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**THE JORDANIAN AGRICULTURAL MARKETING TRAINING PROGRAMME  
INVOLVING FOUR EUROPEAN MARKET OBSERVATION TOURS**

July 1988



Sigma One Corporation

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INVOLVING FOUR EUROPEAN MARKET OBSERVATION TOURS**

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## I INTRODUCTION

Jordan has become increasingly aware of the importance of exports for the development of horticultural production and of the role played by an effective agricultural marketing system. A number of exporters are traditionally supplying a wide range of fruit and vegetables to the markets of the neighbour countries and of the Gulf region. However, the quantities exported decreased lately, due to lower imports, increasing competition, and probably some quality problems.

It has been considered that there is a need to diversify exports and for this to organize a training programme through the Agricultural Marketing Organization (AMO) for producers and exporters. The better knowledge of export techniques and markets would enable the private sector to export a wider range of products and in larger quantities to non traditional markets, specially to the countries belonging to the European Economic Community. During the training programme, emphasis was made on the situation prevailing on the four main markets for winter vegetables and some fruit, viz in the Federal Republic of Germany, France, the Netherlands, and the United Kingdom. In particular, quality aspects, packaging requirements, competition, prices, and marketing structures have been studied. Clear indications have been given to the participants how the entire production and marketing process must be geared to meet market requirements, possible ways to conquest markets were shown, and need for Government support identified. Much attention was given to the transportation problems.

During the preparatory phase (21 March-8 April 1988), basic information needed for the organization of the European Market Observation Tours have been collected, detailed plans for the travel and visits prepared, and participants selected.

The nucleus of the programme was the seven days tour in each of the four countries: 17-23 April 1988 in the Netherlands, 24-30 April 1988 in France, 8-14 May in the United Kingdom, and finally 15-21 May 1988 in the Federal Republic of Germany. The activities carried out during each tour are indicated in Annex II.

On 31 May 1988 in Amman a Workshop took place which permitted that the participants of each tour interchange their experiences and obtain a complete picture of the four markets. Many aspects have been broadly discussed and recommendations for follow-up activities prepared.

For each tour six participants were proposed: five private producers/exporters and one representative of AMO who also acted as coordinator of the group. AMFCO's representative travelled to the United Kingdom. A list of participants is in Annex I.

All participants showed great interest in the programme and took active part in the discussions. It is expected that as an immediate result of the programme, a close cooperation will be forthcoming among the producers and exporters as discussed in the meeting held on 7 June 1988.

The overall planning and supervision of the programme was carried out by Dr. Kelly M. Harrison, Senior Marketing Specialist. As Team Leader acted Peter de Balogh, Senior Marketing Specialist who directed all activities and was also responsible of the tour in the Netherlands. In the other countries, local marketing specialists organized and conducted the tours: Jean Coudert in France, Derek Oakley in the United Kingdom, and Dr. Dieter Hörmann in the Federal Republic of Germany.

The Project Personnel is greatly indebted to all those who assisted in the preparation and implementation of the programme by providing information and advice. A list is given in Annex III.

## II MAIN FINDINGS:

### 1. BASE FOR EXPORT DEVELOPMENT

The Government of Jordan was already very interested in the 1960's and 1970's in promoting the export of horticultural products. The UNDP/FAO technical assistance projects have identified a number of constraints such as poor techniques for crop production, insuitable varieties, deficient handling practices, and lack of market outlets. Among the 43 technical papers, various have dealt with the export requirements, especially related to handling and transportation. The projects have demonstrated the usefulness of newly introduced varieties, improved cultural techniques, and that some new crops should contribute to the diversification of the supply.

However, the promotion of certain new crops or of special varieties required by foreign markets can be dangerous if there is no local demand for them and stimulation of local consumption is not promising.

Until 1985 there was a strong development of green houses and the production in plastic tunnels increased considerably. Due to some temporary sales problems of vegetables in recent years, this trend did not continue.

All the efforts from the public and private sectors contributed to the development of exports undertaken by a number of firms and directed towards the neighbour countries and to the Gulf region. In the last decades, the European market was not yet ready to purchase large quantities of winter vegetables, and the logistics of exports faced many problems. Consequently, the work done by the indicated projects served as a guideline for the development of the modernized production and the initiation of exports to Europe, but did not result in a noteworthy business volume.

AMPCO ( the Agricultural Marketing and Processing Company of Jordan ) started some exports of winter vegetables in February/March 1987 to a French Agricultural Cooperative Organization. The promising outlook resulted in a barter transaction later in the year, consisting of the export of 3,410 tons of French apples to Jordan and 3,550 tons of winter vegetables from Jordan to Western Europe. Due to some temporary constraints in the availability of produce and air cargo space, the quantity of produce shipped from Jordan was much less than anticipated. However, the overall quality of the vegetables was satisfactory and the market, especially in France, responded favourably to the produce from Jordan. In the last season, the sale's volume could undergo a noteworthy increase; the supermarkets and the sellers to ethnic consumers were pleased with the presentation and the quality, and a regular demand has arisen. Some product was also sold in London and Rotterdam. In addition, a few private exporters also shipped by air limited quantities of vegetables to France and the United Kingdom.

Occasional exports by truck to Germany were made by a firm, but the trials did not go without problems. In general, the trade had little experience with the products from Jordan in this country.

Even if there is interest and some possibility to develop further the exports, it has to be kept in mind that a very large competition exists in the visited EC markets. The timely availability of products, their farm value, the marketing costs, the technological knowhow of production and marketing, as well as the shipment opportunities are of great importance to

conquer and maintain the markets.

The general level of producer prices in Jordan is rather high, compared with other overseas producing countries, due to the production costs and the internal market prices. For the next winter season growers expect the following farm gate prices :

<u>Product</u>	Fils / kilo <u>1/</u>	Fils / kilo
Aubergine	100-150	( 150 )
Courgette	200-250	( 180 )
Cucumber	200-300	( 230 )
Hot pepper	250-450	( 200-250 )
Sweet pepper	150-250	( 180 )
Melon	500-600	

1/ Indicative exchange rate : 1 US\$ = 360 fils

The prices indicated in the second column are those paid by AMPCO to the growers in the season 1987/88. It seems that farmers kept in mind these prices when giving their expectations on future prices, instead of well calculated production cost estimates.

There is also some relation between the wholesale market prices in Jordan and the prices paid by the exporters. The average monthly prices for Amman are shown in Table 1.

## 2. EUROPEAN MARKET OBSERVATION TOURS

During the visits to the wholesale centres, retail distribution outlets, grading and storage facilities, and air freight handling agents, the following matters received special attention :

- (i) Present and potential demand for products of interest. Market competition.
- (ii) Quality and packing of products. Main suppliers.
- (iii) Marketing systems : Structure of trade and business methods. Identification of marketing outlets.
- (iv) Transportation and storage.
- (v) Market and price information.
- (vi) Regulations. Regulatory bodies.
- (vii) Additional aspects of importance for export programmes.

### 2.1 Present and potential demand

The Observation Tours permitted to understand the changing situation in the consumption of fresh fruit and vegetables. There is a growing demand during the period when these are not available from domestic production or only in limited quantity from indoor cultivation. Rising standards

of living, growing health awareness, to be open towards new foodstuffs and variations in taste are the main reasons for this change in consumption habits. In addition, new kinds of fruits and vegetables have been added to the normal range consumed as a result of the large immigrant population from the Mediterranean and from overseas countries. Furthermore, the demand from the catering and restaurant trade for certain off-season articles is rapidly increasing. There is a trend towards less cooking and more quickly prepared salades. Many greengrocers and supermarkets have now salad bars. However, it appears that the overall demand for vegetables will increase at a lower rate than before.

The indicated happenings in the markets have been opening the possibilities for producers in the Mediterranean countries in particular, but also overseas to exploit the comparative advantages of the warmer climate and lower production costs they enjoy, in order to develop a specialized production of a variety of fruit and vegetables for export during the off-season to the premium markets of north-western Europe. Undoubtedly, production for the off-season markets requires special efforts and skills as only produce meeting the highest quality standards is worth sending to the markets, but the prices which normally can be obtained for top grade produce are - during important part of the season - also very remunerative.

The volume of this trade is not always large, as the high prices prevailing often put a certain limit on larger, more generalized consumption. However, there is a growing competition between the producers closer to the major import markets with favourable transport possibilities, e.g. Israel and Spain, which undertake all efforts to expand their production and marketing season.

Discussions were focused towards the products for which Jordan obtained experience during the past years. Buyers were satisfied, which allows for further development. As indicated before, Jordanian products were sold mainly in Paris and London and arrived only occasionally to other wholesale markets. Some supermarket chains with high quality requirements became very interested in the merchandise and this sector will represent a good potential demand.

A résumé of the discussions by product is given below :

Aubergines : Consumption was once limited to the producing regions, but has now spread to northern countries. In the EC, the market is rather static, supplied mainly by Spain, Italy, and the Netherlands (hothouse production). During the winter months France is the main importer. For more details please refer to Table 2. With the rising popularity of Mediterranean dishes in many European countries, demand for aubergines is likely to increase, but the expected larger supply from Spain will cause a pressure on the prices.

Courgette : Much competition exists on the market for this produce and prices in general are low. The demand during the winter months (December/March) may increase, especially in France. Spain will increase her strong market position at the expense of overseas suppliers.

Cucumber : The "mini" type cucumber is mainly in demand from consumers coming from the Mediterranean region. In France and the United Kingdom, there is smoothly increasing trend for the sale of small cucumbers; in other countries hardly any is being marketed. Producers in the Netherlands pack a small cucumber in three sizes ( 100/150 grams, 150/200 grams and 200/250 grams per piece). In the Federal Republic of Germany mainly fresh "gherkins" are sold and used for pickling.

French beans : A typical product for off-season trade because in season they are very extensively produced in all countries visited. A considerable part of the crop is also preserved by canning and freezing, which is also available during the off-season. The overall import volume into the EC countries increased steadily having reached nearly 100,000 tons in 1986; more than half of this quantity is imported during the winter months ( from October to June). ( See Table 2.) In the autumn and spring, the market is supplied by the late and early production of Southern European countries, but from November/December to April airfreighted imports from overseas sources dominate the market. France and the Netherlands are the major off-season importers; France draws its supplies mainly from West African countries and the Netherlands from Egypt. The quantity of the Egyptian supplies is variable from one year to an other. Kenya is a special supplier of high quality, fine type produce, meeting mainly the demand from the high-class catering trade. In the French, Belgian, and Swiss markets, filet or needle beans are preferred; while in the Netherlands, United Kingdom, and the Federal Republic of Germany, the bobby beans are more popular.

Hot pepper : Demand comes primarily from expatriates of Mediterranean, Asian, African, and West Indian origin; but sales volume is still limited, as it can be seen in Table 2. The present market of about 13,000 tons per year, but there is scope for market growth. Mediterranean countries are main suppliers in season, and France and the United Kingdom are the best markets. There is a growing demand in the winter months for large and long varieties, but the sales possibilities depend upon supplies from several overseas countries, especially from Morocco and Senegal.

Sweet pepper : According to the figures shown in Table 2, this item became the most important among the out-of-season crops. The annual imports were around 170,000 tons during the period October/June. All four countries visited purchase considerable quantities of sweet pepper. Spain is the largest off-season exporter, and it is likely that this country will further improve its market share, which will limit the export possibilities of overseas suppliers to the EC. Also the Netherlands, which specializes in high quality greenhouse production, has increased its exports. Due to the existing competition, the prevailing price level hardly permits regular air shipments during large periods of the year.

Tomato : In the winter season, markets are well supplied from many sources. Sometimes there may be a good sales opportunity due to temporary shortage on the market. ( Such a situation occurred in February 1988 ). EC demand from November to June is expected to rise further, also for special products, such as large size tomatoes ( meat tomatoes ) and cherry tomatoes. Israel succeeded to introduce a new variety which has very good quality (taste and keeping quality) and consequently obtains premium prices.

Melon : The main types of sweet melons are the Cantaloupe and musk melons, and the Honeydew melons. The latter moved to the mass market, while the Galia and Charantais types have a luxury image and make higher returns. This fruit gains popularity. Table 2 shows the important increase of imports to EC countries, having passed 160,000 tons in 1986, United Kingdom being the main market. During the pre-Christmas period, the market is almost exclusively supplied by Spain and Israel; and there is large demand for melon in December. During the second part of the winter season, the market is supplied by several overseas suppliers, but demand during this period remains limited and is mainly restricted to the United Kingdom market or to the luxury fruit and restaurant trade in other countries. Spain is making considerable efforts to produce more and better fruit, increasing so her market share.

Strawberries : The main season for local production in EC countries is very short, and most of the import takes place during the summer period. Real off-season imports ( November to March ) are small, but prices are usually high. Israel, the United States, and Mexico are the main suppliers in this period, but there is an increasing competition from Spain. In the Federal Republic of Germany, the largest importing country, there is a preference for the Chandler variety. France is the second importer of strawberries. ( See Table 2.

## 2.2 Some supply aspects

During the tour, some farmers were visited and it could be observed that they are doing everything to maintain their market share. Among other:

- Local producers try to adapt their production pattern to the markets and obtain crops earlier than it was the case before. They diversify production according to consumers requirements and grow preferred varieties.
- Apply strict quality control.
- Have organized marketing structure and employ active sales personnel ( intensify direct sales to supermarkets and other large buyers ) .
- Supply organically grown products ( considered free of harm for health ). They are also importing such produce in off-season..

The participants of the tour were very much impressed by the specialized and very intensive glass house production of vegetables and flowers in the Netherlands. The producers are specialized in determined products, grade and pack it, and sell them on the auctions, which are farmers' cooperative trade organizations. All lots offered for sale are examined by quality inspectors of the auction. Growers gave some practical suggestions to the visitors as to harvesting and grading methods. It appears that even the advanced growers are organizing so called " Farmers Clubs ", where they are discussing weekly the production and marketing problems they face, and transmit their experience. In this way they are continuously improving their technique, assisted by the agents of the Government Horticultural Extension Service. The perfect organization of the Dutch auctioning system became evident. This however requires from the members much discipline and ~~compliance~~ with the coherent regulations.

In France the advantages of a joint marketing organization ( SICA ) of 11 growers and 2 traders with complete packing facilities could be observed.

In the United Kingdom a large-scale vegetable grower was visited. The most advanced production, handling, and packing techniques could be seen. In order to have a more stable supply to regular clients, this enterprise also

organized a cooperative operation with other farmers and complements by imports the availability of produce. The farm uses preferably home designed and made, low-cost equipment.

In England, a large farm suggested to keep products for a week under conditions similar to the transportation and distribution in observation which permits to see the keeping quality.

The nation-wide producer' organization, the National Farmers Union pays much attention to the members marketing needs, providing them with advice based on simple market research work. Specific fact sheets are prepared and distributed. The organization also grants Marketing Awards annually to members showing the best examples of successful marketing and who show awareness of changing marketing needs. The Union suggests to take advantage of the health image for vegetables.

Grading and packing : This operation has been carefully studied both at the visited farms and by the trade. It is axiomatic that there is a wide range of equipment used, depending upon the product, market requirements, production and trade structure, and which goes from the most simple to the sophisticated ones. The availability of labour, the financial resources, and the quantity of product are specific factors to be considered

The supermarkets require small size special packs, but normally this activity is being developed by the importers or specialized wholesalers. The modern marketing strategy promotes mixed products in one package and also makes additional requirements to the suppliers such as price indications, weight, and special brands. Some local producers, in order to serve their regular clients with a broad line of products, are also acting as importers and repack the merchandise according to buyers' requirements.

This topic has been widely discussed as some Jordanian exporters consider the usefulness of more sophisticated equipment for specific crops such as tomato and melon.

With respect to packaging material, the products coming from most countries show a high standard . Cartons used by Egypt for french beans and by South American suppliers for melon had not the required rigid structure. In spite of the fact that no complaints were made by the buyers on the cartons used by Jordanian exporters, some minor improvements certainly will improve the marketing and presentation. Sometimes there is a shortage of cartons made by the local industry, but regulations permitting temporary admission of imported cartons seems to have been eased.

### 2.3 Marketing system : Structure of trade and business methods.

In big lines the imported goods follow the same channel in the countries visited as it is shown in Figure 1.

Off-season vegetables and several kinds of fruit are highly perishables and require a high degree of specialization, plus the willingness to take risks. Firms can not deal with this category of merchandise as a sideline. The activities developed by the different type of traders can be resumed as follows :

Importers : A number of strong, long-established companies are importing fruit and vegetables and are selling it to the wholesale trade and large scale buyers, such as multiple groups and supermarkets. Many of them have their own wholesale organization, covering the major markets. Part of the imported merchandise is reexported to other countries, among others to Scandinavia.

In Rotterdam and Hamburg several importers organize once or twice a week auction sales, where some 300 wholesalers and buyers from retail chains make their purchases. For winter vegetables this method is used to a lesser extent than for fruit.

In the wholesale markets, also smaller firms are involved in direct importation.

The large importers usually handle a broad line of produce, are financially sound, but handling products in smaller quantities is less attractive for them. On the other side, special products are often required by smaller importers who have a certain type of clients, but their solvency is not always satisfactory.

Some of the important export organizations have own import offices in the different EC countries and sell their products directly to wholesalers after custom clearance.

Import agents : Purely marketing offices, their function is to serve as a link between the smaller exporters and market wholesalers, distribution agents, or secondary wholesalers. They are not doing any business for their own account and risk.

Wholesalers : Smaller operators than the direct import organizations; are normally established in the wholesale markets and they have a more direct participation by the principals of the business.

Market panellist : Some export organizations work through a fix number of importers and/or wholesalers in the different markets under strictly defined conditions.

Retailers : Supermarkets, street market vendors, and specialized shops are selling directly to consumers.

Hotel and catering suppliers : Usually specialized wholesalers are serving the catering trade which is considered as a high quality buyer.

In all countries visited, there is a concentration of trade on both wholesale and retail level. So in Hamburg during the last five years the number of importers decreased from 35 to 16, and that of the wholesalers from 189 to 157, which means that the large ones swallow the smaller ones. The same trend is true by the supermarkets where there is a concentration of chains.

Business methods : Importers and wholesalers are very much considering that they are providing a service to the producers or exporters to be able to sell their products. For this they receive a fee, consisting of the actual costs and a commission.<sup>1/</sup> Through this system the importers and wholesalers try to minimize their risk, transferring it to the supplier. Most of the firms visited prefer to receive merchandise on this condition ( consignment sale ). It is understandable that the first contracts with importers have to be made on this base, but afterwards it should be possible to make fixed price contracts if the deliveries have been successful. Quality is one of the major preoccupation of the trade. Consignment business requires much trust between the exporter and the importer.

In the fruit and vegetable trade prices are made on a free market basis negotiated between buyers and sellers and responding to changes in supply and demand. A good market information can contribute to avoid drastic changes in the prices. Table 3 gives an indication on the variations of prices in the London market during a four week period. Due to the many supply sources, the quantity of produce arriving in the different markets can change rapidly, causing considerable fluctuations in the prices. Often produce arriving from production regions by air has to compete with road or sea shipments. Due to the freight rates by air, air shipment is only possible for high value and low volume products.

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<sup>1/</sup> The commission varies between 5 and 8 per cent of the sale's value.

A limited number of importers, mainly smaller firms, were open to consider firm price purchases. Suppliers to supermarkets could offer firm price purchases as they are frequently placing orders each week on a agreed price, which should permit to the importer to make similar arrangements with the exporters, especially for shipments by air.

It was interesting to observe the marketing policy of one of the largest export organization which works with a limited number of wholesalers and wholesale organizations scattered all over the countries, on a commission basis. ( Paying 8 per cent commission.) However, in periods of shortage, it sells only at firm prices to the regular clients. The marketing organization is not giving free hand to their buyers on consignment, but gives price indication, and expects to receive from them an estimate on the quantity required to be sold at the indicated price.

During the discussions with the trade, a number of questions were asked, such as :

- Do they buy the products which like to be of interest for Jordan ?
- From which supply sources they buy the products of interest and in which quantities
- Quality requirements and type of packaging
- Price ideas for the next season.
- Under which condition they would purchase the product from Jordan
- Usual payment conditions and guarantees.

It was very difficult to obtain useful information on prices and to find firms interested in purchases at firm prices before or during the season. However, the produce from Jordan obtained a good reputation and therefore there was much interest in establishing or strenghtening business relations. The importance of regular supplies and continous deliveries was stressed by the importers. While this is possible for some products, in the case of others the price fluctuations are too big to permit a lucrative operation when **supplying** the markets all the time. Therefore, only temporary favourable market conditions can be used for the exports.

With respect to payment conditions, opening of letter of credit looks to be exceptional, while buyers normally pay their bills in 10 - 14 days.

Wholesale markets : In the past, wholesale markets played an overwhelming role in the distribution of fruits and vegetables. This has been gradually changing, and the direct sales to large scale customers or other marketing outlets is becoming more usual. <sup>1/</sup> The different groups from Jordan visited the Rotterdam, Rungis (Paris), New Covent Garden (London), Birmingham, Hamburg, Bremen, and Frankfurt markets. It was a good opportunity to observe the quality and presentation of a large variety of produce coming from different origins and to discuss relevant matters with individual traders and market personnel.

To a limited scale, producers from neighbour production areas are also offering their vegetables - with the exception of the Netherlands - on the wholesale markets, but it seems that these direct sales also lo sing importance.

Still an important part of the imported fruits and vegetables are sold through the wholesale markets. In the New Covent Garden Market about 70 per cent of the fruit and vegetables sold is imported, while in Rungis around 30 per cent of the vegetables sold is imported and two thirds of the fruit marketed is coming from abroad. <sup>2/</sup>

When the imported goods are sold through the wholesale markets, the main market days should be taken into account in order to avoid delays in the sale of the products. So in Covent Garden the best days for sale are Monday and Thursday, in Paris Thursday and Friday, and in Frankfurt Monday through Thursday. In principle, shipments should be coordinated in the way that they arrive before the main market days. However, the shortage of air transport capacity and unexpected delays in road transportation are not always making this requirement possible.

#### 2.4 Transportation and storage

The successful export depends on different factors related to the dispatch of products to overseas markets : air shipment for highly perishable produce and the possibility of road-sea transport for the others. The problems likely to be encountered are indicated on the following page :

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<sup>1/</sup> In London, supermarkets sell around 50 per cent of the fruits and vegetables marketed, which merchandise normally bypasses the New Covent Garden and other wholesale markets. Also the direct sales by importers or producers to the catering sector are becoming more important.

<sup>2/</sup> For more details please refer to Appendix V.

- Available capacity of carriers or transport companies.
- Correct technology according to produce characteristics, starting with post-harvest handling.
- Scheduling of transportation and delays.
- Lack of adequate airport and other facilities.
- Possible trans-shipments at a later stage of the transport.
- Preparation and handling of documentation.

Temperature management : The lower the product temperature, so long as it is above the critical chilling temperature, the longer the storage and transportation life and better the presentation.

For long distance transportation of more perishable commodities when a high quality is required in the market, produce should be precooled and kept under optimum condition during transport.

In the various markets, importers indicated that produce from different origins did not arrive in the required condition, due to excessive heat when packed or during transportation in containers used for air freight or for road/sea transport.

Capacity available for air shipments in Jordan : Royal Jordanian, the national carrier, is the main airline which transports vegetables and occasionally fruits to the European markets. At present it has regular passenger service to Amsterdam, Brussels, Copenhagen, Frankfurt, Geneva, London, Paris, and Vienna. It appears that around 100 - 150 tons freight is transported per month to Europe by the regular passenger planes. <sup>1/</sup> Additional 250 tons per month cargo space can be made available in two charter flights per week to Amsterdam and Brussels. As known, there is a big competition between ALPCO and the private exporters for obtaining cargo space.

Other possibilities could represent the return freight resulting from the meat imports to Jordan, which could have Luxemburg as destination. Importers indicated that for France, the Netherlands, and the Federal Republic of Germany transshipment through Luxemburg would not represent excessive delays or too high additional costs. <sup>2/</sup> However, importers in England had problems with shipments of grapes from Cyprus through this airport and were not very much interested in this alternative.

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<sup>1/</sup> The availability of freight space in passenger planes depends on the number of passengers, availability of other cargo, and other technical factors.

<sup>2/</sup> Road transport from Luxemburg costs US\$ 0.20 per kilo to Paris and US\$ 0.10 per kilo to Frankfurt.

Among the other airlines, Air France is offering regularly cargo space for vegetables while other carriers are not interested to transport this kind of merchandise.<sup>1/</sup> The freight rate was for long time JD 0.120 per kilo to Europe, but was increased to JD 0.220, equivalent to around US\$ 0.65 per kilo.

Importers indicated that they prefer to receive the shipments stacked on conventional wooden pallets with plastic strap.

Also the possibilities for additional charter flights were discussed with air transport companies and freight brokers. There was a consensus that it would be difficult to find charter flights at a price below US\$ 0.70 - 0.75 per kilo, as all carriers have to make extra hours to pass through Amman. A cargo plane could load around 35 tons of produce. There was no clear understanding about the authorization procedure for charter flights for vegetables transport.

Forwarding of shipment by air at arrival and custom clearance procedure : It is similar in the countries visited and consists of

- Unloading of the aircraft.
- Moving through the custom area.
- Clearance of the goods.
- Loading of the trucks and dispatch.

In Frankfurt, London, and Paris, most produce is transported to the warehouse of the forwarding agent and then with or without intermediate storage, is loaded on trucks for delivery to clients. The wooden pallets are delivered as a whole or orders are made up according to importers' requirements. In Amsterdam, usually the importers are picking up the merchandise in the custom warehouse. Several forwarding agents are specialized in handling fruit and vegetables and have ample facilities for handling and cold storing the products received.

In Table 4 the estimated costs for landing and custom clearance are given. The fee for custom operation is in the Federal Republic of Germany and the United Kingdom a lump sum, consequently results higher for smaller consignments. The cost of handling at the airports amounts to approximately US\$ 0.20 per kilo in London, US\$ 0.13 in Paris, and US\$ 0.10 in Frankfurt.

Attention of the exporters was requested on the importance of the following:  
Transmit advice on shipment : Specification of the flight, quantity of produce shipped by kind and value ( Number of packages, gross and net weight ).

<sup>1/</sup> It was not possible to obtain concrete information of the possibilities envisaged by Air France at the Freight Department in Paris and inquiries were referred to the regional office.

Providing complete documentation : It is necessary to provide in due time the commercial invoice, plant protection certificate ( this is not required for all products), and documents which permit entry under preferential rates ( EUR 1 or General System of Preference - GSP - certificates ).

Proper marking of the boxes : Is necessary for making deliveries easier. ( Distinctive colour or clear indication for commodities and sizes, preferably on the side of the carton.)

Most planes arrive in the afternoons. It is important that produce is cleared and dispatched in the evening to arrive on the market early in the morning. The time needed for clearance and deliveries at airports varies between four and six hours, and depends on the airline's arrangements ( handling by itself or by an other airline as is the case in Heathrow, where Royal Jordanian's flights are handled by Air Canada and this takes more time). As known, the airline has to verify the merchandise received. If on the Bill of Lading only the number of pallets is indicated instead of details related to the different types of products, this speeds up the clearance. However, this can also cause problems if boxes are missing.

Inspection procedure : Products should be in agreement with EC regulations; normally Public Health or Agricultural authorities are responsible for the inspection. Due to the large number of arrivals, the inspection is made, in most cases, at an ad-hoc basis.

Shipment by truck : Both AMPCO and private exporters made trial shipments to Europe, but the results were not satisfactory. It appears that finding the right maturity of the produce, temperature control, proper stacking of the packages, and excessive transport time were the main problems. Buyers in the Federal Republic of Germany would be very much interested to receive produce from Jordan by truck.

Importers indicated that road transport improved much from Spain and transport time has been reduced considerably. Also there is fast rail connection with Greece. During certain months, exports can benefit from so-called TEEM trains consisting of 30 - 40 wagons which complete the journey to Munich within 3 days. ( The usual journey time is 5 - 6 days.)

The possibility of shipment through Tartouse (Syria) to Volos (Greece) by ferry boat could also become a possibility at a later date.

The Jordanian exporters attention was called on the newly developed " FRESHTAINER " for transporting perishable products, by road, sea, or rail.

The specially adapted containers with controlled atmosphere are offered for rent by an Austrian company. ( Fee is about DM 100 per day-) It is expected that the commercial life of the products can be considerably extended and makes road shipment over long distances possible. So far no experience for vegetable transport by Freshtainer from Turkey or Middle East countries was indicated, only reference to findings during research work is made in a pamphlet.

#### 2.5 Market and price information

Among the services needed by the exporters for the better functioning of the marketing system and the proper planification of the production, is the market and price information. The importance of collecting, organizing, and disseminating supply, demand, and price data should not be underestimated. With respect to the assembling of information, the factors important for the price formation should be carefully selected.

The use of the data is likely to be limited to institutions until an organized demand for such information can be developed. The participants of the tour became familiar with the different information existing and its use by the trade and producers.

For immediate decision taking, undoubtedly the direct information received from importers and agents is the most important. Furthermore, UNDP recently implemented a technical assistance project in Jordan at the Commercial Centres Corporation which will provide exporters with accurate information on the fruit and vegetables market in Europe through the International Trade Centres data transmitted daily by telex.

In addition, information provided by a number of entities and publishers is also valuable for the exporters. A list of these is provided in Appendix IV

#### 2.6 Market regulations and regulatory bodies.

Quality standards and inspection : The aim of quality standards is to ensure that exported produce meets the market country's requirements and that the exporting country's reputation is established and maintained.

In the EC, for many fruits and vegetables legal standards are imposed which must be met by all suppliers, both domestic and overseas. These are covering the produce, the packages, and labelling. AFO has or needs to obtain all published grade standards. In the different countries, special entities are in charge of the inspection. The Federal Office for Food and Forestry

in the Federal Republic of Germany has excellent extension material on the grade standards, which has been showed to the tour participants

For the development of the export, produce inspection at origin plays a vital role in building up and maintain the reputation of the country for its produce on external markets.

Customs duties : EC regulations are protecting the interests of the producers of the member countries. Portugal's and Spain's products are still subject to transitory measures.

Information was collected on the custom duties on produce imported into the EC countries which are uniform. The year round rate for vegetables goes from 9 per cent ad valorem for sweet pepper, 11 per cent for tomato, 13 per cent for french beans to 16 per cent for aubergine, courgette, and cucumber. For lemons the rate is 8 per cent, melons pas 11 per cent, and strawberries 14. However, for most vegetables and lemons, Jordan benefits from a preferential treatment during the winter months. The periods vary according the produce and the rate is reduced to 4.4 to 6.4 per cent. AMO has a complete set of this tariff.

In addition, there is a Reference Price System for a number of products, valid now for aubergine, courgette, cucumber, and tomato. This means that a difference is charged between the market and reference price at the import of the specific article, during certain periods of the year. This period is different according the product and is mainly during the production season. (April/October for aubergine, April/September for courgette, February/November for cucumber, and April/December for tomato). This mechanism prevents imports from third countries from causing the market price to fall short of the reference price level.

Importers indicated that it is very dangerous to supply products to EC countries in periods when the reference price system is prevailing on consignment basis.

The Commodity Board for Fruit and Vegetables in the Netherlands was also visited. This serves both the public interest and also that of the enterprises involved in the production, marketing, and processing. The authority vested is partly autonomous and partly delegated by the Government. In addition, the Board also serves in an advisory capacity. In the Executive Committee the producers, processors, wholesale and retail traders are represented. For the organization of programmes for AMO, the structure of this Board may be of interest.

## 2.7 Additional matters of interest

Export of floricultural products : Participants visited two important flower auctions in the Netherlands : Aalsmeer and Maaldwijk. Many aspects related to growing and marketing have been observed and discussed with the specialists.

The Netherlands is main supplier of the European market. The deliveries also contain important quantities of re-exported cut flowers from European and non-European countries which are sold via that country's efficient marketing system. <sup>1/</sup> Carnations and roses are the most important types of flowers in the intra-European external trade, followed by chrysanthemums.

In Jordan, floriculture has a recent development, producers taking advantage of the local demand which before was satisfied by imports. Thinking on building up regular exports, there is certainly a need to organize better production and packing. The excellent quality and presentation of the products marketed was impressing. Experience in Colombia indicates that farmers need to have appropriate skills which they have obtained through on-the-job training in the Netherlands. Furthermore, Dutch experts regularly advised Colombian producers and exporters on marketable kinds of flowers and technical requirements.

The Dutch auctions function as a focal point for imports and exports. The possibility of starting-up exports from Jordan through these cooperative sales organizations has been discussed. These are permitting the sale of products from abroad to foreign producers ( in the capacity of Associate Members ) at their special sessions for imported products. A double percentage of the market fee is charged to foreign suppliers.

Packaging Research : As some experiments are being carried out with containers used in Jordan, the TNO Packaging Research Institute in Delft ( Netherlands ) was also visited. Recent development in the field of packing and the Institute's activities were explained.

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<sup>1/</sup> Flowers from Israel and Colombia represent the largest share of this trade.

### III CONCLUSIONS AND RECOMMENDATIONS

The Jordanian producers and exporters could find out that after a strong increase of the demand in the earlier years, there is a slowly growing market for winter vegetables in the four countries visited and some temporary sales opportunities for fruit grown in Jordan. Undoubtedly, some of the exporters were over optimistic about the sales potential, as there is a growing competition from Spain and other Mediterranean and overseas countries. A number of issues related to export development have to be addressed as indicated below :

#### 1. PRODUCTION

The realization of larger and regular export programmes requires a solid production base for vegetables and fruits. There is a need to strengthen cooperation among progressive growers - sharing the technical progress - and to establish regular communication with the Agricultural Extension Service.

Once the market outlook is found promising, it is recommended to promote contract farming, selecting growers who are willing to meet delivery obligations and who usually have high quality products. Such arrangements assure availability of produce for export in terms of volume, quality, and time of delivery, as well as permit the control of residues according to regulations. Due to the fluctuations of the prices on the foreign markets, the producer prices agreed should have some flexibility. Price differences according to season and quality should represent incentives to farmers and cover the cost of additional expenses and efforts made.

The value of products is decisive for meeting competition on the market. It is recommended to help growers to calculate regularly their cost prices ( estimating according to the yields obtained : low, medium, and high ) and to find the ways to reduce the costs.

The external markets may incentivate the growing of certain new crops or special varieties ( fennel, figs, parsley, Galia melon ). In order to limit risks to the producers, it is recommended to promote only products which have a local market or for which a demand can be developed.

There is a need for marketing extension work, to be done by the growers organizations. It is recommended that ANO establishes a programme and take care of the required advisory services.

## 2. GRADING AND PACKING

The quality requirements of the EC market are high; consequently the development of the exports requires better infrastructure and services. The keeping quality of the produce depends on the proper temperature management. It is recommended to utilize more intensively the present packing houses. In case there might be a need to expand available infrastructure, interested exporters should prepare proper feasibility studies, considering all economic and social factors ( regular availability of export markets, market requirements, pressure of labour ). There is a need to study the adequacy of modern technologies, e.g. the degree of mechanization and the type of equipment required . (for the grading of melons and tomatoes) First a more secure market has to be assured, before large investments are planned, and also the basis for cooperation between producers and exporters has to be laid down.

Exporters and Government should ensure that only first grade and properly packed produce leaves the country and that during transportation required conditions are met. The present system of internal quality control entrusted to AMO should be extended to provide this service also for exports.

The packing material available locally is not of optimum quality and its price is higher than abroad. Also the export demand for vegetables can suddenly change and there may arise a temporary shortage of cartons. It is recommended to make improvements at the local industry, using the new machinery also to have properly marked cartons and limit their sizes for fruit and vegetables exports to a few types. Furthermore, it is convenient that the facility of duty-free admission of packing material be maintained, keeping simple the administrative procedure.

## 3. TRANSPORTATION

The availability of air transport capacity, freight rates, and the difficulties of road transport are the main limitations of export development. It is recommended to carry out the negotiations through a conjoined effort with the air carriers, in order to assure for the private exporters a reasonable part of the capacity. Also charter arrangements can be made through joint shipments only. Trans-shipments through Luxemburg could represent an alternative for charter flights for merchandise which is to be sent to the Western European market. From the technical point of view, use of pallets and strapping of the cartons is desired by the importers.

Forwarding agents indicated that there is a need to arrange for correct documentation which helps the custom clearance. Also the procedure of issuing documentation in Jordan should be simplified.

There is an interest, mainly in the Federal Republic of Germany, to receive shipments from Jordan by truck. It is recommended to study carefully this alternative and undertake negotiations with the international trucking companies ( especially with HUNGAROCAMION in Budapest ) and to organize well prepared and controlled trial shipments, in order to evaluate technical and financial results. Past experience indicates that proper stacking of the cartons, controlled atmosphere, and fast transit time <sup>1/</sup> are crucial for the creation of this possibility. The newly developed " FRESHTAINER" should also be considered in the trials, which envisages adequate temperature management extending much the shelf-life of the products.

#### 4. MARKET INTELLIGENCE

It is important to have a well functioning production and market forecast service which permits adjustments of supplies according to market requirements. Happenings on the foreign markets need to be included in such a programme and relevant information has to be assembled, analyzed, and diffused. It is recommended to organize the export market and price information service at AMD, in close collaboration with the exporters, which will be used for decision taking at AMD and as a guide for farmers and traders. <sup>2/</sup> This service should consist of short-, medium-, and long-term components.

#### 5. MARKET OPPORTUNITIES

The past exports are a good base for future business. There is certainly a possibility to develop further the export market for vegetables and some fruits in the EC market, which has a large import during the winter months. However, competition is large and several constraints of logistics exist. It is recommended to establish a close cooperation between the Jordanian exporters., taking advantage of a coordinated approach. This would permit to conquer and maintain markets and to avoid excessive competition from this country. The first steps were made during this training programme, showing the willingness

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<sup>1/</sup> It is important to reduce the delays at the boarder with Syria, probably through the possibility of an escorting custom officer for the trucks and at other crossing boarder points.

<sup>2/</sup> The available sources of information are indicated in Appendix IV. Also the UNDP/ITC project at the Jordan Commercial Centres Corp. is important.

of the exporters to cooperate and these efforts should be continued.

As indicated in Table 5, several products grown in Jordan have a potential during certain periods of the year. Others should be promoted, such as Galia type melon and strawberries, developing simultaneously an additional local demand for eventual excess production and non export quality products.

#### 6. COMMERCIAL APPROACH

Under the auspices of AMD and promoted through the present project, the first meetings were held, in order to find the way of a formal cooperation among exporters with respect to supplying the EC markets. Certainly, there are many ways to establish such cooperation, going from having a coordinating body to the creation of a business enterprise. It is recommended that at the initial stage, this cooperation should concentrate on advising members on potential markets, negotiating required Government support measures and transportation, organizing jointly marketing functions ( grading, packing ), and assisting in business transactions. The indicated activities should count with the help of AMD and the technical assistance project.

Exporters should discuss regularly market situations, obtaining maximum benefit for the members. In case firm business is possible, a flexible sales strategy should be designed, meeting competition favourably from other producing countries. However, most importers visited showed preference for consignment sales which represents considerable risks for shippers.

Firm sales versus consignment: In order to familiarize new buyers with produce from Jordan, it could be necessary - at the initial stage - to supply importers on consignment base. It is recommended to select first class firms only, considering carefully their credit-worthiness and to have sufficient market information before shipments are made. At a later stage, efforts should be made to develop business with the few firms who are agreeable to fix term business.

Several larger importers indicated their interest to discuss a weekly shipping programme according to market situation, but still proposed business on consignment. It is recommended to make some minimum price arrangements; otherwise the financial losses can be too heavy.

Continuous monitoring of all marketing costs and margins is imperative, in order to remain competitive in the markets.

During the trips, several importers and agents have been visited. It is recommended to follow up these visits and preparing eventual business

transactions with the firms indicated in Appendix III. It appears that among the many firms visited the following would be most interested to establish closer contact with Jordanian exporters :

<u>The Netherlands</u> :	Velleman & Tass, Rotterdam HAGE International, Barendrecht
<u>France</u> :	Agence Laparra, Paris Lacour, S.A., Paris
<u>United Kingdom</u> :	Harpham Marketing Services, Spalding Tucker & Hamilton, London
<u>Federal Republic of Germany</u> :	Früico, Frankfurt Bocchi International, Köln Kahl München

Promotion makes a critical contribution towards increased sales. Clear indication of "Produce of Jordan" on the cartons and a distinctive trade mark to create an image for high quality product should be considered. Some importers employ sales promoters and arrangements should be made to include products from Jordan in their activities. Because of the high costs, only very well oriented promotional work is possible.

Own representation : Several exporters considered that the substantial increase of exports to EC countries could be achieved through establishing one or more sales representations in Western Europe. For this qualified and experienced personnel is required. Due to the high cost of such an office, a high volume of produce turnover is required to cover the operational expenses. It is recommended first to work from Jordan and to make regular visits to markets, looking for reliable business partners and promote business. Only if the business volume increases sufficiently to cover the costs, one should think about an own office. In the beginning, a longer stay of the exporters representative could be of benefit in order to monitor current business and prepare future sales.

## 7. AGRICULTURAL MARKETING ORGANIZATION

The promotion of exports require ample marketing facilitating services. It is recommended to entrust AMO with the necessary programmes, such as transmitting information on market requirements ( quality factors, reduction of physical losses ), behaviour of markets and prices, transport possibilities. Detailed Terms of Reference for all personnel involved should be worked out.

AMO should also further promote the organization of the export trade and provide it with all assistance required. For this AMO needs a broad documentation centre and should collect continuously up-to-date information on all matters connected with exportation through close contact with foreign entities in charge of import regulations and quality control. (e.g. in Brussels the Commission of the European Communities, in the Federal Republic of Germany the Federal Office for Food and Forestry, in the Netherlands the Commodity Board for Fruit and Vegetables)

It appears that producers and exporters were very interested in the many topics studied during the study tours, and there is certainly a need to organize similar events in other markets. It is recommended however to split the technical matters and the necessary logistical arrangements.

#### 8. FLOWERS AND ORNAMENTAL PLANTS

The production of these items in Jordan is still at a grass roots level, but there is a good potential for development. It is recommended to organize an on-the-job training programme for interested Jordanian growers and also to seek technical assistance from the Netherlands in order to improve and extend this industry.

At a later stage for marketing, cooperation with the Dutch Auction cooperatives should be established as discussed during the visits.

Table 1

AVERAGE MONTHLY WHOLESALE PRICES IN AMMAN. PERIOD 1985/87

PRODUCT	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May
	-----			Fils	per	kilo	-----	
Aubergine	98	71	73	101	119	111	112	131
Courgette	211	112	102	120	126	121	124	170
Cucumber	205	202	256	283	201	153	143	113
Hot pepper	142	122	163	290	175	377	432	344
Sweet pepper	125	175	181	300	324	222	162	133
Tomato	143	133	154	132	108	101	102	93

Source : Agricultural Marketing Organization

Table 2

IMPORTS OF FRENCH BEANS, PEPPER, AUBERGINES,  
MELON AND STRAWBERRIES TO EEC COUNTRIES. PERIOD 1984/86.

PRODUCT	1984	1985	1986
	— Thousand tons —		
<b>FRENCH BEANS</b>			
Total imports EEC	71.9	85.4	97.9
of which from Spain	16.2	22.0	21.0
from Egypt	7.7	7.1	12.0
<u>Period October/June</u> <sup>1/</sup>			
France	22.8	24.3	25.6
Netherlands	14.6	15.3	16.1
Fed. Rep. Germany	5.3	4.6	6.0
United Kingdom	4.7	4.6	4.8
Belgium/Luxemburg	2.2	2.1	2.7
Total	<u>49.6</u>	<u>50.9</u>	<u>55.2</u>
<b>SWEET PEPPERS</b>			
Total imports EEC	234.0	286.0	279.0
of which from Spain	121.0	163.0	159.0
<u>Period October/June</u> <sup>1/</sup>			
Fed. Rep. Germany	89.4	74.0	77.7
France	41.2	39.9	39.5
Netherlands	36.9	27.7	21.2
United Kingdom	20.0	20.5	21.1
Belgium/Luxemburg	2.8	2.6	2.9
Italy	-	7.9	9.2
Total	<u>190.3</u>	<u>172.6</u>	<u>171.6</u>
<b>AUBERGINES</b>			
Total imports EEC	42.4	44.6	43.4
of which from Spain	12.7	13.2	11.6
<u>Period October/June</u> <sup>1/</sup>			
France	10.9	9.9	7.9
Netherlands	4.3	3.1	2.1
United Kingdom	3.3	2.8	2.2
Fed. Rep. Germany	3.0	2.9	2.4
Total	<u>24.5</u>	<u>18.7</u>	<u>14.6</u>

<sup>1/</sup> Refers to the seasons 1984/85, 1985/86, and 1986/87

Source : EEC import statistics for tropical fruits and off-season vegetables from A.C.P. States. COLEACP, Paris, October 1987  
62 p.

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Continuation : Imports of french beans, pepper, aubergines,  
melon and strawberries to EEC countries.  
Period 1984/86.

PRODUCT	1984	1985	1986
	----- Thousand tons -----		
<b>HOT PEPPER</b>			
Total imports EEC	14.3	13.4	13.3
of which from Greece	2.2	2.3	2.1
Turkey	2.6	2.2	2.7
Spain	1.2	1.0	1.0
<u>Main importers</u>			
Federal Rep. Germany	9.6	9.1	8.7
France	2.1	2.1	2.4
United Kingdom	0.8	0.7	0.8
<b>MELON</b>			
Total imports EEC	136.2	147.2	168.2
of which from Spain	92.0	95.9	105.7
<u>Period October/June</u> <sup>1/</sup>			
Netherlands	11.7	16.5	14.6
United Kingdom	33.9	36.2	35.1
France	5.9	8.4	10.4
Fed. Rep. Germany	7.1	8.9	11.8
Belgium/Luxemburg	2.4	3.0	4.0
<b>Total</b>	<u>61.0</u>	<u>73.0</u>	<u>75.9</u>
<b>STRAWBERRIES</b>			
Total imports EEC	124.2	141.3	155.8
of which from Spain	29.3	45.1	66.9
<u>Main importers</u>			
Fed. Rep. Germany	78.6	80.3	76.1
France	19.0	24.1	38.5
Netherlands	8.8	15.4	15.8
United Kingdom	10.2	12.5	13.7

<sup>1/</sup> Refers to the seasons 1984/85, 1985/86 and 1986/87

Table 3

PRODUCT		VARIATIONS OF LONDON MARKET PRICES DURING A FOUR WEEK PERIOD		
		18/11/87	2/12/87	11/12/87
		Prices per unit of packing in £		
Aubergine	Canary Is. Carton 5-6 kilos	4.0	3.5	6.5
Courgette	Cyprus Carton 3 kilos	3.0-3.6	3.0-3.3	4.2-4.5
Cucumber	Carton 12 units	3.5-4.0	2.6-3.0	2.2-2.8
French beans	Kenya Carton 2.5 kilos	4.5-5.5	n.a.	4.0-6.0
Strawberries	Kenya Carton 8x8 ozs	9.6-11.2	9.0-10.	12
Sweet pepper	Spain Carton 5 kilos	Yellow 3.5-4.0 Green 3.5-4.0 Red 4.0-4.5	3.5-4.0 2.8-3.0 4.5-6.0	2.8-3.0 3.0 3.0
Tomato	Trays 6 kilos	2.6-3.5	4.5-5.5	4.5-5.5

Source: The Fruit Importers Association, London

Table 4

ESTIMATED HANDLING CHARGES  
FOR THE IMPORTATION OF FRUIT AND VEGETABLES

CONCEPT	UNITED KINGDOM £	FRANCE FFS	F=R-GERMANY DM	NETHERLANDS Hfl
<u>Delivery of produce at the airport</u>				
Unload, moving through custom warehouse, loading on truck <u>1/</u>	0.05/kg			
Control of deliveries	bto			
Custom operation	40.00	0.08/kg	150	
Collecting produce at airport and delivery to warehouse	per load		per load	
	0.015/kg	0.44/kg	0.05/kg	0.35 per package of 15 kilos
<u>Unload containers or pallets, make orders up to importers requirements</u>	0.03/kg			
<u>Cold storage by forwarding agent</u>	0.025 per package and day	<u>2/</u>	0.06/kg and day	
<u>Delivery to local market</u>	0.03/kg	0.08/kg		

Source : Interviews with forwarding agents( April-May 1988)

1/ If merchandise is on pallets, the fee is £ 0.03 per kilo.

2/ Three days storage is included in the other fees.

EXPECTED MARKET OPPORTUNITIES FOR JORDANIAN FRUIT AND VEGETABLES  
IN THE VISITED EC COUNTRIES

PRODUCT	FED. REP. GERMANY	FRANCE	NETHERLANDS	UNITED KINGDOM
<u>AUBERGINE</u>	Increasing demand; preference for large and medium size prod.	Usual price FF 8-9/kg	Sales potential 1,000 carton / week	Supermarkets increase demand
Total import win- ter months tons	2,400	7,900	2,100	2,200
Main import period tons/month	Nov./Dec. 500 - 600	Nov./Feb. 1,000	Dec./Jan. 400	Nov./Dec. 300
<u>COURGETTE</u>	Low prices hardly justify air transp	Usual price FF 6-7/kg	Market insignificant	Low prices hardly justify air transp.
Total import win- ter months tons	2,500	28,000		2,000
Main import period tons/month	Nov./Dec. March 350	Nov./Dec. March 4,500		Divided 300
<u>CUCUMBER</u> <sup>1/</sup>	Hardly any demand for "mini" cucumbers Demand should be developed for ethnic consumers.	Good demand for Jordan produce Usual price FF 8-9/kg	Very limited demand	Growing demand for ethnic population.
<u>HOT PEPPER</u> <sup>1/</sup>	Limited market	Good demand, mainly Nov./Dec. March Usual price FF 12-15/kg	Limited market	Good market for ethnic population
<u>SWEET PEPPER</u>	Large market, large competition	Usual price FF 7-8/kg	Sales potential 2000-3000 cartons/ week of green & red	
Total import winter months tons	77,700	39,500	21,200	21,100
Main import period tons/month	Dec./Febr. 500 - 700	Dec./ Febr. Apr. 800 - 1,000		

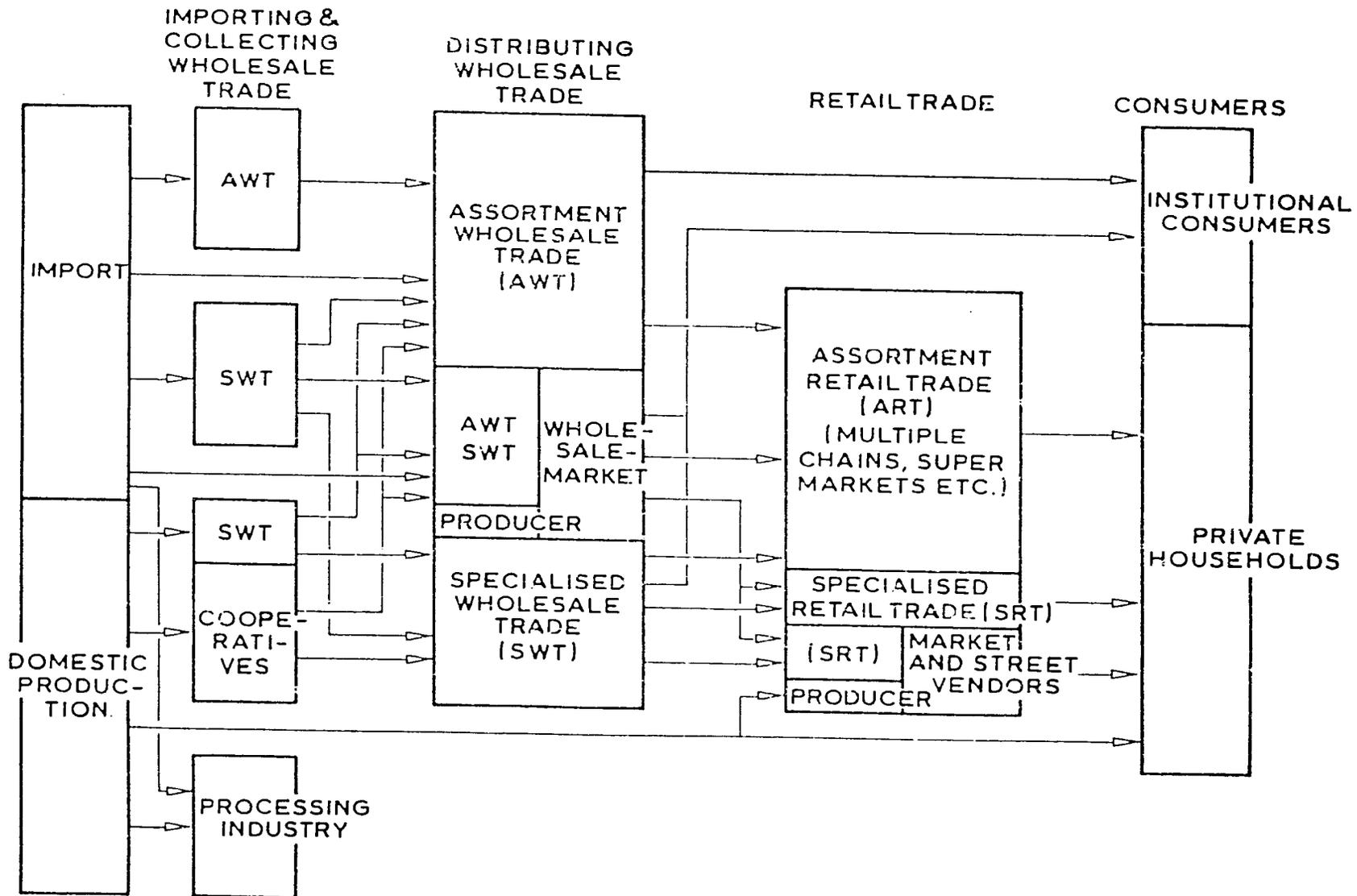
<sup>1/</sup> For cucumbers and hot pepper no separate data available for the produce of interest.

Continuation : Expected market opportunities for Jordanian fruit and vegetables in the visited EC countries.

PRODUCT	FED. REP. GERMANY	FRANCE	NETHERLANDS	UNITED KINGDOM
<u>TOMATO</u>	Small market for cherry type tomatoes. Possibilities by road	Market for special quality	Large competition	Large competition
<u>FRENCH BEANS</u>	Increasing demand for bobby type beans	Demand for extra fine types	Increasing demand	Good demand
Total import winter months/ton	6,000	25,600	16,100	4,800
<u>MELON</u>	Increasing demand Galia variety	Increasing demand Galia variety	Increasing demand Galia variety	Increasing demand Galia variety
Total import winter months/ton	11,800	10,400	14,600	35,100
Main import period tons/month	early and late in the season Nov./Dec. 200 ton/month	early and late in the season Nov./March 200 ton/month	early and late in the season	early and late in the season
<u>STRAWBERRIES</u>				
Total import winter months tons	2,000	2,000	300	800
Main import period from overseas tons/month	Dec./March 200 - 300	Dec./March 200	Dec./March 50	Dec./March 100 - 250

Figure 1

## THE MARKET CHANNELS FOR FRESH FRUITS AND VEGETABLES



APPENDIX I

LIST OF PARTICIPANTS OF THE MARKET OBSERVATION TOURS

The Netherlands

Coordinator : Jamil Y. Zureikat (AMD)  
Mohammad Awamleh  
Hassan Abu-Sido  
Nasr Yousef Shurrah  
Ahmad M. Awwad  
Ali Diab Zou'bi

France

Coordinator : Ibrahim A. Oreikat (AMD)  
Suheil Yousef Marto  
Mohammad Sa'id Labadi  
Akram Elayan  
Ahmad M. A. Abu Matar  
Yousif Hamdan 1/  
Saleh Mousa

United Kingdom

Coordinator : Abdul Rahman Abu Zanimeh (AMD)  
Ibrahim Mousa Oriqat (AMPCO)  
Rizek Odeh Al-Dalou  
Wa'el Nimer Wehbeh  
Habis Suleiman Fakhoury  
Nabil Maroun Ibrahim

Federal Republic Of Germany

Coordinator : Mahmoud Al-Hyari (AMD)  
Karim Philips Haddadin  
Nabil Adel Al-Taji  
Khalil M. Abu Ghannam  
Nidal F. Kanaan

Participants at the Workshop only :

Nael Al. Attia (Arab Trade & Economic Services)  
Mutaz Khalili

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1/ The travel of Mr. Hamdan was financed by the Eastern Company --  
Yousef Marto in Amman

## APPENDIX II

## PROGRAMME OF MARKET OBSERVATION TOURS

## THE NETHERLANDS

- Sunday 17 April 1988 Arrival at Schiphol (Amsterdam) Airport  
Briefing on programme
- Monday 18 April Visit to Cooperative Flower Auction in Aalsmeer  
Visit to KLM Cargo in Schiphol  
Visit to COPEX AIR (charter comp.) in Schiphol  
Visit to Mercury Airfreight in Schiphol  
Visit to the Government Produce Inspection Service  
Visit the flower exposition in Keukenhof
- Tuesday 19 April Visit to Cooperative Fruit and Vegetables Auction  
in Poeldijk  
Visit to Westland Import International in Poeldijk  
Visit to a tomato and a sweet pepper grower in Poeldijk  
Visit to the Fruit and Vegetables Marketing Board in  
The Hague
- Wednesday 20 April Visit to the Fruit and Vegetables Imported Product  
Auction in Rotterdam  
Visit to Velleman & Tass importers in Rotterdam  
Visit to Fa. v.d. Heuvel, importers in Barendrecht  
Discussion with HORTAGRO INTERNATIONAL (project  
development company)
- Thursday 21 April Visit to the Rotterdam Wholesale Market  
Visit to FTK Importers in Rotterdam  
Visit to the Institute for Packaging in Delft
- Friday 22 April Visit to Cooperative Flower Auction in Naaldwijk  
Visit to Leen de Mos, Seed producers and exporters  
in 's-Gravenzande  
Visit to Royal Brinkman, Input suppliers in 's-Graven-  
zande  
Visit to J.P. Beamsterboer, Produce Merchants and  
Cold Storage Company in Warmenhuizen
- Saturday 23 April Discussion on observations and meetings  
Departure from Schiphol (Amsterdam) Airport

## FRANCE

- Sunday 24 April Arrival in Paris  
Briefing on programme
- Monday 25 April Visit to Rungis Wholesale Market  
Visit to Ets. G. Lagueyrie, importers  
Visit to Anarex S.A., importers  
Visit to LACCOUR S.A., importers  
Visit to Jacque Klein, importers  
Discussion with Mr. Durand from Agence Laparra,  
importers and sales agents

Visit to COLBACP, import promotion organization  
Visit to the Ministry of Agriculture  
Market Information Service  
Visit to Air France freight service, Orly Airport

Tuesday 26 April  
Visit to Pascual France S.A., importers  
Visit to POMONA S.A., importers  
Visit to SCAC FRIGO, freight forwarding agents

Wednesday 27 April  
Visit to Air France freight department  
Travel to Marseille/Avignon

Thursday 28 April  
Visit to PETOSEED in Cavaillon, seed exporters  
Visit to Flavien & Co. in Cavaillon, produce merchants  
Visit to Jean Ravauté & Co. in Cavaillon, produce merch.  
Visit to SICA LE RENARD in Chateaurenard, cooperative  
produce merchants  
Visit to SETOP in Cavaillon, equipment manufacturers

Friday 29 April  
Discussion on observations and meetings  
Departure to Marseille

Saturday 30 April  
Departure from Marseille Airport

UNITED KINGDOM

Sunday 8 May  
Arrival in London  
Briefing on programme

Monday 9 May  
Presentation on the UK produce marketing scene from  
overseas exporter to retailer by Derek Oakley  
Presentation on importation procedures and statutory  
requirements by John Langstaff, Secretary of the  
Fruit Importers Association  
Visit to Perishables Transport Company, freight  
forwarding agents

Tuesday 10 May  
Visit to New Covent Garden Market  
Visit to Direct Marketing Supplies, importers  
Visit to M.&W. Mack, Ltd., importers  
Visit to Tucker & Hamilton, importers  
Discussion with H. Kruidenier (London) Ltd., importers  
Discussion with J. Collingridge Ltd., importers  
Discussion with Mr. Collin Allen, General Manager of  
the Covent Garden Market Authority  
Travel to Cambridgeshire and Stamford  
Visit of a major horticultural producer and packing  
house operator

Wednesday 11 May  
Visit of the National Farmers Union (marketing services)  
Visit to Harpham Marketing Services in Spalding,  
produce brokers  
Visit Geest Industries packing operations, importers  
Travel to Birmingham

Thursday	12	May	Visit to the Birmingham wholesale market Discussion with Mr. C.C. Mitchell, General Manager Visit MAP Exotic, importers Visit to the International Fresh Produce Fair Discussion with the local representative of Franz Welz International Transports GmbH in Salzburg, Austria operators of "FRESHTAINER" Travel to London
Friday	13	May	Visit to New Covent Garden Market Discussion with Connolly International, importers Visit to J. Sainsbury, leading supermarket chain Discussion on observations and meetings
Saturday	14	May	Departure from London
FEDERAL REPUBLIC OF GERMANY			
Sunday	15	May	Arrival in Hamburg Briefing on programme
Monday	16	May	Visit to Hamburg Wholesale Market Visit to EDEKA FRUCHTKONTOR, importers Visit to T. Port, importers
Tuesday	17	May	Visit fruit and vegetables retail outlets Visit to FRUCO, importers Visit to a vegetables grower Travel to Bremen
Wednesday	18	May	Visit to Bremen Wholesale Market Visit to the Scipio Group, importers Travel to Frankfurt
Thursday	19	May	Visit to the Rewe-Leibbrandt Group in Rossbach, large scale supermarket operators Visit to Lufthansa Cargo in Frankfurt Visit to Nagel Airfreight GmbH, freight forwarding agents in Frankfurt
Friday	20	May	Visit to Frankfurt Wholesale Market Visit to Anton Dürbeck, importer Visit to FRUCO, importers Visit to the entity in charge of import regulations and quality control Visit to a retail distribution centre Discussion on observations and meetings
Saturday	21	May	Departure from Frankfurt Airport

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APPENDIX III

LIST OF PERSONS MET DURING THE PROGRAMME

1. Importers and wholesalers of fruit and vegetables

1.1. The Netherlands

Velleman & Tass P.O.Box 6118 3002 AC Rotterdam Telex: 22189	Mr. Doesburg, Sales Manager Ms. Hernandez, Marketing Specialist
Westland Import International P.O.Box 224, 2580 AE Munster Telex: 32752	Mr. E. van Bergem Director
HAGE International B.V. Sporwegemplacement 1 2991 VT Barendrecht	Mr. Vervelde Marketing Specialist
J.P. Beemsterboer P.O.Box 8, Warmenhuizen, N.H.	Mr. P. Beemsterboer & Mr. A. Dekker, Directors
Fruit Transitokantoor Rotterdam P.O.Box 11080, 3004 EB Rotterdam	Mr. O. Reimers Director
HORTAGRO International B.V. P.O.Box 4050 8901 EB Leeuwarden (Agricultural project developpers)	Mr. L. de Vries Director
Coop. Flower Auction Westland P.O.Box 220, 2670 AE Naaldwijk	Mr. A.L. Jans, Import Manager Ms. M.P. Veldman, Mark. Spec.
Coop. Flower Auction Aalsmeer P.O.Box 1000, 1430 BA Aalsmeer	Mr. Mulder, Director Ms. R. Sluis-Nieuwkoop, Pub.Rel.
<u>1.2 France</u>	
Agence Laparra 62 A Rue de Montpellier Fruleg 369, 94622 Rungis, Cedex Telex: 260078	Mr. J.-P. Durand Director
Pasoual France S.A. Cour d'Alsace, Ent. G6A , 94155 Rungis Telex: 270310	Mr. Georges Allène Director
POMONA S.A. 21 Rue du Pont Neuf Paris 1e	Mr. Schwarz Marketing Specialist
LACOUR S.A. 106, rue de Montpellier Fruleg 375, 94622 Rungis	Mr. Claude Desmoulins
Ets. G. Lagueyrie 16 au 20 Rue d'Avignon Fruleg 643, 94621 Rungis Telex : 250036	Mrs. Gisèle Lagueyrie Director General

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ANAREX S.A.  
94 rue de Carpantras  
Fruileg 303, 94612 Rungis  
Telex : 270949

Mr. Pierre Allaey  
Sales Chief

Jacques Klein  
Rungis  
Telef: 46872500

Mr. Christian Vayssier

Flavien & Co.  
84300 Cavaillon

Jean Ravauté & Co.  
84300 Cavaillon

Sica Le Renard  
13160 Chateaurenard

### 1.3 United Kingdom

Direct Marketing Supplies Ltd.  
A 164 Fruit & Vegetables Market  
New Covent Garden Market  
London, SW8 5EE  
Tel.: (1) 720-3433, Telex : 934248

Mr. Dennis M. Surgeon  
Managing Director

Tucker & Hamilton Ltd.  
D 172, New Covent Garden Market  
London, SW8 5LL  
Tel.: (1) 720-9411, Telex: 917553

Mr. Richard Nowne  
Director

M. & W. Mack Ltd.  
43 North Street  
Chichester, West Sussex, PO19 1NF

Mr. Christopher P. Mack  
Director

J. Collingridge Ltd.  
H/O 218-223 Flower Market  
London SW8 5ND  
Tel.: (1) 720-6911, Telex: 8813081

Mr. Barrie Collingridge  
Director

The Connolly Group  
London Fruit Exchange  
Spitalfields, London E1 6HD  
Tel.: (1) 377-0222, Telex: 884329

Mr. David K. Brooks  
Chairman

Sunzest Limited  
101 Commercial Road, London E1 1RD  
Tel.: (1) 377-9000, Telex : 918083

Mr. Frank Breckenridge  
Ass. Marketing Manager

H. Kruidenier (London) Ltd.  
201/3 Flower Market,  
London SW8 5NA  
Tel.: (1) 720-9486, Telex : 917217

Mr. H. van Zetten  
General Manager

Harpham Marketing Services  
Low Fulney, Spalding, Lincs.  
Phone : (775) 66811, Telex : 32414

Mr. Derek Harpham and  
Mrs. Betty Harpham, Partners

MAP Exotic  
Unit 65, Smithfield Market  
Birmingham, B5 6UN  
Tel.: (21) 622-1568, Telex: 32414

Mr. Parmijit S. Bhogal  
Director

G.S. Shropshire & Sons  
Barway, Ely Cambs.

Mr. G.S. Shropshire  
Director

1.4 Federal Republic of Germany

T. Port  
Kantorhaus Grossmarkt, Lippelstr.1.  
2000 Hamburg  
Tel.: (40) 30100031, Telex: 17 402272

Mr. Herbert Scholdei, Director  
Mr. Werner Busch, Chief of Section

FRUCO  
P.O.Box 102209, 2000 Hamburg  
Tel.: (40) 3084-0, Telex: 2-162421

Mr. Uwe Blaas,  
Vegetables Purchase Specialist

FRUCO  
Grossmarkthalle, Stände 1-3  
6000 Frankfurt 1  
Tel.: (69) 490586, Telex: 4-11314

Mr. Bernard Zeh  
Branch Manager

REWE Handelsgesellschaft, Leibbrand  
Dieselstrasse 21-27  
8057 Eching / imports are handled by

Mr. Norbert Lux  
Purchase Manager

Bocchi Fruit Trade International  
Marktstrasse 8  
5000 Köln 51  
Tel.: (221) 380221

Mr. H. Fest  
Purchase Specialist

Scipio & Co.  
P.O.Box 105069  
2800 Bremen 1  
Tel.: (421) 3092272, Telex: 244512

Mr. Raffaele Fanatico  
Chief of Section

Edeka Fruchtkontor  
Grossmarkt, 2000 Hamburg 1  
Tel.: (40) 30209220, Telex: 21953212

Mr. Reinhard Feindt  
Chief of Section

2. Transportation companies and forwarding agents

KLM Cargo in Schiphol Airport  
P.O.Box 7700, 1117 ZI Schiphol

Mr. N.T. Scheltus  
Special Services

COPEX AIR B.V.  
P.O.Box 7545, 1118 ZG Schiphol  
Telex : 13247 The Netherlands

Mr. W. Schüngel  
Sales Manager

Mercury Airfreight International  
P.O.Box 75570, Schiphol  
Telex: 18819 The Netherlands

Mr. R. de Vos  
Sales Manager

SCAC Frigo  
3, rue de Remblai, B.P. 10354  
95706 Roissy, CDG, CEDEX  
Telex: 232281 France

Mr. Antoine Huertas  
Chief of Section

PERISHABLES TRANSPORT COMPANY  
Unit 6 & 7, Lakeside Estate  
Coinbruck By Bass, Bucks. SL3 OED  
Telex: 847224, England

Mr. David Sadler  
Managing Director

NAGEL AIRFREIGHT  
Flughafen Frachtzentrum  
6000 Frankfurt 75  
Telex: 417659, FRG

Mr. Rüdiger Kasper  
Director

Heuer & Co.  
Breitenweg 29-33  
2800 Bremen  
Telex: 246630 FRG

Mr. Wolfgang Helmis  
Specialist

2.. Other companies and institutions

Commodity Board for Fruit and Vegetables  
P.O.Box 90403, 2509 LK The Hague, Netherland

Ms. Slotboom

Centre for the Promotion of Imports from  
Developing Countries (CBI)  
P.O. Box 30009, 3001 DA Rotterdam,

Mr. Man

Rijksdienst voor de Keuring van  
Vee en Vlees  
Schiedamseweg Beneden 555  
Rotterdam

Quality Control  
Officers

COLEACP  
5 rue de la Corderie  
94586 Rungis, France  
Telex: 205166

Mr. P. Gerbaud

Société d'Economie Mixte d'Aménagement  
et de Gestion du Marché d'Intérêt  
National de la Région Parisienne  
Boite Postale No. 316, 94152 Rungis

Mr. Jean Grasset  
Section Chief

(Wholesale Market)

Covent Garden Market Authority  
New Covent Garden Market  
London SW8 5NX

Mr. Collin Allen, Gen. Manager  
Mr. Derek Whitehead, Ass.

Birmingham Wholesale Market  
City Markets Department, Manor House  
Birmingham B5 5BD

Mr. C.C. Mitchell,  
General Manager

National Farmer's Union  
Marketing Services  
4 St. Mary's Place, Stamford, Lincs. PE9 2DN

TNO Packaging Research Institute  
P.O.Box 94, 2600 AB Delft

Mr. Eigeman, Service Chief

Leen de Mos (seed producers)  
P.O.Box 54, 2690 AB 's-Gravenzande

Royal Brinkman (input suppliers)  
P.O.Box 2, 2690 AA 's-Gravenzande

Mr. Wubben  
Export Manager

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PETOSEED FRANCE (seed producers) Moulin Saint Pierre Les Taillades, 84300 Cavaillon (France)	Mr. Olivier Crabos Technical Officer
SETOP Machine spéciale pour station de conditionnement (grading equipment) 21, Avenue du Général Leclerc 84300 Cavaillon (France)	Mr. Charles Giraud Director
The Fruit Importers Association 408/409 Market Towers 1 Nine Elms Lane London SW8 5NQ	Mr. John Langstaff Secretary
Franz Welz International Transports P.O.Box 199, A - 5020 Salzburg/Austria	Mr. Ian Thomson, Representative in UK
Federal Office for Food and Forestry Adickesallee 49 6000 Frankfurt 18	Dr. Otto Schmidt Section Chief Import Regulations

3. Persons met in Amman

Dr. Richard A. Johnson	Deputy Mission Director, USAID
Dr. Randall Cummings	Director, Agriculture and Rural Development Office, USAID
Mr. Munther Azer	Project Officer, USAID
Mr. Adnan M. Naghaway	Programme Officer, UNDP
Mr. Zuhair Mubarak Abdalla	FAO Regional Marketing and Credit Officer
Mr. Mazen Abdel Kader	Deputy Director General, AMPCO
Mr. Emil Masarweh	Plant Manager, AMPCO
Mr. Walid Abu Jassar	Cargo Sales Manager, Royal Jordanian
Dr. Mahmud Duwayri,	Dean, Faculty of Agriculture, Jordan Univ.
Dr. Suleiman Arabiat	Chairman of Ag. Econ. Dep., Jordan Univ.
Mr. László Nemere	Commercial Counsellor, Hungarian Embassy

4. Additional addresses of firms which have not been visited

4.1. Flower importers in the Netherlands

Maanen & Mantel, Hortensialaan 31, Aalsmeer Tel.: (2977) 25757  
Zurel & Co. Leegmerdijk 313 1431 GB Aalsmeer Tel.: (2977) 33333

4.2 Vegetables importers in the United Kingdom

Robert Steveny, E 212/215, New Covent Garden Market, London SW8 5MB  
Telex : 913749  
Yanwegar Ltd. 539/541 Market Towers, London SW8 5NQ Tel:ex: 919742  
Brookepaks, 90 Waling St, Gillingham, Kent. ME4 2Y3  
J.W. Brookers, 422 London Fruit Exchange, Spitalfields, London E1 6EP

4.3 Vegetables importers in the Federal Republic of Germany

Internationale Fruchtimport Gesellschaft Weichert & Co.  
Fruchthog, 2000 Hamburg 1., Telex: 21 61348

J. A. Kahl, Grossmarkt München

Zimpelmann GmbH, Thalkirchner Str. 81, 8000 München 70

Fruchthansa, Grossmarkt, 5000 Köln

Arey Bachstrasse 58 4000 Düsseldorf

Türkischer Fruchtimport, Wandalenweg 5, 2000 Hamburg 1, Telex : 213370

4.4 Grading machines for tomatoes

Material Arboriculture Fruitière, B.P. 82001 Montauban, France

AWETA, TAS Machinebouw, Nootdorp, Kruisweg 5, The Netherlands

Groefso Vruchtsorteer machines, Tricht Geldermalsen, The Netherlands

4.5 Packaging material

D. Couvas & Sons Ltd. P.O.Box 35, Limassol Cyprus Telex: 2336

SME , Boite Postale 17, 13633 Arles, France

Bouverat Emballage, La Muscadella, 13670, St. Auriol , France

4.6 Transportation by truck

HUNGAROCAMION, P.O.Box 108, H - 1442 Budapest, Tel.: (36) 1 - 276806

Miss Koltai . Office in Munich (FRG) Tel.: (49) 89 - 3518051

Mr. Szemes

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## APPENDIX IV

### SOURCES FOR PERIODIC MARKET INFORMATION

#### Europe and EC

International Trade Centre, Geneva Switzerland through UNDP project in Amman

COLEACP, 5 rue de la Corderie, Centra 342, 94586 RUNGIS, Cedex, France

- Weekly price information messages
- Monthly information bulletins
- Commercial Data Bank (Statistics)

International Fruit World, Oscar Bauer Publication, Basel, Switzerland  
(Three publications per year)

#### Federal Republic of Germany

ZMP MARKTBERICHT, ZMP - Godesberger Alee 142-148, 5300 Bonn 2  
( Two bulletins per week, but in German only)

#### France

Le Marché des Fruit et Légumes  
Ministère d'Agriculture, Rungis Wholesale Market

#### The Netherlands

Velleman & Tass, Rotterdam  
Price Reports on auction sales (after each auction, twice a week)

#### United Kingdom

Fruit Traders Journal

Weekly publication. Subscription fee : £ 48 per year

Lockwood Press Ltd. 430-438 Market Towers, New Covent Garden, London SW8 5NN

EURO FRUIT, The International Monthly Magazine for Marketing Fresh Produce

Subscription fee : £ 40 per year

Market Intelligence Ltd, 4th floor, Market Towers, New Covent Garden  
London SW8 5NQ

London Market Prices of Imported Fruit and Vegetables

published twice a week by the Fruit Importers Association

408/409 Market Towers, 1 Nine Elms Lane, New Covent Garden, London SW8 5NQ

## APPENDIX V

ARRIVAL OF SOME VEGETABLES AND MELON  
TO PARIS RUNGIS MARKET IN 1987

PRODUCT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
						METRIC TONS							
<u>CUCUMBER</u>													
Total arrivals	588	697	1630	2415	2525	2879	2654	1529	1925	1387	1100	1101	20430
Imports	588	697	583	621	554	302	259	59	143	436	799	908	5938
<u>EGGPLANT</u>													
Total arrivals	324	507	496	683	792	1102	900	732	979	867	599	505	8486
Imports	324	507	496	683	783	1102	702	235	200	496	549	503	6580
<u>GREEN BEENS</u>													
Total arrivals	1179	1046	1266	1309	1468	2258	1596	1068	1620	1535	1298	1167	16810
Imports	1179	1046	1266	1309	1468	1909	487	36	255	884	1222	1163	12224
<u>GREEN PEPPER</u>													
Total arrivals	719	945	1005	1050	1256	1461	1579	1007	1443	1288	979	854	13586
Imports	719	943	1005	1045	1256	1461	1140	254	253	345	786	832	10039
<u>SQUASH</u>													
Total arrivals	1115	1331	1454	1552	1653	2394	1989	1568	2150	1424	1366	1222	19218
Imports	1114	1327	1444	1448	762	212	56	7	20	177	1039	1154	8760
<u>TOMATO</u>													
Total arrivals	6810	7730	8530	9343	10603	13522	13169	9599	11219	8556	9505	8463	117059
Imports	6810	7718	8177	8244	8470	6827	6493	3612	2166	3466	7971	8217	78171
<u>MELON</u>													
Total arrivals	23	111	210	615	1270	5585	8817	8930	7816	1472	218	207	35274
Imports	23	111	210	592	946	1175	684	159	195	257	211	207	4750

SOURCE: Market Information of the Ministry of Agriculture

APPENDIX VI

BIBLIOGRAPHIE

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Supply and demand for Southern Mediterranean Horticultural Products. Vol. V Jordan AIE/TR/ARD Agency for International Development, Sept. 85., 70 p.

Bale, M.D.; Horticultural Trade of the Expanded European Community. The World Bank, Washington, D.C., 1986, 274 p.

The Wholesaling of fruit and vegetables. Covent Garden Market Authority. London, 1987

Customs duties on produce imported into the United Kingdom. The Fruit Importers Association, London 12p. (Mim.)

International Market situation for selected off-season fruits and vegetables. FAO, Rome, 1984, 38 p.

International trade with floricultural products with particular consideration on the Western European Markets.. FAO, Rome, 1984, 38 p.