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**THE U.S. MARKET FOR
PASSION FRUIT JUICE AND BANANA PUREE**

Prepared for USAID/Ecuador

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and Banana Puree**

CONTENTS

Study Description

Product History

Market Outlook

Market Structure and Distribution Channels

Price

Major Market Requirements

Exporting Countries

Conclusions and Recommendations

Companies to Contact

Annexes:

A. Relevant Studies

B. People/Companies Contacted

C. Brokers/Importers/Manufacturers - U.S.

D. Brokers/Importers/Manufacturers - Non-U.S.

THE U.S. MARKET FOR PASSION FRUIT JUICE AND BANANA PUREE

A. Study Description

This LAC TECH report summarizes market information on the following products:

- Passion fruit juice
- Banana puree

In response to a request from USAID/Ecuador, LAC TECH gathered information on the U.S. market for tropical fruit juices/concentrates and banana puree. LAC TECH agreed to identify existing market studies, analyze the studies obtained and make telephone calls to selected persons in the trades in the U.S., draw tentative conclusions as to possible marketing strategies for LAC firms, and provide copies of the studies as requested.

It later became evident that the tropical fruit juice currently of major interest in Ecuador was passion fruit, which is why this report focuses on passion fruit juice and its concentrate forms, in addition to banana puree.

Methodology. Published data on imports and production of passion fruit juice and banana puree are very limited. Information on prices, imports, production, and general trends was obtained from database research and via telephone interviews with industry personnel and representatives of the commercial sector in exporting countries. Dated studies (the most recent published in 1991) on passion fruit were read and analyzed, however, no studies on banana puree were identified. Studies used for this report are listed in Annex A, and companies contacted by telephone are in Annex B.

B. Product History

Passion fruit juice. Passion fruit juice may have been used first in the United States as a flavoring ingredient in Hawaiian Punch. In the 1970s it was introduced as an ingredient in other juice/drink products and in some food products. It became an increasingly popular flavor in juices, dairy products (yogurts, ice creams), and wine coolers throughout the 1980s, and became very popular with the U.S. Hispanic market until recently when demand leveled off.

Banana puree. Banana puree was introduced to the food industry in the early 1960s and was used primarily by baby food manufacturers. Other users included the bakery industry and juice manufacturers. Puree users diversified by developing new products. Sources of supply have not varied until recently, with the majority still coming from Central and South America.

C. Market Outlook

Passion fruit juice. According to a recent study by the International Trade Center (UNCTAD/GATT), global trade in fresh passion fruit is about 15,000 metric tons per year and in passion fruit pulp about 40,000 metric tons. The U.S. market for passion fruit juice/concentrate is currently estimated at 3,000 MT/year (50 degree brix concentrate equivalent). Industry experts' estimates of world wide shipments of concentrate range from 10,000 to over 30,000 metric tons per year. An article in the May, 1993 issue of Prepared Foods magazine reported statements from a U.S. tropical concentrate supplier to the effect that European demand for passion fruit was now 10 times greater than in the U.S. and that U.S. growth possibilities were tremendous.

Although the period from 1979 to 1989 saw an eight-fold increase in tropical fruit juice imports to the United States, the volume of passion fruit juice consumed has not increased significantly since 1990 and is not expected to increase significantly in the near future. Growth of the Hispanic market is expected to continue at a rate of over 5% per year, to approximately 49 million persons in the year 2020. This should have some beneficial effect on consumption of passion fruit and its products

One industry spokesperson attributes the perceived slowed growth of the passion fruit juice market to economic recession in the United States and other consuming countries. It is also possible that the extremely high prices of several years ago (1987) led manufacturers to reformulate recipes using significantly less passion fruit in mixes. Some sources indicate that the growth rate stalled due to mediocre consumer response to products offered. Another contributing factor is the recent overall decline of the juice industry. The orange juice and apple juice industries are beset with stagnation, with virtual worldwide oversupply of product. Apple juice prices are low, making it a cheaper ingredient than tropical fruit juices in juice blends.

Dole and Del Monte have experimented in the past several months with exotic juice blends in 64 ounce cartons, but seem to be going back to more standard juice ingredients such as orange, pineapple, and banana. There has, however, been a major recent decrease in planting and supply, especially in Colombia, that has caused prices to rise. The recent very low prices have been blamed largely on over planting in Colombia.

Banana puree. The U.S. market size for banana puree in 1993 is estimated by one industry representative to be about 23,000 metric tons, although imports of banana pulp in 1992 were just 16,000 tons. Demand for this product remains stronger than for other tropical purees, largely because of its use in baby foods and industrial bakery products. The manufacturing industry continues to explore new products and uses for banana puree, and some long-term growth is expected.

Industry representatives, however, indicate that at present the supply of banana puree on the market is at least equal to demand. This is especially true with the recent addition of new processing capacity in producing countries.

D. Market Structure and Distribution Channels

Passion fruit juice. About 75 percent of passion fruit juice and concentrate are sold through importers or brokers, who serve the needs of many small-scale users. Some large manufacturers buy directly from foreign processors, while others buy from importers. With conditions of oversupply, distributors holding stocks, and passion fruit decreasing as a percent of the content of some juice drinks, there is little or no incentive for users to import directly.

A few major industry players are responsible for about one third of U.S. market consumption of passion fruit. The other two thirds of industrial consumers are small-scale producers of the above-mentioned products, indicating a fragmented market. The principal kinds of users, in order of importance, are the following: (1) juice, nectar, and drink manufacturers, (2) frozen-dessert manufacturers, (3) producers of flavors/aromas/essences, and (4) manufacturers of yogurt, wine coolers, jellies, and bakery products. According to a 1991 Beverage Marketing Corporation report, the fourth category above accounts for only 2.8 percent of total consumption.

Banana puree. The biggest user of banana puree is the baby food market, followed by the bakery industry and a few large juice manufacturers. Some large baby food manufacturers have their own production and processing companies or affiliates abroad, such as Gerber in Costa Rica and Heinz in Venezuela. The large juice manufacturers often buy puree directly from foreign processors, even though they may buy passion fruit and other juices through importers. The largest supplier of banana puree to industry is Chiquita. Although Chiquita produces and processes its own banana puree and other banana products, it has expressed an interest in investigating new sources of supply.

The use of U.S. importers and brokers is prevalent among small-scale end users.

E. Price

Passion fruit juice. Due to market saturation the price of passion fruit juice was at an all time low a few months ago, but has increased significantly since then. Passion fruit can be planted and brought to production within eight or nine months; therefore, it is also easily destroyed and replaced with another crop. Investors in producing countries have a tendency to plant when the price is high and abandon the crop when prices decline. Because both growers and users have the means to react rapidly to price incentives and disincentives, there are unusually large fluctuations in both volume and price.

Prices paid for passion fruit juice (50-degree brix concentrate) averaged about \$3,500/tn (CIF) in 1991 and \$2,600/tn in 1992. The price for concentrate is estimated at \$1,900/tn in 1993. In May, 1993, one Florida trader reported paying around \$600-\$700 per ton for single strength juice. Grower prices were reportedly about \$0.90 per kilogram.

In mid-August, 1993 a Florida importer reported that full container loads of 50 brix passion fruit concentrate were selling for about \$1.36 per pound, c.i.f. Miami, and single strength juice for about \$0.70 per pound. This is roughly double the price reported just 3 months earlier.

Banana puree. Some significant users of banana puree buy at contract prices that are much more stable than spot prices. Many users have established sources of supply and are satisfied with the quality that is being received. One major manufacturer, who uses banana puree in baby food formulations, reports receiving an average of five phone calls a month from potential LAC-region suppliers. Rarely is the price offered attractive enough to engender further interest on the part of the manufacturer, however, users in general are interested in hearing of potential new sources of supply. New production in India has come onto the market recently and has contributed to the fall in price.

According to import statistics, average prices paid for "banana pulp prepared or preserved" (harmonized System number 20089913) are as follows: 76 cents per kilogram for the first quarter on 1993, 72 cents/Kg in 1992, 52 cents/Kg in 1991, and 53 cents/Kg in 1990 (approximately FAS foreign port). These figures may be inaccurate, however, because shipments of banana products other than puree may sometimes be included in the category. Recent discussions with industry personnel indicate that prices have dropped due to oversupply. Landed prices for banana puree in April, 1993 were said to be about 35 to 40 cents per pound, or about 81 cents per kilogram.

For 1992, the average c.i.f. value of banana pulp imported into the U.S. was 30% higher than the average customs value. This means that shipping and insurance costs added an average of 30% to the f.a.s. value. According to the same statistics, shipping costs from Ecuador add only about 12% to the f.a.s. value. This gives Ecuador an advantage on transportation costs.

U.S. customs duty was paid in 1992 on banana pulp from China, Ecuador, Honduras, and Brazil. There was no duty on shipments from Mexico, Costa Rica, Panama, Brazil, Thailand, or the Philippines. This means that only one of the major suppliers, Panama, has a duty advantage over Ecuador.

In the month of March, 1993, the latest month for which U.S. import statistics are available, the average customs value of banana pulp was 76 cents per kilogram and the average c.i.f. value was 94 cents per Kg, or about 43 cents per pound.

F. Major Market Import Requirements

Passion fruit is imported as juice in five different forms: (1) frozen, pasteurized, single-strength, (2) aseptic, pasteurized, single-strength, (3) frozen, non-pasteurized, single-strength, (4) frozen concentrate; and (5) aseptic concentrate. According to many industry representatives, the most common and preferred form of passion fruit is frozen 50-degree brix concentrate.

Banana puree is imported in frozen and aseptic pack, including single-strength and frozen concentrate with 42 percent solids. Aseptic packaging seems to be increasing in popularity and may come to dominate the industry..

Problems cited with banana puree from some suppliers include less than desirable quality (taste, packing) and non-competitive prices. Established processors such as Chiquita in Central America can provide a known high-quality product at relatively low prices.

As banana puree is low in acid, with a Ph above 4.6, processors for shipment to the USA must usually obtain FCE (Food Canning Establishment) numbers from the federal Food and Drug Administration (FDA). This requires convincing FDA that the processing equipment and techniques are sufficient to prevent contamination by the clostridium botulinum bacteria. FDA often requires new foreign processors for the U.S. market to, at their expense, obtain certificates of compliance from qualified inspectors.

Potential producers of banana puree for the U.S. market should obtain information and registration forms from the LACF Registration Coordinator, HFF-233, Center for Food Safety & Applied Nutrition (FDA), 200 C Street SW, Washington, DC 20204. LAC TECH has copies of the information and forms.

G. Exporting Countries

Passion fruit juice. According to some industry spokespeople, excess processing capacity exists worldwide for both passion fruit and banana puree. Quantities on the market of both products are sufficient to meet current and anticipated demand.

The largest suppliers of passion fruit juice, which collectively have 90 percent of the world market, are, in order of importance, Brazil, Colombia, Ecuador, Peru, and Venezuela. Minor exporters include Kenya, Costa Rica, Sri Lanka, and India. According to the Passion Fruit Juice Products Association, shipments of passion fruit juice (50 brix concentrate equivalent) in 1992 were as follows: Colombia 7,000 tons, Ecuador 2,100 tons, Brazil 1,850 tons and Peru 900 tons, for a total of 11,500 tons.

Published import statistics are hard to interpret because they mix passion fruit with other juices in Harmonized System classification number 2009806090. According to a 1991 report from the International Trade Center (UNCTAD/GATT), the important markets, in order, are the United States, the Federal Republic of Germany (also a re-exporter to neighboring countries), the United Kingdom, the Netherlands, France, Canada, and Japan.

Banana puree. Major suppliers of banana puree, in order of volume shipped to the U.S. in 1992, were Costa Rica, Honduras, Panama, Ecuador, China, and Mexico. Minor suppliers include Brazil, France, Thailand, and the Philippines. Recently, India began production of banana puree and, although no volume figures were obtained, could become a significant source of low-cost supply.

H. Conclusions and Recommendations

Some industry experts who were contacted said that they had seen a decrease in the volume of passion fruit juice demanded. On balance, however, it appears the market for passion fruit juice will remain about steady or will grow very slowly. The reformulation of juice mixes, the lackluster response of the consuming public, and the availability of inexpensive apple and pear juice have negatively affected demand.

The boom and bust of passion fruit prices suggests that producers might diversify into passion fruit but should not depend on it entirely, and that they should produce steady volumes rather than reacting to market prices.

Banana puree has established uses, primarily in baby food, and market volume will remain at least at the present level. In recent interviews, industry representatives indicated that current supplies of banana puree were adequate. Unlike passion fruit juice, however, banana products have a desired flavor for which there is no close substitute. There will probably be an element of "supply push," with larger supplies leading to greater demand.

Distribution Strategy. Passion fruit is a small volume, undifferentiated, industrial product. This kind of product is normally sold through brokers and, in fact, it is very difficult to set up any other kind of distribution channel. Banana puree, on the other hand, moves in sufficient quantities that it can be exported directly to industrial end users. This allows each end user to specify whichever unique product characteristics he may require.

Industry contact and follow-up. In general, industry contact is essential for marketing fruit juices and purees. Manufacturers and brokers are often interested in looking at new sources of supply, provided the price is competitive and samples are of adequate or superior quality. In a stagnant or slow growth market, however, new entrants must displace existing suppliers. This is usually difficult.

Conversations with buyers in the purchasing departments of companies such as those in Annex B will provide more information about product form, quality, packaging, and price. Also, frequent contact with buyers will provide vital information on the evolution of market conditions.

Interviews with industry spokespeople indicate dissatisfaction with the level of communication from producers in general. In particular, follow-up is cited as insufficient; for instance, promised stateside visits did not take place and samples were not sent in the requested form.

Serious discussions should be held with buyers before installing new capacity to produce tropical fruit juice or puree. Companies with installed capacity should provide potential buyers with information on the type of plant/equipment installed, who installed it, plant capacity, etc.

I. Companies to Contact

- **Non-U.S. markets.** Although this report covers largely the U.S. market, the EEC and Canadian markets for these products should also be considered. See Annex D for addresses of selected importers and manufacturers of tropical fruit juices in Europe and Canada.

Further information on the EEC juice market can be obtained by contacting the Servicio de Noticias sobre Mercados, Centro de Comercio Internacional UNCTAD/GATT, 54-56 rue de Montbrillant, 1202 Ginebra, Suiza. Tel: (22) 730 01 11; FAX: (22) 733 71 76; Telex: 414118 MNS CH. Information will be provided free of charge to entities in developing countries.

Brokers and Agents. Brokers and agents responsible for the bulk of buying and selling single-strength juice are **Sunbase** and **Prima Foods International**. Brokers of passion fruit concentrate include **Hartog Trade International**, **Sunbase**, **Nationwide of Chicago**, **JES Trade**, and the **Bradford Company**. Their addresses are in Annex C of this report.

- **Major U.S. users of passion fruit juice.** The following brands were identified in a 1991 report by Beverage Marketing Corporation as major users of passion fruit juice in formulas. Their addresses also can be found in Annex C. We have added Dole Packaged Food Company and Sunkist to the list.

Dole Packaged Food Company
Sunkist
Ocean Spray (Milne Fruit Products, Inc.)
Hawaiian Punch (Proctor & Gamble)
Chiquita
Sundance (New Era Beverage Company)
Hawaiian Sun (Hawaiian Sun Products, Inc.)
Everfresh
POG (Haleakala Dairy)
Welch's Orchard Blend (Welch Foods)
Tropicana Twisters (Tropicana/Seagram)
Meadow Gold
Minute Maid (Coca-Cola)
Hi-C (Coca-Cola)
Adam's (Adam's Packing Association)
Hawaiian juice (Kilauea Agronomics Inc.)

ANNEXES

ANNEX A
RELEVANT STUDIES

Estudio de Mercados de Los Estados Unidos Para El Maracuya Y La Guanabana Procesados, Robert J. Vilece, Ph.D., and Sandra K. Dunlap for Chemonics International Consulting Division, Washington, D.C., 1989.

Fruit Juices with Special Reference to Citrus and Tropical Fruit Juices: A Study of the World Market, International Trade Center, Geneva, 1991.

Juices and Drinks, The Food Institute, Fair Lawn, New Jersey, 1993.

Market Profile: Selected Commodities of the Caribbean Basin Region, USDA OICD, Washington D.C., 1990.

The Market for Juices, Ades and Noncarbonated Drinks, Business Trend Analysts, Inc., 1989.

U.S. Market Study for Selected Fruit Juices and Nectars: CARIBEX Domunicana, S.A., Chemonics International Consulting Division (for OPIC), July 1990.

U.S. Market for Passion Fruit Juice, Beverage Marketing Corporation, New York, NY, 1991.

ANNEX B
PEOPLE/COMPANIES CONTACTED

Importers/Brokers

Sunbase
Barkey Importing
Crystals International
Camerican
Prima Foods International

Manufacturers

Del Monte
Dole
Heinz
Gerber
Chiquita
Goya

Other

Food Institute
Food Marketing Institute
Dan Casper, Independent Consultant
Fruit growers in Bolivia

ANNEX C
BROKERS/IMPORTERS/MANUFACTURERS - U.S.

The following list is non-inclusive and covers both passion fruit juice and banana puree.

Brokers/Importers

Bradford & Co., Inc., Montgomery, AL (205) 271-6074.

Hartog Trade International, Inc., New York, NY (212) 687-2000.

A.M. Beebe Company Inc., San Francisco, CA (415) 421-5362.

Keren Trading Corporation, New York, NY (212) 697-5477.

Prima Foods International, Deland, FL (904) 736-9138.

Sunbase, Ocala, FL (904) 351-5355.

JES Trade, Miami, FL (305) 591-7335.

Nationwide of Chicago, Food Brokers, Inc., Northlake, IL (312) 681-3700.

Kendall Frozen Fruits, Inc., Beverly Hills, CA (213) 272-8111.

El Tesoro Foods Inc., Miami, FL (305) 887-7515.

L. Della Cella Company Inc., Mineola, NY (516) 742-5400.

Herburn Spa, USA, Napa, CA (707) 226-8552.

Down Under Beverage Corporation, Fort Lee, NJ (201) 224-0440.

Lyon's magnus Inc., Clovis, CA (209) 299-2183.

Manufacturers: Juices, Drinks, Nectars, Pulps/Purees

Dole Packaged Foods, San Francisco, CA (415) 986-3000.

Sunkist Growers, Inc., Van Nuys, CA (818) 986-4800.

Milne Fruit Products Inc., 804 Bennett Avenue Box 111, Prosser, WA 99350, (509) 786-2611, Fax (509) 786-1724.

Proctor & Gamble, Beverage Division, P.O. Box 599, Cincinnati, OH 45201, (513) 983-1100.

Chiquita Brands International 250 East Fifth Street, Cincinnati, OH 45202, (513) 784-8011, Fax (513)784-8030.

New Era Beverage Company, 12377 Merid Drive #100, Dallas, TX 75251, (214) 991-6751, Fax (214) 788-0936.

Hawaiian Sun Products Inc., 259 Sand Island Access Road, Honolulu, HI 96819, (808) 845-3211, Fax (808) 842-0532.

Everfresh (Division of Labatt's), 333 North Mount Prospect Boulevard, Franklin Park, IL 60131, (708) 833-8440.

Haleakala Dairy, 55 South Wakea Avenue, Kahului, HI 96732, (808) 877-5541.

Coca-Cola Foods, 2000 St. James Place, Houston, Texas 77056, (713) 888-5000, Fax (713) 888-5959.

Welch Foods Inc., 100 Main Street, Concord, MA 01742, (617) 371-1000, Fax (508) 371-2832.

Tropicana (Seagram), 1001 Thirteenth Avenue E, Bradenton, FL 34208, (813) 747-4461, Fax (813) 745-2375.

Meadow Gold Dairies Inc., 925 Cedar Street Box 1880, Honolulu, HI 96805, (808) 949-6161.

Purely Delicious, 8728 Utica Avenue, Rancho Cucamonga, CA 91730, (714) 948-0797.

Adams Packing Association, P.O. Box 37, Auburndale, FL 33823, (813) 967-4431, Fax (813) 965-2480.

Kilauea Agronomics Inc., P.O. Box 80, Kilauea, HI 96754, (808) 828-1761, Fax (808) 828-1880. Ancel Products Inc., Miami, FL (305) 325-8444.

Del Monte USA, San Francisco, CA (415) 442-4000.

Everfresh Juice Company, Warren, MI (312) 833-8440.

Flavor Fresh, Chicago, IL (312) 254-3747.

Flavors from Florida, Winterhaven, FL (813) 533-0408.

FoodPro, Florida, Puerto Rico (809) 822-0966/0942.

San Feliz, Goya de Puerto Rico, Bayamon, Puerto Rico (809) 740-4900.

Industrias La Famosa, San Juan, Puerto Rico (809) 251-0060.

Lykes Pasco Packing, Dade City, FL (904) 567-5211.

Ocean Spray, Plymouth, MA (508) 747-1000.

Ponai Inc., Honolulu, HI (808) 526-1186 (also jams and jellies).

Procesadora Campofresco, Mayaguez, Puerto Rico (809) 834-4760.

Shasta, Hayward, CA (415) 783-3200.

TreeSweet Products Company, Houston, TX (713) 876-3759.

TreeSweet of Puerto Rico, San Juan, Puerto Rico (809) 722-6162.

Tropical Fruit Products Company Inc., San German, Puerto Rico (809) 892-1345.

Wagner Excello Food Products, Schiller Park, IL (312) 671-6110.

Purely Delicious, Los Angeles, CA (813) 243-9384.

Manufacturers: Ice Creams, Sherbets, Frozen Desserts

Production Manager, Le Sorbet, Alexandria, VA.

Manufacturers: "Wine Coolers," Cream Liqueurs, Cocktail Mixes

Aloha Liquors Inc., Honolulu, HI (808) 841-5787.

14

ANNEX D
BROKERS/IMPORTERS/MANUFACTURERS - NON U.S.

Canada - Brokers/Importers

Arthur Roger & Associates Inc., suite 206, 491 Boulevard Lebeau
Montréal, Québec, H4N 1S2, Tel: (514) 745 1036, Telex: 05-826623, Fax: (514) 745
1036.

A.S. Mav and Company Ltd., 10 Gateway boulevard, Suite 310, Don Mills, Ontario M3C
3A1, Tel: (416) 425 3030, Telex: 06-524068, Fax: (416) 425 1775.

Brastor Mercantile Ltd., 25 University Avenue, Suite 701, Toronto, Ontario M5G 1T6, Tel:
(416) 596 1190, Telex: 06-218330, Fax: (416) 597 0677.

Charles Masson Inc., 16 Westminster Nord, Suite 210, Montréal Ouest, Québec J4X 1Z1.
Tel: (514) 483 1690, Telex: 05-566128, Fax: (514) 483 5445.

Citrolad Canada (Juices) inc., 44 Longbourne Drive, Suite 709, Weston, Ontario M9R 2M7,
Tel: (416) 259 0594, Telex: 06-984682 tor.

D. Cracower & Co. Ltd, 4216, Thimens Blvd, Montréal, Québec H4R 2B9, Tel: (514) 337
8210, Fax: (514) 337 5700.

Ernest St. Arnaud Inc., 2185 Francis Hughes Ave., Laval, Québec H7S 1N6, Tel: (514)
667 4040.

Fruitrade International Inc., One Atlantic Avenue, Suite 216, Toronto, Ontario M5K 3E7,
Tel: (416) 538 2700, Fax: (416) 538 2702.

Harold T. Griffin Inc., 7491 Pacific Circle, Mississauga, Ontario L5T 2A4, Tel: (416) 564
1710, Fax: (416) 564 2494.

H & T International Food Brokers, 385 The West Mall, Suite 404, Etobicoke, Ontario M9C
1E7, Tel: (416) 622 6650.

Miller & Smith Foods Inc., 815 Danforth Avenue, Suite 307, Toronto, Ontario M4J 1L2,
Tel: (416) 462-1663, Telex: 06-524416 smitrad, Fax: (416) 462 1708.

National Importers Ltd, 1331 Main Street, Vancouver, British Columbia V5G 1J5, Tel:
(604) 435 6611, Telex: 04356676, Fax: (604) 435 3863.

Peter Igel Food Products Inc., Suite 206, Four Lansing Square, Willwdale, Ontario M2J
1T1, Tex: (416) 493 1721, Fax: (416) 493 3672.

S. Blinick Company Limited, 330 Progress Avenue, Scarborough, Ontario M1P 2Z4, Tel: (416) 298 3300, Telex: 06 525440, Fax: (416) 298 4545.

Trakel Holdings Inc., 178 Main Street, Unionville, Ontario L3R 2G9, Tel: (416) 477 4742, Fax: (416) 477 4745.

Canada - Producers/Importers

Agrinove Coopérative Agro-alimentaire, 180 Boulevard Begin, Ste. Claire, Québec G0R 2V0, Tel: (418) 883 3301.

A. Lassonde et Fils Inc., 170, 5ème Avenue, Rougemont, Québec J0L 1M0, Tel: (514) 878 1057/469 4926.

Ault Foods Ltd, 405 The West Mall, Etobicoke, Ontario M9C 5J1.

Cobi Foods Inc., P.O. Box 1-000, Port Williams, Nova Scotia, B0P 1T0.

Coca-Cola Foods Canada Inc., 2550 Victoria Park, Willowdale, Ontario M2J 5A9, Tel: (416) 756-8100.

Dairyland Foods, P.O. Box 9100, 6800 Lougheed Hwy., Burnaby, British Columbia V6B 4G4, Tel: (604) 420 6611, Telex: 04-354591, Fax: (604) 420 9700.

FBI Brands Ltd/Les Marques FBI Ltée, 16 chemin Benoit, Mont St. Hilaire, Québec J3G 4S6, Tel: (514) 467 9341, Fax: (514) 467 4902.

Grantham Foods Ltd, Food Services Division, 1388 Cliveden Avenue, Annacis Business Park, New Westminster, British Columbia, V3M 6K2, Tel: (604) 521 1585, Fax: (604) 521 0223.

Holiday Jice Ltd, 1030 Walker Road, Windsor, Ontario N8Y 2N5, Tel: (519) 252 4471.

The International Beverage Corp., 1700-355 Burrard Street, Vancouver, British Columbia V6C 2G8, Tel: (604) 683 0312, Fax: (604) 683 2256.

J.B. Food Industries, Inc., 2115 South Service Road W., Oakville, Ontario L6L 5W2, Tel: (416) 827 8200, Telex: 06-982356.

Pride Beverages Ltd, 200-4082 McConnel Court, Burnaby, British Columbia V5A 3L8, Tel: (604) 420 5556, Fax: (604) 420 1733.

Rose & Laflamme Cie Ltée, 300, rue St. Jacques, La Prairie, Québec J5R 1G6, Tel: (514) 659 9151.

Silvan Natural Spring (1989) Limited, 3850-789 W. Pender, Vancouver, British Columbia

V6C 1H2, Tel: (604) 685 5459, Fax: (604) 685 5478.

Sun Dew Foods Ltd, P.O. Box 480, 200 Maple Street, Okanagan Falls, British Columbia V0H 1R0, Tel: (604) 497 8777, Fax: (604) 497 8988.

Sun Glow Food Service Limited, 102-12303 King George Highway, Surrey, British Columbia V3V 3K2, Tel: (604) 580 6811.

Sunny Orange, Division of McCain Foods Ltd, 55 Torlake Crescent, Toronto, Ontario M8Z 1B6, Tel: (416) 259 7851.

Sun-Rype Products Ltd, 1165 Ethel Street, Kelowna, British Columbia V1Y 2W8, Tel: (604) 860 7973, Fax: (604) 762 3611.

Sunsational Juice Ltd, 100 Cameron Street, Suite 201, Moncton, New Brunswick, B1C 8T6.

Sun Squeeze Juices Inc., 348 Woodlawn Road West, Guelph, Ontario N1H 7M4.

Trojan Foods Inc., 17902 Roan Place, Surrey, British Columbia V3S 5K1, Tel: (604) 574 3505, Fax: (604) 574 3855.

Canada - Major Users, Brokers, Supermarkets

Canada Safeway Ltd, 535 10th Avenue South West, P.O. Box 640, Calgary, Alberta T2R 0, Tel: (403) 294 6600, Fax: (403) 294 6694.

Dominion Stores Ltd (Head Office), P.O. Box 68, Station A, Toronto, Ontario N5W 1A6, Tel: (416) 239 7171, Fax: (416) 234 6581.

Empress Foods, 7280 Fraser Street, P.O. Box 8300, Vancouver, British Columbia V5X 3V9, Tel: (604) 324 3323, Telex: 04-51248, Fax: (604) 324 0094.

Great Atlantic & Pacific Co. of Canada Ltd, 5559 Dundas St., West 6, Toronto, Ontario M9B 1B9, Tel: (416) 239 7171, Fax: (416) 234 6581.

Knob Hill Farms Ltd, 1250 South Service Road, Dixie Value Mall, Mississauga, Ontario, Tel: (416) 278 2221, Fax: (416) 278 5366.

The Oshawa Group Ltd, 302 The East Mall, Toronto, Ontario, Tel: (416) 236 1971, Fax: (416) 236 2071.

Provigo Inc., 2600-800 Boul. René Lévesque Ouest, Montréal, Québec H3B 1Y2, Tel: (514) 878 8300, Fax: (514) 871 1607.

Steinberg's Limited, 5400 Hochelaga Street, Montréal, Québec, Tel: (514) 252 7668, Fax: (514) 252 7795.

11

Thomas, Large & Singer Ltd, 40 Emblem Court, Agincourt, Ontario M1S 1B1, Tel: (416) 291 9931, Telex: 065-25251, Fax: (416) 291 9096.

Canada - Essence/Aroma Manufacturers

Givaudan (Canada) Inc., 98 Walker Drive, Brampton, Ontario L6T 4H6, Tel: (416) 458 5888, Telex: 06-97736.

Haaman & Reimer, 1355 Aerowood Drive, Mississauga, Ontario L4W 1C2, Tel: (416) 625 6114.

Imperial Flavours Inc., Mississauga, Ontario, Tel: (416) 678 6680.

International Flavour and Fragrances, 7330 Keele Street, P.O. Box 7330, Concord, Ontario L4K 1B6. Tel: (416) 661 4111, Telex: 06-964522, Fax: (416) 738 9071.

Universal Flavours of Canada, 110 Vulcan St., Rexdale, Ontario M9W 1L2, Tel: (416) 245 6610, Fax: (416) 245 6379.

France - Brokers/Importers

Louis Dreyfus Citrus, 87 avenue de la Grande Armée 75782 Paris Cedex 16, Tel: (1) 4066 1333, Téléc: 611234, Fax: (1) 450 1 7136.

Abcie, 56 Boulevard de Reuilly, 75012 Paris, Tel: (1) 4344 6877, Téléc: 220 149 ALHAU F, Fax: (1) 4343 5744.

Couécou, Villa Aranoa, R.N. 10, 64200 Biarritz La Négresse, Tel: 5923 6950, Téléc: 560752, Fax: 5941 1282.

Eurotrade, 11 rue des Suisses, 92380 Garches, Tel: (1) 4759 0500, Téléc: 613062, Fax: (1) 4795 2464.

PIC, 26 rue Davioud, 75016 Paris, Tel: (1) 4525 9060, Téléc: 630314, Fax: (1) 4525 7714.

SIAS - MPA, 142 boulevard Haussmann, 75008 Paris, Tel: (1) 4076 7770, Téléc: 651728, Fax: (1) 4563 8807 (Importador/mezclador).

Tradimpex, J.M. Thiercelin SA, 11-13 rue G. Eiffel, Z.I. Saint-Nicolas, B.P. 23, 94510 La Queue en Brie, Tel: (1) 4593 0232, Téléc: 262210 CROCUS F, FAX: (1) 4593 0810.

Tropimco, 60 rue Laugier, 75017 Paris, Tel: (1) 4380 7769, Téléc: 642208, Fax: (1) 4380 2880.

France - Manufacturers/Canners/Bottlers of Fruit Juices

Bric Fruit, BP 34, 44690 La Haie Fouassière, Tel: 4003 8043, Téléx: 710947, Fax, 4003 8136.

Caraibos, 15 Place de la Nation, 75011 Paris, Tel: (1) 4348 3636, Téléx: 216628, Fax: (1) 4348 5600.

Cidou SA, BP 9, 67580 Mertzwiller, Tel: 8890 3183, Téléx: 880432, fax: 8890 1322.

Cidrerie Mignard, BP 1, Bellot, 77510 Rebais, Tel: 6404 8151, Téléx: 690335, Fax: 6465 9040.

H. Bouhy, 71800 La Clayette, Tel: 8528 0220, Téléx: 800261, Fax: 8528 0383.

J.F.A. Pampryl, 12 rue François Mignotte, BP 18, 21700 Nuits Saint Georges, Tel: 8061 0012, 8061 0356, 8061 0107, Téléx: 350096, Fax: 8062 3617.

Joker SA, 895 rue des Frères Lumière, Z.I. Sud, BP 508, 71009 Macon, Tel: 8534 9000, Téléx: 800819, Fax: 8529 2455.

La Fermière, Cidreries du Calvados, 11 rue Dosne 75116 Paris, Tel: 4553 3812, Téléx: 610007, Fax: 4755 6200.

Laiterie de Saint-Denis de l'Hôtel, BP 10, 45550 St Denis de l'Hôtel, Tel: 3859 0203, Téléx: 780914, Fax: 3859 1604.

Les Jus de Fruits Réunis, Z.I., 34440 Nissan Lez Enserune, Tel: 6737 0345, Téléx: 490880, Fax: 6737 1796.

Les Vergers de Savoie, Z.I. Les Afforêts, 74800 La Roche s/Foron, Tel: 50003 2146, Téléx: 309414, Fax: 50003 3857.

Maxime Delrue SA, 2 chemin des Marois, Zone Garosud, 94000 Creteil, Tel: (1) 4396 3232, Téléx: 262513, Fax: (1) 4893 8127.

REA, Les Vergers d'Alsace, Route de Sarrebourg, BP 103, 67260 Sarre Union, Tel: 8800 1204, Télé: 870951, Fax: 8800 2122.

SILL, Usine du Raden, 29212 Plouvien, Tel: 9840 9030, Téléx: 940545, Fax: 9840 0076.

Germany - Brokers/Importers

Klaus Böcker GmbH, Bahnhofstrasse 26, 2150 Buxtehude, Tel: (04161) 4012, Télex: 21 88 52 boeco d, Fax: (04161) 3536.

Bösch & Co. GmbH, Lippelstrasse 1, 2000 Hamburg 1, Tel: (040) 333 01 60, Fax: (040) 3352 60.

Brazilian Citrus Products GmbH, Georgsplatz 6, 2000 Hamburg 1, Tel: (040) 33 30 59 31, Télex: 2 163001, Fax: 040) 330418, (Cutrale).

Citrus Brazil Trading GmbH, Neuer Wall 63, 2000 Hamburg 36, Tel: (040) 36 34 73, Télex: 21 41 29 citro d, Fax: (040) 37 21 05, (Frutesp).

KG FIAS Übersee-Handels GmbH & Co., Alter Fischmarkt 11, 2000 Hamburg 11, Tel: (040) 323 21 10, Télex: 2 163 028 fias d, Fax: (040) 33 65 79 (Citrusuco).

Frutene Products Marketing, Bullskamp 38, 2000 Hamburg 72, Tel: (040) 645 22 27/28, Télex: 2 165 719 rmhh.

Hartwick & Kaden, Neuer Wall 73-75, 2000 Hamburg 36, Tel: (040) 36 30 61, Télex: 02 12 380, Fax: (040) 36 43 58.

Heinrich Harmsen GmbH, Am Hehsel 38, 2000 Hamburg 63, Tel: (040) 538 80 78, Télex: 216 40 07, Fax: (040) 538 42 19.

Jahncke Fruchtsäfte-Konzentrate GmbH & Co. KG, Asseler Strasse 90, 2168 Drochtersen, 2168 Drochtersen, Tel: (04148) 1011-15, Télex: 21 81 20 jafu, Fax: (04148) 5444.

Wfgang Jobmann GmbH & Co., Gudrunstrasse 73, 2000 Hamburg 56, Tel: (040) 81 80 94-97, Télex: 40 38 87, Fax: (040) 81 09 75.

Kienast & Co. GmbH, Colonadon 51, 2000 Hamburg 35, Tel: (040) 35 16 91, Télex: 21 26 12, Fax: (040) 35 16 91.

Kemna Trading GmbH, P.O. Box 1524, 2110 Buchholz, Tel: (04181) 6048, Télex: 218 97 38 ktra d, Fax: (04181) 33 441.

Nölting Gebrüder GmbH & Co., P.O. Box 1320 18, Alsterchaussee 9, 2000 Hamburg 13, Tel: (040) 44 14 31, Télex: 21 25 07 ngh d, Fax: (040) 45 08 27.

Pittrex Handelsgesellschaft mbH, P.O. Box 70 13 49, Wandsbeker Zollstr. 17, 2000 Hamburg 710, Tel: (040) 682 90 91, Télex: 216 52 46 lime d, Fax: (040) 682 90 94.

Rickertsen Import GmbH & Co. KG, Sachsenstrasse 8, 2000 Hamburg 1, Tel: (040) 2 37 17-241, Télex: 2 162 008 RIMP, Fax: (040) 2 37 17-207.

Standard Übersee Handels GmbH, Rothenbaumchaussee 3, 2000 Hamburgo 13, Tel: (040) 44 1041, Télex: 211 596, Fax: (040) 44 30 60.

United Breweries Handels GmbH, Malerecke 14, 7994 Langenargen, Tel: (07543) 2082, 2083, Télex: 73 48 06 mango d, Fax: 07543 2084.

Wilhelm Phillipp GmbH, Frauenbergstrasse 2, 8355 Hengersberg, Tel: (09901) 5780, Télex: 06 98 94 phil d.

Germany - Producers of Flavors, Essences, and Aromas

DEKA Düning & Krause GmbH, Hansestrasse 33, 3300 Braunschweig, Tel: (0531) 310 01-0, Fax: (0531) 310 01 25.

Döhler GmbH, Riedstrasse 7-9, 6100 Darmstadt, Tel: (06151) 3 06-0, Télex: 4 19 545, Fax: (06151) 3 06-2 78.

Franz Zentis GmbH & Co., Jülicher Strasse 125/157, 5100 Aachen, Tel: (0241) 47 60-1, Télex: 8 32 796, Fax: (0241) 4 76 03 69.

International Flavors & Fragrances IFF (Deutschland) GmbH, Reeser Strasse 60, 4240 Emmerich, Tel: (02822) 40 21, Télex: 8 125 101, Fax: (02822) 40 56.

Rudolf Wild GmbH & Co. KG, Rudolf-Wild-Strasse 4-6, 6904 Eppelheim-Heidelberg, Tel: (06221) 799-0, Télex: 46 17 20, Fax: (06221) 799-398.

Sundi GmbH, Beim Struckenberge 4-6, 2800 Bremen 21, Tel: 90421) 649 01-0, Télex: 2 44 114], Fax: (040) 722 94 42.

Germany - Manufacturers\Bottlers of Juices, Nectars, etc.

Anton Riemerschmid, Justus-bon-Liebig-Str. 2-14, 8058 Erding, Tel: (08122) 411-230, Télex: 5 270 427, Fax: (08122) 411-599.

Deutsche Granini GmbH & Co. KG, Kammerratsheide 3, 4800 Bielfeld 1, Tel: (0521) 78 40, Télex: 9 32 340, Fax: (0521) 78 43 55.

Junita Fruchtsaft Marketing GmbH, Darmstädter Str. 29, 6080 Gross-Gerau, Tel: (06152) 4 09 29, 4 09 51, Télex: 4 191 166 juta d, Fax: (06152) 8 12 32. (This marketing group consists of several plants in Germany.)

Krings Fruchtsaft AG, Am Hasenhess 1, 4050 Mönchengladbach 4, Tel: (02166) 5 54-0, Télex: 8 52 419 krin d, Fax: (02166) 5 14 13.

Lindavia Fruchtsaft AG, Kellereiweg 6-22, 8990 Lindau, Tel: (08382) 27 71-0, Télex: 5 4 363 lidava d, Fax: (08382) 2 26 01.

Nordgetränke GmbH & Co., Hörgensweg 6, 2000 Hamburgo 54, Tel: (040) 57 00 03-0,
Telex: 2 15 028, Fax: (040) 570 38 71.

Peter Eckes GmbH KG, Ludwig-Eckes-Alée 6, 6501 Nieder-Olm, Tel: (06136) 35-0, Télex:
4 187 221, Fax: (06136) 3 54 00.

Riha-WeserGold Getränkeindustrie, GmbH & Co. KG, Auf der Behrm 3-5, 3260 Rinteln 3
(Exten), Tel: (05751) 4 04-0, Télex: 9 71 891, Fax: (05751) 4 04 69.

Rolf H. Dittmeyer GmbH, Sulzbacher Strasse 40, 6231 Schwalbach am Taunus, Tel:
(06196) 89 44 86, Télex 4 072 526, Fax: (06196) 8 28 08.

Stute Nahrungsmittelwerke GmbH & Co. KG, Abtsbrede 129, 4790 Paderborn, Tel:
(05251) 7 05-0, Télex: 9 36 863.

Vainhinger Fruchtsäfte, Hauptstrasse 26, 7000 Stuttgart 80, Tel: (0711) 73 70-280,
Télex: 7 255 525, Fax: (0711) 73 70 400.

Germany - Retailers and Wholesalers

Aldi Einkauf GmbH & Co. KG, P.O. Box 01 01 40, 4330 Mülheim a.d.R., Tel: (0208)
4 09 91, Télex: 8 5 57 13, Fax: (0208) 409 93 21.

Edeka Produktions und Handelsgesellschaft GmbH & Co., New York Ring 6, 2000
Hamburgo 60, Tel: (040) 73 77 0, Télex: 2 19 53 311, Fax: (040) 63 77 22 31.

Rewe Zentrale AG, Domstrasse 20, 5000 Cologne 1, Tel: (0221) 16 55-1, Télex:
8 88 52 06, Fax: (0221) 16 55 555.

Tengelmann Group, Wissollstrasse 5-43, 4330 Mulheim-Ruhr, Tel: (0208) 580 63 35.

Glenmore Distilleries Inc., Louisville, KY (502) 589-0130.

Pat Schnitzus, Bartush-Schnitzus, Dallas, TX (214) 241-4431.

Manufacturers: Flavors and Essences

John Duss, Givanda Corporation, Clifton, NJ (201) 365-8140.

Imperial Flavors Inc., Winterhaven, FL (813) 294-3591.

Kohnstamm, V & E Inc., Brooklyn, NY (718) 788-6320.

Universal Flavor Company, Indianapolis, IN (317) 243-3521.

28

Manufacturers: Jams and Jellies

Octavia Randolph, Oulie Ltd., Waltham MA (617) 290-5888.

Source: Vilece/Chemonics 1991.

23