	0	0
		90	Other	13.6	0	10.1
0707			**Cucumbers and gherkins**			
	00	05	Cucumbers *	-	-	-
		90	Gherkins	12.8	0	-
0708			**Leguminous vegetables**			
	10		Peas	8	0	0
	20		Beans	10.4 min € 1.6/100kg	0	0
	90	00	Other leguminous vegetables	11.2	0	0
0709			**Other vegetables**			
	10	00	Globe artichokes *	-	0	-
	20	00	Asparagus	10.2	0	0
	30	00	Aubergines (eggplants)	12.8	0	0
	40	00	Celery other than celeriac	12.8	0	0
	51		Mushrooms:			
		10	- agaricus	12.8	0	9.3
		30	- chantarelles	3.2	0	0
		50	- flap mushrooms	5.6	0	2.1
		90	- other	6.4	0	2.9
	52	00	Truffles	6.4	0	-
	60		Capsicum and Pimenta			
		10	Sweet peppers	7.2	0	0

HS code			Description	Rate of duty Conventional	Rate of duty GSP	
07			**FRESH VEGETABLES**		**Group 1**	**Group 2**
			Other:			
		91	- for manufacture of capsicin or capsicum oleoresin dyes *	0	-	-
		95	- for manufacture of essential oils or resinoids *	0	-	-
		99	- other	6.4	0	0
	70	00	Spinach	10.4	0	6.9
	90		Other:			
		10	Salad vegetables, other than lettuce and chicory	10.4	0	6.9
		20	Chard 'white beet' and cardoons	10.4	0	6.9
		31	Olives (excluding for oil production)	4.5	0	0
		39	Olives for oil production	€ 13.1/100kg	0	-
		40	Capers	5.6	0	2.1
		50	Fennel	8	0	4.5
		60	Sweet maize	€ 9.4/100kg	0	-
		70	Courgettes *	-	-	-
		90	Other	12.8	0	0
08			**FRESH FRUIT**			
0803			**Bananas:**			
	00	11	- plantains	16	0	12.5
	00	19	- other	€ 680/1000kg	€ 408/1000kg	-
0804			**Dates, figs, pineapples, avocados, guavas, mangoes and mangosteens:**			
	10	00	Dates	7.7	0	0
	20	10	Figs, fresh	5.6	0	2.1
	30	00	Pineapples	5.8	0	0
	40		Avocados	4	0	0
	50	00	Guavas, mangoes and mangosteens	0	-	-
0805			**Citrus fruit**			
	10		Oranges *	-	-	-
	20		Mandarins, clementines, wilkings and similar citrus hybrids *	-	-	-
	30	10	Lemons *	-	0	-
		90	Limes	12.8	0	0
	40		Grapefruit	1.5	0	0
	90	00	Other	12.8	0	0
0806			**Grapes**			
	10		Fresh *	11.5 - 14.4	0	8 - 10.9
0807			**Melons and papayas:**			
	11/19		Melons	8.8	0	0
	20	00	Papayas	0	-	-
0808			**Apples, pears and quinces**			
	10		Apples			
		10	Cider apples 16/9 - 15/12 *	-	0	-
		20	Golden delicious *	-	0	-
		50	Granny Smith *	-	0	-
		90	Other *	-	0	-
	20		Pears and quinces			
			Pears			
		10	Perry pears 1/8 - 31/12 *	-	0	-
		50	Other*	-	0	-
		90	Quinces	7.2	0	3.7

HS code		Description	Rate of duty Conventional	Rate of duty GSP	
08		**FRESH VEGETABLES**		**Group 1**	**Group 2**
0809		**Apricots, cherries, peaches, plums and sloes**			
10		Apricots*	20	0	16.5
20		Cherries*	12	0	0 - 8.5
30		Peaches and nectarines*	17.6	0	14.1
40	05	Plums*	6.4	0	2.9
	90	Sloes	12	0	0
0810		**Other fruit**			
10		Strawberries	11.2	0	7.7
20		Raspberries, blackberries, mulberries and loganberries	8.8-9.6	0	0
30		Black, white or red currants and gooseberries	8.8-9.6	0	0
40		Cranberries, billberries, other Vaccinium:			
	10	- cowberries, foxberries or mountain cranberries	0	-	-
	30	- fruit of the Vaccinium myrtillus	3.2	0	0
	50	- fruit of the Vaccinium macrocarpon and Vaccinium corymbosum	3.2	0	0
	90	- other	9.6	0	0
50		Kiwi fruits	8.8	0	0
90		Other:			
	30	- tamarinds, cashew apples, lychees, jackfruit, sapodillo plums	0	-	-
	40	- passion fruit, carambola and pitahaya	0	-	-
	85	- other	8.8	0	0

* Entry price is applicable. Please refer to Section 9.2 for more details on entry prices.

Group 1: Least developed countries R98/2820, annex IV

Group 2: Andean Group (CO Colombia, VE Venezuela, EC Ecuador, PE Peru, BO Bolivia) plus Central American Common Market (GT Guatemala, HN Honduras, SV El Salvador, NI Nicaragua, CR Costa Rica, PA Panama).

APPENDIX 2 DETAILED IMPORT/EXPORT STATISTICS

The source of the data presented below is Eurostat COMEXT 2002.

Table 1 Imports of FRESH FRUIT by EU member countries, by country of origin, 1999-2001
€ million / 1,000 tonnes

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total fruit	**13,267**	**18,792**	**13,497**	**18,942**	**14,444**	**18,481**
Extra-EU	**5,277**	**7,673**	**5,328**	**7,488**	**6,039**	**7,843**
Developing countries	**4,386**	**6,585**	**4,453**	**6,405**	**5,113**	**6,791**
Spain	2,695	3,867	2,885	4,255	2,930	3,840
Italy	1,360	1,997	1,403	2,021	1,418	2,009
The Netherlands	1,239	1,550	1,057	1,268	1,072	1,152
France	934	1,322	1,068	1,564	1,062	1,311
Belgium	1,086	1,429	1,017	1,336	1,020	1,217
South Africa	669	850	666	834	836	906
Costa Rica	495	827	506	826	558	823
Ecuador	372	704	370	700	422	729
Chile	368	399	302	280	383	342
Colombia	309	577	351	640	374	666
Argentina	283	429	269	361	372	489
Germany	268	364	292	402	338	426
New Zealand	302	300	282	303	337	331
Brazil	175	268	207	271	267	363
Côte d'Ivoire	201	381	222	370	254	404
Turkey	186	242	177	220	253	270
Greece	173	291	204	292	226	295
Israel	220	260	221	233	224	209
Panama	262	424	239	394	223	358
Morocco	210	339	197	311	211	281

Table 2 **Imports of FRESH VEGETABLES by EU member countries, by country of origin, 1999-2001. € million / 1,000 tonnes**

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total vegetables	**6,640**	**8,268**	**7,564**	**8,476**	**7,820**	**8,740**
Extra-EU	**839**	**901**	**946**	**874**	**1,090**	**1,027**
Developing countries	**557**	**531**	**618**	**486**	**687**	**612**
Spain	2,122	2,670	2,542	2,789	2,621	2,960
The Netherlands	1,899	2,318	2,183	2,469	2,037	2,307
Italy	487	671	506	613	551	650
France	516	731	520	733	549	743
Belgium	341	467	373	480	394	493
Germany	133	240	166	260	202	300
Morocco	178	239	181	193	198	250
Ireland	119	47	134	51	149	58
Kenya	103	41	128	46	124	44
Israel	65	48	82	51	95	57
Greece	71	50	70	41	92	50
Poland	40	73	51	90	83	111
Turkey	49	56	60	67	69	91
Hungary	49	51	54	53	66	60
United Kingdom	57	84	53	69	54	58
New Zealand	33	121	34	121	39	106
Egypt	24	28	28	33	33	41
Thailand	19	5	26	6	31	7

Table 3 **Imports of BANANAS by EU member countries, by country of origin, 1999-2001 value in € 1,000 / volume in tonnes**

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total	**2,963,448**	**4,812,137**	**3,010,969**	**5,024,595**	**3,068,116**	**4,757,236**
Extra-EU	**1,846,205**	**3,222,735**	**1,896,060**	**3,325,192**	**1,932,872**	**3,235,733**
Developing countries	**1,844,789**	**3,220,356**	**1,895,892**	**3,324,919**	**1,932,376**	**3,235,012**
Top 3 suppliers:						
Belgium	476,095	676,182	461,859	682,527	456,267	632,551
Ecuador	366,122	697,983	363,866	694,134	409,554	715,825
Costa Rica	388,657	664,821	370,147	658,402	393,177	637,258
Developing countries:						
Colombia	298,394	574,834	334,917	636,356	355,481	661,577
Panama	260,418	422,399	236,422	389,223	215,008	348,367
Cameroon	98,389	160,787	129,778	204,978	146,109	215,930
Côte d'Ivoire	100,819	192,557	103,340	200,200	130,798	217,888
Honduras	38,673	68,168	66,915	107,795	66,713	106,434
Dominican Republic	21,863	42,237	32,994	59,829	50,594	86,065
Jamaica	39,455	51,636	33,623	40,961	33,303	42,985

Table 4 Imports of APPLES by EU member countries, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**1,565,982**	**2,683,481**	**1,423,827**	**2,540,116**	**1,632,837**	**2,423,129**
Extra-EU	**593,402**	**783,267**	**465,134**	**671,435**	**601,114**	**732,290**
Developing countries	**353,175**	**474,531**	**266,526**	**319,645**	**370,911**	**431,092**
Top 3 suppliers:						
France	312,449	570,877	366,110	707,497	384,893	584,213
Italy	204,054	425,524	213,023	428,132	222,469	412,438
New Zealand	179,624	183,853	146,651	167,069	178,876	175,820
Developing countries:						
South Africa	125,042	158,342	102,542	121,633	137,175	154,993
Chile	132,666	179,906	78,633	91,159	122,535	143,460
Argentina	52,827	77,051	34,426	41,330	71,574	87,433
Brazil	37,112	49,682	44,603	57,053	27,027	31,661
China	1,530	1,900	3,047	4,010	8,272	7,949

Table 5 Imports of GRAPES by EU member countries, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**1,207,757**	**1,090,832**	**1,341,712**	**1,166,941**	**1,440,264**	**1,103,741**
Extra-EU	**433,958**	**312,139**	**473,919**	**340,992**	**541,627**	**331,765**
Developing countries	**375,261**	**282,180**	**417,080**	**310,796**	**488,565**	**307,500**
Top 3 suppliers:						
Italy	319,712	425,971	380,210	449,762	392,026	427,035
South Africa	173,186	117,231	194,825	125,846	228,230	130,813
The Netherlands	153,978	98,047	143,732	98,113	135,495	77,339
Developing countries:						
Chile	111,484	82,347	112,569	82,766	128,425	76,427
Turkey	32,771	42,320	38,160	51,377	32,731	44,487
Argentina	18,233	13,123	30,178	20,993	31,105	20,528
Brazil	10,378	6,735	9,774	7,641	23,556	13,065
Mexico	6,311	3,765	6,470	4,114	10,267	5,195
India	10,617	9,892	11,650	9,447	10,066	6,463
Egypt	4,088	2,553	5,421	3,568	9,521	5,182

Table 6 **Imports of ORANGES by EU member countries, 1999-2001**
value in € 1,000 / volume in tonnes

	1999		**2000**		**2001**	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**1,159,716**	**2,308,781**	**1,116,415**	**2,433,334**	**1,339,352**	**2,384,525**
Extra-EU	**365,504**	**846,522**	**300,395**	**738,609**	**487,302**	**931,927**
Developing countries	**323,495**	**764,820**	**266,574**	**673,866**	**449,706**	**866,057**
Top 3 suppliers:						
Spain	547,468	1,010,382	598,860	1,235,224	585,098	985,788
South Africa	112,985	265,228	108,307	272,095	174,487	311,556
The Netherlands	97,950	167,908	71,619	140,936	89,481	140,666
Developing countries:						
Morocco	86,413	195,285	65,764	164,535	81,628	166,661
Argentina	23,018	53,326	13,305	31,456	45,872	80,816
Brazil	27,684	86,180	19,465	63,326	42,265	116,165
Uruguay	23,302	51,623	11,037	25,518	26,993	48,482
Zimbabwe	11,365	24,651	11,100	28,038	26,364	39,578
Turkey	7,403	15,006	4,333	8,548	11,035	17,087

Table 7 **Imports of MANDARINS, CLEMENTINES by EU member countries, 1999-2001**
value in € 1,000 / volume in tonnes

	1999		**2000**		**2001**	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**932,498**	**1,273,726**	**1,000,299**	**1,390,312**	**990,101**	**1,247,894**
Extra-EU	**192,041**	**288,208**	**183,325**	**273,298**	**220,736**	**299,918**
Developing countries	**164,813**	**253,013**	**154,453**	**231,679**	**191,271**	**263,831**
Top 3 suppliers:						
Spain	640,374	850,616	714,308	976,712	672,212	828,813
Morocco	74,617	110,837	70,168	103,963	62,007	75,336
Turkey	29,413	47,783	32,757	49,302	44,356	69,567
Developing countries:						
South Africa	30,454	45,991	20,975	35,141	40,922	58,278
Uruguay	12,576	19,443	11,129	15,204	18,525	24,612
Argentina	13,196	20,569	11,832	16,410	15,361	20,618
Peru	214	377	592	753	3,694	4,745
Chile	1,414	2,499	3,161	4,305	3,147	5,102
Brazil	847	1,978	1,863	3,292	1,237	2,299

Table 8 **Imports of PEACHES, NECTARINES by EU member countries, 1999-2001**
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total	**589,330**	**750,940**	**641,571**	**738,894**	**708,846**	**770,074**
Extra-EU	**25,830**	**17,399**	**26,879**	**15,327**	**34,196**	**21,876**
Developing countries	**23,537**	**15,493**	**23,144**	**13,041**	**31,241**	**19,677**
Top 3 suppliers:						
Spain	192,177	198,542	248,677	265,074	275,251	239,448
Italy	247,415	400,676	242,682	336,322	262,378	383,422
France	71,581	68,937	72,697	65,024	78,838	63,699
Developing countries:						
Chile	9,149	7,217	8,230	4,566	10,584	6,914
South Africa	7,248	4,243	8,729	4,128	9,734	4,855
Turkey	376	411	1,990	2,106	3,870	3,778

Table 9 **Imports of BERRIES by EU member countries, 1999-2001**
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total	**722,974**	**449,728**	**703,028**	**443,929**	**698,123**	**444,149**
Extra-EU	**126,678**	**90,509**	**138,585**	**94,039**	**133,445**	**96,236**
Developing countries	**45,536**	**17,331**	**50,853**	**23,333**	**62,408**	**20,396**
Top 3 suppliers:						
Spain	319,942	220,888	296,820	216,740	314,015	227,829
The Netherlands	78,247	27,067	76,280	27,684	65,982	22,498
Belgium	62,193	27,575	66,082	30,739	61,014	26,719
Developing countries:						
Morocco	29,600	12,580	34,801	20,190	39,852	14,671
Egypt	3,091	764	3,898	1,072	7,778	2,284
Chile	7,028	883	7,050	675	6,485	631
Fed. Rep. Yugoslavia	1,523	2,129	572	663	1,477	1,651

Table 10 Imports of MELONS by EU member countries, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total	**575,917**	**1,150,302**	**621,099**	**1,103,501**	**664,527**	**1,121,474**
Extra-EU	**144,585**	**220,056**	**164,757**	**216,045**	**171,876**	**236,726**
Developing countries	**112,759**	**173,140**	**134,582**	**178,451**	**147,662**	**201,793**
Top 3 suppliers:						
Spain	260,793	596,529	286,105	596,063	323,714	607,737
The Netherlands	61,873	86,725	54,539	69,326	52,634	65,151
Brazil	32,742	63,831	40,415	64,428	50,693	90,709
Developing countries:						
Costa Rica	40,396	52,431	43,506	51,139	48,089	47,950
Morocco	12,675	16,744	19,264	18,704	20,167	19,825
Panama	1,122	1,784	2,640	4,359	7,817	9,361
Honduras	7,174	10,238	9,549	13,196	5,238	5,881
Turkey	3,721	10,345	3,966	11,432	4,954	13,446

Table 11 Imports of PEARS by EU member countries, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total	**637,177**	**919,404**	**630,722**	**830,481**	**631,180**	**844,425**
Extra-EU	**208,041**	**305,718**	**201,944**	**265,337**	**204,157**	**267,435**
Developing countries	**193,438**	**284,642**	**190,951**	**251,781**	**193,682**	**254,420**
Top 3 suppliers:						
The Netherlands	137,498	171,660	144,330	172,860	116,410	145,129
Argentina	81,814	120,740	89,600	117,097	94,888	126,310
Italy	107,707	136,808	102,810	125,091	94,790	110,362
Developing countries:						
South Africa	60,657	85,265	58,281	75,966	55,217	71,219
Chile	43,576	68,367	34,891	48,600	32,088	42,541
Turkey	4,791	5,748	4,754	5,474	6,836	8,062

Table 12 Imports of KIWIFRUITS by EU member countries, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**484,730**	**426,432**	**458,798**	**471,734**	**499,905**	**485,542**
Extra-EU	**152,498**	**147,165**	**167,351**	**169,664**	**201,961**	**197,361**
Developing countries	**32,643**	**33,425**	**36,599**	**36,753**	**45,667**	**44,247**
Top 3 suppliers:						
New Zealand	119,702	113,511	130,706	132,804	156,119	152,927
Italy	134,894	134,699	130,794	175,761	123,363	157,082
Belgium	94,510	58,086	77,881	51,483	88,500	56,869
Developing countries:						
Chile	32,520	33,314	36,338	36,441	45,478	44,028
Argentina	95	86	140	176	189	219

Table 13 Imports of PINEAPPLES by EU member countries, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**313,540**	**522,300**	**369,771**	**478,379**	**433,092**	**539,826**
Extra-EU	**181,370**	**332,589**	**233,396**	**318,298**	**276,069**	**366,948**
Developing countries	**181,057**	**332,003**	**233,240**	**318,063**	**275,962**	**366,895**
Top 3 suppliers:						
Costa Rica	61,202	106,226	87,762	112,741	113,642	135,646
Côte d'Ivoire	88,004	177,775	105,922	158,164	109,078	174,644
France	56,749	90,342	60,976	78,641	62,461	81,943
Developing countries:						
Ghana	15,875	25,660	23,331	29,322	30,016	31,743
Honduras	3,753	6,371	4,263	5,175	7,236	9,115
South Africa	2,415	3,545	3,809	4,642	4,126	5,046
Ecuador	684	1,234	306	348	2,583	3,563

Table 14 **Imports of LEMONS, LIMES by EU member countries, 1999-2001**
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total	**432,340**	**652,949**	**415,255**	**620,290**	**430,067**	**637,983**
Extra-EU	**133,935**	**198,644**	**118,198**	**175,254**	**140,851**	**206,157**
Developing countries	**128,460**	**191,031**	**113,377**	**168,281**	**136,421**	**199,007**
Top 3 suppliers:						
Spain	207,705	328,735	212,475	330,147	194,889	305,143
Argentina	76,747	119,938	72,579	115,646	82,939	126,473
The Netherlands	49,409	61,521	43,215	52,394	45,328	55,837
Developing countries:						
Turkey	25,082	41,506	9,765	14,974	15,686	25,175
South Africa	7,153	10,875	11,349	18,569	15,202	23,108
Brazil	3,523	2,475	7,588	6,084	11,648	9,733
Uruguay	5,944	8,757	4,241	6,473	7,493	11,408

Table 15 **Imports of GRAPEFRUIT by EU member countries, 1999-2001**
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total	**324,976**	**629,035**	**305,390**	**558,803**	**335,094**	**489,272**
Extra-EU	**204,852**	**414,464**	**210,370**	**383,509**	**233,099**	**347,807**
Developing countries	**88,995**	**181,768**	**106,095**	**197,430**	**118,110**	**166,084**
Top 3 suppliers:						
USA	61,216	124,720	61,709	105,931	70,448	109,919
The Netherlands	64,321	110,172	44,452	79,411	44,946	59,334
South Africa	33,363	72,789	49,564	92,182	44,746	64,283
Developing countries:						
Turkey	21,364	40,857	27,724	49,773	24,786	40,276
Argentina	10,159	19,942	8,562	14,456	14,152	18,911
Cuba	6,435	12,588	4,869	10,291	10,060	11,284
Honduras	8,495	15,228	5,584	11,935	8,587	10,663
Swaziland	4,617	11,241	5,686	10,928	6,048	8,549

Table 16 Imports of AVOCADOS by EU member countries, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**234,173**	**165,944**	**241,032**	**196,684**	**273,968**	**187,929**
Extra-EU	**130,848**	**88,995**	**139,254**	**112,681**	**159,171**	**104,183**
Developing countries	**91,728**	**57,980**	**84,871**	**69,254**	**107,505**	**66,328**
Top 3 suppliers:						
South Africa	53,714	31,557	47,391	42,098	55,418	32,307
Spain	47,799	36,908	49,142	39,215	52,924	39,664
Israel	38,580	30,694	53,603	42,948	51,424	37,718
Developing countries:						
Mexico	20,812	13,996	19,326	12,614	22,030	13,178
Kenya	12,948	9,739	13,772	11,422	21,248	15,772
Peru	744	407	2,713	2,014	4,747	2,437
Brazil	683	453	294	190	1,053	576

Table 17 Imports of CHERRIES by EU member countries, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**209,878**	**142,540**	**213,703**	**125,411**	**243,064**	**124,232**
Extra-EU	**98,332**	**73,596**	**93,432**	**57,186**	**139,572**	**73,735**
Developing countries	**56,942**	**31,655**	**41,702**	**17,379**	**93,596**	**30,732**
Top 3 suppliers:						
Turkey	48,465	26,662	32,728	12,434	82,959	27,176
Spain	39,524	23,218	34,272	18,206	31,493	15,174
Italy	19,932	10,426	23,970	12,167	16,968	5,630
Developing countries:						
Chile	5,221	996	3,933	702	5,108	778
Argentina	933	197	2,799	506	4,184	722
Fed. Rep. Yugoslavia	1,739	3,126	1,516	2,775	993	1,936

Table 18 **Imports of PLUMS, SLOES by EU member countries, 1999-2001**
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**200,884**	**221,864**	**191,440**	**218,717**	**233,200**	**331,671**
Extra-EU	**75,255**	**74,631**	**67,151**	**54,910**	**97,583**	**88,334**
Developing countries	**65,820**	**61,034**	**54,577**	**39,140**	**78,435**	**59,369**
Top 3 suppliers:						
Spain	44,014	55,567	46,030	53,306	53,677	77,872
South Africa	37,985	35,335	33,223	24,627	42,357	30,602
Chile	23,727	22,271	15,553	10,163	26,131	19,906
Developing countries:						
Argentina	2,470	2,142	3,839	2,802	5,812	4,054
Turkey	1,380	1,092	1,677	1,297	3,464	3,720
Fed. Rep. Yugoslavia	62	65	73	104	268	685

Table 19 **Imports of GUAVAS, MANGOES by EU member countries, 1999-2001**
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**190,146**	**182,046**	**220,096**	**184,695**	**232,167**	**189,806**
Extra-EU	**121,182**	**116,302**	**147,445**	**119,379**	**166,832**	**135,693**
Developing countries	**98,788**	**95,920**	**121,339**	**99,226**	**141,712**	**120,674**
Top 3 suppliers:						
Brazil	36,300	38,409	45,623	39,637	64,200	60,325
The Netherlands	41,943	39,672	40,645	37,166	35,858	32,345
Israel	9,859	8,932	10,927	8,456	13,829	6,599
Developing countries:						
Côte d'Ivoire	11,280	10,265	11,505	10,305	13,685	10,842
Pakistan	5,999	5,610	8,673	7,095	11,095	8,751
South Africa	8,634	9,897	11,185	9,292	10,752	10,622
Peru	6,925	7,348	10,843	9,305	8,929	7,749
Ecuador	3,720	3,980	3,015	3,259	5,998	6,220
India	3,439	2,134	3,848	1,747	4,441	2,624

Table 20 **Imports of APRICOTS by EU member countries, 1999-2001**
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**120,318**	**136,791**	**131,338**	**126,402**	**131,011**	**106,546**
Extra-EU	**8,414**	**7,113**	**15,409**	**9,567**	**17,985**	**12,090**
Developing countries	**6,633**	**4,257**	**13,159**	**7,858**	**14,228**	**8,634**
Top 3 suppliers:						
Spain	42,472	48,104	45,559	50,927	53,959	53,092
France	40,579	48,592	42,538	35,236	33,968	20,095
Greece	8,052	9,283	10,600	13,031	9,236	9,095
Developing countries:						
Turkey	929	608	4,743	3,208	7,674	4,746
South Africa	5,106	3,340	5,611	3,509	5,746	3,268
Argentina	0	0	5	1	352	328

Table 21 **Imports of DATES by EU member countries, 1999-2001**
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**106,792**	**60,005**	**116,442**	**61,443**	**107,845**	**61,246**
Extra-EU	**85,280**	**50,593**	**95,031**	**52,046**	**90,097**	**52,069**
Developing countries	**66,217**	**45,468**	**74,696**	**46,744**	**67,400**	**46,317**
Top 3 suppliers:						
Tunisia	43,370	22,033	50,755	25,945	47,255	27,053
Israel	12,967	3,567	13,825	3,909	17,366	4,277
France	14,710	6,369	15,350	6,937	11,084	6,378
Developing countries:						
Algeria	14,166	10,074	15,593	9,937	10,433	6,946
Iran	5,864	10,388	5,172	7,822	6,923	10,141
South Africa	183	31	435	95	709	104
Pakistan	1,066	1,668	1,018	1,655	492	805
Turkey	426	342	409	236	421	324

Table 22	**Imports of TAMARINDS, LYCHEES by EU member countries, 1999-2001 value in € 1,000 / volume in tonnes**					
	1999		**2000**		**2001**	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**66,491**	**28,450**	**84,399**	**32,814**	**70,171**	**31,175**
Extra-EU	**49,334**	**18,846**	**68,215**	**22,624**	**52,464**	**21,683**
Developing countries	**48,032**	**18,110**	**66,127**	**22,031**	**50,139**	**21,028**
Top 3 suppliers:						
Madagascar	37,073	12,439	55,972	18,678	37,482	16,622
France	8,971	4,815	8,800	4,927	9,966	5,906
South Africa	7,103	4,234	5,925	2,002	7,233	3,030
Developing countries:						
Thailand	2,775	1,067	3,227	1,049	3,592	877
Mauritius	358	92	255	48	689	142
Colombia	93	23	163	42	265	64

Table 23	**Imports of PAPAYAS by EU member countries, by country of origin, 1999-2001 value in € 1,000 / volume in tonnes**					
	1999		**2000**		**2001**	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**31,620**	**17,558**	**37,884**	**19,941**	**43,174**	**22,950**
Extra-EU	**24,227**	**13,923**	**30,567**	**16,750**	**34,041**	**18,676**
Developing countries	**23,225**	**13,698**	**29,356**	**16,506**	**32,313**	**18,304**
Top 3 suppliers:						
Brazil	17,946	10,295	24,609	13,462	27,032	15,254
The Netherlands	4,624	2,287	4,631	2,029	5,821	2,573
Ghana	2,030	1,789	2,216	1,859	2,172	1,822
Developing countries:						
Thailand	671	214	785	243	1,130	361
Côte d’Ivoire	599	382	566	317	480	235
Jamaica	696	317	519	254	403	224
Malaysia	219	103	192	98	373	126

Table 24 **Imports of PASSION FRUIT by EU member countries, by country of origin, 1999-2001**
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**25,659**	**10,116**	**32,086**	**10,071**	**30,285**	**9,820**
Extra-EU	**15,949**	**6,166**	**19,200**	**6,143**	**18,363**	**6,142**
Developing countries	**15,678**	**6,084**	**18,645**	**6,014**	**17,736**	**5,988**
Top 3 suppliers:						
Malaysia	8,566	3,600	10,221	3,442	9,776	3,558
The Netherlands	7,078	2,421	9,238	2,624	8,144	2,263
Zimbabwe	2,551	1,000	2,903	971	2,369	841
Developing countries:						
Kenya	1,420	603	1,963	670	2,181	682
Colombia	2,004	469	1,940	400	1,535	319
South Africa	459	160	438	147	606	214
Vietnam	319	106	516	124	604	158

Table 25 **Imports of FIGS by EU member countries, by country of origin, 1999-2001**
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**20,828**	**13,949**	**27,539**	**15,149**	**27,342**	**16,347**
Extra-EU	**10,357**	**6,376**	**14,569**	**6,930**	**12,818**	**6,838**
Developing countries	**10,126**	**6,332**	**14,322**	**6,896**	**12,394**	**6,772**
Top 3 suppliers:						
Turkey	6,957	5,489	10,799	5,985	8,657	5,759
The Netherlands	2,806	1,343	3,591	1,531	4,147	1,721
Spain	3,162	2,296	2,972	1,888	3,595	2,266
Developing countries:						
Brazil	2,563	699	2,850	714	2,926	792
Peru	548	114	430	75	541	102
Saudi Arabia	13	4	118	35	155	54

Table 26 Imports of TOMATOES by EU member countries, by country of origin, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**1,613,393**	**1,844,132**	**2,096,658**	**1,915,909**	**1,852,867**	**1,948,623**
Extra-EU	**145,376**	**214,149**	**159,229**	**174,685**	**146,438**	**206,821**
Developing countries	**128,200**	**200,592**	**134,925**	**157,034**	**125,756**	**190,424**
Top 3 suppliers:						
Spain	599,557	761,134	852,770	831,991	773,473	904,422
The Netherlands	576,424	550,729	719,736	588,390	585,150	513,468
Italy	101,030	104,909	124,280	103,438	130,427	105,148
Developing countries:						
Morocco	123,299	195,212	117,175	140,813	112,816	175,994
Turkey	2,488	2,939	13,076	12,264	9,035	10,293
Senegal	1,106	858	2,303	1,869	2,862	2,313
Tunisia	919	1,034	2,270	1,821	1,900	1,941

Table 27 Imports of CAPSICUM by EU member countries, by country of origin, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**847,481**	**678,223**	**1,007,241**	**680,881**	**1,034,649**	**700,163**
Extra-EU	**86,763**	**80,265**	**106,051**	**91,332**	**127,373**	**108,664**
Developing countries	**43,993**	**40,846**	**47,754**	**46,770**	**49,758**	**57,197**
Top 3 suppliers:						
Spain	344,732	341,572	406,062	316,792	415,919	321,075
The Netherlands	362,014	211,501	415,955	218,603	403,897	206,818
Israel	24,319	17,884	34,763	17,680	51,714	26,905
Developing countries:						
Turkey	28,528	28,520	27,576	29,598	31,831	38,782
Morocco	5,671	6,940	8,915	8,718	7,267	11,401
Kenya	3,040	1,294	2,631	1,005	1,896	692
Thailand	1,317	290	1,583	304	1,586	321

Table 28 Imports of LETTUCE by EU member countries, by country of origin, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total	**675,503**	**758,435**	**747,187**	**822,735**	**759,359**	**791,380**
Extra-EU	**2,852**	**2,090**	**3,815**	**5,444**	**6,302**	**7,511**
Developing countries	**172**	**196**	**862**	**902**	**1,111**	**1,129**
Top 3 suppliers:						
Spain	288,649	375,430	328,611	416,573	344,858	418,954
France	117,504	94,538	124,774	100,915	111,755	86,990
The Netherlands	100,205	99,023	102,308	109,338	104,710	88,440
Developing countries:						
Turkey	61	64	198	210	469	439
Chile	0	0	244	226	225	232
Morocco	2	1	77	110	172	288

Table 29 Imports of ONIONS by EU member countries, by country of origin, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total	**548,369**	**1,226,906**	**514,507**	**1,235,131**	**690,808**	**1,374,278**
Extra-EU	**122,425**	**318,529**	**104,544**	**296,184**	**150,263**	**339,517**
Developing countries	**59,815**	**111,535**	**42,373**	**83,301**	**73,631**	**130,466**
Top 3 suppliers:						
The Netherlands	139,685	337,728	134,964	379,380	176,246	408,560
Spain	113,939	278,493	111,566	244,931	147,722	297,207
France	57,151	78,834	49,789	88,887	65,926	85,691
Developing countries:						
Argentina	29,989	45,236	16,539	26,739	28,126	40,061
China	8,624	12,165	9,036	13,355	11,880	15,345
Chile	5,714	19,941	5,185	17,013	9,439	23,329
Egypt	4,180	7,598	4,580	11,897	6,144	17,237

Table 30 Imports of MUSHROOMS by EU member countries, by country of origin, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**454,252**	**190,864**	**525,643**	**215,296**	**578,169**	**243,408**
Extra-EU	**107,620**	**36,221**	**132,998**	**46,047**	**174,119**	**67,437**
Developing countries	**19,837**	**3,801**	**21,434**	**3,052**	**28,428**	**4,853**
Top 3 suppliers:						
The Netherlands	151,067	73,129	177,885	83,910	170,208	80,687
Ireland	107,501	39,870	122,242	44,539	135,172	48,480
Poland	25,888	9,980	32,043	14,538	60,291	29,983
Developing countries:						
Fed. Rep. Yugoslavia	9,034	1,772	7,205	929	14,149	2,326
Turkey	3,223	375	3,064	244	3,636	335
Bosnia & Herzegovina	1,115	250	3,360	487	3,317	572
China	2,716	746	2,474	552	2,782	786

Table 31 Imports of CUCUMBERS by EU member countries, by country of origin, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**502,686**	**700,256**	**605,351**	**714,363**	**578,140**	**730,649**
Extra-EU	**13,075**	**18,380**	**12,338**	**16,191**	**18,390**	**23,912**
Developing countries	**5,741**	**6,643**	**6,442**	**7,721**	**11,189**	**12,899**
Top 3 suppliers:						
The Netherlands	238,442	357,615	293,519	346,604	253,160	320,120
Spain	200,954	251,063	245,195	278,263	246,860	296,641
Greece	14,697	15,484	14,944	13,202	17,538	19,982
Developing countries:						
Turkey	3,773	4,898	4,573	6,067	7,910	10,554
Morocco	963	836	314	232	1,964	1,225
Jordan	818	725	1,366	1,169	1,122	872

Table 32 Imports of CABBAGES by EU member countries, by country of origin, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total	**456,828**	**772,014**	**455,413**	**737,691**	**502,499**	**712,408**
Extra-EU	**6,464**	**10,545**	**6,510**	**10,956**	**8,780**	**13,675**
Developing countries	**2,658**	**4,263**	**2,756**	**3,892**	**3,812**	**5,813**
Top 3 suppliers:						
Spain	186,441	247,561	181,542	231,404	213,258	231,429
France	83,532	154,374	83,139	142,946	92,603	135,984
The Netherlands	66,920	135,446	75,706	143,214	76,270	124,130
Developing countries:						
Turkey	1,374	3,203	1,212	2,864	1,390	3,382
China	1,100	446	1,321	540	1,219	533
South Africa	9	15	40	43	645	316

Table 33 Imports of CARROTS by EU member countries, by country of origin, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total	**342,698**	**957,757**	**284,358**	**925,889**	**370,261**	**1,016,267**
Extra-EU	**12,604**	**29,629**	**12,944**	**19,915**	**13,278**	**24,892**
Developing countries	**1,971**	**4,176**	**3,495**	**5,203**	**2,294**	**4,048**
Top 3 suppliers:						
The Netherlands	111,757	386,903	99,437	419,343	114,728	411,242
Italy	69,163	136,665	46,812	105,437	75,395	136,144
Spain	41,918	88,409	40,722	92,561	51,601	92,148
Developing countries:						
Turkey	1,237	2,975	2,652	4,286	1,389	2,895
South Africa	95	187	360	322	392	557
China	66	68	125	169	153	151

Table 34 **Imports of PEAS, BEANS by EU member countries, by country of origin, 1999-2001 value in € 1,000 / volume in tonnes**

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**303,568**	**317,987**	**360,526**	**362,671**	**351,139**	**332,068**
Extra-EU	**177,703**	**94,750**	**212,994**	**103,208**	**206,170**	**112,212**
Developing countries	**164,482**	**87,255**	**199,373**	**95,252**	**193,854**	**105,075**
Top 3 suppliers:						
Kenya	78,599	29,370	94,441	30,690	74,255	25,812
Spain	47,206	32,205	53,623	36,276	55,470	35,363
Morocco	21,557	16,296	36,414	24,911	49,210	36,756
Developing countries:						
Egypt	18,441	19,243	20,710	18,464	23,887	20,908
Guatemala	6,178	2,304	10,239	3,154	10,738	3,668
Senegal	10,284	5,579	10,368	5,914	10,613	5,905
Zimbabwe	17,220	6,886	12,532	4,190	9,985	4,124
Zambia	6,063	3,023	7,121	3,381	9,499	4,717
Ethiopia	4,863	3,269	6,001	3,521	5,206	3,154
Burkina Faso	4,825	2,604	4,669	2,439	3,545	1,595

Table 35 **Imports of ASPARAGUS by EU member countries, by country of origin, 1999-2001 value in € 1,000 / volume in tonnes**

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**193,720**	**91,185**	**204,971**	**72,356**	**234,852**	**77,831**
Extra-EU	**35,863**	**12,604**	**41,961**	**13,377**	**48,985**	**14,489**
Developing countries	**26,867**	**7,935**	**34,089**	**9,006**	**37,507**	**10,038**
Top 3 suppliers:						
Spain	55,486	20,513	64,332	23,776	78,831	29,658
Greece	46,677	26,889	46,540	20,224	62,373	21,327
Peru	16,418	4,505	24,600	6,505	28,351	7,522
Developing countries						
Thailand:	1,823	322	2,221	370	3,303	514
Chile	2,206	675	1,591	433	1,604	482
South Africa	2,416	729	2,300	649	1,563	435
Morocco	1,154	844	1,492	506	1,217	658

Table 36 Imports of COURGETTES by EU member countries, by country of origin, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**164,281**	**171,087**	**164,459**	**200,166**	**195,390**	**210,917**
Extra-EU	**19,267**	**14,310**	**11,720**	**15,174**	**16,823**	**17,170**
Developing countries	**19,193**	**14,243**	**11,645**	**15,100**	**16,701**	**17,064**
Top 3 suppliers:						
Spain	106,480	116,203	111,947	143,820	134,578	150,569
The Netherlands	11,939	10,793	13,711	12,446	14,047	11,389
Morocco	17,367	12,037	9,686	12,544	13,957	13,724
Developing countries:						
Turkey	1,491	1,894	1,638	2,151	2,231	2,701
Egypt	67	53	69	93	255	429
Jordan	186	207	161	219	121	147

Table 37 Imports of EGGPLANTS by EU member countries, by country of origin, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**78,560**	**84,636**	**89,622**	**91,209**	**94,190**	**92,488**
Extra-EU	**2,835**	**2,697**	**4,063**	**4,212**	**5,188**	**6,420**
Developing countries	**2,529**	**2,475**	**3,787**	**4,034**	**5,099**	**6,357**
Top 3 suppliers:						
Spain	34,075	41,958	42,243	51,047	48,983	54,225
The Netherlands	32,806	30,150	34,473	25,925	30,076	21,573
Turkey	1,654	2,006	2,827	3,527	4,220	5,889
Developing countries:						
Thailand	284	83	357	94	416	103
Kenya	106	64	142	90	125	68
Dominican Republic	125	100	170	113	120	87
Ghana	37	30	44	38	119	96

Table 38 Imports of SWEET MAIZE by EU member countries, by country of origin, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**30,080**	**27,442**	**37,205**	**24,208**	**42,614**	**26,142**
Extra-EU	**20,385**	**10,310**	**25,353**	**12,649**	**29,703**	**13,962**
Developing countries	**14,570**	**5,016**	**18,249**	**5,670**	**21,602**	**8,365**
Top 3 suppliers:						
Thailand	8,750	2,402	13,034	3,128	15,837	3,762
USA	3,271	3,645	4,320	5,055	5,449	3,702
France	3,318	6,475	3,349	4,749	4,398	5,508
Developing countries:						
Morocco	499	602	748	860	2,479	3,104
Zambia	1,411	542	1,357	525	1,279	568
Zimbabwe	2,638	792	2,152	617	995	363
Kenya	318	108	160	55	322	130

Table 39 Imports of ARTICHOKES by EU member countries, by country of origin, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**39,115**	**42,286**	**41,721**	**47,153**	**34,926**	**46,417**
Extra-EU	**1,350**	**971**	**1,926**	**1,403**	**863**	**807**
Developing countries	**1,344**	**967**	**1,918**	**1,399**	**862**	**806**
Top 3 suppliers:						
Spain	23,582	22,447	25,112	27,460	20,430	30,873
France	8,204	9,842	7,848	7,851	6,681	6,143
Italy	4,360	7,561	4,924	8,166	4,666	6,666
Developing countries:						
Egypt	1,043	769	1,748	1,302	793	758
Tunisia	116	75	73	43	47	35
Turkey	12	9	5	6	18	11

Table 40 Imports of FENNEL by EU member countries, by country of origin, 1999-2001 value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total	**24,254**	**33,788**	**25,695**	**35,207**	**28,784**	**36,726**
Extra-EU	**26**	**24**	**36**	**13**	**62**	**14**
Developing countries	**24**	**21**	**35**	**12**	**60**	**13**
Top 3 suppliers:						
Italy	17,768	26,795	18,329	27,436	22,439	30,054
The Netherlands	2,755	2,772	3,269	2,816	2,721	2,423
Spain	2,600	3,440	2,689	3,912	2,182	3,139
Developing countries:						
South Africa	1	1	21	5	58	10
Tunisia	1	2	14	7	2	3

Table 41 Imports of SPINACH by EU member countries, by country of origin, 1999-2001 value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	volume	value	volume	value	volume
Total	**20,855**	**43,869**	**23,217**	**41,466**	**28,336**	**38,046**
Extra-EU	**1,392**	**420**	**999**	**183**	**1,730**	**652**
Developing countries	**358**	**128**	**254**	**70**	**42**	**35**
Top 3 suppliers:						
Italy	6,699	7,125	7,688	6,631	9,026	7,325
Spain	3,690	2,932	5,133	5,416	6,505	4,607
France	2,847	2,955	2,636	2,466	2,756	2,432
Developing countries						
Kenya:	336	112	239	58	16	3
Turkey	3	6	2	3	10	24
Thailand	7	2	5	3	8	4

Table 42 Imports of TRUFFLES by EU member countries, by country of origin, 1999-2001
value in € 1,000 / volume in tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**12,669**	**111**	**15,313**	**139**	**12,710**	**149**
Extra-EU	**594**	**26**	**746**	**31**	**1,365**	**44**
Developing countries	**531**	**25**	**742**	**31**	**1,196**	**43**
Top 3 suppliers:						
Spain	5,657	26	6,548	36	3,976	24
Italy	3,758	26	5,176	39	3,615	35
France	2,345	21	2,591	27	3,277	43
Developing countries:						
China:	496	25	694	31	809	40
Croatia	34	0	34	0	323	1
Macedonia	0	0	0	0	48	1

Table 43 Exports of FRESH FRUIT by EU member countries, by product, 1999-2001
€ million / 1,000 tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total fruit	**9,075**	**13,883**	**9,713**	**14,398**	**10,266**	**13,780**
Intra EU	**7,931**	**11,602**	**8,286**	**11,682**	**8,626**	**10,910**
Extra-EU	**1,144**	**2,281**	**1,427**	**2,716**	**1,639**	**2,870**
Apples	1,158	2,391	1,196	2,378	1,336	2,244
Bananas	1,412	2,023	1,289	1,839	1,315	1,742
Grapes	963	1,025	1,069	1,070	1,199	1,110
Oranges	884	1,915	943	2,201	1,015	2,083
Mandarins	905	1,410	1,159	1,651	1,004	1,318
Peaches	588	901	696	943	787	914
Berries	631	360	590	357	607	346
Pears	474	715	492	690	551	759
Melons	408	1,065	486	1,046	543	1,091
Lemons, limes	341	616	385	693	385	698
Kiwifruits	317	333	289	387	327	387
Pineapples	144	229	151	191	218	253
Plums, sloes	123	156	138	152	161	157
Apricots	120	143	131	133	135	112
Cherries	113	67	131	69	126	59
Grapefruit	118	231	119	226	126	190
Avocados	110	82	119	99	122	86
Guavas, mangoes	69	64	93	78	90	76
Tamarinds, lychees	19	10	18	10	33	14
Dates	25	11	28	12	26	11
Figs	12	8	17	9	14	8
Papayas	9	4	13	6	13	7
Passion fruit	8	3	11	3	11	4

Table 44 Exports of FRESH VEGETABLES by EU member countries, by product, 1999-2001
€ million / 1,000 tonnes

	1999		2000		2001	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total vegetables	**6,314**	**8,549**	**7,068**	**8,817**	**7,501**	**8,986**
Intra EU	**5,583**	**7,443**	**6,261**	**7,577**	**6,584**	**7,693**
Extra-EU	**731**	**1,106**	**807**	**1,240**	**918**	**1,293**
Tomatoes	1,654	2,006	1,966	1,953	1,904	2,148
Capsicum	917	747	1,136	745	1,123	798
Lettuce	694	849	719	907	804	876
Onions	494	1,261	508	1,475	629	1,432
Cucumbers	539	816	623	815	608	804
Cabbages	470	917	485	914	533	848
Mushrooms	328	148	368	167	432	192
Carrots	328	879	263	823	366	872
Courgettes	154	183	157	224	191	213
Asparagus	150	61	154	57	173	64
Peas, beans	122	183	152	205	155	216
Eggplants	83	95	106	102	117	109
Artichokes	41	41	43	46	42	42
Fennel	31	42	33	44	38	46
Spinach	19	47	21	30	25	29
Truffles	20	0	26	0	20	0
Sweet maize	11	17	12	18	11	13

APPENDIX 3 USEFUL ADDRESSES

3.1 Standards organisations

INTERNATIONAL:

International Standardisation Institute (ISO)
E-mail: central@iso.org
Internet: www.iso.org

UN/ECE
Trade Division - Agricultural Standards Unit
E-mail: info.ece@unece.org
Internet: www.unece.org

Joint FAO/WHO Food Standards Programme
CODEX ALIMENTARIUS COMMISSION ESN Division
E-mail: fao-hq@fao.org
Internet: www.fao.org

EUROPEAN UNION:

Comité Européen de Normalisation (CEN)
European Normalisation Committee
E-mail: infodesk@cenorm.be
Internet: www.cenorm.be

SGS European Quality Certification Institute E.E.S.V.
E-mail: sgs.nl@sgs.com
Internet: www.sgs.nl

FRANCE:

Association Française de Normalisation (AFNOR)
E-mail: norminfo@afnor.fr
Internet: www.afnor.fr

GERMANY:

Deutsches Institut für Normung eV (DIN)
E-mail: postmaster@din.de
Internet: www.din.de

ITALY:

Ente Nazionale Italiano di Unificazione (UNI)
E-mail: uni@uni.com
Internet: www.unicei.it

THE NETHERLANDS:

Nederlands Normalisatie Instituut (NNI)
Address: P.O.Box 5059, 2600 GB Delft,
The Netherlands
Telephone: +31 (0)15 2690390
Fax: +31 (0)15 2690190
E-mail: info@nni.nl
Internet: www.nni.nl

UNITED KINGDOM:

British Standards Institution (BSI)
E-mail: info@ bsi-global.com
Internet: www.bsi-global.com

3.2 Sources of price information

INTERNATIONAL:

International Trade Centre UNCTAD/WTO (ITC)
E-mail: itcreg@intracen.org
Internet: www.intracen.org

FRANCE:

Services des Nouvelles des Marchés (SNM)
E-mail: cat@snm.agriculture.gouv.fr
Internet: www.snm.agriculture.gouv.fr

Association Interprofessionelle des Fruits et Légumes Frais (INTERFEL)
E-mail: infos@interfel.com
Internet: www.interfel.com

GERMANY:

Zentrale Markt- und Preisberichtstelle für Erzeugnisse der Land-, Forst- und Ernährungswirtschaft GmbH (ZMP)
E-mail: info@zmp.de
Internet: www.zmp.de

THE NETHERLANDS:

Productschap Tuinbouw
Netherlands' Commodity Board for Horticulture
E-mail: pt@tuinbouw.nl
Internet: www.tuinbouw.nl

3.3 Trade associations

EUROPEAN UNION:

Freshfel Europe
European Association for the fresh produce industry
E-mail: info@freshfel.org
Internet: www.freshfel.org

EUCOFEL
European Union of the Fruit and Vegetable Wholesale, Import and Export Trade
Fax: +32 (0)2 7321747
E-mail: eucofel.fruittrade.org@skynet.be

Groupement Européen des Producteurs de Champignons (GEPC)
Federation of European Mushroom Growers
Telephone: +33 (0)1 42360329
Fax: +33 (0)1 42362693

AUSTRIA:

Österreichische Vereinigung für Obst- und Gemüseunternehmen (ÖVOG)
Austrian Fruit and Vegetable Association
Telephone: +43 (0)1 5128459
Fax: +43 (0)1 5139446
E-mail: kaukal@netway.at

BELGIUM:

National Fruit and Vegetables Importers, Exporters and Wholesalers Union
Telephone: +32 (0)2 2159050
Fax: +32 (0)2 2156863
E-mail: nufeg@sknet.be

FINLAND:

Finnish Food Marketing Association (FFMA)
E-mail: info@pty.fi
Internet: www.pty.fi

FRANCE:

Fédération Française des Importateurs de Fruits et Légumes (FFIFL) and
Chambre Syndicale des Importateurs Français (CSIF)
French Federation of Importers of Fruit and Vegetables
Telephone: +33 (0)1 45607280
Fax: +33 (0)1 46753631
E-mail: fifl@wanadoo.fr

Association Interprofessionelle des Fruits et Légumes Frais (INTERFEL)
E-mail: infos@interfel.com
Internet: www.interfel.com

Federation Nationale des Syndicates Agricoles de Cultiveur de Champignons (FNSACC)
French Mushroom Growers' Federation
Telephone: +33 (0)1 42360329
Fax: +33 (0)1 42362693

GERMANY:

Naturland-Verband für naturgemäßen Landbau e.V.
Germany's Naturland association for organic agriculture
E-mail: naturland@naturland.de
Internet: www.naturland.de

Deutsche Fruchthandelsverband e.V. (DFHV)
Association of the German Fruit Trade
E-mail: bonn@dfhv.de
Internet: www.dfhv.de

IRELAND:

The Wholesale Fruit, Potato and Produce Merchants' Association of Ireland Ltd.
Telephone: +353 (0)1 289 7959
Fax: +353 (0)1 288 6406

ITALY:

Associazione Nazionale Esportatori Importatori Ortofrutticoli e Agrumari (ANEIOA)
National Association of Fruit and Vegetable Importers and Exporters
E-mail: aneioarm@tin.it
Internet: web.tin.it/aneioa

Associazione Nazionale Importatori Prodotti Ortofrutticoli (ANIPO)
National Association of Importers of Horticultural Products
Telephone: +39 06 7726401
Fax: +39 06 7004428
E-mail: anipo@confcommercio.it

THE NETHERLANDS:

The Greenery B.V.
Marketing and sales organisation
E-mail: info@thegreenery.com
Internet: www.thegreenery.com

Voorlichtingsbureau Groenten en Fruit
The General Promotion Office for Dutch and Imported Fruit and Vegetables
E-mail: vgf@vgf.info
Internet: www.groentenenfruit.nl

Productschap Tuinbouw
Netherlands' Commodity Board for Horticulture
E-mail: pt@tuinbouw.nl
Internet: www.tuinbouw.nl

Frugi Venta
Netherlands Platform of Fruit and Vegetable Traders
E-mail: info@frugiventa.nl
Internet: www.frugiventa.nl

SPAIN:

Federación Española de asociaciones de Productores Exportadores de frutas, hortalizas, flores y plantas vivas (FEPEX)
E-mail: fepex@fepex.es
Internet: www.fepex.es

SWEDEN:

Swedish Fruit and Vegetables Distributors
Internet: www.sfg.se

SWITZERLAND:

Schweizerischer Obstverband
Swiss Fruit Association
E-mail: sov@swissfruit.ch
Internet: www.swissfruit.ch

UNITED KINGDOM:

Fresh Produce Consortium (UK)
E-mail: info@freshproduce.org.uk
Internet: www.freshproduce.org.uk

Mushroom Growers' Association for Great Britain and Northern Ireland (MGA)
E-mail: info@mushgrowersassoc.fsnet.co.uk
Internet: www.mushgrowersassoc.fsnet.co.uk

3.4 Trade fair organisers

GERMANY:

ANUGA
One of the leading trade fairs for the food and drink industry worldwide
Frequency, date: biennial, 11 - 15 October 2003
Location: Cologne, Germany
E-mail: anuga@koelnmesse.de
Internet: www.anuga.com

Fruit Logistica
International show for industries involved in fruit trading; developing countries offering exotics are a special target groups
Frequency, date: annual, 5 - 7 February 2004
Location: Berlin, Germany
E-mail: central@messe-berlin.de
Internet: www.fruitlogistica.com

FRANCE:

Salon International de L'Alimentation (SIAL)
Trade exhibition for the food industry
Frequency, date: biennial, 17 - 21 October 2004
Location: Paris, France
E-mail: sial@sial.fr
Internet: www.sial.fr

THE NETHERLANDS:

AGF-Totaal
Platform for international trading in fruit and vegetables
Frequency, date: biennial 15 - 17 September 2003
Location: Rotterdam, The Netherlands
E-mail: info@agftotaal.nl
Internet: www.agftotaal.nl

SPAIN

Alimentaria
International food and beverages exhibition
Frequency, date: biennial, 8 - 12 March 2004
Location: Barcelona, Spain
E-mail: alimentaria@alimentaria.com
Internet: www.alimentaria.com

UNITED KINGDOM:

IFE
International food and drink exhibition
Frequency, date: biennial, 2003
Location: London, United Kingdom
E-mail: ife@freshrm.co.uk
Internet: www.ife.co.uk

3.5 Trade press

FRANCE:

Fruitrop
Language: French, English
Main subjects: (tropical) fruit, vegetables, prices, regulations
Frequency: monthly publication
Internet: www.cirad.fr

Fruits Légumes Distribution (FLD)
Language: French
Main subjects: fruit, vegetables and their distribution
Frequency: weekly publication
E-mail: omasbou@siac.fr
Internet: www.siac.fr

GERMANY:

Fruchthandel
Language: German
Main subjects: fresh fruit, vegetables, nuts, dried fruit and potatoes
Frequency: weekly publication
E-mail: info@fruchthandel.de
Internet: www.fruchthandel.de

THE NETHERLANDS:

Vakblad AGF
Language: Netherlands
Main subjects: wide variety of topics on the fruit and vegetable trade
Frequency: weekly publication
E-mail: redactie@vakbladagf.nl
Internet: www.vakbladagf.nl

Primeur
Languages: Dutch and French, in some editions also English and German
Frequency: fortnightly publication
Main subjects: fresh fruit and vegetables trade within Europe
Telephone: +31 (0)113 230621
Fax: +31 (0)113 230865
E-mail: primeur@zeelandnet.nl

SPAIN:

Horticultura & Internacional
Language: Spanish
Main subjects: international horticultural trade and techniques
Frequency: monthly publication
E-mail: horticom@ediho.es
Internet: www.horticom.com

Valencia Fruits
Language: Spanish
Main subjects: fresh fruit and vegetables in the Spanish market
Frequency: weekly publication
E-mail: info@valenciafruits.com
Internet: www.valenciafruits.com

UNITED KINGDOM:

Fresh Produce Journal
Language: English
Main subjects: news and services for fresh fruit and vegetable businesses in the UK and its supplying countries
Frequency: weekly publication
E-mail: info@fpj.co.uk
Internet: www.freshinfo.com

Eurofruit
Language: English
Main subjects: international market for fresh fruit and vegetables
Frequency: monthly publication
E-mail: info@fruitnet.com
Internet: www.eurofruitmagazine.com

Fruit and Vegetable Markets
Language: English
Main subjects: fresh and processed fruit and vegetables in the European and international markets
Frequency: monthly publication
E-mail: marketing@agra-net.com
Internet: www.agra-net.com

SWITZERLAND:

Fruit World International
Language: English, German, French
Main subjects: fresh fruit and vegetables worldwide
Frequency: quarterly publication
E-mail: adve@agropress.com
Internet: www.agropress.com

3.6 Other useful addresses

INTERNATIONAL:

Demeter International
E-mail: demeterinternational@kraaybeekechof.nl
Internet: www.demeter.net

IFOAM
(International Federation of Organic Agriculture Movements)
E-mail: headoffice@ifoam.org
Internet: www.ifoam.org

International Chamber of Commerce
E-mail: webmaster@iccwbo.org
Internet: www.iccwbo.org

European Food Safety Authority (EFSA)
Internet: www.efsa.eu.int

UNCTAD
(United Nations Conference on Trade and Development)
E-mail: info@unctad.org
Internet: www.unctad.org

EUROPE:

Contact point EU ECO-label
(Commission of the European Communities)
E-mail: ecolabel@cec.eu.int
Internet: www.europa.eu.int/ecolabel

EurepGap
(European retailers' organisation for the promotion of good agricultural practice)
E-mail: info@foodplus.org
Internet: www.eurep.org

GreenTrade
(Online directory of buyers and sellers of organic products)
E-mail: info@greentrade.net
Internet: www.greentrade.net

Green Trade Net
(E-commerce of organic products)
E-mail: info@green-tradenet.de
Internet: www.green-tradenet.de

TransFair International
(fair trade organisation)
E-mail: info@transfair.org
Internet: www.transfair.org

GERMANY:

BCS ÖKO-GARANTIE GMBH
(contact point for organic certification)
E-mail: info@bcs-oeko.de
Internet: www.bcs-oeko.de

Ecocert
(contact point for organic certification)
E-mail: info@ecocert.de
Internet: www.ecocert.de

GTZ Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH
(service enterprise for development cooperation)
E-mail: internet-team@gtz.de
Internet: www.gtz.de

Naturland Verband für naturgemäßen Landbau e.V
(Germany's Naturland association for organic agriculture)
E-mail: naturland@naturland.de
Internet: www.naturland.de

FRANCE:

Ecocert
(contact point for organic certification)
E-mail: info@ecocert.fr
Internet: www.ecocert.fr

THE NETHERLANDS:

CBI/Accesguide
CBI's database on European non-tariff trade barriers
Email: accessguide@cbi.nl
Internet: www.cbi.nl/accessguide

The Ministry of Public Health, Welfare and Sports
(Netherlands food inspection service)
E-mail: ad@kvw.nl
Internet: www.keuringsdienstvanwaren.nl

SKAL
(internationally operating organisation, inspecting and certifying sustainable agricultural production methods and products)
E-mail: info@skal.nl
Internet: www.skal.nl

Stichting Max Havelaar
(Max Havelaar Foundation, fair trade organisation)
E-mail: maxhavelaar@maxhavelaar.nl
Internet: www.maxhavelaar.nl

Milieukeur Foundation
(Netherlands Ecolabel enquiry point)
E-mail: milieukeur@milieukeur.nl
Internet: www.milieukeur.nl

UNITED KINGDOM:

Soil Association
(IFOAM accredited contact point for organic certification)
E-mail: info@soilassociation.org
Internet: www.soilassociation.org

APPENDIX 4 LIST OF DEVELOPING COUNTRIES

The list of developing countries as applied in this market survey, is the OECD DAC list of countries receiving Official Development Assistance (Part I). The list used is the one as at 1/1/2003.

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

Note: Eurostat figures do not include figures for St. Kitts-Nevis

APPENDIX 5 USEFUL INTERNET SITES

www.thefruitpages.com
Provides practical information on the characteristics of all kinds of fruit, especially exotic and citrus fruit. You can also subscribe to a free fruit newsletter and ask questions relating to fruit. (Language: English)

www.fruitonline.com
This site is devoted to the international fruit business. It offers a diverse array of free information. As you browse through its pages, you will find fruit prices, market analyses, statistics, fruit industry news and business opportunities. (Language: English, Spanish)

www.fintrac.com
Fintrac is a market research, information technologies and technical consultancy firm, which provides specialised products and services to agribusiness, governments and associations worldwide. The web site contains market, trade, price and other information on fresh produce and also provides news and links to other sites. (Language: English, French, Spanish)

www.marketag.com
This Internet site, which is designed by Fintrac Inc., provides market prices, market information, company directories, calendar of events and more than one thousand links to market research, statistics, regulations, associations and a lot of other organisations relevant to the fresh produce trade. (Language: English)

www.freshinfo.com
The web site of the magazine Fresh Produce Journal provides daily news, information on events and an archive of news and features plus global produce data. Also contains an on-line fresh produce industry marketplace. (Language: English)

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

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

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

www.coleacp.org
Web site of COLEACP (Europe-Africa-Caribbean-Pacific Liaison Committee), which promotes the export of fresh fruit, vegetables and flowers from the ACP countries. It provides links to the “Pesticides Initiative Programme,” which aims to provide practical solutions to ACP fruit and vegetable producers’ and exporters’ adaptation difficulties, and to the “Harmonised Framework for Codes of Practice,” which promotes safe and responsible production in the horticultural sector in ACP countries. (Language: French, English)

europa.eu.int/comm/food/index_en.html
Web site of the European Union, with practical information on food safety and direct links to pesticide regulations, food labelling and many other food safety issues. (Language: Spanish, Danish, German, Dutch, English, French, Italian, Finnish, Swedish, Greek)

CBI: YOUR EUROPEAN PARTNER FOR THE EUROPEAN MARKET

The CBI (Centre for the Promotion of Imports from developing countries) is an agency of the Dutch Ministry of Foreign Affairs. The CBI was established in 1971. The CBI's mission is to contribute to the economic development of developing countries by strengthening the competitiveness of companies from these countries on the EU market. The CBI considers social values and compliance with the most relevant environmental requirements to be an integral part of its policy and activities.

CBI offers various programmes and services to its target groups:

Market information
A wide variety of tools to keep exporters and Business Support Organisations (BSOs) in developing countries in step with the very latest development on the EU market.
These include market surveys and strategic marketing guides for more than 40 product groups, manuals on export planning and other topics, fashion and interior forecasts and the CBI News Bulletin, a bi-monthly magazine. This information can also be obtained from our website at www.cbi.nl For all information on non-tariff trade barriers in the EU CBI has a special database, AccessGuide, at www.cbi.nl/accessguide
And finally CBI's Business Centre is offering free office facilities, including telephones, computers, internet and copiers for eligible exporters and BSOs. Market reports, international trade magazines, cd-roms and much more can be consulted in the information section of the business centre.

Company matching
The company matching programme links well-versed suppliers in developing countries to reliable importing companies in the EU and vice versa. The online matching database contains profiles of hundreds of CBI-audited and assisted exporters in developing countries that are ready to enter into various forms of business relationships with companies in the EU, as well as many EU companies interested in importing or other forms of partnerships such as subcontracting or private labelling.

Export development programmes (EDPs)
EDPs are designed to assist entrepreneurs in developing countries in entering and succeeding on the EU market and/or in consolidating or expanding their existing market share. Selected participants receive individual support over a number of years by means of on site consultancy, training schemes, trade fair participation, business-to-business activities and general export market entry support. Key elements usually include technical assistance in fields such as product adaptation, improving production, implementing regulations and standards and export marketing and management assistance.

Training programmes
Training programmes for exporters and BSOs on, among others, general export marketing and management; trade promotion; management of international trade fair participations and developing client-oriented market information systems. The duration of the training programmes vary between two days and two weeks and are organized in Rotterdam or on location in developing countries.

BSO development programme
Institutional support for capacity building for selected business support organisations.
The programme is tailored to the specific needs of participating BSOs and can include train-the-trainer assistance, market information systems support and staff training. CBI's role is advisory and facilitative.

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

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

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