PN-ABR-605

ISA 28...

KENYA EXPORT DEVELOPMENT SUPPORT

NETHERLANDS MARKET SURVEY

FOR

SELECTED KENYAN FRESH

AND PROCESSED PRODUCE

Development Alternatives, Inc.
USAID Contract No. 623-0249-C-00-2021-00
KEDS Project P.O. Box 40312 Nairobi, Kenya

PN-ABR-605

Netherlands Market Survey

for

Select Kenyan Fresh and Processed Produce

Prepared by
David Jones
Fintrac Inc.

USAID Contract No. 623-0249-C-00-2021-00

This publication was prepared under the auspices of KEDS, which is the USAID-funded Kenya Export Development Support Project. Technical assistance is being provided by Development Alternatives, Inc. in association with The Services Group, Deloitte Haskins Sells, and Fintrac Inc.

TABLE OF CONTENTS

OVERVIEW

Market Opportunities for Kenyan Exporters

The table below gives a brief overview of Netherlands market prospects for selected Kenyan products. Products are rated on the following scale:

5 Excellent/Good market prospect, high volume potential
4 Excellent/Good market prospect, low volume potential (niche)
3 Fair market prospect, high volume potential
2 Fair market prospect, low volume potential (niche)
1 Poor market prospect
0 No market prospects exist

Those marked with an asterisk ("*") signify that additional market research is needed before any further steps such as trial shipments can be recommended.

Product	Rating	Notes
Asparagus	1	Predominantly white, some green but only window from Nov-Dec; very difficult.
Avocados	2	Existing growth market for Kenya; intense competition from Israel and R.S.A.
Beans	4	Good growth re-export market; Kenya associated with "fine beans"; strong competition from Egypt and other European countries.
Chilies	1*	Italy predominant. Zambia has had some success with dried hot chili. Very small market, however. More research possibly warranted.
Mangetout	2*	Small market but experience of Zambia and Zimbabwe indicative of potential. More research needed.
Mangoes	2	Small existing market for Kenya but expansion will always be limited by the preference for red-blush varieties.
Okra	1	Product hardly known but very small market does exist. More competition from Mediterranean countries.
Cherry Tomatoes	2	Intense competition: best prepacked. Market for Kenyan produce could be expanded; need for broad range of high value produce.

Product	Rating	Notes
Strawberries	2	Large but risky market; only chance from November to February but intense competition from Israel and Colombia. Spain dominates import market.
Juices	4	Major European market for exotics e.g. passion fruit, pineapple and mango concentrates/purees. Strict adherence to standards essential.
Canned and Frozen Produce	2	Some prospects for mixed range of exotics; must include pineapple and fruit cocktail. Small demand for Individual Quick Frozen (IQF); again a mixed range is important. Small markets for frozen vegetables.
Dried Fruit	1	Small market for sugared product from the Far East.

SECTION I: ASPARAGUS

Ranking Overview

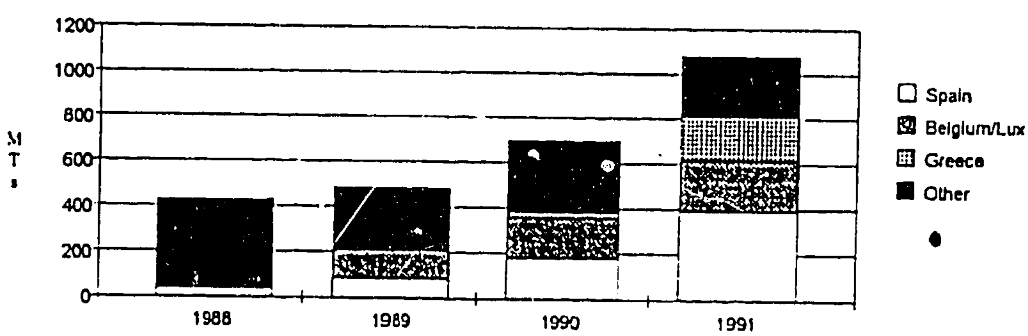
Product	Ranking	Notes
Asparagus	1	Predominantly white, some green but only window from Nov-Dec; very difficult.

Domestic Production

The Netherlands is one of the most important growers and exporters of white asparagus in Europe and only has certain specific windows for imported product. Indeed, in 1991, of the 48,800 tons imported into the 12 EC countries, the Netherlands was the third largest supplier after Spain and Greece.

Imports

Netherlands Asparagus Imports, 1988-1991, MTs



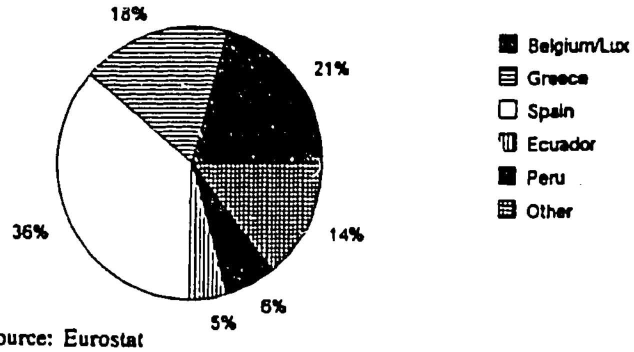
Source: Eurostat

In 1991, the Netherlands imported just over 1,000 tons of asparagus, which continued the significant increase on earlier years which seemed to appear during 1990, with, for example, only 430 tons imported in 1988 and 488 tons in 1989. Of total imports of 1,084 tons in 1991, intra-EC sources supplied 884 tons or 81.6% of total imports.

Market Share

The major supplier to the Netherlands market in 1991 was Spain, with 391 tons, followed by Greece, with 195 tons. There were no other real suppliers of note, although Peru did supply 68 tons and Ecuador, 50 tons. There were few, if any, imports from Africa, except for 2 tons from Zambia and 2 tons from South Africa. The same situation prevailed in 1990, with, once again, Spain being the major supplier, followed by Greece and Belgium/Luxembourg. Peru and Chile also supplied some quantities.

Netherlands Import Market Share - Fresh Asparagus, 1991



Source: Eurostat

Consumer Preferences

The Netherlands market for asparagus is almost exclusively for the white variety, although some green product is also gaining ground in the market as a gourmet item for the specialist restaurant trade or for re-export. (At present, green asparagus appears to be around 20% of the market, although much of it is re-exported to other European countries, Scandinavia and even the UK.) Essentially, the varieties are similar to those imported into Germany, of which the most notable are "University of California" (UC) 157, F1 and F2 UC 157, UC 72, "Mary Washington" and improved types such as "Mary Washington 500 W", "Lucullus", Argenteuil, UC800, Balenco Aleman, Franklin, Rutgars Beacon and Boomlin.

Asparagus spears are classified into three groups according to color - white, violet (with tips and part of the shoot colored between pink and purple), and green, when the tips and part or all of the stem are green in color.

Spear tips must be closed, undamaged and with a straight stem. Consumers in the Netherlands expect white asparagus to be soft whereas green varieties can be somewhat more crisp to the bite. Asparagus must not be stringy, or in any way woody in texture.

Seasonal Patterns of Demand

Domestic supplies of the product are available from May through July. Spain, the major supplier, starts in the market in March/April and continues through until June. Greece, which has emerged as a significant supplier in the last few years, usually enters the market in April, along with France and Belgium/Luxembourg. During the period from March through July/August, product is distributed both into and throughout the country by truck and prices fall significantly. Ecuador, Peru, Guatemala and Mexico air-freight their product during the winter months and have carved out a comfortable position for themselves in the market. Asparagus from California usually arrives in February/March, although quantities are relatively small.

Prices

As a rule, winter prices can be almost double those existing in summer,. when the enormous quantities of local and neighboring countries' product arrives on the Netherlands market. Price differences can be as large as 50%, with even higher levels pertaining during the special periods around Christmas and the New Year. On average, prices are between 4 and 7 Dutch Guilders per kilo on wholesale markets during good market conditions, although they can fluctuate significantly.

Market Distribution

The distribution system for imported air-freighted asparagus in the Netherlands is similar to that for most imported fresh fruit and vegetables, *viz* through established importers in the main market centers. Most importers will be interested in small quantities of good quality green asparagus from distant sources in winter months, especially if the supplier could offer a range of high value specialty items such as mangetout, baby corn, cherry tomatoes, etc.

Names and addresses of importers are contained in Appendix B.

Grades and Standards

Asparagus grades are defined by EEC regulation No. 183/64, the last amendment being 1677/88 of June 1988. Quality standards have also been issued by UN/ECE:No.FFV-04 and by the OCED:No.19.

Subject to special provisions for each class and the tolerances allowed, the asparagus must be whole, fresh in appearance, fresh smelling, sound, free from damage by rodents or insects, practically unbruised, free of earth or any other dirt, and free from excess external moisture. Washed asparagus must be adequately dried, free from foreign smell or taste, cut at the base as clean and as square as possible. They must also be able to withstand transport and handling and arrive in satisfactory condition.

The contents of each packet should be uniform in terms of origin, quality, color and size. The shoots must not be hollow, split, peeled or broken and the product should not have been treated to any preservatives or restoratives.

There are three classes: "Extra" Class, Class 1 and Class 2. The "Extra" Class asparagus spears must be of superior quality, well formed and practically straight. The spears should have compact tips. A trace of rust is allowed provided it can be easily removed by peeling. "White" asparagus tips must be white, with only a faint tint of pink allowed, provided it appeared after cutting.

To improve presentation of bundled asparagus, outside spears can be bevelled up to a height of 1cm. Length of the spears in this class must be: 17cm to 22cm for long asparagus and 12 -

17cm for short asparagus. Sizes under 12cm are called asparagus tips.

The diameter of a spear is measured at its mid point, with "Extra" class having a diameter of between 12 - 16mm. Spears of 16mm must not have a diameter variation of over 8mm in each bundle.

Tolerances in terms of quality are that no more than 5% of the spears should fall short of "Extra" Class quality and then not below Class 1 standards.

The other two classes, Class 1 and Class 2 are similar to the above, except with greater tolerances in all aspects.

Asparagus is usually packed in bundles or in trays which are over wrapped with micro perforated PVC film. The normal form of packaging is in 8 x 500gm cartons, although the product is also accepted loose in 5 and 6 kilo trays. 6 kilo bulk packed asparagus requires about 15 liters of internal volume, but when packed in 500 units the internal space required is 14 liters for 4 kilos.

Winter asparagus coming from distant sources should be packed in 500g or 1 kg bundles. 1kg bundles are only accepted after April when prices reduce as a result of increased supplies. Before that, the product should be packed in 500g bundles, otherwise importers will have to re-pack at increased cost. Crates should contain 8-10 bundles or trays.

The Netherlands will, however, at all times, accept packing loose in 5kg boxes, although this is unadvisable for any distant trader to base his business on, given the possibility for the importer to claim large wastage rates during re-packing. It is always difficult to disprove this without incurring extra costs of inspection.

Import Regulations and Duties

Asparagus falls under tariff number 07092000 and attracts a rate of 7.2% during the first fifteen days of January, but averaging at 9.6% during the period from September to the beginning of March. Between March and September, the rate increases to 16% in order to protect domestic European supplies.

Market Opportunities for Kenyan Exporters

The Netherlands market for asparagus is mainly for the white variety, although some green product is also gaining ground for re-export and for the restaurant trade. Although not large, however, the Netherlands market for asparagus is an active one and growth has been marked during the last two years. There are distinct windows for imported product and the ideal period is in the early months of the year, preferably January, February and early March. December is also a good month. After March, Spanish supplies become available and prices fall. This process is further exaggerated when domestic and neighboring countries' supplies come on to the market and it becomes relatively saturated. Furthermore, Dutch growers indulge in heavy promotion of asparagus, both within their own country and others and it does have a strong market position.

It is no doubt an extremely difficult market for Kenya to break into and perhaps it would be easier to concentrate any efforts on the UK market if other factors justified this. Suffice it to say, however, that the market does have windows, is being developed by some distant sources, notably South and Central America, and does offer scope for re-exports to other markets. The prospects for green asparagus are also improving and an eye should therefore be kept on the situation with a view to further investigation.

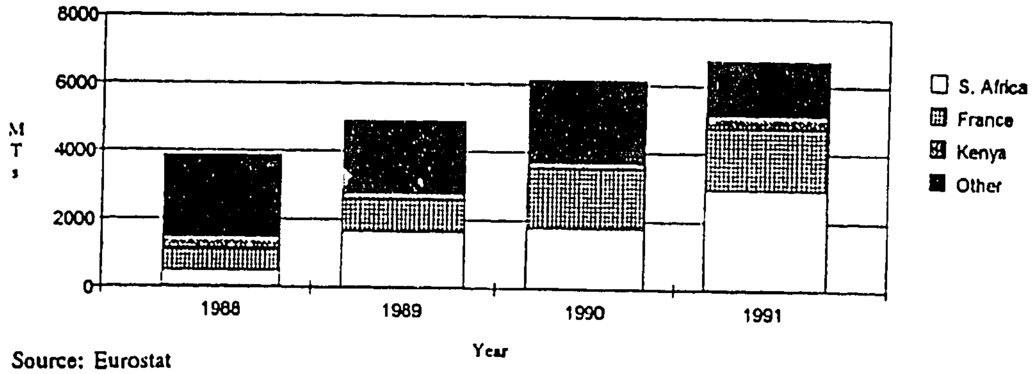
SECTION II: AVOCADOS

Ranking Overview

Product	Ranking	Notes
Avocados	2	Existing growth market for Kenya; intense competition from Israel and R.S.A.

Imports

Netherlands Avocado Imports, 1988-1991, MTs



Source: Eurostat

In 1991 the Netherlands imported 6,754 tons, which represented a small, but steady increase on the total of just over 6,000 tons for 1990. Both years were, however, significantly higher than the total imports for 1988, which stood at 3,864 tons. It can be said, therefore, that the import market for avocados in the Netherlands has almost doubled in the last four years.

Market Share

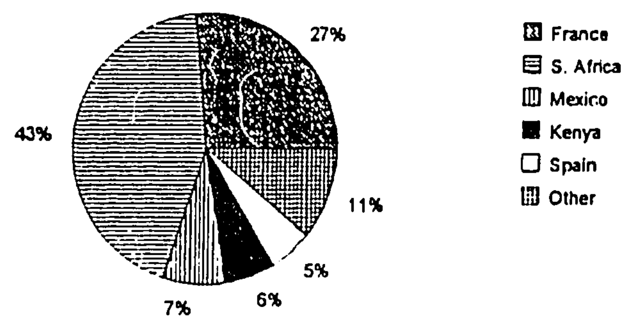
The market has been traditionally supplied by South Africa and Israel, although Kenya, the USA and Mexico have also featured as suppliers. In 1990 and 1991, however, Israel practically disappeared from the scene because of climatic problems and the vacuum was filled by France, South Africa, Belgium/Luxembourg and, to a lesser extent, Mexico. It can be seen, however, that imports of avocados into France in 1990 and 1991 were around 70,000 - 80,000 tons, of which it can be safely argued that a good percentage was re-exported. In 1988, for example, total French imports amounted to only 50,000 tons.

The above, however, provides a clear example of how market opportunities emerge, as traditional suppliers, for one reason or another, fail to supply the market. In this instance, France was opportunist and channelled large quantities of avocados into the Netherlands and into Germany. Interestingly also, the Dutch being ever opportunist, also re-directed avocados into

Germany, which could even have come via France!

Total imports from Kenya in 1991 amounted to just over 400 tons, with by far the greatest proportion of Kenya's exports in that year finding their way to France. The 420 tons imported into the Netherlands from Kenya in 1991 compares with a total of 200 tons in 1990 and a similar amount in 1989. It is obvious therefore that all countries were attempting to fill the gap created by the reduction in Israeli supplies.

Netherlands Import Market Share - Fresh/Dried Avocado, 1991



Source: Eurostat

Consumer Preferences

The Netherlands accepts both green varieties such as "Fuerte", "Ettinger" and "Nabal", as well as the dark, crumpled "Hass" variety, although the latter is more acceptable in the UK.

The fruit should essentially be pear shaped, green, with no marks on the skin and without a stalk if possible. The internal characteristics of the fruit are that it should not be too unripe and there should be no bruising. A smooth, creamy taste is required with little, if any, fiber texture. The taste should have no bitterness.

As regards sizes, the market's optimum dimensions are between 260-360 grams - counts of 12-14 in a box. Fruit within the range 10-16 are also acceptable. The most popular sizes are 270-330 grams. UN/ECE standards stipulate that the minimum weight should not be less than 125 grams and buyers prefer weights to be guaranteed over the minimum.

Seasonal Patterns of Demand

Israel, which used to be the major supplier, usually puts its product into the market in mid-September and supplies consistently through the winter period up until mid-March. South African supplies are normally available from early April through until September and the same tends to apply for Kenyan mangoes as and when they are directed to the Netherlands market. Spain and the USA are in the market mainly in the winter months, from October through until January/February.

There are no obvious gaps in the flow of avocados to the market, although disturbances to supplies from traditional country suppliers can create opportunities for new or opportunistic suppliers. Under normal conditions, however, market opportunities are relatively few.

Prices

Compared with France and the UK, the Netherlands is a moderate consumer of avocados and the product is not as appreciated as it is in the other two countries. As a result, prices do not reflect its esteem as a gourmet item and re-export is very much in evidence.

The Israeli Marketing Board, "Agrexco", which has an office in the Netherlands, is expending considerable funds on a campaign of promotion and education for Dutch consumers and this is having some effect in creating a specific demand for the "Carmel" label avocado.

On average, prices are moderate and are around a level of 5 Dutch Guilders per kilo in wholesale markets. The lowest prices prevail in the January and February period because it is at that time that the major suppliers to the market are in season.

A further depressing influence on prices is the fact that avocados are increasingly being transported around the world by ship and it is therefore increasingly difficult for countries to get acceptable prices for air-freighted produce. It would be necessary to create some special niche for the variety or the country image and it does not seem that the potential size of the trade would justify the necessary expenditure.

Market Distribution

Market distribution of imported avocados in general in the Netherlands is done by the same importers that handle most produce coming into the country from relatively distant sources. *(See Appendix B)*. Contact with any of the major ones based in Amsterdam, Rotterdam, or Delft would be sufficient to gain in-roads into the market.

Israel and South Africa have their own marketing systems based either on marketing boards and/or systems of import panelists. Both countries spend significant amounts of money on promoting their particular branded avocados.

Grades and Standards

The standards for avocado are set under UN/ECE No. FFV-42. EC minimum requirements are that the fruit must be:

- Whole, intact
- Sound: rotting and deteriorating produce which is unfit for consumption must be excluded
- Clean and practically free of foreign matter

- Maximum stalk length of 10mm, absent stalk acceptable
- Free of abnormal external moisture
- Free of foreign smell or taste and the ripe fruit free of bitterness
- Free of damage due to low temperature
- Sufficiently mature so that ripening process can be completed
- In packages that are uniform in terms of origin, variety, quality and size

Avocados, like many other fruit under EC standards are classed into "Extra" Class, Class 1 and Class 2.

"Extra" Class avocados must be of best quality, typical in shape and coloring of the variety. Skin must be blemish free, except for the most superficial of marks, and if there is any stalk present it must be intact. Tolerances are only 5% short of "Extra" Class quality standards and not below Class 1 Standards.

Class 1 avocados must be of good quality and typical in terms of shape and coloring of the variety. Some slight defects are allowed as long as the fruit is generally "typical", keeping quality and presentation. No more than 10% of the fruit should fall below Class 1 standards and then not below Class 2 standards.

Packaging is normally in the form of a single layer fiberboard box of around 4 kilo net weight, with an approximate size of 300mm x 390mm x 88mm. Fresh air ventilation is important and boxes should have ventilation holes. Fully lidded boxes are best to give strength and rigidity. Dividers may be used but are not a necessity.

The labelling on each package must be clearly legible and visible, and should state:

- Identification, name and address of packer or dispatcher
- Produce, avocados and variety name
- Country of origin
- Commercial specifications, class, net weight, size in maximum and minimum weight, code number of size scale and number of fruits, if different from reference number.

Although this is not legally insisted on by the EEC it is strongly recommended that this information is included in the labelling. Other useful information which would assist with marketing would be:

- "This Side Up" symbol
- "Fragile" symbol

- Temperature symbol with indication of correct storage temperature for fruit, i.e. maximum 8°C, minimum 5°C
- Date of packing, often in code
- Tare weight in kilograms with maximum deviation in percentage
- Identity of grower

Import Regulations and Duties

Avocados fall under tariff number 080440100100 (December 1st to May 31st) and 08044090010 (June 1st to November 30th). Products from ACP countries pay zero duty during both calendar periods. Israel pays 0.8% duty from December to May and 1.6% duty from June to November. The full rate of duty is 4% in the first calendar period and 8% in the second.

Market Opportunities for Kenyan Exporters

The European market for avocados is relatively familiar to Kenya, it having exported almost 4,000 tons in 1991. Most of this went to France, however, and only just over 420 tons went to the Netherlands. As mentioned above, it is possible that some Kenyan avocados that went to France found their way back into the Netherlands, and even on to Germany.

The Netherlands market has been growing steadily over the last few years, increasing from some 6,200 tons in 1990 to over 6,700 tons in 1991. The feeling in the trade, however, is that a level of between 6,000 - 7,000 tons is a reasonably true reflection of what the market will bear for the short-term future. It is also felt that market expansion, if it occurs, will be as a result of active promotion by Israel and South Africa, but that the ensuing demand may well be directed at the particular brand images created by these two countries. An eye should be kept on relative prices in the different countries, however, so that even if most Kenyan avocados are landed at Marseille port, they could be re-directed throughout Europe according to price differentials. To do this would involve having an efficient communication system and a good Euro-wide distribution system, as is the case with Agrexco.

SECTION III: GREEN BEANS

Ranking Overview

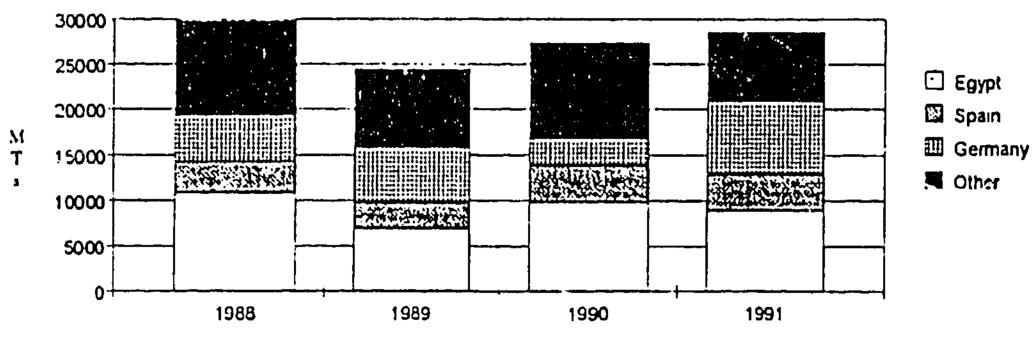
Product	Ranking	Notes
Beans	4	Good growth re-export market; Kenya associated with "fine beans"; strong competition from Egypt and other European countries.

Domestic Production

The Netherlands is a very important producer of beans and is the major supplier to other European markets in the months from 1st July to 30th September. In 1991, for example, the Netherlands' exports to the rest of Europe during the summer months amounted to 11,808 tons, exceeding its imports during that period by 1,800 tons. During the rest of the year, however, from October to 30th June, the Netherlands is a net importer of beans, only exporting 4,500 tons and importing 18,600 tons.

Imports

Netherlands Fresh Bean Imports, 1988-1991, MTs



Source: Eurostat

Official European statistics do not distinguish the different varieties of beans. It is therefore impossible to identify imports of fine beans separately.

In 1991 total imports of beans into the Netherlands amounted to 28,617 tons, which, although an increase over the 27,000 tons imported in 1990, was still below the levels reached in earlier years. In 1987, for example, total imports of beans amounted to 29,500 tons.

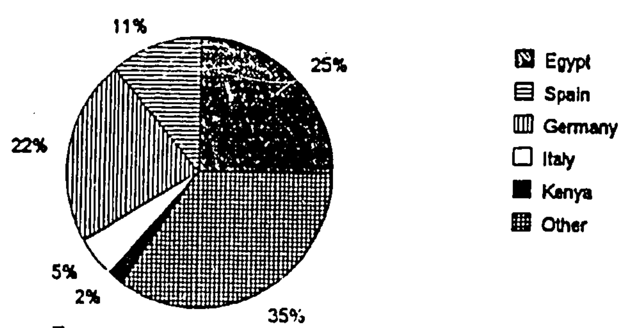
Market Share

The major supplier of beans to the Netherlands during the "off-season" in 1991 was Egypt, with 8,908 tons. These would have been fine and bobby beans. The other major supplier during this time was Spain, with 3,756 tons, probably made up of "Helda" (flat) beans, fine beans, bobby beans and runner beans. African suppliers of significance in 1991, apart from Egypt, were Kenya (630 tons), Senegal (575 tons), Ethiopia (521 tons), Surinam (200 tons) and Niger (170 tons). It can be seen from the Eurostat table that there were many suppliers, although the position of Egypt is predominant.

During the summer period from 1st July to 30th September, the bean trade is dominated by domestic supplies and imports from Germany and neighboring countries. Some imports of fine beans come in from Kenya (110 tons), but Egyptian supplies are practically non-existent.

In total in 1991, Kenya supplied 741 tons to the Netherlands. This represents a steady growth in Kenya's position in the market, commencing from a total of 400 tons in 1987, 435 tons in 1988, 301 tons in 1989 and 579 tons in 1990. Egypt, on the other hand, has seen a gradual reduction in the size of its market, from 12,500 tons in 1987 to 10,800 tons in 1988, to 7,000 tons in 1989 and increasing to 9,800 tons in 1990. The market stabilized somewhat between 1990 and 1991, with Egypt maintaining its supplies at a level of just below 9,000 tons in 1991.

Netherlands Import Market Share - Fresh/Chilled Beans, 1991



Source: Eurostat

Consumer Preferences

It is the Dutch slicing bean that is most popular in the Netherlands. Stringless bobby beans are also consumed throughout the country. The "fine" and "very fine" beans supplied by Egypt and Kenya are popular, notably in supermarkets.

In any one bunch, produce must be straight, uniform in color and overall dimensions, particularly length.

Seasonal Patterns of Demand

The largest off-season supplier of beans to the Netherlands continues to be Egypt, supplying almost 9,000 tons between October and June 1991. Egyptian beans arrive mainly between November and January. After this period, overall supplies drop, although Senegal, Ethiopia and Kenya have all increased their supplies to the market in recent years. Kenya continues its supplies into the summer months as, to a far lesser extent, does Egypt. Some product from Thailand is also seen on the market during the summer.

Market Distribution

Fine beans are imported into the Netherlands by the established importers. Some specialist packers and distributors bring in pre-packed beans for distribution specifically to supermarkets. A high percentage of beans is also re-exported by these importers. *(See Appendix B.)*

Grades and Standards

The EEC have a common quality standard for beans applied to the varieties "color vulgaris L" and "color coccineus L". The standard is EEC Regulation No. 58-62 - the most recent amendment number 920/89 being in April 1989. Minimum EC requirements are that the vegetables must be whole, intact, free from soil, pest and disease and without mechanical crushing and bruising. They must be free from break-down discoloration, yellowing, scorch and coarse string. They must not be withered from water loss. They must be free from foreign smell or taste, free from all abnormal external moisture, able to withstand transportation and uniform in terms of origin, variety, quality and length.

Produce should be rapidly cooled to remove field heat prior to packing and held at 5-8°C in store. It should be despatched as soon as possible for sale to avoid deterioration and delivered to depot at between 4°C and 10°C.

All varieties should be true to type and packed in lengths fitting comfortably within the specified pack without crushing or bending.

Kenya fine beans with cylindrical pods should be 12-13cm in length and less than 6mm in diameter. In any one batch, produce must be straight, uniform in color and overall dimensions, particularly length.

The EC standard divides beans into two groups, viz fine beans (needle beans) and "other beans", e.g. Bobby beans. Fine beans are graded into three classes, "Extra" Class, Class 1 and Class 2, while other beans are graded into two classes, Class 1 and Class 2.

"Extra" Class needle beans must be of superlative quality and of the shape, size and color characteristic of the variety. They must be classified as "very fine" or "extra fine", with a maximum pod width of 6mm. Quality tolerances are that no more than 5% of the beans can fall short of the class.

Class 1 needle beans must be of good quality, but slight defects are allowed. Beans can be graded into two sizes, very fine and fine, with a maximum width of 9mm. Quality tolerances are that no more than 10% of the beans can fall short of Class 1 standards.

For other beans, such as Bobby beans, Class 1 must of good quality and must have the shape, size and coloring characteristic of the variety. They must be easily broken by hand, young and tender, and stringless, except in the case of slicing beans. The seeds should be small and tender for the variety concerned and the pods must be closed.

Beans enter the Netherlands market packed either in cartons of net weights 5kg and 2.7kg or pre-packed in 250g and 500g consumer containers.

The labelling must be legible and indelibly marked on the outside of the package. Both packer and dispatcher should be identified, either by name and address or code mark. The nature of the produce included in the package should be identified, i.e. whether or not they are fine beans, with size classes Very Fine, Fine, and Average. Other beans should be labelled either Green Beans or Bobby Beans. The country of origin, the commercial specifications, the class, the net weight in kilos should also be placed on the package.

It is also advisable that the following information is provided on the labels, since it assists in marketing:

- "This Side Up" symbol
- "Fragile" symbol
- Temperature symbol, with indication of correct storage temperature
- Date of packing, tare weight in kilos, with maximum deviation percentage, and identify of grower.

Market Opportunities for Kenyan Exporters

Although the Netherlands market for fine beans has been growing, consumption within the Netherlands itself is still relatively small. A high percentage is re-exported to other countries. The Dutch themselves prefer the flat slicing beans and the bobby beans which are grown extensively within the country. Also, a great percentage of the beans imported from neighboring countries find their way into various forms of processing, including canning and freezing.

It is a steady market for beans from Kenya and one which should be continued, especially given the fact that it gives access, through re-export, to other markets. Kenya has been steadily expanding its exports to the Netherlands for the last five years and given the increasing efficiency in the re-export of products by the Dutch, there is no reason why this should not continue. It is less likely that any growth in the market would be due to a sudden expansion in domestic sales of the product within the Netherlands itself.

Kenya has established itself as the supplier of fine and very fine beans and should continue to consolidate this position.

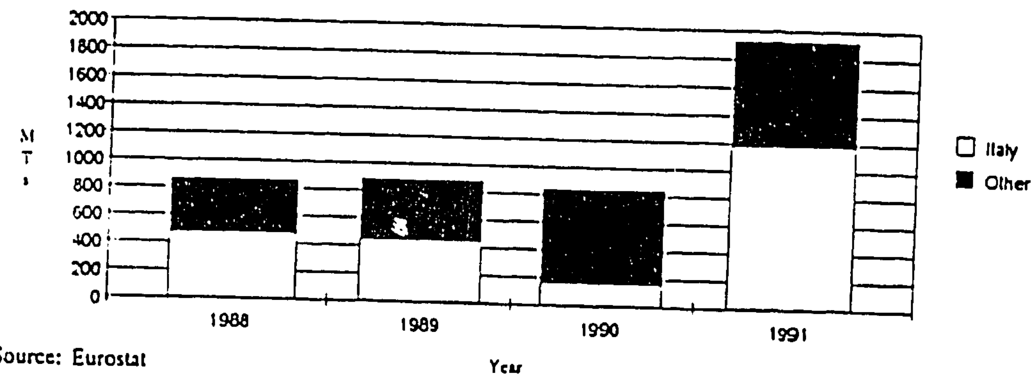
SECTION IV: CHILIES

Ranking Overview

Product	Ranking	Notes
Chilies	1*	Italy predominant; Zambia has some success; very small market; further research may be warranted.*

Imports

Netherlands Fresh Pepper Imports, 1988-1991, MTs



Source: Eurostat

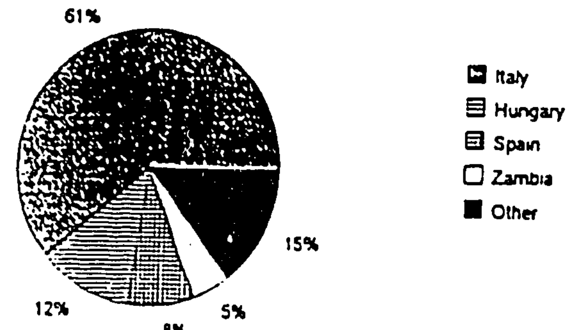
In 1991, total Dutch imports of chilies (capsicum/piment) amounted to 1,922 tons. This compares with total imports of 863 tons in 1988, 884 tons in 1989 and 842 tons in 1990. As can be seen therefore, the market for chilies in the Netherlands during 1991 was particularly active, more than doubling in size over the average levels for the previous three years.

Market Share

In 1990, the major supplier of chilies to the Netherlands was Italy, with 160 tons, followed by Spain with 90 tons. In 1991, Italy once again predominated with 1,177 tons or 61% of total imports. Spain supplied 160 tons and Hungary (paprika) supplied 223 tons. Out of the total imports in 1991 of 1,922 tons, European countries supplied 75%.

In 1991, chilies and hot peppers were imported into the Netherlands from 32 different countries. Apart from EEC countries, the only other suppliers of note were Zambia with 86 tons and Surinam with 75 tons. There were no recorded imports from Kenya. Other African suppliers were Ethiopia, Zimbabwe, Morocco, Senegal, Gambia, Togo, Burundi, and South Africa, but quantities were practically insignificant.

Netherlands Import Market Share - Fresh/Chilled Peppers, 1991



Source: Eurostat

Consumer Preferences

Although the Dutch prefer the "Westlandia" type of chili, which is grown in the Netherlands itself, attempts at propagating it have not proved too successful in tropical countries. Most imports are of the "long thin" ("Fresno" and "Jellapino"), "Hot Bonnet" (also called "Lantern"), and "short" (also called "piment") chilies. The trade with Zambia is mainly in Hot Bonnet and "Birdseye" chilies. From Thailand, Indonesia and Surinam, a small green chili, similar to the Birdseye chili and called the "Tjabeh Rawit" is imported. This is normally between 1cm and 3cm in length.

All should have stalk attached, be straight for long chilies, with pointed end and a regular appearance. Color should be green for "long thin" and "short", red and green for "Birdseye" and red, green or orange for "Lantern". The skin must be firm, not withered, and shiny. The taste and texture should be hot and juicy according to variety.

Seasonal Patterns of Demand

Italy, the main supplier, is in the market from August through October, with most supplies coming in September. Spain supplies product in most months except in high summer, but its main supplies arrive in December, January and February. Dutch supplies are mainly on the market in summer months, as are those of Belgium/Luxembourg. For countries outside the EEC, Turkey supplies in November/December, Hungary (paprika) in October, and Zambia between February and May. Surinam, the only other supplier of any note, has produce available from January through May, the same period as smaller quantities are coming in from Thailand.

Looking at total imports on a monthly basis, one can see that the major months of supply are September/October and the lowest months June and July. The period from January through May is relatively steady at between 300 tons and 500 tons per month. The only other month of relatively low supplies is November, which usually averages between 100-150 tons.

Prices

Since there is such a wide range of varieties of chilies coming into the Netherlands, it is practically impossible to get average indicative prices. This would have to be achieved through detailed field research.

Market Distribution

Imported chilies are handled by most fresh fruit and vegetable importers in the main markets of the Netherlands, although those importers specializing in tropical produce tend to be the ones bringing in the product from distant sources. These importers are located in Amsterdam, Rotterdam and Delft. *(See Appendix B.)* Most chilies find their way from these importers onto wholesale markets, and direct, perhaps re-packed, to supermarkets. A significant percentage is also re-exported to other EC countries, Scandinavia, the Middle East and other more distant countries.

Grades and Standards

No international standards are presently in force for chilies, but it is advisable that packaging be labelled by origin, variety, color, weight, date of packing and the usual convenience symbols, e.g. temperature, fragility and "side up".

Packaging should be in boxes of between 2kg-5kg. Importers also accept baskets of 12.5kg which are subsequently broken up into smaller lots by wholesalers. Tissue paper may be used to fill the carton and improve presentation.

The chilies are usually jumble packed (loose within the cartons), although some degree of pre-packing or re-packing is organized for supermarket chains.

Import Regulations and Duties

Chilies are classified under tariff numbers 07096099 and ACP countries have duty-free access to EEC countries. This compares with a full tariff of 10% and a GSP of 5%.

Market Opportunities for Kenyan Exporters

The fact that the Netherlands market has more than doubled between 1990 and the end of 1991 seems to give an indication that it is a growth market. It is felt, however, that this increase has, for the present, fully developed any market potential and that there may well be some fall-back during 1992, although not as low as levels pertaining in previous years. Future imports can be expected to average at between 1,500 and just over 2,000 tons per annum.

An indication of market potential can be gathered from the experience of Zambia, which, in 1991, exported some 86 tons to the Netherlands. This compares with a total of only 22 tons in

1990 and practically nothing in 1989. To some extent, this has come about through the activities of one significant specialist importer in the Netherlands working closely with Zambian growers and exporters to find varieties suitable to particular markets. To date it has been a success and provides some indication as to the type of arrangement that Kenya might consider if it wished to target the Netherlands market.

In 1990, Kenya exported 250 tons of chilies to Europe, although only 21 tons were directed to the Netherlands, a very large majority going to the UK. As to whether or not Kenya should re-direct product to the Netherlands, no conclusions can be reached on the basis of desk research. On the one hand, by channeling to the Netherlands, the range of potential markets is significantly broadened because of the re-export activities of that country. The Dutch are extremely competitive in their trading practices, however, and the trade may not be as comfortable as that presently existing with the UK.

SECTION V: MANGETOUT

Ranking Overview

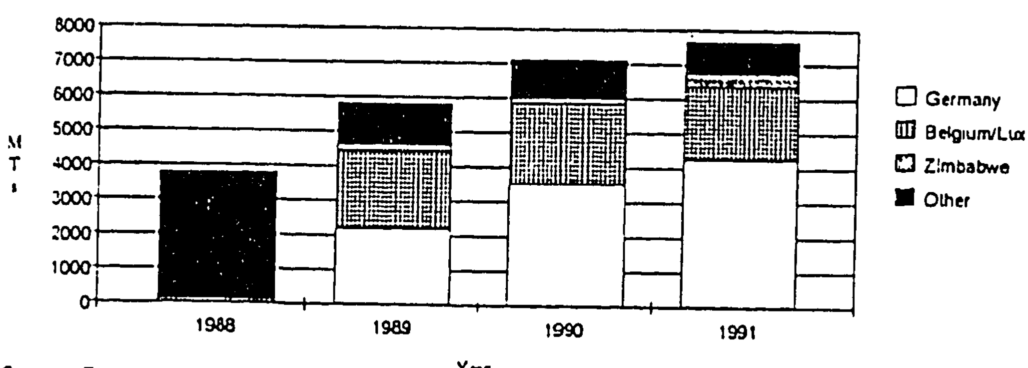
Product	Rating	Notes
Mangetout	2*	Small market but experience of Zambia and Zimbabwe indicative of potential. More research needed.*

Domestic Production

The Netherlands produces its own snowpeas during the summer months.

Imports

Netherlands Fresh/Chilled Pea Imports, 1988-1991, MTs



Source: Eurostat

Unfortunately, official trade statistics do not distinguish mangetout (snowpeas) from other peas in general and it is therefore impossible, on the basis of secondary data, to precisely identify the actual tonnage imported.

In 1991, Dutch imports of <u>fresh</u> or <u>chilled</u> peas "pisum sativum" amounted to almost 7,400 tons. This represented a significant growth in the market from 3,800 tons in 1988 to 5,800 tons in 1989 and 7,100 tons in 1990. The market seems now to have stabilized and is not expected to exceed 7,500 tons in the foreseeable future.

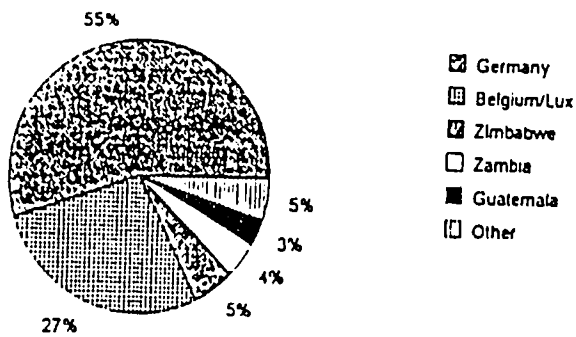
Market Share

The major supplier of peas to the Netherlands in 1991 was Germany, with over 4,000 tons. The only other significant supplier was Belgium/Luxembourg, with almost 2,000 tons. Most of the imports from these two suppliers would be of the normal garden peas, of which a good percentage would be for processing.

Imports of snowpeas can be reasonably accurately identified by source and in 1991, this product entered the Netherlands from Zimbabwe (almost 400 tons) and Guatemala (257 tons). It can be estimated that the minimum import tonnage of snowpeas into the Netherlands in 1991 amounted to just below 1,000 tons. There would also be imports of snowpeas from neighboring European countries, although it is not possible to distinguish these from the statistics.
The imports of a minimum of 1,000 tons of snowpeas in 1991 reflect a significant increase in the market from totals of around 500 tons in 1989 and around 650 tons in 1990. There has therefore been significant growth over the last few years, although again, it is felt that a plateau has been reached.

The major suppliers of snowpeas, apart from neighboring countries, have been Guatemala and Zimbabwe. Product has also been imported from Kenya, Zambia, Egypt and Nigeria. Total exports to the EEC from Kenya in 1991 amounted to only 29 tons, of which 13 tons were sent to the Netherlands. It is undoubtedly Guatemala, Zimbabwe and, increasingly, Zambia that are the major distant source suppliers of snowpeas to the Netherlands market.

Netherlands Import Market Share - Fresh/Chilled Peas, 1991



Source: Eurostat

Consumer Preferences

Any multi-noded varieties are acceptable, although the actual variety should be chosen to meet the requirements of the specification and growing conditions. The most acceptable variety is the "Oregon Sugar Pod", whereas "Mammoth Melting", large, pale, podded types are usually not acceptable.

Seasonal Patterns of Demand

Zimbabwe and Zambia seem to supply product all year round. Guatemala is a major producer in the winter period. As can be seen from the statistics in the Eurostat tables *(See Appendix A)*, most snowpeas come into the Netherlands in the period from 1st September to 31st May, notably because this is the main supplying period for Guatemala.

Prices

As in Germany, prices of snowpeas in the Netherlands can vary significantly, partly because of the relative small size of the market and the influence of supply movements.

During off-season months, prices tend to average at around 10 Dutch Guilders per kilo.

Market Distribution

The import of snowpeas into the Netherlands is done by the established importers in the main market centers, *viz* Amsterdam, Rotterdam and Delft. The multiple supermarket chains do import pre-packed product and usually do this through specialist importers. This process has not, however, advanced to the degree that it has done in the UK. *(See Appendix B.)*

Grades and Standards

There are common quality standards for peas which include mangetout. They are the same in general terms for most other fresh produce in that the peas must be whole, sound, fresh in appearance, clean, free from foreign smell or taste, and free from abnormal external moisture.

Mangetout are classified into Class 1 and Class 2. To qualify as Class 1 mangetout must be: of good quality and characteristic of the variety in color, shape and size. The product should be young and tender so that they can be easily broken in the hand, the seeds must be small, tender and the pods must be closed. The product must be stringless and free from blemish. Some traces of wind damage are allowed. To qualify for Class 2 the mangetout must be similar to Class 1, although the seeds may be larger, some stringiness and minor superficial blemishes are allowed.

The pod must be flat with the peas just showing. It should be straight with a very small stem and pale green in color. The taste and texture should be juicy, crunchy and sweet and the ripeness should be at the level where the pea actually snaps in the hand. Sizes of 7-10cm length and circa 2cm width are acceptable.

Mangetout is a highly perishable product which must be cooled immediately after picking and held in cool conditions right through to the retail or catering outlet. The initial color should be dark green because the color fades quite quickly and a yellow pod is unacceptable. On average, the minimum length should be 70mm and the maximum length 90mm.

In the Netherlands, packaging is normally in 2kg cartons, although waxed, 5kg cardboard boxes are also acceptable if well ventilated. Although pre-packing in the Netherlands is not as prevalent as in the UK, it is increasing in importance and the normal format is a micro-perforated cryovac bag (perforated 8 per sq. inch, 25 micron thick), heat-sealed at the top.

Each pack must clearly be labelled with the following:

1. supplier name and address
2. commodity name
3. country of origin
4. net weight of produce
5. packing date - to be coded by agreement

Import Regulations and Duties

Snowpeas come under tariff heading 070890 and ACP countries have duty-free access to the Netherlands market.

Market Opportunities for Kenyan Exporters

Kenya has little, if any, presence as a mangetout supplier to the Netherlands and indeed to the EEC as a whole in 1991 when it supplied a total tonnage of only 29 tons. Zimbabwe, on the other hand, has seen its total exports to the Netherlands increase from 92 tons in 1987 to 185 tons in 1989 and to 430 tons in 1991. Similarly, Zambia has increased its exports to the Netherlands from 6 tons in 1987 to 26 tons in 1989 and to 170 tons in 1991.

The growth in the Netherlands market is indicative of the potential that exists and the experiences of Zimbabwe and Zambia are clear examples of what can be achieved. It is possible that Kenya has now missed the boat because the development of trade with Zambia and Zimbabwe has been part of specific arrangements between importers in the Netherlands and suppliers in those two countries. Further investigation should be carried out into the feasibility of setting up relationships between Dutch importers and Kenyan suppliers, although it is probable that it would be necessary to provide a range of high value horticultural items rather than snowpeas alone.

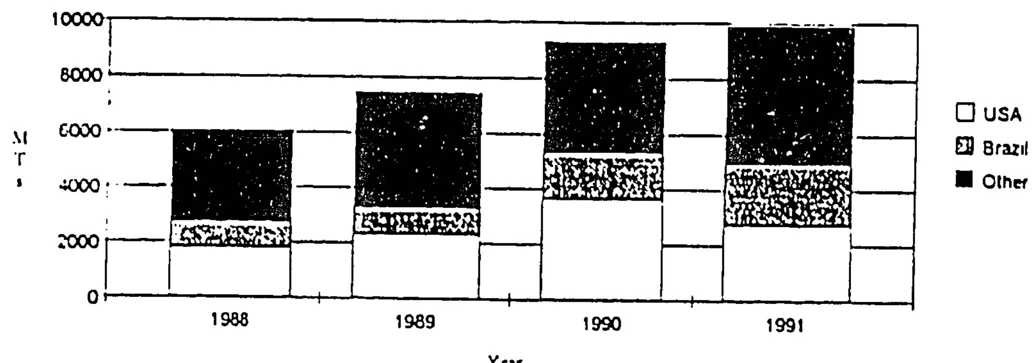
SECTION VI: MANGOES

Ranking Overview

Product	Rating	Notes
Mangoes	2	Small existing market for Kenya but expansion will always be limited by the preference for red-blush varieties.

Imports

Netherlands Fresh/Dried Mango Imports, 1988-1991, MTs



Source: Eurostat

During the last decade, the Netherlands has seen dramatic increases in its imports of mangoes. At the same time, the percentage of imports that have been re-exported has increased to a point where it now exceeds 50%.

In 1991 total imports of fresh and dried mangoes and mangosteens to the Netherlands amounted to 9,920 tons. This represented a significant increase over the imports in 1989, which were some 7,400 tons, although by 1990 total imports had risen to 9,300 tons.

Market Share

Major suppliers of mangoes in the past to the Netherlands have been Mali, Mexico and Brazil, but since 1987, supplies from these countries have remained static or decreased. In 1989, the USA supplied over 30% of the total imports and forty other countries supplied the rest of the imported tonnage, reflecting the all-the-year-round basis of the mango trade.

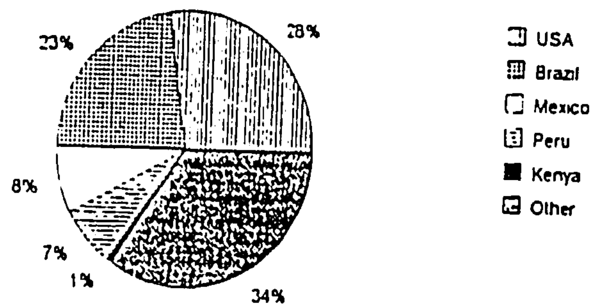
The major supplier in 1990 was the USA, with almost 40% of total imports, followed by Brazil and Peru. In 1991, the USA was again the largest supplier, although its exports had fallen, both in quantitative and percentage terms since 1980, i.e. from 3,647 tons and 40% to 2,729 tons and

27.5%. The country that gained market share of imports between 1990 and 1991 was Brazil, which increased its supplies from 1,703 tons to 2,234 tons. The only other suppliers of note in 1991 were Mexico, Peru, and South Africa.

In 1991, Kenya was recorded as supplying only 56 tons of its total exports to the Netherlands although its total exports to Europe were 397 tons. The only other African country of any note was Zimbabwe with 43 tons.

The widespread nature of the mango trade, is shown by the fact that in 1991, 52 countries supplied mangos to the Netherlands, of which the vast majority came from outside the EEC. Belgium and France were the only significant suppliers from within the EEC, obviously re-exporting from other sources.

Netherlands Import Market Share - Fresh/Dried Mangos, 1991



Source: Eurostat

Consumer Preferences

As with the UK, the popular varieties in the Netherlands are those with color, and particularly, with a marked red blush as ripening proceeds. "Tommy Atkins", "Haden" and "Keith" are particularly in demand, but other colored varieties are also sold. Green varieties such as "Julie" which is the standard variety from Mali, are much more difficult to sell.

It is possible to sell any type of mango in the Netherlands, although the greener and more elongated the product, the lower the attainable price. The varietal range is possible because of the ability of the Dutch to re-export mixed containers of fruit in small individual quantities to other countries. There is, for example, a thriving trade with countries in the Middle East for mixed containers of a few cartons each and in some cases, fruit which is not saleable within Europe is re-sold in this way. Far better, of course, for Kenya, as it is already doing, is to sell its mangoes direct to countries such as those in the Middle East.

Seasonal Patterns of Demand

The USA, which is still the largest supplier of mangoes to the Netherlands, usually has its fruit on the market between April and October, although during 1990, US supplies were on the market during most of the year except for perhaps one month. Brazil mainly supplies in the winter period, between November and February, and Mexico comes on to the market between April and October. South African supplies generally arrive in January and are in the market through into April, with Mali starting in April and continuing until July. Peru, again, supplies between January and March and Venezuela has some product on the market between April and August.

Prices

There is no shortfall in supplies of mangoes during any month in the Netherlands market, although, as with many products, prices tend to be higher from November through to the end of January. Although prices vary each day and according to an amalgam of determinants, an average level during the 1991 season was between 25 and 35 Dutch Guilders per 5/6 Kg carton or 5 Dutch Guilders per kilo for high quality fruit. Naturally, there has been a general reduction in prices as a result of the increasing incidence of sea-borne fruit from most sources - a form of transportation that has now become the norm, except in December and January. Some air-freighted mango commands a premium by being identified as a specialist product, but this has to be one of the desired varieties and in absolutely prime condition.

Market Distribution

Imported mangoes are handled by most fresh fruit and vegetable importers in the main markets of the Netherlands, although those importers specializing in tropical produce tend to be the ones bringing in the product from distant sources. These importers are located in Amsterdam, Rotterdam and Delft. *(See Appendix B.)* Most mangoes find their way from these importers onto wholesale markets, and direct, perhaps re-packed, to supermarkets. A significant percentage is also re-exported to other EC countries, Scandinavia, the Middle East and other more distant countries.

Grades and Standards

Standards for mangoes into the Netherlands are exactly the same as those existing for Germany and the United Kingdom, and indeed for all EC countries.

The mainline trade however, is for fruit which is ripe with tender flesh, no fibrosity, an aromatic flavor and a reasonably strong scent. The fruit should be oval with no turpentine flavor, easy stone removal and no bruising or disfigurement.

Export quality standards are provisional (see UN/ECE AGRI/WP.1/R.142 Rev.3). Normal EC minimum requirements are applicable, as with most other fruit and vegetables, hinging on wholeness; firmness; cleanliness; lack of bruising; no rotting or deteriorating matter; ability to withstand the ripening process and; the contents of each package to be uniform in terms of origin, variety, quality and size.

For mangoes there are two classes: Class 1 and Class 2. Class 1 fruit are to be superior in quality and size, with only a 10% tolerance not satisfying the requirements of the Class but meeting those of Class 2.

Mangoes should be graded to size and coded as follows:

Size Code A - 200-250gms

Size Code B - 351-550gms

Size Code C - 551-800gms

For the Netherlands market the most popular weights are between 350 and 450 grams. Given the fact that the Dutch, however, supply much of the rest of Europe with mangoes, then a standard range of between 300 - 550g would be acceptable. There is, however, a small shift to the larger mangoes and the trade has noticed an increasing preference for Counts of 8's and 10's rather than 12's as in the past.

The maximum permissible difference between fruit in the same package belonging to either size Group A, B or C shall be 75 to 125 gms. The minimum weight of the mangoes must not be less than 200 gms.

Essentially, as mentioned above, since Dutch importers not only cater to their own market, but to other European markets as well, standards are general. For the Netherlands the net weight per box should be 4.5 kilograms (plus or minus 500g). The cartons should be single layer fiberboard with the fruit wrapped individually on the one layer. Numbers per box are between 6 and 14 but as mentioned earlier, preferred sized are between 8 and 12.

There are numerous different box sizes. Internal volume for 5kg of fruit without inserts is 8.5 - 9.5 liters whilst a cell pack requires 11-13 liters per 5kg of fruit. New carton sizes according to Euro specifications will be 40x30x10/12cms.

As usual the labels must be clearly legible and visible and have the identification name and address (or code) of packer or dispatcher and the name of the produce and variety name. Country of origin, commercial specifications, class, size and maximum and minimum weight or size code number, number of fruit and net weight in kg should also be on the label. To assist in marketing, labels should also contain various symbols relating to temperature, fragility, right side up, date of packing, tare weight and identity of grower.

Import Regulations and Duties

Mangoes from ACP countries face a zero import tariff into the Netherlands.

Market Opportunities for Kenyan Exporters

Although mangoes from Kenya are known in the Netherlands market, the general attitude is that their market prospects are limited by their characteristics. Kenya is associated with the "Ngowe" and "apple" mangoes and these are not in great demand in the Netherlands. As mentioned above, the most popular varieties have a red/yellow color and the consumer essentially buys with his eyes.

There is intense competition from countries worldwide and market shares do shift annually. Price, variety and quality control are crucial and Dutch importers are relatively satisfied with the range of supply presently available. Few, if any, are looking for new suppliers.

SECTION VII: OKRA

Ranking Overview

Product	Rating	Notes
Okra		Product hardly known but very small market does exist. More competition from Mediterranean countries.

Imports

Although no separate statistics exist for okra imports into the Netherlands, trade sources estimate that the market is relatively insignificant. In 1991, total imports are estimated at only 216 tons, compared with, for example, the 2,500 tons imported into the UK in the same year.

Market Share

The major supplier of okra to the Netherlands in 1991 was Surinam, with 122 tons, followed by Kenya with 62 tons, Ethiopia with 22 tons and Thailand with 8 tons. All other suppliers did not export more than 1 ton - they included Tunisia, Gambia, Ghana, Tanzania, Zimbabwe, Dominican Republic, St.Lucia and Trinidad.

Consumer Preference

The varieties imported are similar to those to the UK, viz, "Clemson Spineless", "Bindi" and "Annie Oakley".

Seasonal Patterns of Demand

Since supplies are so small, distance does not really apply as an effect on price. Kenya and Surinam can supply the product all year round.

Prices

No details on prices are available, although the unit value of Kenyan okra in 1991 was 4.50 Dutch Guilders per kilo.

Market Distribution

Dutch importers are aware of okra, but have little interest in it. Much of what is imported is re-exported. *(See Appendix B.)*

Grades and Standards

Okra is loose packed in 2.5kg - 5kg boxes, ventilated and full-lidded. Lower capacity packs are preferred for the Netherlands.

There are no international quality standards, although a degree of immaturity is essential because of perishability.

Import Regulations and Duties

Okra comes under tariff heading 07099090 for "Other Vegetables". ACP countries have duty-free access to EEC countries.

Market Opportunities for Kenyan Exporters

Although the Netherlands does have a number of ethnic groupings, they are not significant consumers of okra. This is in contrast to the UK. The very small market that does exist is for African and Asian consumers in the main cities.

There does not seem much point in Kenya expending energy in attempting to develop the Dutch market for okra, especially given the increasing competition in Europe from Greece and Cyprus. It is unlikely the market will ever become significant and it is better for Kenya to concentrate its market development on the UK and attempt to consolidate its position as the leading supplier to that market.

SECTION VIII: STRAWBERRIES

Ranking Overview

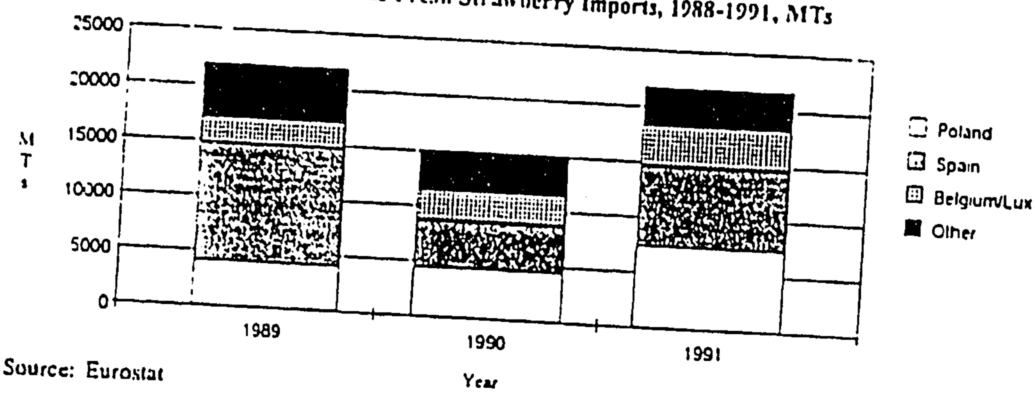
Product	Rating	Notes
Strawberries	2	Large but risky market; only chance from November to February but intense competition from Israel and Colombia. Spain dominates import market.

Domestic Production

The Netherlands produces a large crop during the summer months (May through July).

Imports

Netherlands Fresh Strawberry Imports, 1988-1991, MTs



Source: Eurostat

Imports of strawberries into the Netherlands have fluctuated in the last four years, starting at a level of 15,000 tons in 1988, increasing to 22,000 in 1989 and falling back once again to 15,000 tons in 1990. In 1991, total imports of strawberries amounted to almost 22,000 tons, thus revealing an almost regular fluctuation over the four years. It is probable that these fluctuations in the market are a reflection not only of the abundance of local and neighboring supplies during summer months, but also of demand levies in other countries, to which the Netherlands supplies large quantities.

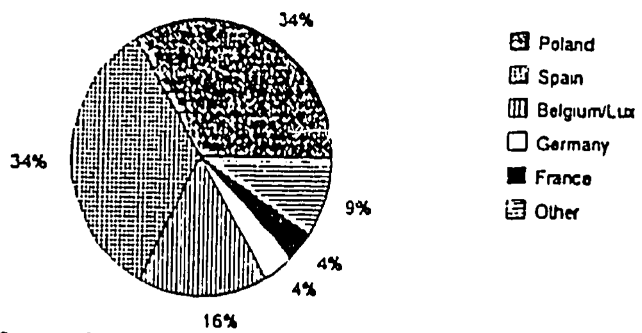
Market Share

The Eurostat data tables split the imports of strawberries into two time periods, viz 1 May - 31 July when domestic supplies are available and 1 August - 30 April when most supply is imported. During the summer period, the major supplier of strawberries to consumers in the

Netherlands is, of course, the Netherlands itself, which has very large supplies, both for domestic consumption and for re-export. 1991 data show Poland as the main supplier of strawberries to the Netherlands in the summer period, with 7,123 tons. It is possible, however, that this is a statistical error in that the main supplies of strawberries coming from Poland are normally in frozen format. Traditionally, the major supplier in the summer period is Spain, which in 1991 supplied 4,364 tons and Belgium, with 2,886 tons.

Other strawberries also come from Eastern European countries, but, as with Poland, most of these are for industrial processing rather than table use. In the "off-season" from August through April 1991, the major supplier of strawberries to the Netherlands was, once again, Spain, with almost 3,000 tons. In total in 1991 Spain supplied 7,300 tons of strawberries. Distant suppliers only provided small quantities, the largest being Israel, with 64 tons, followed by Colombia with 60 tons, the USA with 31 tons, Kenya with 14 tons, Ecuador with 13 tons and Mexico with 10 tons.

Netherlands Import Market Share - Fresh Strawberries, 1991



Source: Eurostat

Consumer Preferences

Most red varieties are acceptable in the Netherlands during the off-season. The main type coming from Spain is the "Chandler" variety, but "Pajaro", "Selva", and "Tioga" are also acceptable, as are mixed red varieties.

Other acceptable varieties are "Osso Grande" from Spain. Domestic strawberries include "Elsanta", "Marmalada", "Gorella", Rapella", "Hapil Pandora" and "Pegasus". Domestic strawberries are preferred to imported fruit.

Seasonal Patterns of Demand

As mentioned above, the three months from May through July represent the period when the domestic production season in northern European countries is in full swing. At this time, the Dutch consume their own strawberries almost exclusively. Product still comes in from Spain, although this is normally in the early part of May and tonnage reduces as domestic product comes on stream. The period immediately after the cessation of domestic supplies is relatively quiet, partly because an abundance of other cheap local fruit is available. The market starts to pick up again in November, when product from Israel and some of the south and central American countries arrives on the market. The market then builds up until the Christmas period, when the best prices are available. At this time a number of distant sources are in the market, including Australia and New Zealand, which, in the past, have received the best prices for their produce.

After the New Year, the market is relatively flat until the end of January, when Israeli fruit once again arrives and prices start to reduce until Spanish produce commences in March. At that time, prices start to fall off significantly and punnet size increases from 250g to 500g. The small tonnages of Kenyan fruit that are seen on the market usually arrive in November/December (14 tons in 1991).

Prices

It is possible to get very high prices for strawberries during the month of December, as is evidenced by the fact that it is feasible to import berries from as far away as Australia and New Zealand. In the week leading up to Christmas, a carton of 9 x 250g punnets air-freighted in from New Zealand can fetch a price of US$25.00 per carton. Quality is important and prices can fall as low as US$10.00 per carton, even in December, if standards are not met.

Market Distribution

The Netherlands, like Germany and the UK has long-established importers/wholesalers which import fresh produce from all over the world. For fresh strawberries particularly, the market is dominated by five of these large importers, who are involved, to a small extent, in supplying the local market, but more intensely in re-exporting to other European and Scandinavian countries. Some of these Dutch companies have undergone significant modernization in the last few years and now have Euro-wide distribution networks with sister companies and associated transport fleets working in all the major markets of the EEC and elsewhere. *(See Appendix B.)*

Grades and Standards

Strawberries must be of EC "Class 1" standard, i.e. they must be mature, ripe, well balanced fruit with regular growth characteristics. The berries must be of a uniform bright red color, with glossy appearance and without greening, except minimally around the calyx in some varieties. They must be firm with smooth outlines and without hardened clefts in the flesh due to infertility. A short, clipped, unwithered stalk and green calyx should be attached. The taste should be sweet and devoid of earthiness, and flesh should be moist, firm and juicy.

The berries should be whole and clean from soil, pest, disease and foreign material. They must be free from damage due to mechanical crushing and bruising, water marks, taints and pale pink or brown break-down discoloration. Dull skin and softness due to over-ripeness will not be tolerated.

Fruits should not be less than 25mm across the equatorial diameter and must weigh 15g or more. Most fruit should fall within the 30mm-40mm band.

Wedge-shaped varieties such as "Hapil" must not be splayed or multi-lobed, but have a fairly regular shape. In any one batch, produce must be uniform in color and overall dimensions.

Except for strawberries from California, almost all fruit imported into the Netherlands is ready-packed in 500g or 250g punnets. In most cases, these punnets should be clear, with a white drip pad liner, not greater in size than the punnet base. The punnets must be within a protective carton.

Because of the effect of price on demand, punnets are only acceptable in 250g weights between October and April and 400-500g punnets after that date. Plastic punnets with micro-polypropylene over-wrap are acceptable, although some Dutch importers do also prefer clear plastic punnets with lids, as is the case in the UK. In most cases, there should be eight punnets to a carton, although counts of 12 are also acceptable.

Labelling can either be done at the packhouse or in the Netherlands. Often, because of the need for further quality weight checks, and risk of delays in transit, the final labelling of shelf-life and sell-by date are not carried out until just prior to despatch to the retail outlet.

Import Regulations and Duties

Imported strawberries normally face an import duty of 14% for most of the year, except between 1 May and 31 July, when it goes up to 16% as a form of protection for domestic strawberries. Berries from other European countries face no import duty and that currently levied on Spain is to disappear entirely by 1995. Cyprus pays only 3.5% duty, whereas Turkey and Morocco have free access.

Market Opportunities for Kenyan Exporters

The only real window of opportunity for strawberries for the retail trade is between November and mid-February. Unfortunately, Israel is very active in the market and Colombia and Mexico have also been increasing their participation. After March, the market is relatively saturated with products from Spain and prices start falling off significantly.

Strawberries from Colombia start arriving on the market in November, as do those of Israel. Morocco is also active during the off-season.

The Netherlands market for strawberries is an extremely competitive and cut-throat one. There is a great risk for any small supplier to be associated with such a competitive market for such a high value consignment. Unless Kenya can be certain of top quality fruit with strict inspection and total quality management, it is probably better to continue targeting the UK, as it has done in the past. There is always a market in the Netherlands for fresh strawberries because of the ability of the Dutch to re-direct the product to markets world-wide. It is therefore an avenue that should always be kept open and a regular check made on wholesale prices and on importer interest. The fact that Dutch importers insist on trade on a "free consignment" basis, however, means that the risk is entirely with the exporter. The development of trusting relationships with importers takes a significant period of time and since this obviously has been done with the UK, it is probably better to continue channeling exports of strawberries in this particular direction.

SECTION IX: CHERRY TOMATOES

Ranking Overview

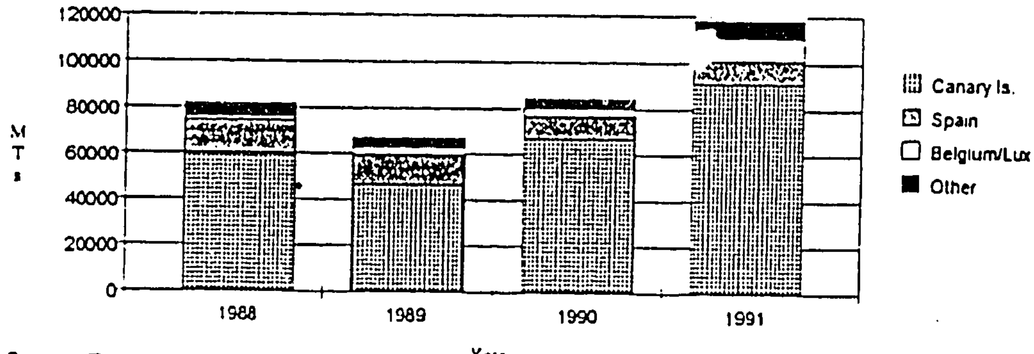
Product	Rating	Notes
Cherry Tomatoes	2	Intense competition: best prepacked. Market for Kenyan produce could be expanded; need for broad range of high value produce.

Domestic Production

The Netherlands is a major producer and re-exporter of tomatoes and is easily the largest supplier to the 12 EEC countries. In 1990, out of total EEC imports of 1,180,000 tons of tomatoes, the Netherlands supplied 46.3% or 546,000 tons. Most of these tomatoes were supplied in the summer period from the middle of May to the end of October, although almost 200,000 tons were also supplied during the winter period. The Dutch are able to grow tomatoes under cover for the entire off-season.

Imports

Netherlands Fresh Tomato Imports, 1988-1991, MTs



Source: Eurostat

Eurostat tables do not differentiate cherry tomatoes from total imports of tomatoes in general and it is not, therefore, possible to identify precisely the tonnage imported into any European country. A study of sources, however, does provide some indication as to variety.

In 1991, the Netherlands imported 119,000 tons of tomatoes. This represented 9.1% of total European imports of 1,305,586 tons, putting it well down the league of European importers behind Germany, France and the UK.

Total imports in 1991 did, however, represent an increase over the totals for previous years which were 85,000 tons in 1990, 65,000 tons in 1989 and 82,000 tons in 1988.

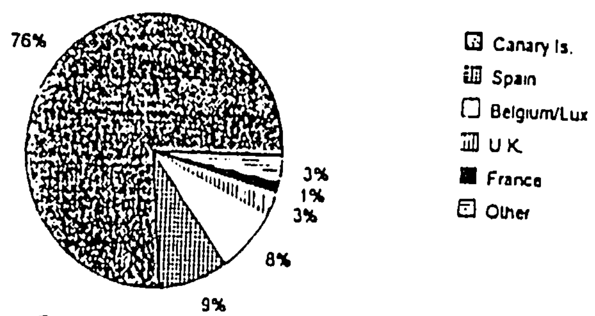
Market Share

As can be seen from the Eurostats tables, the main period of supply of tomatoes into the Netherlands is in the winter period from 1st November to 14th May. During that period, the major supplier is the Canary Islands, which, in 1991 supplied over 80% of total imports. A percentage of the supplies coming from the Canary Islands are of cherry tomatoes. For distant suppliers during the winter period, the major sources are Morocco, the USA and Israel.

The largest supplier from Africa is Mali, with 142 tons, followed by Zimbabwe with 53 tons and Egypt with 35 tons. Other distant suppliers are the Dominican Republic and Venezuela. In 1991, Kenya was recorded as exporting 9 tons of tomatoes to the Netherlands.

During the summer period, very few tomatoes enter the country from distant sources, since the Netherlands and neighboring countries are more than self-sufficient. Cherry tomatoes are also produced, both within the country and by its neighbors. 1991 data do show some imports from distant sources, although these probably occur at the cusp of the time period, i.e. on 15th May and at the end of October.

Netherlands Import Market Share - Fresh Tomatoes, 1991



Source: Eurostat

Consumer Preference

The varieties of cherry tomatoes most in demand for the Netherlands are similar to those for the UK and Germany, *viz* "Gardener's Delight", "Cherita" and "Evita". "Cherry Wonder" is also acceptable and new varieties are always welcomed if consistent with specifications.

The most acceptable size for cherry tomatoes ranges from 10-30mm, depending on variety, although 25-30mm is the more popular.

The shape should be uniform-round. Uniformity in the punnet is essential.

The color should be red, although an element of green is acceptable in some varieties. Small quantities of yellow cherry tomatoes can also be sold in the summer period; although these are normally grown within Europe.

In terms of ripeness, the fruit should be firm, with a color of 8/9 on the Dutch color chart. Some green is allowed, although the product should be edible by the time it reaches the retail shelf.

The taste and texture of the cherry tomato should be sweet, firm and juicy. The flavor should be distinctive.

Seasonal Patterns of Demand

During the European main season, i.e. from May through September, most tomatoes, including cherry tomatoes, come from domestic production, the Canary Islands and Spain, and neighboring European countries. Distant suppliers, notably Morocco, Mali, the USA, and Zimbabwe, supply during the winter months from November to mid-May. There is hardly any gap in the Netherlands market for cherry tomatoes in that Spain is getting increasingly earlier with its own supplies and, of course, the Dutch themselves can actually produce the product all year round, albeit under cover and at relatively high cost during the winter.

Market Distribution

The import of cherry tomatoes into the Netherlands is done by the established importers in the main market centers, *viz* Amsterdam, Rotterdam and Delft. The multiple supermarket chains do import pre-packed product and usually do this through specialist importers. This process has not, however, advanced to the degree that it has done in the UK. *(See Appendix B.)*

Grades and Standards

Although there are no specific standards for cherry tomatoes as distinct from tomatoes, there is a difference concerning size.

The minimum EC requirements for tomatoes are that they be intact, fresh looking, sound, clean, practically free of visible foreign matter, free of abnormal external moisture and free of foreign smell and/or taste.

Although four classes are defined for ordinary tomatoes, viz "Extra" and Classes 1, 2 and 3, only two classes are defined for cherry tomatoes. These are "Extra" Class and Class 1, with Extra Class requiring superior quality and no defects and Class 1 allowing slight defects. It is also specified that cherry tomatoes must be uniformly round.

Specifications applied by buying organizations include the following:

"Extra" Class cherry tomatoes must be firm and free from "greenbacks" and other defects, with the exception of very slight superficial defects which should not affect the general appearance of the produce, shelf life and presentation. No more than a 5% tolerance is allowed below Extra class quality and then not below Class 1 standard.

Cherry tomatoes are normally pre-packed at source to minimize handling damage. Packing is normally in 250gm punnets with 8-12 per tray (Senegal) and 9 punnets per tray (Netherlands). At the time of packing it is advisable to include an additional 5-10% weight to make up for travel weight loss.

Packages must be labelled by origin, name of packer and/or dispatcher, as "Cherry Tomatoes", and by variety (optional). Labels must also have date of packing and class of tomato. Net weight in Kg and minimum and maximum diameters would also assist in marketing, along with the usual "This Side Up", "Fragile" and Temperature symbols.

Import Regulations and Duties

During the period from 1st November to 14th May, ACP countries pay 4.4% duty except during 1st-14th May and 1st-14th November when they pay the full 11% tariff. During the summer months, however, from May 15th to October 31st, all ACP countries have to pay the full 18% duty.

Market Opportunities for Kenyan Exporters

Because cherry tomatoes are not distinguished separately in the official trade statistics, it is difficult to get an idea of the size of the market. The tonnages forthcoming from major distant suppliers also cannot give an indication of the rates of growth of the market since the quantities are so small in terms of the total size of the market. Furthermore, data is not available on the amount of cherry tomatoes actually being produced in the Netherlands itself.

If there are any gaps in the market, they occur from December to March, although these gaps are becoming smaller and supplies from Morocco are also increasingly filling any gaps that exist.

The Netherlands market in the off-season does bring in cherry tomatoes from a wide range of sources and, given Kenya's small production base as evidenced by its exports in 1991, it is probable that a market could be found for increased quantities. Again, this should be done in conjunction with a broad range of high value horticultural produce.

SECTION X: TROPICAL FRUIT JUICES

Ranking Overview

Product	Rating	Notes
Juices	4	Major European market for exotics e.g. passion fruit, pineapple and mango concentrates/purees. Strict adherence to standards essential.

General

The Netherlands occupies a pivotal position in the marketing and distribution of processed food products throughout Europe. It is very much the entrepot for Europe for foodstuffs and is the focus of import of physical quantities of juices, canned, frozen and dried fruit. Traders, agents and processors throughout Europe use Rotterdam and Amsterdam as points of import for products mainly transported by sea. These companies either have their own offices in the Netherlands, use agents and importers in the country or use cold stores and transporters to handle the product on arrival and despatch to destination.

Over the past five years, Dutch companies in the fruit juices, canned, frozen and dried food sectors have established efficient distribution networks throughout Europe and Scandinavia and are able to provide a fast and competitive service. In some cases, they break bulk and put together mixed containers of small quantities of a wide range of products. This increases the density of the potential market and makes them particularly attractive to the small and medium sized outlets. There is no doubt that contact with established and efficient traders/processors in the Netherlands does mean effective market exposure throughout most European and Scandinavian countries.

Mango Puree

The major suppliers of mango purée to the Netherlands are South America and India. India supplies the Alfonso and Totapuri varieties, South American countries supply purée made from Haden, Irving, Tommy Atkins, Chatto de Ica, Criolo and Kent varieties.

Most of the Indian product (mango) is delivered in 3-5kg hot pack or aseptic. The single strength frozen purée is required in 200 liter drums with a minimum level of 15° brix and a total acid rate of between 5-7 grams/kilograms. There is also some demand for a concentrate of between 28°-30° brix.

Passion Fruit Juice

Passion fruit juice is purchased either as a single strength product or as a 30°-50° brix concentrate. The fruit juice has to be a natural pure product without the addition of anything else, except a small amount of SO_2 if necessary. The residual SO_2 should not exceed 60mg/kg passion fruit juice. The product needs to be deep frozen and stored in a cooling cell at 18°C below zero.

It is normally the yellow passion fruit that is most in demand, although purple passion fruit is also acceptable, especially where the product is mixed in with other juices. Any company producing a new product should attempt to produce concentrates, as this has wider acceptability.

The total acid content, calculated as citric acid, should be 30-50kg. Aroma should be typical aromatic fresh, without strange odor, with an evaluation minimum of 5 points according to IFJU Analysis No.25 and the flavor should be a typical sourish fruity flavor with a minimum of 8 points according to the same IFJU Analysis.

Prices

An average price level for passion fruit juice would be between US$3,000-4,000 per ton CIF main European port and any factory could, if they had the capacity and the efficiency, probably sell 1-2 containers a month to the Netherlands at around that price. Almost every processor is looking for a good source of passion fruit concentrate (and single strength) at a stable price, although few believe they will be successful. For both passion fruit and mango concentrates and purées, ACP countries have duty-free access to EEC markets.

Market Distribution

The most important figures in the tropical juice trade in the Netherlands are the blending companies. The four major ones are *Cargill, Euro Citrus, SVZ* and *Mondi*. They all purchase product directly from source, but also use importers and agents where necessary.

Specifications

The specifications for passion fruit and mango concentrate and purée for import into the Netherlands are identical to those for Germany and the UK because some of the product received in those countries is sourced via the Netherlands. For additional information, see U.K. Market Survey.

Packaging

The product should be frozen and packed in double polyliner in 200 liter drums. The drums should be of steel rather than plastic construction because of the new environmental laws in

Germany which require a recyclable product. Aseptic packaging is also acceptable, but again, there should be a double polyliner to prevent the sides of the packaging material from contaminating the outside of the aseptic pack.

Market Opportunities for Kenyan Exporters

Although the Netherlands domestic market is one of the smallest in Europe for fruit juices, it is the re-export trade that makes the country such a large importer. Sometimes the juices are re-exported without further processing, but in many cases, juices from different areas are mixed to provide blends and taste bases according to recipes of processors throughout Europe. An example of the value added to juices in the Netherlands can be seen from the fact that exports by weight averaged under 50% of the tonnage of imports between 1986 and 1990, whereas expo s by value as a percentage of imports averaged over 80%.

Most of the exotic juices imported into the Netherlands find their way to blending houses for further processing. It is only in the case of passion fruit, mango and guava that there is any re-export of individual juice. In 1989, for example, the Netherlands exported over $43 million worth of "mixtures of different juices" mainly to Sweden, the UK and Germany. It is likely that these mixtures were made up of citrus and tropical juices.

All in all, the opportunities for new products are somewhat limited. The market is relatively conservative, dominated by the major blenders and certain tastes are well established. Price fluctuations do limit the size of the market, especially for passion fruit, although there will always be a constant demand for these products because they have an established niche in European markets generally.

For exotic juices, the major product produced in the Netherlands is the multi-fruit blend, which is exported throughout Europe. The major tastes in the multi-fruit blend are pineapple, passion fruit, mango, kiwi, guava, papaya and banana. Very small quantities of other juices are included in some bases which have many ingredients, but the amounts involved are minute.

Most of the major Dutch companies interviewed felt that there was potential to further develop European markets, notably Spain, Portugal, France and Italy, where per capita consumption was still low at between 9-11 liters per head. It was also felt that eastern Europe could be a good market for second quality juices.

One example of the enterprising nature of the Dutch trade is that they were in the past importing mango from India, bottling it in the Netherlands and re-exporting it to Middle East markets, notably Kuwait. Although the Kuwait market has, for the time being, disappeared, the Dutch are still heavily involved in supplying the relatively lucrative Middle East Markets.

All major blenders stressed the increased stringency concerning quality. They are reluctant to take on new suppliers, since they are increasingly being held responsible for meeting the quality control requirements of the EEC. Furthermore, the new *Topfer* legislation in Germany concerning the effect of packaging on the environment means that strict controls will need to be applied to the packaging medium.

The blenders generally feel that it is only passion fruit that will ever reach significant levels of trade. They prefer the yellow variety, ranging from 30-50° brix. They are, however, rather loathe to use this product unless they get specific orders for large quantities. This is because of the extreme price fluctuations which could result in them being saddled with large inventory over a considerable period of time.

Mango has expanded considerably of late, but is very taste-specific and the market has become somewhat saturated with Indian mango diverted from the USSR and other central European countries.

For guava the situation is similar to that mentioned in the UK and Germany in that most of it is sourced from South Africa.

Trade in papaya is very small indeed, compared with other products, and the product is usually incorporated in a blend as a very small percentage.

SECTION XI: CANNED FRUIT

Ranking Overview

Product	Rating	Notes
Canned Exotic Blend	2	Some prospects for mixed range of exotics; must include pineapple and fruit cocktail.

General

Per capita consumption of canned fruit in the Netherlands is just over 3kg per annum, which puts it about on par with the UK and Germany. The total value of the canned fruit retail market in 1990 was at some Dfl 120 million, which puts it fourth in the ranking of foodstuffs after yogurt, with Dfl 460 million, ice cream, with Dfl 200 million and cereals, with some Dfl 150 million.

As with juices, the demand for canned fruit in the Netherlands comes from two sources, *viz* that of national demand and that of the re-export trade. The major re-export markets for canned exotic fruit are the countries of Scandinavia and agents/traders in the Netherlands link up with similar companies in Norway, Sweden, Denmark and Finland. In many cases, bulk is broken in the Netherlands and the product transported by road to Scandinavia. Although the industrial sector in the Netherlands does purchase A10 type cans for further processing, most trade is done along the same lines as the UK and Germany, i.e. the importation of labelled retail cans for final consumption. The only difference is that the more popular sizes of can in the Netherlands are the 15oz and 30oz cans on a 60%-40% basis, although the 15oz squat can is increasing in popularity.

Consumer Preferences

The main products sold in the retail market are the exotic fruit cocktail and mango slices. Trade in guava is much smaller and mainly it is imported as part of a cocktail. Papaya is mainly used in the food industry and comes in A10 cans. The present color required is red and this is mainly passed on to food service industries throughout Europe, who produce their own fruit cocktails.

Market Distribution

There are five main importers working in this area in the Netherlands, *viz Gloe & Company, Boas BV, Catz International, Inter Group Trading* and *Maarten Catz Merchandising*. All operate in the same way as importers of canned fruit in other European countries, and all have well established suppliers from Thailand. The company specializing most in the more exotic products is *Boas BV*, which is based in Zoetermeer, near The Hague. They are interested in exotic fruit cocktail, mango slices, guava halves, papaya chunks, and lychees. Some small interest was expressed in rambutan stuffed with pineapple and star fruit in syrup.

Prospective Kenyan suppliers should target one of the above mentioned companies, notably *Boas BV* and be prepared to provide a range of products with significant volumes available of fruit cocktail and mango. Contact with these importers will mean not only exposure to the food processing and retail sectors within the Netherlands, but also to Benelux countries and Scandinavia.

Import Duties and Regulations

The rates of duty are the same as those applying in other countries and vary between 7-9% depending on the sugar levy.

Market Opportunities for Kenyan Exporters

The Netherlands market itself is a growing one however, showing a 4% growth in 1990. Apparently, this growth rate was due to an increased interest in peaches and fruit cocktail, including exotic fruit, by households with children. In general, it seems there is a trend towards fruit packed in juice, towards more exotic fruits and towards smaller can sizes, since the Netherlands market is characterized by a booming number of small households. It is advisable therefore that any company targeting the Netherlands market should concentrate on the 15oz can.

SECTION XII: DRIED FRUIT

Ranking Overview

Product	Ranking	Notes
Dried Fruit	1	Small market for sugared product from the Far East.

The market for exotic dried fruit in the Netherlands is identical to that in the United Kingdom and Germany in that the only real interest is in dried/sugared pineapple and papaya. Banana chips are also of interest. The major suppliers are Thailand and the Philippines.

The key points of distribution in the trade are the importers who buy container loads, break bulk and sell on to wholesalers and manufacturers.

The major companies operating in this area are *Maarten Catz Merchandising, Gloe & Co., De Winter & Konijn, Boas BV* and *Catz International*. All these companies are involved in importing products which are made up into tropical fruit mixes, *viz* pineapple, banana, papaya and occasionally guava. Sometimes mango is also imported, although the problem remains of the degree of moisture retention in the mango affecting other products in the snack.

The tropical fruit cocktail is sometimes packed in the Netherlands and distributed throughout the country, Benelux countries, northern France and Scandinavia.

The general feeling amongst all the importers is that they are not that interested in sourcing new supplies of these products. Thailand, the Philippines and certain South American countries are more than meeting their requirements and the market itself is a relatively stagnant one.

Targeting any of the above-mentioned companies and working with them on market development is probably the simplest and most effective means for prospective Kenyan suppliers to get maximum exposure throughout Europe.

In most cases, the dried mango imported into the Netherlands is sugared and either diced or sliced. There is some experimentation with vacuum and freeze dried, but this has not yet taken off in a significant sense. The sugared, diced or sliced mango mainly finds its way into tropical snacks or tropical muesli. Measurements for the dices are 5x5mm or 10x10mm, usually packed in 5 kilo bags with two or four bags to a carton. Quality inspection is high and the major traders regularly visit suppliers' factories and carry out full audits. Use of chemicals is essentially limited to correct amounts of SO_2 and nothing else.

SECTION XIII: FROZEN VEGETABLES

Product Overview

Product	Ranking	Notes
Frozen Fine Beans/ Mangetout/ Asparagus	2*	Small markets with limited expansion possibilities; more research needed.*

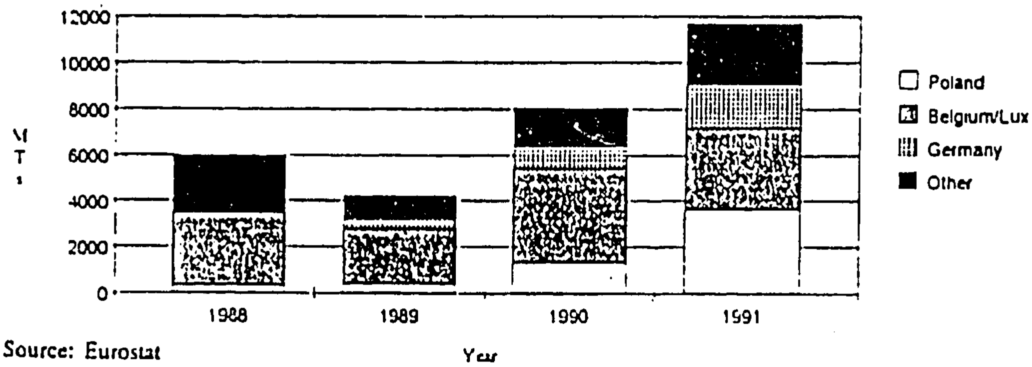
General

The Netherlands is an active and growing market for frozen vegetables, although the volume trade is mainly supplied from domestic production or from neighboring European countries. The volume trade is in products such as carrots, potatoes, cauliflower, peas and beans.

GREEN BEANS

Imports and Market Share

Netherlands Frozen Bean Imports, 1988-1991, MTs

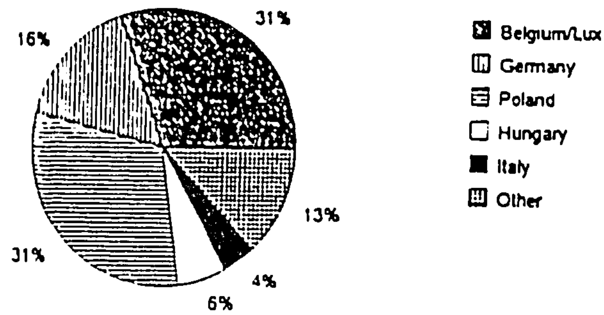


Source: Eurostat

There is some potential in the Netherlands for the importation of top quality, frozen fine green beans. The Eurostat tables do not distinguish between the types of beans but, as can be seen from the 1991 data, the Netherlands imported 11,700 tons, putting it well down the list of European importers after Germany (22,000 tons), France (17,000 tons), the UK (16,000 tons), Belgium/Luxembourg (12,000 tons) and Spain (11,800 tons). Major suppliers of frozen beans to the Netherlands in 1991 were Belgium/Luxembourg, Poland and Germany. The only distant supplies came from Kenya (40 tons), the USA (142 tons), Canada (347 tons), China (38 tons) and Thailand (24 tons). Hong Kong also supplied 41 tons, although it is likely that this was product re-exported from China.

Dutch imports of 11,700 tons in 1991 represented an increase over the total imports for 1990 which were at just over 8,000 tons, which in turn represented a significant increase over total imports in 1989 of 4,300 tons. All in all, it's quite obvious that the market has been growing steadily over the last four to five years. The trade is mainly European, however, and of the total imports of 11,700 tons in 1991, 6,600 tons came from within the EEC and most of the rest came from Eastern European countries. The ACP countries in total only supplied 40 tons, all of which came from Kenya.

Netherlands Import Market Share - Frozen Beans, 1991



Source: Eurostat

Consumer Preferences and Specifications

The only prospects for frozen beans from distant sources is for the Extra Fine beans. All other types of bean are available from domestic production or neighboring suppliers.

The length of the extra fine bean should be around 3.5", with a diameter of between 5-7mm. It is the diameter that is crucial, not so much the length. A small, but steady market exists for this type of product.

The product should be packed in 10 x 1kg bags, with all the beans laid in the same direction.

Prices

Attainable prices would vary around the $1.00 per lb FOB Mombasa mark, but only if strictly according to specifications.

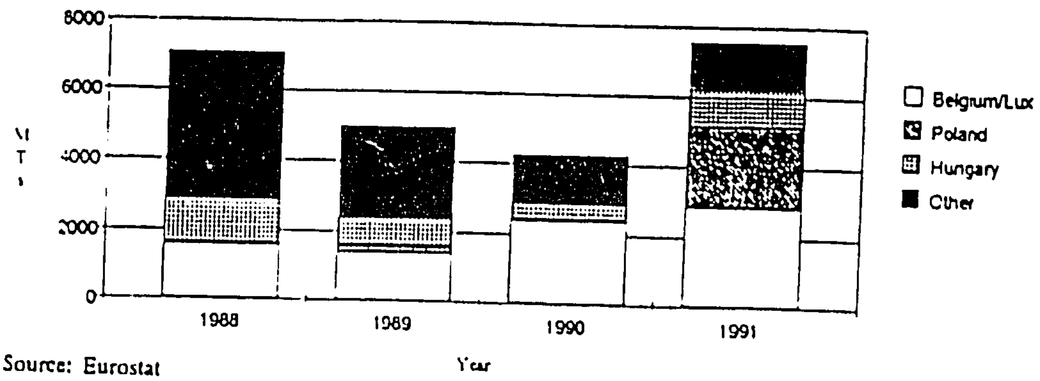
Market Prospects

It is estimated that the size of the total potential European market for frozen fine beans is around 400 tons. Kenya is already partly supplying this market, either directly or indirectly by having its fresh produce frozen within Europe. There is thus the distinct possibility of Kenya expanding its exports of frozen fine beans from the 63 tons exported to Europe as a whole in 1991. The market, however, is not likely to be big enough to justify extensive investment in frozen beans as a sole product line by Kenyan manufacturers.

MANGETOUT (SNOWPEAS)

Imports and Market Share

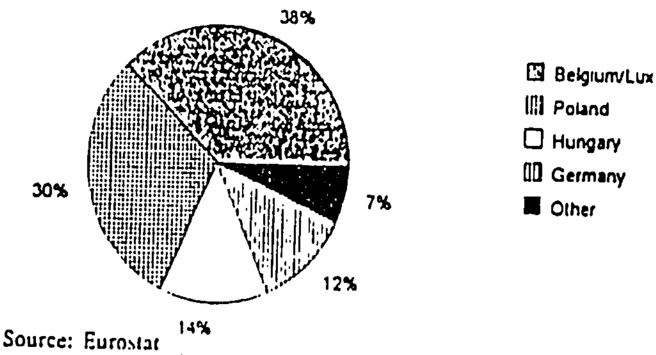
Netherlands Frozen Pea Imports, 1988-1991, MTs



Source: Eurostat

In 1990, total imports of frozen peas into the Netherlands amounted to 4,273 tons. This makes it a relatively insignificant importer of peas in the European context, with, for example, Italy importing 27,000 tons and Germany importing 22,000 tons. The size of the total European market for frozen peas in 1990 was 98,268 tons.

Netherlands Import Market Share - Frozen Peas, 1991



Source: Eurostat

Of the total tonnage imported into the Netherlands, other EEC countries supplied 3,518 tons or over 82% of the total. Little, if any, product came from distant sources, although China did supply some 50 tons, which were definitely of the snowpea variety. There would also be snowpeas coming from other European countries at certain times of the year. It is impossible, therefore, to get a clear picture of the size of either the European or the Netherlands market for frozen snowpeas.

Consumer Preferences and Specifications

The peas should be Individual Quick Frozen (IQF), not in excess of 8cm in length, dark green in color, non-stringy and medium-sweet.

Price

Offers in Europe vary, but tend to cluster around the US$1,900 per metric ton CIF. Prices can go above $2,000 per ton and as low as $1,300 per ton depending on markets and supply circumstances.

Market Opportunities for Kenyan Exporters

The major problem facing new entrants to the market is the emergence of China as a supplier of extremely cheap products. Although political disturbances in China did lead to the belief that there would be some disruption to the supply, it appears that this has not happened. Production facilities and quality control are increasing apace in China and there is consistent improvement in landed quality.

There might be a niche market of a few hundred tons for particularly high quality snowpeas adhering to very strict specifications. It is unlikely, however, that demand would be enough to fill container-loads coming from Mombasa.

ASPARAGUS

Domestic Production and Imports

Most frozen white asparagus comes either from the Netherlands itself, Spain, France and from neighboring European countries, although some products have also arrived from Chile and Peru.

Green asparagus is mainly supplied by the UK. There are, however, some imports of frozen green asparagus from distant suppliers, although transport costs tend to be somewhat prohibitive.

Frozen asparagus is not distinguished separately in the statistics and it is not therefore possible to get an indication of the volume or value of imports into the Netherlands. As is mentioned in the chapter on fresh asparagus, there is significant domestic production in the Netherlands and, in season, a certain amount of the crop is frozen for annual distribution. Having said that, however, the domestic product is only available from May through June and there are obvious gaps in the market.

Customer Preferences and Specifications

The market for green asparagus is relatively small as the Netherlands market is almost exclusively a market for white asparagus.

Specifications for frozen white asparagus are: the product must average around 16-17cm in length, be pure white, well peeled and packed in either 4 x 2.5kg or 10 x 1kg polybags within export quality cartons. The preferred diameter is around 17mm.

Specifications for frozen green asparagus are: the spears must be between 16-17cm in length. Diameter can vary from 8mm-20mm, with 70% normally having to be between 9mm and 16mm. The diameter is measured 120mm from the tip of the spear. Most importers would allow only one broken spear per 5 packs of 1,250g. The packs contain 250g sachets, within plain polybags; cartons are normally of 10kg.

There is also a market for cuts and tips. Length must be between 2-3cm and diameter between 8-12mm. Cuts and tips can also ~ ½" and 1".

A 10% tolerance is normally allowed on all these specifications.

Prices

Prices for white asparagus from Chile are of the order of US$3,500 per ton CIF main European port. Attainable prices for cuts and tips would be around US$2,500 per ton CIF main European port.

Attainable prices for green asparagus tend to vary significantly, but fluctuate at between US$2,700 and US$3,000 per ton CIF main European port for whole spear green asparagus.

Market Prospects

The market is extremely competitive. Food processors require specifications which are almost of industrial standard and it is difficult to meet their increasingly stringent requirements. South American countries have traditionally been supplying the product, but countries of the Far East, notably Taiwan and China, now have an increasing presence on the market, with a product of low price and improving quality.

Kenya would have some advantage over distant suppliers who have to carry an import duty of up to 18% into EC countries. On the other hand, Spain and Portugal will have their duties reduced to zero in the near future and are steadily increasing their production of fresh and frozen green asparagus.

Demand does exist, however, and there are gaps in the market. Further research into the markets for frozen vegetables is probably justified.

References:

International Trade Centre, "Fresh Fruit and Vegetables Report," 1987,

Eurostat, 1988 - 1991.

ITC Market News Service, 1988 - 1991.

Commonwealth Secretariat "Guidelines," 1991.

Commodity Board for Fruits and Vegetables of the Netherlands, 1988-1991.

"Eurofruit," various issues 1992.

Primary Interviews in the Netherlands, David Jones, 1988 - 1992.

"Food News," various issues 1992.

International Trade Centre, "Fruit Juices Report," 1991.

"Fruit Trades Journal," various issues, 1992.

The Fresh Produce Book 1993, Lockwood Press, London 1993.

APPENDIX A: EUROPEAN COMMUNITY IMPORT STATISTICS

All statistics provided by Eurostat. Statistics for certain years (notably 1988-1990) include top exporters to the EC for that year only. Other countries are either included in the "World" total or are listed under "Other." Those countries which appear in "Other" for one year, may appear under their own category once total EC imports have reached a certain level.

Table 1: Netherlands' Imports of Fresh/Chilled Asparagus, 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
Belgium/Lux	n/a	125	178	225	n/a	292	595	699
Greece	2	8	23	195	6	18	103	493
Spain	37	87	180	391	103	239	472	861
Ecuador	n/a	n/a	n/a	50	n/a	n/a	n/a	190
Peru	n/a	69	78	68	n/a	242	292	244
Other	391	199	241	155	1,226	642	658	533
Total	430	488	700	1,084	1,335	1,433	2,120	3,020
Intra-EC	233	365	504	884	784	984	1,520	2,269
Extra-EC	197	123	196	200	551	449	600	751

Source: EUROSTAT

Table 2: Netherlands' Imports of Fresh/Chilled Asparagus, 1988-1991, Unit Value

	ECU/MT			
	1988	1989	1990	1991
Belgium/Lux	n/a	2,336	3,343	3,107
Greece	3,000	2,250	4,478	2,528
Spain	2,784	2,747	2,622	2,202
Ecuador	n/a	n/a	n/a	3,800
Peru	n/a	3,507	3,744	3,588
Other	3,136	3,226	2,730	3,439
Total	3,105	2,936	3,029	2,786

Source: EUROSTAT

Table 3: Netherlands' Imports of Fresh/Dried Avocados, 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
France	628	925	1,735	1,799	1,016	1,289	2,314	2,075
Belgium/Lux	n/a	290	1,007	354	n/a	427	1,374	478
Spain	119	75	279	362	183	109	356	432
Canary Islands	0	0	6	29	0	0	9	29
Kenya	366	198	190	421	572	304	236	453
South Africa	485	1,643	1,780	2,925	787	2,210	2,305	3,426
USA	811	42	39	2	1,051	62	60	3
Mexico	421	1,348	606	504	504	1,480	716	524
Israel	628	86	110	72	899	128	157	79
Other	406	305	396	286	603	497	551	327
Total	3,864	4,912	6,148	6,754	5,615	6,506	8,078	7,826
Intra-EC	890	1,438	3,083	2,580	1,423	2,052	4,134	3,052
Extra-EC	2,974	3,474	3,065	4,174	4,192	4,454	3,944	4,774

Source: EUROSTAT

Table 4: Netherlands' Imports of Fresh/Dried Avocados, 1988-1991, Unit Value

	ECU/MT 1988	1989	1990	1991
France	1,618	1,394	1,334	1,153
Belgium/Lux	n/a	1,472	1,364	1,350
Spain	1,538	1,453	1,276	1,193
Canary Islands	n/a	n/a	1,500	1,000
Kenya	1,563	1,535	1,242	1,076
South Africa	1,623	1,345	1,295	1,171
USA	1,296	1,476	1,538	1,500
Mexico	1,197	1,098	1,182	1,040
Israel	1,432	1,488	1,427	1,097
Other	1,485	1,630	1,391	1,143
Total	1,453	1,325	1,314	1,159

Source: EUROSTAT

Table 5: Netherlands' Imports of Fresh/Chilled Beans (vigna spp., phaseolus spp.), 1988-

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
France	1,889	2,050	1,936	1,399	1,220	1,980	2,027	1,299
Belgium/Lux.	2,425	1,365	1,134	1,213	1,019	976	1,097	1,108
Germany	5,025	6,012	3,015	7,932	908	1,335	576	1,307
Italy	1,814	2,021	1,625	1,760	1,814	2,429	1,778	1,913
Spain	3,440	2,928	4,080	3,978	3,429	3,805	5,062	5,672
Canary Islands	555	365	505	362	697	665	787	787
Egypt	10,865	6,953	9,814	8,972	5,917	3,817	4,801	4,505
Senegal	201	204	276	575	256	418	427	865
Ethiopia	1,182	1,266	829	521	1,437	1,447	824	550
Kenya	435	301	579	741	510	387	673	992
Thailand	n/a	387	381	227	n/a	777	790	469
Other	1,919	663	3,238	937	2,050	754	1,870	1,438
Total	29,750	24,515	27,412	28,617	19,257	18,790	20,712	20,905
Intra-EC	15,757	14,641	13,887	16,345	9,234	10,756	11,069	11,352
Extra-EC	13,993	9,874	13,525	12,272	10,023	8,034	9,643	9,553

Source: EUROSTAT

Table 6: Netherlands' Imports of Fresh/Chilled Beans (vigna spp., phaseolus spp.), Unit

	ECU/MT 1988	1989	1990	1991
France	646	966	1,047	929
Belgium/Lux.	420	715	967	913
Germany	181	222	191	165
Italy	1,000	1,202	1,094	1,087
Spain	997	1,300	1,241	1,426
Canary Islands	1,256	1,822	1,558	2,174
Egypt	545	549	489	502
Senegal	1,274	2,049	1,547	1,504
Ethiopia	1,216	1,143	994	1,056
Kenya	1,172	1,286	1,162	1,339
Thailand	n/a	2,008	2,073	2,066
Other	1,068	1,137	578	1,535
Total	647	766	756	731

Source: EUROSTAT

Table 7: Netherlands' Imports of Frozen Beans, 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
France	1,309	166	206	236	1,164	128	208	183
Belgium/Lux.	3,128	2,406	4,146	3,591	1,937	1,462	3,135	3,108
Germany	n/a	442	914	1,821	n/a	236	570	1,077
Italy	250	246	272	474	236	241	272	471
U.K.	49	22	204	76	46	25	140	73
Poland	328	401	1,325	3,643	108	132	475	1,383
Hungary	n/a	372	557	676	n/a	148	245	373
Kenya	n/a	n/a	n/a	40	n/a	n/a	n/a	51
USA	n/a	n/a	n/a	142	n/a	n/a	n/a	103
Canada	n/a	n/a	n/a	347	n/a	n/a	n/a	222
Other	987	238	493	689	554	170	327	514
Total	6,051	4,293	8,117	11,735	4,045	2,542	5,372	7,558
Intra-EC	516	3,284	5,911	6,609	3,680	2,094	4,418	5,209
Extra-EC	5,535	1,009	2,206	5,126	365	448	954	2,349

Source: EUROSTAT

Table 8: Netherlands' Imports of Frozen Beans, Unit Value

	ECU/MT			
	1988	1989	1990	1991
France	889	771	1,010	775
Belgium/Lux.	619	608	756	865
Germany		534	624	591
Italy	944	980	1,000	994
U.K.	939	1,136	686	961
Poland	329	329	358	380
Hungary		398	440	552
Kenya				1,275
USA				725
Canada				640
Other	561	714	663	746
Total	668	592	662	644

Source: EUROSTAT

Table 9: Netherlands' Impo:ts of Fresh/Chilled Capsicum or Pimenta, 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
Italy	468	439	160	1,177	235	227	109	663
Spain	n/a	33	90	159	n/a	50	140	293
Hungary	n/a	n/a	n/a	223	n/a	n/a	n/a	107
Zambia	n/a	n/a	21	89	n/a	n/a	47	236
Surinam	n/a	n/a	n/a	74	n/a	n/a	n/a	201
Other	395	412	571	206	414	611	698	312
Total	863	884	842	1,928	649	888	994	1,812
Intra-EC	722	625	470	1,441	417	442	548	1,117
Extra-EC	141	259	372	487	232	446	446	695

Source: EUROSTAT

Table 10: Netherlands' Imports of Fresh/Chilled Capsicum or Pimenta, 1988-1991, Unit V

	ECU/MT			
	1988	1989	1990	1991
Italy	502	517	681	563
Spain		1,515	1,556	1,843
Hungary				480
Zambia			2,238	2,652
Surinam				2,716
Other	1,048	1,483	1,222	1,515
Total	752	1,005	1,181	940

Source: EUROSTAT

Table 11: Netherlands' Imports of Fresh/Dried Mangos and Mangosteen, 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
France	473	807	342	295	822	1,283	492	453
Belgium/Lux	169	452	393	569	200	705	577	838
Mali	269	343	335	245	460	563	455	437
Burkina Faso	84	2	67	179	163	3	81	278
Ivory Coast	107	135	49	110	190	212	58	160
Kenya	122	51	137	56	221	79	159	90
South Africa	325	351	227	485	588	542	324	710
Namibia	n/a	n/a	228	3	n/a	n/a	376	6
USA	1,786	2,308	3,647	2,729	2,588	2,698	4,899	3,401
Mexico	508	853	402	767	720	898	483	795
Guatemala	n/a	n/a	n/a	270	n/a	n/a	n/a	322
Venezuela	357	225	313	264	474	304	392	363
Peru	274	262	683	712	474	420	1,066	1,155
Brazil	945	985	1,703	2,234	1,478	1,488	2,415	2,994
Other	642	692	797	1,002	1,123	1,058	1,131	1,401
Total	6,061	7,466	9,323	9,920	9,501	10,253	12,908	13,403
Intra-EC	821	1,476	980	1,019	1,372	2,294	1,422	1,535
Extra-EC	5,240	5,990	8,343	8,901	8,129	7,959	11,486	11,868

Source: EUROSTAT

Table 12: Netherlands' Imports of Fresh/Dried Mangos and Mangosteen, 1988-1991, Unit Value

	ECU/MT			
	1988	1989	1990	1991
France	1,738	1,590	1,439	1,536
Belgium/Lux	1,183	1,560	1,468	1,473
Mali	1,710	1,641	1,358	1,784
Burkina Faso	1,940	1,500	1,209	1,553
Ivory Coast	1,776	1,570	1,184	1,455
Kenya	1,811	1,549	1,161	1,607
South Africa	1,809	1,544	1,427	1,464
Namibia			1,649	2,000
USA	1,449	1,169	1,343	1,246
Mexico	1,417	1,053	1,201	1,037
Guatemala				1,193
Venezuela	1,328	1,351	1,252	1,375
Peru	1,730	1,603	1,561	1,622
Brazil	1,564	1,511	1,418	1,340
Other	1,749	1,529	1,419	1,398
	1,568	1,373	1,385	1,351

: EUROSTAT

51

Table 13: Netherlands' Imports of Canned Passionfruit and Guavas, 1990-1991

	Metric Tons		1,000 ECUs		Unit Value, ECU/MT	
	1990	1991	1990	1991	1990	1991
Belgium/Lux	n/a	12	n/a	27		2,250
Nigeria	n/a	11	n/a	5		455
Kenya	n/a	3	n/a	3		1,000
South Africa	n/a	563	n/a	286		508
Venezuela	n/a	3	n/a	2		667
India	n/a	18	n/a	20		1,111
Thailand	n/a	12	n/a	9		750
Malaysia	n/a	3	n/a	3		1,000
Other	766	0	471	0	615	
Total	766	624	471	355	615	569
Intra-EC	52	12	53	27	1,019	2,250
Extra-EC	714	612	418	328	585	536

Source: EUROSTAT

Table 14: Netherlands' Imports of Fresh/Chilled Peas (Pisum Sativum), 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
Belgium/Lux	n/a	2,228	2,313	2,103	n/a	797	859	839
Germany	n/a	2,199	3,516	4,235	n/a	613	897	925
Kenya	n/a	n/a	n/a	13	n/a	n/a	n/a	29
Zambia	n/a	22	197	319	n/a	49	430	384
Zimbabwe	118	191	187	398	309	428	380	755
Guatemala	113	146	235	257	207	304	547	649
Other	3,578	1,062	706	360	1,722	749	654	491
Total	3,809	5,848	7,154	7,685	2,238	2,940	3,767	4,072
Intra-EC	3,401	5,216	6,400	6,509	1,461	1,941	2,346	2,048
Extra-EC	408	632	754	1,176	777	999	1,421	2,024

Source: EUROSTAT

Table 15: Netherlands' Imports of Fresh/Chilled Peas ('Pisum Sativum'), 1988-1991, Unit Valu

	ECU/MT			
	1988	1989	1990	1991
Belgium/Lux		358	371	399
Germany		279	255	218
Kenya				2,231
Zambia		2,227	2,183	1,204
Zimbabwe	2,619	2,241	2,032	1,897
Guatemala	1,832	2,082	2,328	2,525
Other	481	705	926	1,364
Total	588	503	527	530

Source: EUROSTAT

Table 16: Netherlands' Imports of Frozen Peas, 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
France	1,424	563	173	129	1,203	454	197	108
Belgium/Lux.	1,575	1,379	2,384	2,859	908	799	1,358	1,549
Germany	681	871	625	878	439	566	517	287
U.K.	24	250	10	38	15	140	22	29
Italy	n/a	235	105	1	n/a	143	90	1
Denmark	40	160	191	15	15	116	135	14
Yugoslavia	1,380	373	144	90	307	147	59	35
Poland	n/a	195	69	2,310	n/a	78	23	727
Hungary	1,267	807	404	1,036	502	302	156	486
China	n/a	102	49	173	n/a	167	61	260
Other	712	59	119	64	375	61	84	77
Total	7,103	4,994	4,273	7,593	3,764	2,973	2,702	3,573
Intra-EC	3,783	3,458	3,518	3,924	2,604	2,219	2,320	1,994
Extra-EC	3,320	1,536	755	3,669	1,160	754	382	1,579

Source: EUROSTAT

Table 17: Netherlands' Imports of Frozen Peas, Unit Value

	ECU/MT			
	1988	1989	1990	1991
France	845	806	1,139	837
Belgium/Lux.	577	579	570	542
Germany	645	650	827	327
U.K.	625	560	2,200	763
Italy		609	857	1,000
Denmark	375	725	707	933
Yugoslavia	222	394	410	389
Poland		400	333	315
Hungary	396	374	386	469
China		1,637	1,245	1,503
Other	527	1,034	706	1,203
Total	530	595	632	471

Source: EUROSTAT

Table 18: Netherlands' Imports of Fresh Strawberries, 1989-1991

	Metric Tons			1,000 ECUs		
	1989	1990	1991	1989	1990	1991
France	1,115	777	786	2,463	1,700	1,798
Belgium/Lux.	2,257	2,646	3,544	3,836	3,960	6,479
Germany	848	334	816	553	425	656
Italy	776	623	475	1,241	1,032	845
Portugal	45	185	466	57	185	420
Spain	10,731	4,321	7,319	11,852	7,624	10,302
Poland	4,033	4,425	7,373	2,208	2,008	3,157
Romania	937	n/a	535	467	n/a	247
Bulgaria	393	874	293	179	381	124
Kenya	6	0	15	27	0	30
Israel	78	121	65	313	359	252
Other	724	855	132	699	808	369
Total	21,943	15,161	21,819	23,895	18,482	24,679
Intra-EC	15,498	8,886	13,406	20,394	14,926	20,510
Extra-EC	6,445	6,275	8,413	3,501	3,556	4,169

Source: EUROSTAT

Table 19: Netherlands' Imports of Fresh Strawberries, Unit Value

	ECU/MT 1989	1990	1991
France	2,209	2,188	2,288
Belgium/Lux.	1,700	1,497	1,828
Germany	652	1,272	804
Italy	1,599	1,657	1,779
Portugal	1,267	1,000	901
Spain	1,104	1,764	1,408
Poland	547	454	428
Romania	498		462
Bulgaria	455	436	423
Kenya	4,500		2,000
Israel	4,013	2,967	3,877
Other	965	945	2,795
Total	1,089	1,219	1,131

Source: EUROSTAT

Table 20: Netherlands' Imports of Fresh/Chilled Tomatoes, 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
France	1,167	1,036	694	1,668	698	716	546	1,417
Belgium/Lux.	1,479	2,956	3,258	9,084	1,323	2,687	3,042	7,542
Germany	170	1,021	777	499	98	826	766	431
Italy	47	52	80	88	14	31	42	51
U.K.	3,234	1,358	1,196	3,308	2,625	1,109	1,250	3,566
Spain	14,679	13,409	10,039	10,328	7,963	7,839	7,514	9,033
Canary Islands	60,034	46,489	66,940	90,986	45,231	32,136	60,253	80,339
Turkey	131	81	40	38	103	59	29	23
Morocco	250	435	684	1,148	179	264	528	895
Kenya	n/a	n/a	n/a	9	n/a	n/a	n/a	3
Israel	120	264	504	511	95	205	487	418
Other	1,175	500	745	1,274	678	339	610	1,096
Total	82,486	67,601	84,957	118,941	59,007	46,211	75,067	104,814
Intra-EC	21,797	19,985	16,350	25,210	13,275	13,325	13,383	22,185
Extra-EC	60,689	47,616	68,607	93,731	45,732	32,886	61,684	82,629

Source: EUROSTAT

Table 21: Netherlands' Imports of Fresh/Chilled Tomatoes, Unit Value

	ECU/MT			
	1988	1989	1990	1991
France	598	691	787	850
Belgium/Lux.	895	909	934	830
Germany	576	809	986	864
Italy	298	596	525	580
U.K.	812	817	1,045	1,078
Spain	542	585	748	875
Canary Islands	753	691	900	883
Turkey	786	728	725	605
Morocco	716	607	772	780
Kenya				333
Israel	792	777	966	818
Other	577	678	819	860
Total	715	684	884	881

Source: EUROSTAT

60

TABLE 22 IMPORTS - NETHERLANDS Jan - Dec 1988 - 1990

Quantity = Tons
Value = 1000 ECU

Juice of Single Fruit or vegetable, (excl. 2009.11-11 to 2009.80-95, excl. mixtures), of Density < 1.33, of value < ECU30 per 100kg, (excl. added sugar), unfermented, (not containing added spirit).

2009.80-99	1988		1989		1990	
Country	Quantity	Value	Quantity	Value	Quantity	Value
Colombia	3037	3424	2467	2245	2808	2173
Venezuela	-	-	165	100	50	22
Ecuador	259	676	378	697	867	1483
Peru	196	349	168	323	322	430
Brazil	1469	3198	1118	2098	1465	1800
Chile	145	178	18	20	-	-
India	253	261	159	181	166	160
Sri Lanka	279	325	262	266	379	349
Thailand	117	126	98	87	358	268
Malaysia	-	-	-	-	-	-
China	-	-	-	-	20	83
World	11144	20167	11331	18817	13686	21611
Intra EEC	4553	9899	5618	11362	6489	13217
Extra EEC	6591	10267	5713	7457	7197	8394

Source: Eurostat

61

TABLE 23 IMPORTS - NETHERLANDS Jan - Dec 1988 - 1990 Quantity = Tons
Value = 1000 ECU

Mixtures of Juices (excluding citrus & pineapple), of Density <1.33, of value >30 ECU/100kg (excl. added sugar). Unfermented (Not containing added spirit).

2009.90-59	1988		1989		1990	
Country	Quantity	Value	Quantity	Value	Quantity	Value
Belg-Lux	228	360	501	763	773	932
Germany	593	620	1421	1154	2509	2246
Italy	84	36	424	195	437	342
USA	87	72	-	-	-	-
Brazil	3	7	191	282	94	128
Israel	27	16	3	5	286	413
World	1077	1203	2587	2460	4129	4102
Intra EEC	937	1079	2393	2173	3743	3547
Extra EEC	141	124	194	287	386	555

Source: Eurostat

67

TABLE 24(a) IMPORTS - NETHERLANDS Jan - Dec 1988 - 1990 Quantity = Tons
Value = 1000 ECU

Fruit & edible parts of plants, with added sugar, in packings >1kg (excl.added spirit and 2008.11-10 to 2008.99-45), (otherwise prepared or preserved in 20.06 and 20.07).

2008.99-49	1988		1989		1990	
Country	Quantity	Value	Quantity	Value	Quantity	Value
Italy	403	349	97	58	-	-
S. Africa	456	213	491	283	221	144
Honduras	390	273	190	155	398	288
Brazil	1629	927	3311	2033	2985	1691
Thailand	85	83	90	110	129	173
Philippines	414	397	500	510	338	299
World	65316	5098	7966	6307	8299	6537
Intra EEC	1028	1236	866	1207	815	1399
Extra EEC	5504	3862	7100	5101	7484	5138

Source: Eurostat

TABLE 24(b) IMPORTS - NETHERLANDS Jan - Dec 1988 - 1990 Quantity = Tons
Value = 1000 ECU

Fruit & edible parts of plants, with added sugar, in packings <1kg (excl. 2008.11-10 to 2008.99-55 or added spirit), (otherwise prepared or preserved in 20.06 and 20.07).

2008.99-59	1988		1989		1990	
Country	Quantity	Value	Quantity	Value	Quantity	Value
Thailand	410	402	433	556	656	639
China	544	618	434	543	451	428
Taiwan	258	338	220	359	149	213
World	3195	3626	3154	3748	2528	3006
Intra EEC	1033	1305	992	1276	814	1229
Extra EEC	2161	2321	2162	2472	1715	1778

Source: Eurostat

62

TABLE 25(a) IMPORTS - NETHERLANDS Jan - Dec 1988 - 1990 Quantity = Tons
Value = 1000 ECU

Mixtures of fruit, with added sugar, in packings >1kg (excl. added spirit, 2008.19-10), (otherwise prepared or preserved in 20.06 and 20.07).

2008.92-50	1988		1989		1990	
Country	Quantity	Value	Quantity	Value	Quantity	Value
Italy	1075	870	1094	940	737	636
Greece	230	194	381	313	120	100
S. Africa	52	36	180	116	122	92
Thailand			63	54	292	201
World	2434	2819	3287	3919	2791	3486
Intra EEC	2360	2775	2998	3687	2326	3143
Extra EEC	74	63	289	232	465	343

Source: Eurostat

TABLE 25(b) IMPORTS - NETHERLANDS Jan - Dec 1988 - 1990 Quantity = Tons
Value = 1000 ECU

Mixtures of fruit, with added sugar, in packings <1kg, no single fruit exceeding 50% of total (excl. added spirit), (excl. 2008.19-10), (otherwise prepared or preserved in 20.06 and 20.07).

2008.92-71	1988		1989		1990	
Country	Quantity	Value	Quantity	Value	Quantity	Value
Italy	4665	4601	4998	4934	5992	6266
Greece	2179	2203	2199	1985	1609	1369
South Africa	740	609	1177	922	1281	936
Thailand	226	197	735	570	1138	710
Taiwan			14	21	-	-
World	8274	8169	9781	9149	12089	11262
Intra EEC	7252	7297	7823	7627	8950	9132
Extra EEC	1022	872	1958	1522	3139	2129

Source: Eurostat

TABLE 26 IMPORTS - NETHERLANDS Jan - Dec 1988 - 1990 Quantity = Tons
Value = 1000 ECU

Mixtures of fruit, with added sugar, in packings < 1kg (excl. added spirit and 2008.19-90 and 2008.92-71), (otherwise prepared or preserved in 20.06 and 20.07).

2008.92-79	1988		1989		1990	
Country	Quantity	Value	Quantity	Value	Quantity	Value
Thailand	9	9	32	34	2	1
Taiwan	-	-				
World	1911	1825	1685	1636	2416	2355
Intra EEC	1872	1789	1652	1599	2248	2207
Extra EEC	38	36	33	36	168	148

Source: Eurostat

TABLE 27 IMPORTS - NETHERLANDS Jan - Dec 1988 - 1990 Quantity = Tons
Value = 1000 ECU

Fruit & edible part of plants, (excl. added sugar or spirit and those 2008.11-10 to 2008.99-91, (otherwise prepared or preserved in 20.06 and 20.07).

2008.99-99	1988		1989		1990	
Country	Quantity	Value	Quantity	Value	Quantity	Value
Thailand	102	75	129	104	92	74
China	200	94	18	12	87	58
World	7902	4902	8390	5247	8597	5895
Intra EEC	4119	2444	5773	3387	4996	3654
Extra EEC	3783	2458	2617	1860	3601	2241

Source: Eurostat

TABLE 28 IMPORTS - NETHERLANDS Jan - Dec 1990 Quantity = Tons
Value = 1000 ECU

Passionfruit, guavas and tamarinds, with added sugar, in packings > 1kg, (excl. added spirit), (otherwise prepared or preserved in 20.06 and 20.07).

2008.99-46	1990	
Country	Quantity	Value
Kenya	85	83
South Africa	387	179
Namibia	114	55
Honduras	22	14
Brazil	26	10
India	58	59
Thailand	7	6
World	744	441
Intra EEC	39	29
Extra EEC	705	411

Source: Eurostat

TABLE 29 IMPORTS - NETHERLANDS Jan - Dec 1988 - 1990 Quantity = Tons
Value = 1000 ECU

Fresh or Dried Mangos and Mangosteens.

0804.50-00	1988		1989		1990	
Country	Quantity	Value	Quantity	Value	Quantity	Value
Venezuela	357	474	225	304	313	392
Peru	274	474	262	420	683	1044
Brazil	945	1478	985	1488	1703	2415
Thailand	39	92	24	67	33	75
World	6061	9501	7466	10253	9323	12908
Intra EEC	821	1372	1476	2294	980	1422
Extra EEC	5240	8129	5990	7958	8343	11486

Source: Eurostat

64

TABLE 30 IMPORTS - NETHERLANDS Jan - Dec 1988 - 1990

Quantity = Tons
Value = 1000 ECU

Dried Pawpaws

0813.40-50	1988		1989		1990	
Country	Quantity	Value	Quantity	Value	Quantity	Value
Thailand	248	404	390	725	141	268
World	264	435	488	896	181	337
Intra EEC	10	21	70	133	16	38
Extra EEC	254	414	418	763	165	299

Source: Eurostat

TABLE 31 IMPORTS - NETHERLANDS Jan - Dec 1988 - 1990

Quantity = Tons
Value = 1000 ECU

Unsweetened Fruits and Nuts, uncooked or cooked by steaming or boiling in water, frozen, (excl. 0811.10-11 to 0811.90-70).

0811.90-90	1988		1989		1990	
Country	Quantity	Value	Quantity	Value	Quantity	Value
Netherlands	-	-	-	-	-	-
Yugoslavia	3107	1467	2619	977	4276	2523
Guatemala	-	-	-	-	-	-
Costa Rica	719	602	668	567	1089	814
Peru	257	210	191	184	99	84
Brazil	473	303	995	1073	779	620
Chile	151	113	-	-	59	38
Israel	94	219	51	116	138	267
Thailand	154	223	77	151	121	224
Philippines	-	-	-	-	15	12
Taiwan	50	82	58	122	6	9
New Zealand	697	490	398	301	142	95
World	21095	15642	23511	17547	31070	22542
Intra EEC	9231	8204	12838	11053	14286	12462
Extra EEC	11865	7439	10673	6494	16785	10080

Source: Eurostat

APPENDIX B

REPRESENTATIVE LIST OF DUTCH IMPORTERS

Indupro B.V
P.O. Box 30231
3001 DE
Rotterdam
Tel: 010 4051234
Fax: 010 4055175
Tlx: 23515
Juice

Hikoma
Exotic Juice Terminal
Vierhavenstraat 30
NL-3002 AG
Rotterdam
Tel: 010 4255466
Fax: 010 4775046
Juice

Catz International BV
3000 AD
P O Box 180
Blakeburg Bldng
Blaak 22
Tel: 010 411 34 40
Fax: 010 404 88 09
Tlx: 21164
Canned fruit, Dried fruit, IQF

Boas B.V.
Stephensonstraat 40
2723 RN Zoetermeer
P O Box 340
2700 AH Zoetermeer
Tel: 079 442600
Fax: 079 421722
Canned fruit, Dried fruit, IQF

Maarten Catz Merchandising B.V.
P O Box 140
3100 AC Schiedam
Tel: 010 4739444
Fax: 010 4739849
Canned fruit, dried fruit, IQF

Gloe & Co.
van Riensdijkweg 68
3088 HD Rotterdam
P O Box 53027
3008 HA Rotterdam
Tel: 010 4295033
Fax: 010 4292194
Tlx: 28450
Canned fruit, Dried fruit, IQF

Intergroup Trading IGT B.V.
Rokin 101
1012 KM Amsterdam
Tel: 020 272027
Fax: 020 253548
Tlx: 13083
Canned fruit

E. van de Sandt B.V.
Straatweg 206
Rotterdam
P O Box 1027
3000 BA Rotterdam
Tel: 010 4182040 / 4182060 / 4221177
Fax: 010 4610665
Tlx: 21389 SANDT NL
Dried fruit, Canned fruit

69

De Winter & Konijn B.V.
Jan Rebelstraat 2
Amsterdam
P O Box 9613
1006 GC Amsterdam
Tel: 020 100234
Fax: 020 100239
Tlx: 11287
Canned fruit, Dried fruit

Hero Nederland BV
Teterunbgsedijk
4817 ME
Breda
Tel: 076 798000
Tlx: 54182 HER NL
Juice, IQF

Keizer BV
Postbus 67
5165 ZH WASPIK
Industrieterrein de "Maasoever"
Industrieweg 3
Waspik
Tel: 04168-2196
Fax: 04168-1865
Tlx: 35023 Keidi nl/30802 nl
IQF

Hikoma AG
Thiersteinerallee 89
CH-4053 Basel
(Switzerland)
Tel: 061 3315595
Fax: 061 3312009
Tlx: 965175 AKO
Juice

Euro Citrus BV
Albusstraat 5
P O Box 227
4900 AE Oosterhout
Tel: 01 620 27900
Tlx: 54818 NL
Fax: 01 620 54397
Juice

Hiwa Rotterdam Port Cold Store
Van Maasdijkweg 15
P O Box 5027
3008 AA
Rotterdam
Tel: 010 4294877
Fax: 010 4298420
Tlx: 28128 HIWA NL
Juice

Mondi (De Leeuw)
Ziederwij 8-10
2991 LB
Barenbrecht
Tel; 0180614433
Tlx: 20101
Juice

SVZ
P O Box 27
Oude Kerkstraat 8
4870 AA
Etten-Leur
Tel: 01 60827321
Tlx: 54034
Fax: 01 60813321
Juice

10

Quest International BV
P O Box 2
1400 CA
Bussum
Tel: 021 5999111
Tlx: 54673
Juice

MCM Foods BV
'S-Gravelandseweg 567
3119 XT Schiedam
P O Box 140
3100 AC Schiedam-Holland
Tel: 010 473 9444
Fax: 010 473 9849
Tlx: 25410 - 25462
Canned fruit, Dried fruit, IQF

Westland Import International
Postbus 224
2680 AE
Monster (Poeldijk)
Tel: 01 749 14444
Fax: 01 749 46890
Tlx: 32752

Westkust Holland
Herenweg 63
1935 AZ
Egmond Binnen
Tel: 31 220 62289
Fax: 31 220 65914
Tlx: 57880

Van Dijk Delft BV
Hoornseweg 26
2635 CN
Den Hoorn
PO Box 50003 NL
2600 GA
Delft
Tel: 1 56 11261
Tlx: 38013 / 38116

Unimarkt BV
Centralgroothandelsmarkt
Pier B/C
Postbus 59345
1040 KH
Amsterdam
Tel: 20 681 2056

Windig BV
Centrale Markt Hal 16-20
Jan van Galenstraat 4
NL 1051 KM
Amsterdam
Tel: 20 824 040
Fax: 20 861 813
Tlx: 16342

Agrofresh BV
Marconistraat 3-11
Postbus 6076
3002 AB Rotterdam
Tel: 010 42 53288
Fax: 010 47 60397
Tlx: 26119 / 28577

Albert Heijn BV
Ankersmidplein 2
Postbus 604
1500 EP Zaandam
Tel: 075 599111
Fax: 075 31 3030
Tlx: 19155

Bratlanta Handelsmij. BV
Groothandelsmarkt 188
Postbus 10092
3004 AB Rotterdam
Tel: 010 437 5333
Fax: 010 415 4627
Tlx: 23444

11

Citronas BV
Keileweg 80
Postbus 6094
3002 AB Rotterdam
Tel: 010 4766544
Fax: 010 4779712
Tlx: 22007

Blending Companies

Cargill BV
Coenhavenweg 2
P O Box 8074
1005 AB
Amsterdam
Tel: 020 5801911
Tlx: 14081 CGLH
Fax: 020 868715
Juice

Importers/Reprocessors

Riedel BV
Postbus 64
6710 BB
Ede
Tel: 083 8079911
Fax: 083 8031509
Tlx: 37066
Juice

Raak (Holland) BV
Postbus 8332
3503 RH
Utrecht
Tel: 030 445804
Fax: 030 445594
Tlx: 40188
Juice

Vrumona BV
Postbus 1
3980 CA
Bunnik
Tel: 034 0568911
Fax: 034 0562382
Tlx: 40271
Juice

Retail Companies

Ahold
Postbus 33
1506 CK
Zaandam
Tel: 075 599111
Tlx: 19022 A AH HK
Juice

Hermans BV
Laanstraat 2
3762 Soest
Tel: 021 5510404
Head Office:
Omval 50
Amsterdam
Tel: 020 948829
Juice

Internationale Spar Centrale BV
Rokin 101
1012 KM
Amsterdam
Tel: 020 266749
Juice

12

Useful Addresses

Centre for the Promotion of Imports from
Developing Countries
P O Box 3009
Trade Promotion Section
3001 DA
Rotterdam
Tel: 010 4130787
Fax: 010 4114081
Tlx: 27151 CBIBZ

Produktschaap (Commodity Board)
Bezuidenhoutsweg 153
2594 AG
The Hague
Tel: 070 3814631
Tlx: 31046
Fax: 070 3477176

Central Bureau of Statistics
P O Box 959
Prinses Beatrixlaan 428
2270 AZ Voorburg
Tel: 070 694341