KENYA EXPORT DEVELOPMENT SUPPORT

FRENCH MARKET SURVEY OF SELECT KENYAN FRESH AND PROCESSED HORTICULTURAL PRODUCTS

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

PN-ABR-608

French Market Survey

of

Select Kenyan Fresh and Processed Horticultural Products

Prepared by:
David Jones & Thomas Klotzbach
Fintrac Inc.

AID 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 French 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.[1]

Product	Rating	Notes
Mangoes	2	Small existing market for Kenya but strong competition from ex French colonies. Preference for red-blush varieties.
Strawberries	3	Large but risky market; only chance in late December to early February but intense competition; more research needed.
Avocados	3	Existing market for Kenya but only 2% total imports; intense competition from Israel and R.S.A.
Asparagus	2	Predominantly white, some green but only window from Nov-Dec; more research needed.
Beans	4	Good established market; Kenya associated with "fine beans"; market consolidation required; more research needed.

[1] Data collection on the French market is best achieved through on-site field research. As this was not part of the scope of work for these Kenyan market surveys, and considering the relative importance of the French market to Kenya (particularly for avocados and fine beans), the authors recommend that the KEDS project undertake such a field survey.

Product	Rating	Notes
Mangetout	2	Small market, but growing. Domestic production, but market potential in small window. More research needed.
Cherry Tomatoes	1	Domestic production, also Spain. Market for Kenyan produce could be expanded; more research needed.
Okra	1	Very small but growing market does exist. Competition from French Departments. More research needed.
Chilies	2	Growth market for dried hot chili. More research needed.
Juices	3	Steady market for exotics e.g. passionfruit, pineapple and mango concentrates/purees. More research needed.
Canned and Frozen	2	Some prospects for mixed range of canned exotics; must include pineapple, mango slices and fruit cocktail. Good demand for frozen beans and fruit in catering sizes. More research needed.
Dried	1	Small market for sugared product from the Far East.

Country Profile

The French market is a large and diverse one, with a number of trading centers distributed in different cities throughout the country. The major market is in Rungis, just outside Paris - probably the largest produce market in the world, selling not only fruits and vegetables, but flowers, fish, dairy products and meat. In 1990 for example, the market itself handled 1.35 million tons of fruits and vegetables, of which, 750,000 tons were fruits and over 600,000 tons were vegetables. This was actually a small reduction on the totals for 1988 and 1989 - a reflection of the downward trend in the activities of wholesale markets throughout Europe, as supermarkets gain control of the food business and require more direct forms of buying and selling.

The main other wholesale markets in France are based at Rouen, Nantes, Bordeaux, Lille, Lyon and Strasbourg, with smaller markets at Dijon, Nancy and other smaller towns. Most of the major import companies have some form of representation, either through branch offices or associate companies throughout the country.

Market Trends

The French market can almost be split into two distinct time periods - i.e. the months when no domestic or nearby European production is available, and those months when domestic production comes on stream.

For the years 1989/90, total imports of fruits and vegetables into France as a whole amounted to just over 3.8 million tons. In the 10 years since 1980/81, imports have increased steadily except for some variations in 1982/83 and 1984/5. The figure for 1989/90 represents an overall increase of 40% in total tonnage imports. Of the total imports, fruit amounted to 2.4 million and vegetables (including potatoes) to 1.4 million.

Prices

Appendix B contains a list of indicative prices for the Rungis market during the second week of November 1993. In each product section, COLEACP price trends, when available, are discussed.

Distribution Structure

French companies are following the trends in other countries by merging and consolidating in order to combat the increasing purchasing power of the supermarkets and competition from other countries, notably the Netherlands. For the Kenyan products under review, the major importing companies in France are Helfer, Pascual, Compagnie Fruitiere, Pomona, and Malet Azoulay. Names and addresses of fruit and vegetable importers are provided in Appendix B. Each of these companies has acquired other companies and has distribution networks throughout the country. They specialize not only in selling to the supermarkets, but also in selling to wholesalers and to small shops, i.e. the company has a number of specialist companies within it, performing these functions. Most of them work mainly on a commission basis, although there are possibilities for advances and in very rare cases, minimum guaranteed prices. They are, however, prepared to discuss minimum quantity and price guarantees only when they have established a trusting relationship with a supplier.

The general pattern of trade in France now is that these large companies sell between 60-75% of their products to the supermarkets, with the rest going to the wholesalers, secondary wholesalers, catering sector and alternative distribution outlets. The main supermarkets are Intermarche, Casino, Super-U, Metro and Euromarche. These supermarkets are presently controlling around 60% of the fruit and vegetable business in France, although there are more of them than in the United Kingdom, perhaps 10 in all.

The traditional wholesale markets are still relatively important, although their share is falling, and the small shops and street trading are also still quite a significant part of the retail trade. There is a trend towards direct trading, however, and there is no doubt that in the years to come the wholesale market will see its power significantly reduced. For example, although, at the moment, there are about 250 companies named as operating in the Rungis market, it is probable that those that are actually operating effectively number about 100. Equally, there has been an increasing degree of specialization in the market, with companies identifying themselves as specialists in certain types of exotic fruits or vegetables or stone fruits, etc. This trend is seen to be a continuing one as supermarkets require increasing expertise on a product by product basis.

SECTION I: MANGOES

France is a major market for tropical fruit, second after Germany among European Community (EC) countries. Demand for imported tropical products has remained high due to: higher income levels; increased foreign travel by a wide segment of the population exposing them to tropical fruits; a large foreign population acquainted with these items; and an interest by consumers to incorporate new products to their eating habits.

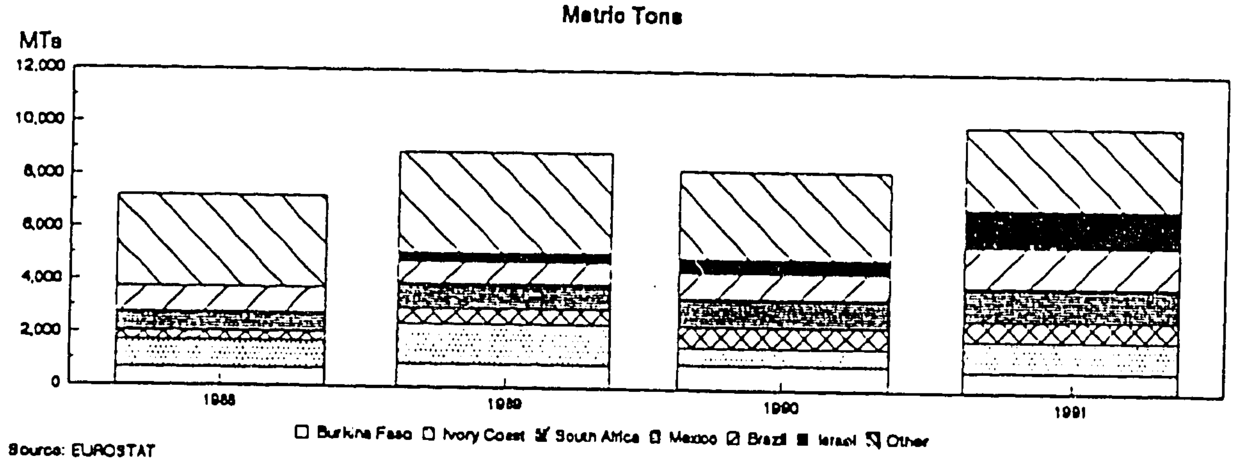
The per capita consumption of mangoes (plus certain quantities of guavas and mangosteens) was estimated at 145g in 1990, increasing from 110g in 1986. Importers are increasing their attempts to make mangoes available all year round.

Imports

Although mangoes account for less than one percent of the total volume of fruit imports, the market is growing quickly. Over the period 1988-1991, volume increased by 40 percent to 10,004 MTs and value by 29 percent to ECU16.4 million (note that figures also include certain quantities of guavas and mangosteens).

French Imports of Fresh Mangoes, 1988-1991

Metric Tons



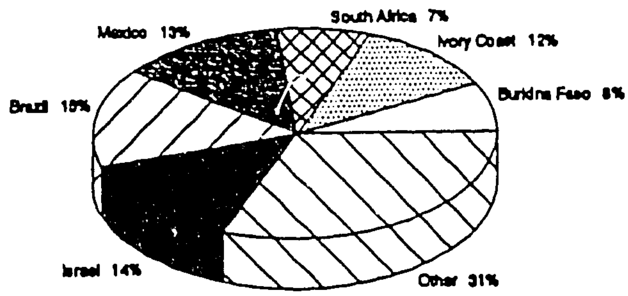
Source: EUROSTAT

Import Share

In 1991, 92 percent were sourced from outside the EC. The main supplier was Brazil (with 15 percent of 1991 imports), followed by Israel (14%), Mexico (13%), the Ivory Coast (12%), Burkina Faso (8%), South Africa (7%), Peru (6%), Mali (5%) and the United States (6%, and particularly Puerto Rico). These countries together supplied 87 percent of mango imports in 1991. It should be noted, nevertheless, that among the exports from countries like Brazil, South Africa and the USA, the import figures also include guavas. Kenya currently has less than a one percent market share, supplying only 59 MTs in 1991.

French Import Share - Fresh Mangoes

1991, based on weight



Source: EUROSTAT

Table 1: French Imports of Fresh/Dried Mangos and Mangosteen, 1988-1991								
	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
Belgium/Lux	143	77	145	192	287	140	281	330
Netherlands	559	748	834	528	1,073	1,348	1,446	881
Mali	753	899	644	539	1,273	1,254	944	856
Burkina Faso	647	842	908	755	1,103	1,153	1,407	1,195
Guinea	n/a	512	n/a	149	n/a	692	n/a	223
Ivory Coast	1,030	1,519	638	1,163	1,744	2,414	1,120	2,067
Kenya	51	35	138	59	88	71	312	82
South Africa	343	578	793	746	657	1,061	1,364	1,391
USA	304	385	386	569	478	527	521	727
Mexico	730	964	1,081	1,303	1,007	1,248	1,430	1,588
Venezuela	114	130	65	91	202	193	102	132
Peru	750	629	139	637	1,483	1,155	210	1,126
Brazil	964	823	978	1,508	2,006	1,686	1,773	2,497
Israel	n/a	380	553	1,444	n/a	494	759	2,578
Other	783	368	950	321	1,360	714	1,749	731
Total	7,171	8,889	8,252	10,004	12,761	14,150	13,418	16,404
Intra-EC	730	872	1,018	766	1,427	1,581	1,795	1,282
Extra-EC	6,441	8,017	7,234	9,238	11,334	12,569	11,623	15,122

Source: EUROSTAT

Seasonality

Based on COLEACP price reporting at the Rungis market, the following chart shows primary seasons of supply for key exporters to the French market.

Seasonal Supply Chart - Fresh Mangoes												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Peru												
Mali												
Burkina Faso												
Ivory Coast												
Mexico												
Israel												
Puerto Rico												
Brazil												
South Africa												
Kenya												

Source: Taken from COLEACP price reporting data

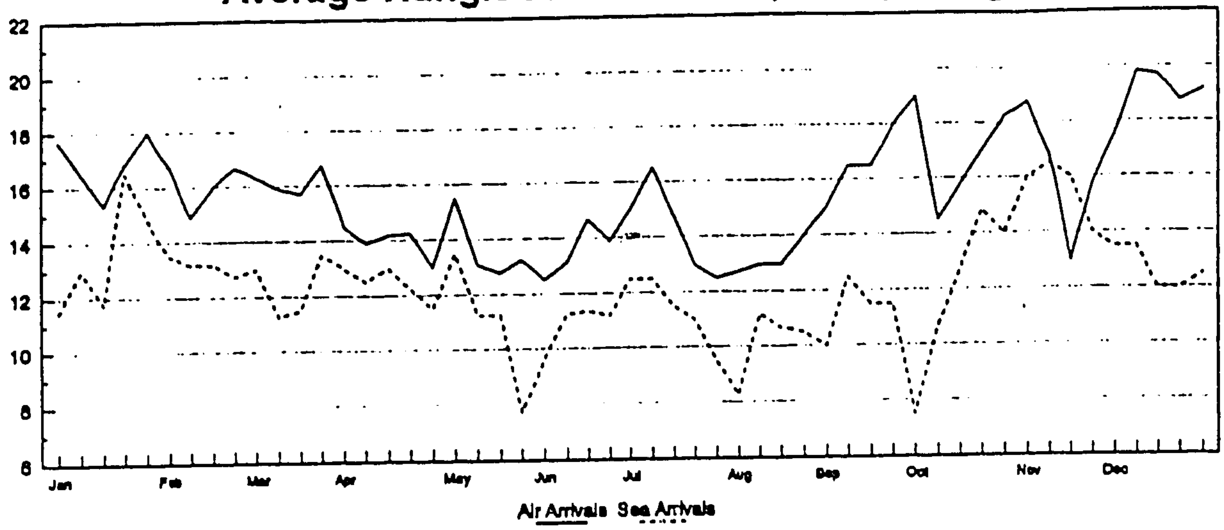
Prices

Table 2 shows the average import unit values of fresh mango imports, by country, over the period 1988 to 1990. The overall average unit price in 1991, while slightly lower than 1988 unit values, represents a very slight improvement over the last two years.

Table 3, summarized in the graph on the following page, presents 1991 weekly prices (from importer to wholesaler) for key suppliers to the French market. Sea arrivals consistently garner lower prices that airfreighted produce. Airfreighted produce typically received between FF13-FF16 per kilogram, although prices appeared to be higher in the first and last quarters of the year.

The Rungis market wholesale price during the week of 11/12/92 was FF16-FF18 per kilogram for airfreighted Brazilian mangoes. For airfreighted Israeli airfreighted mangoes, the price ranged from FF14-FF16 per kilogram.

Average Rungis Market Prices, 1991, FF/kg



Source: COLEACP

Table 2: French Imports of Fresh/Dried Mangos and Mangosteen, 1988-1991, Unit Value				
	ECU/MT			
	1988	1989	1990	1991
Belgium/Lux	2,007	1,818	1,938	1,719
Netherlands	1,919	1,802	1,734	1,669
Mali	1,691	1,395	1,466	1,588
Burkina Faso	1,705	1,369	1,550	1,583
Guinea		1,352		1,497
Ivory Coast	1,693	1,589	1,755	1,777
Kenya	1,725	2,029	2,261	1,390
South Africa	1,915	1,836	1,720	1,865
USA	1,572	1,369	1,350	1,278
Mexico	1,379	1,295	1,323	1,219
Venezuela	1,772	1,485	1,569	1,451
Peru	1,977	1,836	1,511	1,768
Brazil	2,081	2,049	1,813	1,656
Israel		1,300	1,373	1,785
Other	1,737	1,940	1,841	2,277
Total	1,780	1,592	1,626	1,640

Source: EUROSTAT

Specifications

Consumers are not entirely aware of the different varieties of nangoes and buy according to appearance, therefore preferring those that are apparently well ripe, ie with an attractive red or orange color and without spots. Importers consequently concentrate on fruit which meets these requirements in order to avoid costly returns, specifying varieties such as Haden, Julie, Zill, Alphonso and Tommy Atkins. Importers are interested in contacting new reliable sources for mangoes, including those producing other varieties.

Importers in France are very wary about the quality of mangoes in view of the large number of suppliers to the market, many of whom have not followed recommendations and delivered unripened fruit which has discouraged any further dealings.

A draft quality standard issued by the UN/EC (FFV-45) is under trial and should be given due consideration by potential exporters to this market. Two categories of fruit are being proposed: the Extra Class , without any faults and only tolerating small alterations on the skin of the fruit; and Class I, tolerating some misshapen fruit and light alterations to the skin. Fruit size is determined by weight, from a minimum of 200g up to 800g. Fruit maturity is not clearly defined, but fruit softness under pressure and color are more commonly in use. The ISO has issued an international standard (ISO 6660, Mangoes - Guide to Storage) which should be consulted in order to ensure the delivery of quality fruit.

Specific packaging requirements have been established for mangoes, bearing in mind the nature of the fruit and the time required between harvesting and marketing. The fruit is usually packed in a single layer carton of 400x300x110 or 120 according to the size of the fruit. In France, mangoes are graded according to the number of fruits per carton, which may vary between 10, 12, 14 and 16 for a net weight of 5 kg. Adequate separation materials should be used to avoid the fruit from bruising and the carton should have ventilation holes.

Market Prospects

The growth of the French market for fresh mangoes to date has been encouraging and future prospects are good. Increased knowledge in the handling of fruit from the moment of harvest, through the packaging and shipping phases and at importer and distribution level, has provided the background for improving the performance of this fruit. Continuing to meet consumer requirements, maintaining a stable price structure and providing further promotion could lead to a noticeable increase in consumption by the French population. The green mango is not well known in France but its introduction as a specialty, particularly at the catering level of the market, could open up interesting possibilities.

The French market for processed mangoes is limited for such products as canned slices for sale at retail level. Far more interesting is the opportunities for the larger size packs or for frozen slices, used by the catering segment of the market, and, in larger volume, by the dairy industry in the preparation of yogurt, ice-cream etc. The latter industry also uses mango pulp as does the fruit-drink industry. Mango pulp is exported either hot-packed or frozen, but is now also traded in concentrated form (25-30 degrees Brix). Also aseptic packaging of this product is becoming more frequent. As the consumption of fruit juices increases yearly in France and consumers demand a wider range of fruit flavors, the prospects for new suppliers to enter this market are good.

Table 3: 1991 Importer to Wholesaler Prices in the French Market – Fresh Mangoes FF/kg

Month	Week	By Air															By Sea											AVG	AVG	AVG
		Kenya	Brazil	Peru	S Africa	Congo	Mali	B Faso	C d'Ivoire	Mexico	Guinea	Israel	Senegal	Egypt	Madagas	Reunion	Brazil	Peru	S Africa	C d'Ivoire	P Rico	Mexico	B Faso	C Rica	Guatemala	Israel	Spain	AIR	SEA	ALL
Jan	1	17.00	18.50	17.50													11.50											17.67	11.50	16.13
	2	16.50	14.00	16.50	19.00												10.50	15.50										16.50	13.00	15.33
	3	11.50		15.50	19.00												10.00	13.50										15.33	11.75	13.90
	4	14.50		18.50	17.50													16.00	17.00									16.83	16.50	16.70
	5	15.00		16.00	21.00												14.00	15.00	15.50									16.00	14.83	15.42
Feb	6	15.00		18.50													12.00	15.00	13.50									16.75	13.50	14.80
	7	15.00		17.50	16.00	11.00											11.50	13.50	14.50									14.88	13.17	14.14
	8	13.50		15.50	19.00												12.50	12.50	14.50									16.00	13.17	14.58
	9			19.00	18.00	13.00												12.00	13.50									16.67	12.75	15.10
Mar	10	14.50		19.00	17.00		17.50	13.50										12.00	14.00									16.30	13.00	15.36
	11			19.00	15.50		15.50	13.50										11.50	11.00									15.88	11.25	14.33
	12	14.00		20.50	16.00		14.50	13.50											11.50									15.70	11.50	15.00
	13			20.50	15.50		16.50	14.50											13.50									16.75	13.50	16.10
Apr	14						14.00	14.00	15.50										13.00	13.00								14.50	13.00	13.90
	15	16.00					13.00	12.50	14.00										12.50	12.50								13.88	12.50	13.42
	16	16.00					12.00	12.50	14.50	16.00										12.50	13.50							14.20	13.00	13.86
	17	16.00					12.00	12.50		16.50										11.00	13.50							14.25	12.25	13.58
	18						12.50	12.00		14.50										10.50	12.50							13.00	11.50	12.40
May	19						12.00	11.50		23.00										14.50	11.50	14.50						15.50	13.50	14.50
	20	13.00					11.50	11.00	15.50	16.50	11.00									13.50	10.00	12.00	9.50					13.08	11.25	12.35
	21						11.50	11.50	16.50	13.00	11.50									13.50			9.00					12.80	11.25	12.36
	22	13.50					11.50	12.50	16.50	13.00	12.50									11.50			4.00					13.25	7.75	11.88
Jun	23							12.50			12.50									11.50		10.50	4.00	12.50				12.50	9.63	10.58
	24						12.50	10.00		17.50	12.50									11.50		11.00						13.13	11.25	12.50
	25						12.00			19.00	13.00									12.50		14.00	5.50		13.50			14.67	11.38	12.79
	26						14.00	14.00		16.00	11.50											9.50		11.50	12.00			13.88	11.17	12.71
Jul	27									15.00												12.50						15.00	12.50	13.75
	28									16.50												12.50						16.50	12.50	14.50
	29									14.50		15.00										11.50						14.75	11.50	13.67
	30									13.50		12.50										11.00						13.00	11.00	12.33
	31									12.50		12.50										9.50						12.50	9.50	11.50
Aug	32									14.00		11.50									7.50	9.00						12.75	8.25	10.50
	33									15.00		11.00									11.50	9.50				12.50		13.00	11.17	11.90
	34									15.00		13.00	11.00								9.50	10.00				12.50		13.00	10.67	11.83
	35											14.00									10.00	11.00						14.00	10.50	11.67
Sep	36											15.00									10.00							15.00	10.00	12.50
	37											16.00		17.00							12.50							16.50	12.50	15.17
	38											16.00		17.00							11.50							16.50	11.50	14.83
	39											18.00									11.50							18.00	11.50	14.75
Oct	40		19.00																		7.50							19.00	7.50	13.25
	41											14.50					14.50				9.00					8.50		14.50	10.67	11.63
	42																16.00				11.50					11.50	12.00	ERR	12.75	12.75
	43																17.00				13.00					14.50		ERR	14.83	14.83
	44		22.00									14.50					16.50				11.00					14.50	14.00	18.25	14.00	15.42
Nov	45		18.50												19.00		16.00											18.75	16.00	17.83
	46	17.00	17.00												16.50		16.50											16.83	16.50	16.75
	47	13.00															16.00											13.00	16.00	14.50
	48	15.00	18.50														14.00											16.75	14.00	16.17
Dec	49		16.00													19.00	13.50											17.50	13.50	16.17
	50		16.50	22.00												21.00	13.50											19.83	13.50	18.25
	51		17.00	21.00												21.00	12.00											19.67	12.00	17.75
	52		18.50	19.00													12.00											18.75	12.00	16.50
	53		17.50	19.00												21.00	12.50											19.17	12.50	17.50

Source: COLEACP

SECTION II: PASSIONFRUIT

Fresh Passionfruit

Imports

There are no separate statistics on the imports of passionfruit into France. Trade sources indicate that French imports of fresh passionfruit are small in volume but growing.

Market Share

Kenya is the leading supplier to the French market and exports both purple and yellow passionfruit -- although COLEACP price reporting appears to show that exports are chiefly comprised of the purple variety. The variety preferred in the market is the black skinned passionfruit which wrinkles as it matures. This has a better flavor and longer shelf life than the yellow variety. Other suppliers showing up in COLEACP price reporting include Zimbabwe, Burundi, Chile, France and Reunion for purple passionfruit, and Colombia for yellow passionfruit. South Africa, the West Indies, and various West African countries may also supply the market at various times.

Seasonal Supply

Based on COLEACP price reporting, the following chart shows the months in which supplies entered France from key exporting countries. All price reporting was for the purple passionfruit, except for Colombia which was completely made up of yellow passionfruit.

Seasonal Supply Chart - Fresh Passionfruit

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Colombia	■	■	■		■	■		■	■	■	■	■
Zimbabwe	■	■	■	■	■	■			■	■	■	■
Kenya	■	■	■	■	■	■	■	■	■	■	■	■
Burundi			■		■	■	■	■				
Chile				■	■							
France								■	■			
Reunion												■

Source: Taken from COLEACP price reporting data

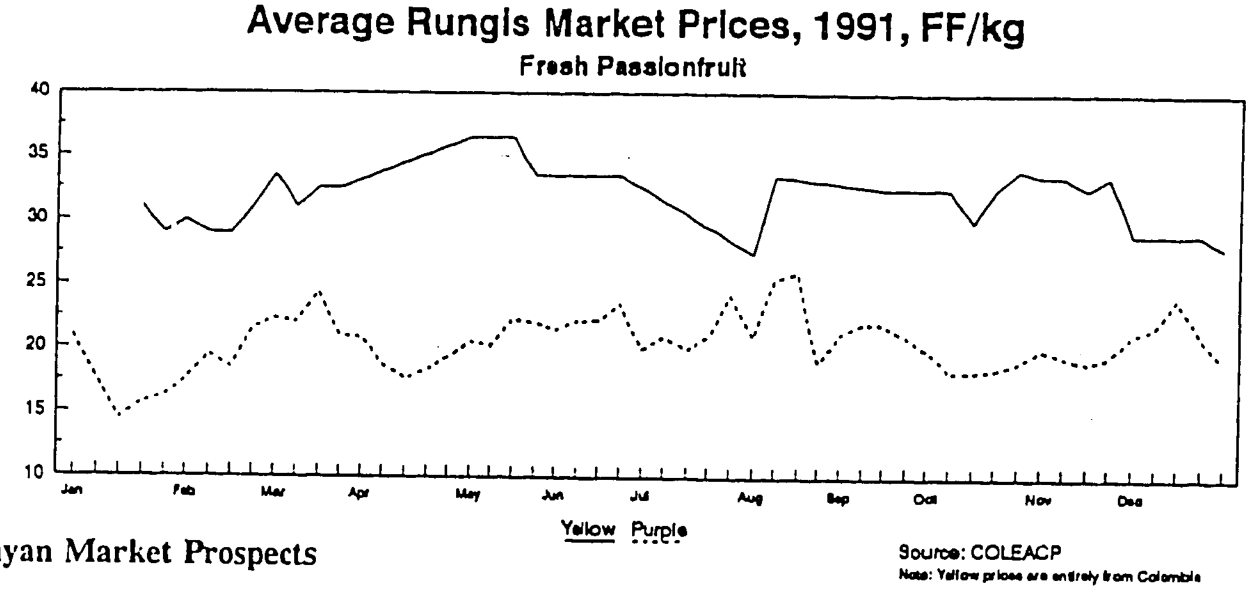
Specifications

There are no national or international standards concerning passionfruit. The fresh passionfruit is usually packed in single-layer fiberboard containers or trays of 2kg and are retailed by the piece.

Prices

Prices for Colombian yellow passionfruit generally remained stable throughout the year at around FF30 per kilogram. Purple passionfruit prices, also generally stable, hovered around FF20 per kilogram. See chart below and Table 4 for additional detail.

During the week of November 12, 1992, Kenyan purple passionfruit was receiving between FF20-FF22 per kilogram at the Rungis wholesale market.



Kenyan Market Prospects

The market for passionfruit in France is progressing slowly. Certain inconveniences, the high price and unattractive appearance and texture of the fruit, tend to put off many consumers. Some importers see a bright future for passionfruit because its unique flavor and versatility appeal to numerous other consumers. Promotion aimed at educating consumers is required to develop the market.

Processed Passionfruit

Passionfruit 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 passionfruit juice. The product needs to be deep frozen and stored in a cooling cell at 18°C below zero.

It is normally the yellow passionfruit that is most in demand for processing, although purple passionfruit 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.

Imports

The only import statistics available for processed passionfruit is that for canned product. Unfortunately, canned guavas are also included in this category, and it is therefore impossible to determine the exact level of imports of this product. For the combined category, EUROSTAT statistics reveal total imports of only 39 MTs (ECU 51 thousand) in 1991, of which 30 MTs was supplied by South Africa. The Netherlands, Germany and Thailand supplied the remaining 9 MTs.

Specifications

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.

The product should be frozen and packed in double polyliner in 200 liter drums. The drums should be of steel rather than plastic construction. Aseptic packaging is also acceptable, but again, there should be a double polyliner to prevent the sides of the packaging material contaminating the outside of the aseptic pack.

Market Prospects

There is a demand for passionfruit juice in France but it is normally obtained from blenders within Europe. Prospects for potential suppliers wishing to ship directly to this market are therefore more apparent for canned fruits and specialties prepared from passionfruit, which would find outlets in some of the gourmet specialty shops.

Table 4: 1991 Importer to Wholesaler Prices in the French Market – Fresh Passionfruit

		Yellow	Purple						AVG	AVG
Month	Week	Colombia	Zimbabwe	Kenya	Burundi	Chile	France	Reunion	Yellow	Purple
Jan	1		22.00	20.00					0.00	21.00
	2		18.50	16.50					0.00	17.50
	3		14.50	14.50					0.00	14.50
	4	31.00	16.00	15.50					31.00	15.75
	5	29.00	16.50	16.00					29.00	16.25
Feb	6	30.00		17.50					30.00	17.50
	7	29.00	20.00	19.00					29.00	19.50
	8	29.00	19.50	17.50					29.00	18.50
	9	31.00		21.50					31.00	21.50
Mar	10	33.50	24.00	21.00	22.00				33.50	22.33
	11	31.00	22.00	22.00	22.00				31.00	22.00
	12	32.50	26.00	24.00	23.00				32.50	24.33
	13	32.50	23.50	22.00	17.50				32.50	21.00
Apr	14		21.00	23.00		18.50			0.00	20.83
	15		19.00	19.00		18.00			0.00	18.67
	16		17.50	19.00		16.50			0.00	17.67
	17		17.00	19.00		19.00			0.00	18.33
	13		18.00	21.00		19.00			0.00	19.33
May	19	36.50	20.50	21.00	21.00	19.50			36.50	20.50
	20		22.50	22.50	18.00	18.00			0.00	20.25
	21	36.50	23.00	23.00	21.00				36.50	22.33
	22	33.50	21.50	23.00	21.50				33.50	22.00
Jun	23	33.50	22.00	21.00					33.50	21.50
	24	33.50	22.50	23.00	21.00				33.50	22.17
	25	33.50		23.50	21.00				33.50	22.25
	26	33.50		23.50					33.50	23.50
Jul	27			21.00	19.00				0.00	20.00
	28			22.00	20.00				0.00	21.00
	29			20.00					0.00	20.00
	30			21.00	21.00				0.00	21.00
	31			25.00	23.50				0.00	24.25
Aug	32	27.50		23.50	18.50				27.50	21.00
	33	33.50		23.50	20.50		32.50		33.50	25.50
	34			21.00			31.00		0.00	26.00
	35			19.00					0.00	19.00
Sep	36		21.50	21.00					0.00	21.25
	37		21.00	20.00			25.00		0.00	22.00
	38	32.50	19.00	19.00			28.00		32.50	22.00
	39	32.50	21.00	21.00					32.50	21.00
Oct	40	32.50	19.00	21.00					32.50	20.00
	41	32.50	18.00	18.50					32.50	18.25
	42	30.00	18.50	18.00					30.00	18.25
	43	32.50	18.00	19.00					32.50	18.50
	44	34.00	18.00	20.00					34.00	19.00
Nov	45	33.50	19.00	21.00					33.50	20.00
	46	33.50	19.00	20.00					33.50	19.50
	47	32.50	18.50	19.50					32.50	19.00
	48	33.50	19.00	20.00					33.50	19.50
Dec	49	29.00	19.50	22.00				22.00	29.00	21.17
	50	29.00	21.50	21.00				23.00	29.00	21.83
	51	29.00	22.50	22.00				28.00	29.00	24.17
	52	29.00	21.00	21.00					29.00	21.00
	53	28.00	19.00	17.50				21.00	28.00	19.17

Source: COLEACP

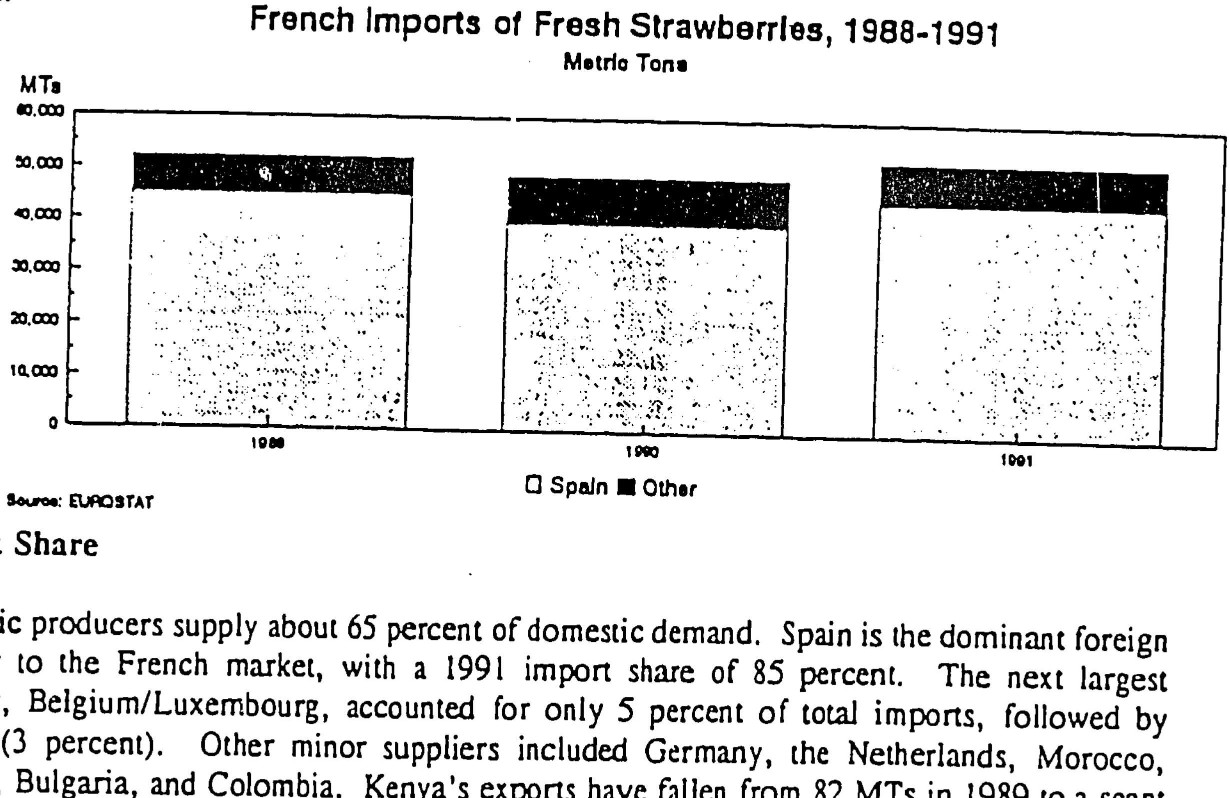
SECTION III: STRAWBERRIES

Domestic Production

France produces significant quantities of strawberries, primarily during the period May through September. During this time, domestic suppliers meet most local demand requirements. The FAO estimated 1989 domestic strawberry production at 88,100 MTs.

Imports

Imports of fresh strawberries into France have remained relatively stable over the last three years, hovering around 50,000 MTs. In 1991, imports stood at 52,585 MTs or ECU 113.4 million.



Market Share

Domestic producers supply about 65 percent of domestic demand. Spain is the dominant foreign supplier to the French market, with a 1991 import share of 85 percent. The next largest supplier, Belgium/Luxembourg, accounted for only 5 percent of total imports, followed by Poland (3 percent). Other minor suppliers included Germany, the Netherlands, Morocco, Mexico, Bulgaria, and Colombia. Kenya's exports have fallen from 82 MTs in 1989 to a scant 6 MTs in 1991.

Seasonal Supply

Imports of strawberries into France during the period August-April are, on average, more than twice those during the period May-July. This, of course, is because of the arrival of the very large crops of French strawberries in the early summer months. Although Spain is the major supplier from outside France in both periods, there is no doubt that demand during the summer months is met mainly by domestic production. During the "off season", most imports arri· the months of March and April, mainly coming from Spain.

French Import Share - Fresh Strawberries

1991, based on weight

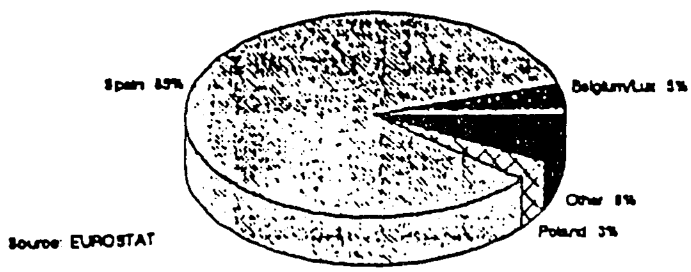


Table 5: French Imports of Fresh Strawberries, 1989-1991						
	Metric Tons			1,000 ECUs		
	1989	1990	1991	1989	1990	1991
Belgium/Lux.	2,174	4,135	2,379	4,510	8,049	5,275
Netherlands	1,016	1,411	740	2,464	3,145	2,067
Germany	102	162	837	225	250	582
Italy	588	292	121	1,177	505	249
Portugal	234	0	184	155	0	277
Spain	44,908	39,677	44,499	84,478	81,066	98,190
Poland	2,104	2,273	1,592	1,341	1,076	784
Romania	n/a	n/a	129	n/a	n/a	61
Bulgaria	342	96	297	170	55	108
Morocco	n/a	n/a	765	n/a	n/a	1,793
Kenya	82	23	6	330	82	25
USA	2	75	144	6	214	414
Mexico	434	384	587	1,867	1,184	2,427
Colombia	n/a	100	190	n/a	351	765
Other	117	237	115	411	661	364
Total	52,103	48,865	52,585	97,134	96,638	113,381
Intra-EC	49,024	45,680	48,809	93,021	93,030	106,780
Extra-EC	3,079	3,185	3,776	4,113	3,608	6,601

Source: EUROSTAT

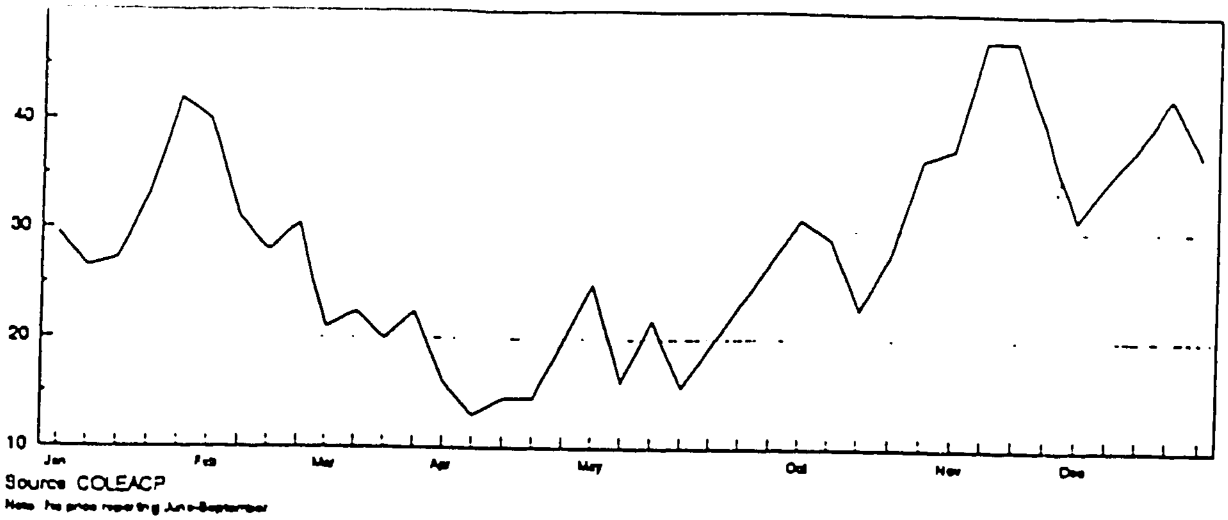
Prices

Average import unit values for the period 1988-1991 are given in Table 6. As can be seen, import values have risen from ECU 1,864/MT to ECU 2,156/MT. COLEACP price reporting is presented in the chart below and in Table 7. COLEACP did not report prices during the period June-September, when domestic production supplies the majority of demand and when developing country suppliers are not present on the market to any great extent. From this data, it is apparent that prices are highest when Spanish supplies are lowest (November-January). During the week of November 12, 1992, Colombian strawberries sold for FF28 to FF32 per kilogram on the Rungis wholesale market.

Table 6: French Imports of Fresh Strawberries, Unit Value

	ECU/MT		
	1989	1990	1991
Belgium/Lux.	2,075	1,947	2,217
Netherlands	2,425	2,229	2,793
Germany	2,206	1,543	695
Italy	2,002	1,729	2,058
Portugal	662		1,505
Spain	1,881	2,043	2,207
Poland	637	473	492
Romania			473
Bulgaria	497	573	364
Morocco			2,344
Kenya	4,024	3,565	4,167
USA	3,000	2,853	2,875
Mexico	4,302	3,083	4,135
Colombia		3,510	4,026
Other	3,513	2,789	3,165
Total	1,864	1,978	2,156

Source: EUROSTAT



Specifications

Among the varieties of strawberry acceptable during the off-season months in the market are the Chandler Pajaro and Selva varieties.

The United Nations and the Economic Commission for Europe (UN/ECE) have published a common standard (FFV-35) for fresh strawberries. There are three classes of strawberries: Extra Class (superior quality) , Class I (good quality), and Class II (meet minimum quality requirements). Extra Class strawberries must be at least 25 mm^2 in diameter, while Classes I and II must be at least 22 mm^2 in diameter. Primella and Gariguette varieties are allowed a minimum diameter of 18 mm^2 in Classes I and II. Size and quality tolerances are set out in the standard.

Each package must have the following markings, grouped on the same side:

- Identification [Packer and/or Dispatcher]
- Nature of Produce ["Strawberries," and variety (optional)]
- Origin of Produce [Country and district (optional)]
- Commercial Specifications [Class]
- Official Control Mark [Optional]

Market Prospects

The French market for strawberries is not expected to grow in the foreseeable future. This does not mean that there are not windows in the market and certainly, French importers are looking for strawberries in the early months of the year, especially February and early March. The low import quantities at that time are matched by relatively high import prices.

Because of its position as a very large domestic producer, France is a major market in Europe for strawberries (second only to Germany) and is, to a large extent, the price setter. It is a difficult market and one in which timing is crucial to success in terms of price.

Kenyan producers should attempt to supply Euro standard strawberries, packed in either 250g or 500g punnets (500g punnets later in the year) and, ideally, should deliver the product before large quantities from Spain arrive. This means that exports should start from the middle of February up until the end of March, with prices being highest in the earlier weeks. As with most other countries, there is a small but very highly priced market around Christmas and the new year for quality strawberries.

Table 7: 1991 Importer to Wholesaler Prices in the French Market – Fresh Strawberries, FF/kg

Month	Week	Colombia	Mexico	Egypt	Spain	France	Holland	Belgium	AVERAGE
Jan	1	31.50	27.50						29.50
	2	28.00	25.00						26.50
	3	30.00	26.00	26.00					27.33
	4	36.00	26.00	37.50					33.17
	5	42.00							42.00
Feb	6	40.00							40.00
	7	30.00		31.00	32.00				31.00
	8			25.00	31.00				28.00
	9			31.00	30.00				30.50
Mar	10				21.00				21.00
	11				22.50				22.50
	12				20.00				20.00
	13				22.50				22.50
Apr	14				16.00				16.00
	15				13.00				13.00
	16				14.50				14.50
	17				14.50				14.50
	18								ERR
May	19				17.50	32.50			25.00
	20				11.00	21.00			16.00
	21				17.00	26.50			21.75
	22				12.00	19.00			15.50
	ERR	NO PRICE REPORTING JUNE–SEPTEMBER							
Oct	40					32.00	30.00		31.00
	41	32.50				27.00	28.00		29.17
	42	24.00				20.00	28.00	19.00	22.75
	43					29.00	29.00	25.50	27.83
	44	36.00				37.50	37.50	35.00	36.50
Nov	45	37.50							37.50
	46	47.50							47.50
	47	47.50							47.50
	48								ERR
Dec	49	37.50	24.50						31.00
	50	42.00	27.50						34.75
	51	44.50	31.50						38.00
	52	47.50	37.50						42.50
	53	45.00	29.00						37.00

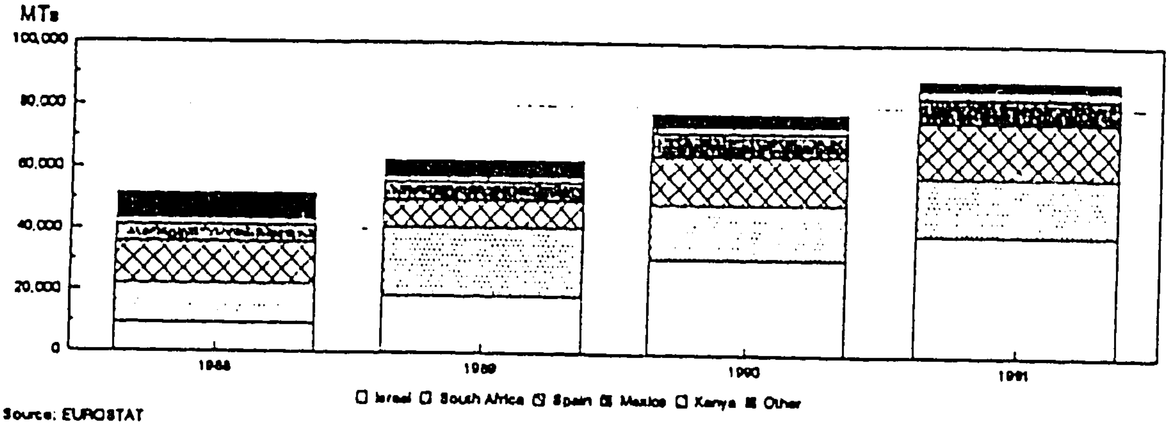
Note: French prices primarily for Gariguette variety
Source: COLEACP

Imports

The market for imported fresh or dried avocados has increased steadily in volume since 1988 (see Table 7). In 1991, 88,500 MTs were imported at a value of ECU 104.8 million, which represents a 72% increase in volume and a 34% increase in value on the level imported in 1988.

French Imports of Fresh Avocados, 1988-1991

Metric Tons



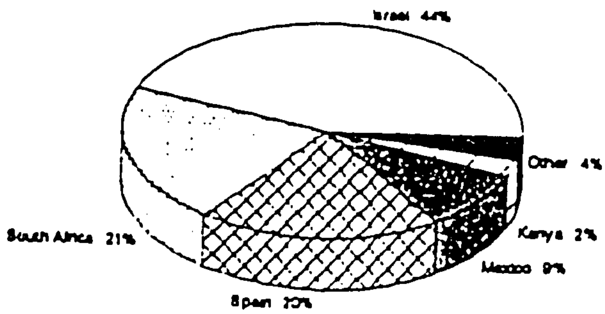
Source: EUROSTAT

Market Share

Israel is by far the largest supplier of avocados with a 44.1 percent import share in 1991, followed by South Africa (20.9%), Spain (19.6%), and Mexico (9.2%). Kenya, the fifth largest supplier, exported 2,155 MTs to France in 1991, achieving a 2.4 percent share of the import market. Israel's market share has increased significantly since 1988, when it stood at under 18 percent. The other top four suppliers have witnessed decreases in their market shares, even though their absolute import volumes have each increased.

French Import Share - Fresh Avocados

1991, based on weight



Source: EUROSTAT

Table 8: French Imports of Fresh/Dried Avocados, 1988-1991								
	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
Netherlands	1,184	989	700	489	1,710	1,393	1,043	652
Spain	13,272	8,556	15,377	17,307	19,413	13,103	18,302	19,562
Canary Islands	811	1,313	978	1,188	1,266	2,328	1,314	1,534
Kenya	1,294	1,194	1,252	2,155	1,979	1,584	1,850	2,796
South Africa	12,915	22,292	17,638	18,508	23,413	33,726	26,096	23,097
USA	4,344	1,243	n/a	69	6,441	2,325	n/a	94
Mexico	5,996	6,221	8,117	8,110	9,638	9,709	11,819	10,029
Israel	9,184	18,455	30,760	39,028	13,662	28,189	42,579	45,187
Other	2,561	2,415	3,045	1,671	576	1,897	4,029	1,942
Total	51,561	62,678	77,867	88,525	78,098	94,254	107,032	104,893
Intra-EC	14,851	10,027	16,535	18,253	21,821	15,258	20,014	20,823
Extra-EC	36,710	52,651	61,332	70,272	56,277	78,996	87,018	84,070

Source: EUROSTAT

Seasonal Supply

Demand appears to be higher during the winter and spring months (from December to May).

Import Unit Prices

Average import unit values have dropped consistently in the last four years -- going from ECU 1,515/MT in 1988 to ECU 1,185/MT in 1991. Of the top five suppliers, Israel and Spain have the lowest unit values at ECU 1,158/MT and ECU 1,130/MT, respectively. They are followed by Mexico (ECU 1,237/MT), South Africa (ECU 1,248/MT), and Kenya (ECU 1,297/MT). In November 1992 at the Rungis wholesale market, Israeli product obtained FF34/case (14s-16s), while Spanish Fuerte received FF32/case (14s-16s).

Table 9: French Imports of Fresh/Dried Avocados, 1988-1991, Unit Value				
	ECU/MT			
	1988	1989	1990	1991
Netherlands	1,444	1,408	1,490	1,333
Spain	1,463	1,531	1,190	1,130
Canary Islands	1,561	1,773	1,344	1,291
Kenya	1,529	1,327	1,478	1,297
South Africa	1,813	1,513	1,480	1,248
USA	1,483	1,870	n/a	1,362
Mexico	1,607	1,561	1,456	1,237
Israel	1,488	1,527	1,384	1,158
Other	225	786	1,323	1,162
Total	1,515	1,504	1,375	1,185

Source: EUROSTAT

Specifications

The Fuerte and Hass avocados are the varieties most preferred. 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 with no bruising. A smooth, creamy taste is required with little, if any, fibre texture. The taste should have no bitterness.

As regards sizes, the markets 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. The UN/ECE standard (FFV-42) stipulates that the minimum weight should not be less than 125 grams (buyers prefer weights to be guaranteed over the minimum).

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 they are 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 standard and then not below Class 2 standards.

Packaging is normally in 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 labeling 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 difference from reference number.

Although this is not legally insisted on by the EEC it is strongly recommended that this information is included in the labeling. 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

Market Prospects

The French avocado market should remain targeted by the Kenyans, not only because it is the largest market in the world, but because it is also Kenya's largest market. Although Kenya currently only provides two percent of all imports, this is enough to make it the fifth largest supplier. It has maintained, and even improved, its market share over the past four years. However Kenya faces stiff competition from Israeli and South African suppliers, who both market their avocados under well respected brand names (Carmel and Outspan, respectively). It can be safely assumed France also reships some of its imports, potentially giving Kenya market access to other EC countries. Sea shipments are becoming increasingly important in order to compete with other supplying nations. Technical assistance may be required to assure high and consistent quality of Kenyan avocados shipped by sea.

SECTION V: ASPARAGUS

Domestic Production

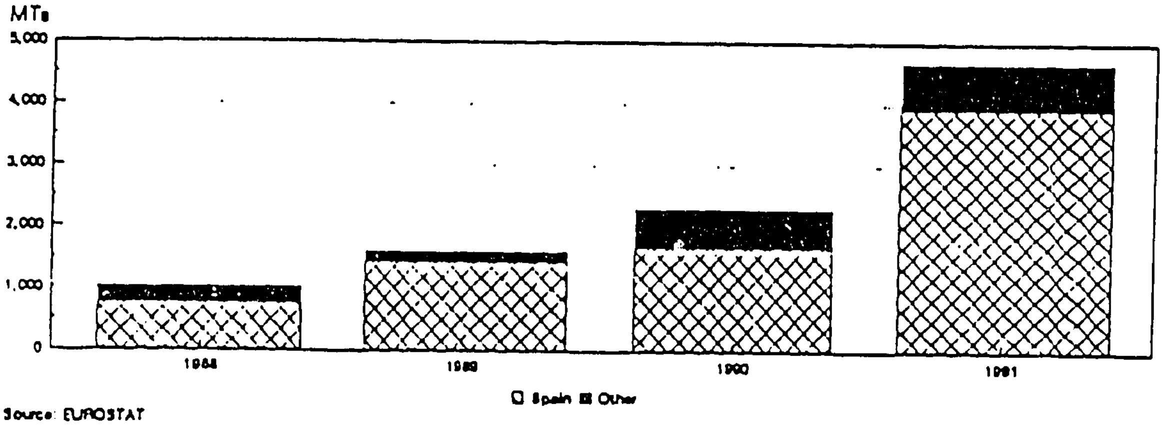
As a producer, France is by far the largest in Europe, with 1991 production estimated at around 57,000 tons on 16,500 hectares. The main variety grown is the Argenteuil.

Imports

Asparagus imports have increased from 1,033 MTs in 1988 to 4,672 MTs in 1991. 1991 imports are more than double the level recorded the previous year.

French Imports of Fresh Asparagus, 1988-1991

Metric Tons



Source: EUROSTAT

Market Share

French domestic production supplied about 95 percent of total market supplies in 1991. Imports are supplied primarily by Spain, which held an 84 percent import market share that year. Smaller amounts also enter from Argentina, Chile, and the United States. The Netherlands also features as a supplier, some of which may be re-exports from other nations. Ecuador, which does not appear separately in the Eurostat figures analyzed, is most likely one of the largest suppliers included in the "others" category.

Seasonal Supply

Asparagus is usually regarded as a Spring/late Spring vegetable and interest in other seasons is relatively unimportant. However, demand for the product in the off-season is increasing, although this is normally at special times, notably around Christmas, New Year and in the early weeks of the season. French production normally lasts from mid-April to early June, with peak production occurring between May and June. The use of plastic has allowed production to start earlier, although quality naturally suffers.

French Import Share - Fresh Asparagus
1991, based on weight

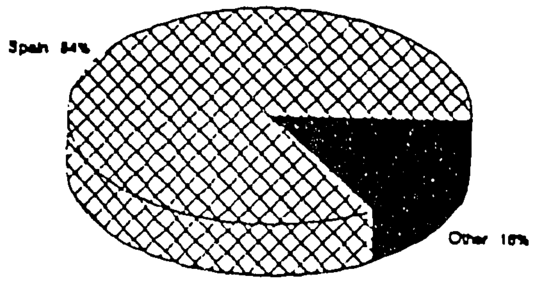


Table 10: French Imports of Fresh/Chilled Asparagus, 1988-1991								
	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
Netherlands	50	19	204	260	72	78	86	88
Italy	n/a	n/a	16	47	n/a	n/a	24	111
Spain	730	1,404	1,656	3,907	2,134	3,991	5,145	10,334
USA	10	1	48	60	44	9	150	212
Chile	71	48	119	87	354	193	417	359
Argentina	84	43	56	51	334	158	153	173
Other	88	95	199	260	259	317	492	738
Total	1,033	1,610	2,298	4,672	3,197	4,746	6,467	12,015
Intra-EC	824	1,477	1,889	4,258	2,302	4,237	5,320	10,658
Extra-EC	209	133	409	414	895	509	1,147	1,357

Source: EUROSTAT

The majority of supplies from Spain arrive during March and April, whereas those from Argentina, Chile and other southern hemisphere countries arrive in October, November and December.

Import Unit Prices

COLEACP reports importer-wholesaler prices for various suppliers to the French market during the off-season (see Table 12). In 1991, white asparagus from Ecuador earned between FF29 and

FF45 per kilogram, with the highest prices being around Christmas. Green asparagus from Chile during the same period earned between FF22.50 and FF33.50 per kilogram, although no quotations were given in December, except for the first week. Chilean green asparagus received between FF30 and FF35 per kilogram on the Rungis wholesale market during the week of November 12, 1992.

Using unit values derived from Eurostat import data, it is evident that unit values have fallen over the period 1988-1991 (from ECU 3,095/MT to ECU 2,572/MT). Spain, by far the largest foreign supplier, had an average import unit value of ECU 2,645/MT in 1991.

Table 11: French Imports of Fresh/Chilled Asparagus, 1988-1991, Unit Value

	ECU/MT			
	1988	1989	1990	1991
Netherlands	1,440	4,105	422	338
Italy	n/a	n/a	1,500	2,362
Spain	2,923	2,843	3,107	2,645
USA	4,400	9,000	3,125	3,533
Chile	4,986	4,021	3,504	4,126
Argentina	3,976	3,674	2,732	3,392
Other	2,943	3,337	2,472	2,838
Total	3,095	2,948	2,814	2,572

Source: EUROSTAT

Specifications

French production and consumption are almost entirely of white asparagus, although there is a small but growing market for green asparagus. Specifications for the French market are relatively standard and the country is prepared to accept white asparagus, violet asparagus and small quantities of green asparagus.

Asparagus <u>grades</u> are defined by EEC regulation No. 183/64, the last amendment being 1677/88 of June 1988. Quality <u>standards</u> 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 shoots may be packed either in bundles or loose within a package. When in bundles they must be firmly bound in weights of 500g, 1kg, or 2kg and the shoots on the outside must be representative of the whole. Generally a carton of 4kg made of 8 x 500g bundles is acceptable.

Market Prospects

Owing to its special requirements and its limited size, the French off-season market should be approached with caution by exporters from developing countries. In general, other European countries have a much stronger off-season demand and offer better prices to exporters.

Table 12: 1991 Importer to Wholesaler Prices in the French Market – Fresh Asparagus								
		White			Green			Purple
Month	Week	Ecuador	Spain	Chile	Chile	Ecuador	France	Spain
NO PRICE REPORTING JANUARY–FEBRUARY								
Mar	10							
	11							
	12							35.00
	13							
Apr	14							
	15		21.00					21.00
	16							
	17							
	18							
NO PRICE REPORTING MAY – SEPTEMBER								
Oct	40				29.00			
	41			32.50	26.50			
	42				29.00			
	43							
	44	34 50			33.00	33.00		
Nov	45	29.00			33.50			
	46				31.00			
	47	33.50			33.50			
	48	29.00			33.50			
Dec	49				22.50	31.00		
	50	33.00						
	51	40.00						
	52	45.00					45.00	
	53	31.00						

Source: COLEACP

TABLE VI: FINE BEANS AND BOBBY BEANS

Note: Production and import data are not itemized separately for french (both fine and very fine) and bobby beans.

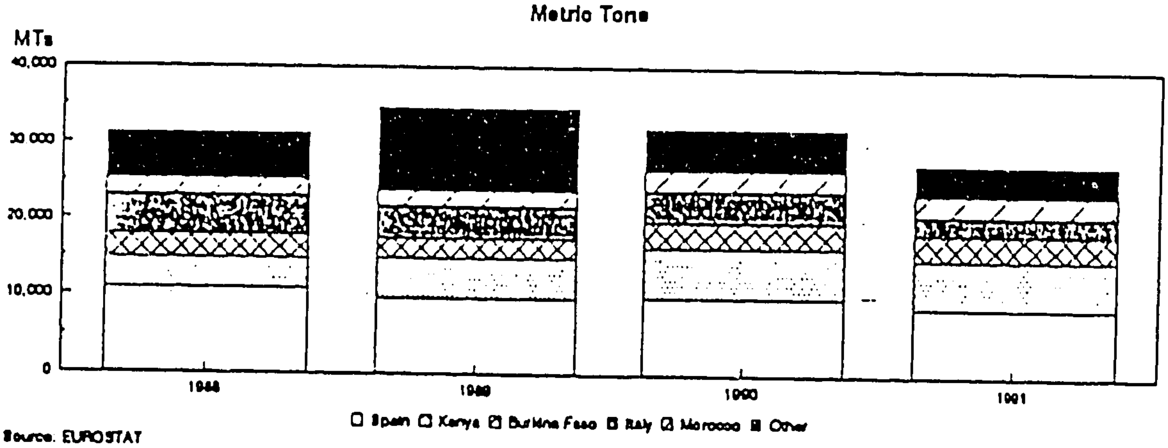
Domestic Production

Domestic production of green beans (haricots verts) stood at 235,000 MTs in 1991.

Imports

French imports of fresh or chilled Beans (*vigna spp., phaseolus spp.*) were 27,607 MTs in 1991, the lowest level in four years. In 1988, 31,368 MTs of bean imports were recorded, rising to 34,653 MTs in 1989, before falling to 32,165 MTs in 1990.

French Imports of Fresh Beans, 1988-1991



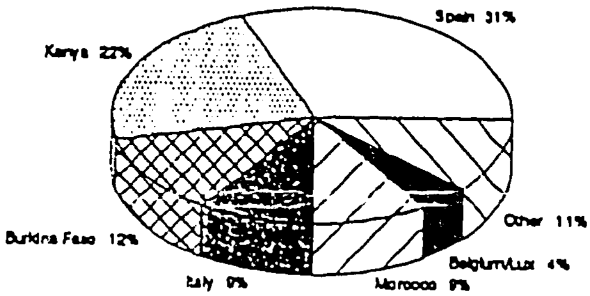
Source: EUROSTAT

Market Share

Major suppliers of beans in the "off season" are Spain, with supplies of flat beans, round beans, fine beans and bobby beans. Kenya is in second position with its distinctive fine beans, followed by Burkina Faso, Morocco and Italy. Senegal also supplies fine beans to France. In the three Summer months from July through September, France produces and consumes its own beans and imports relatively little, most of which comes from Italy, Belgium/Luxembourg and Kenya.

French Import Share - Fresh Beans

1991, based on weight



Source: EUROSTAT

Table 13: French Imports of Fresh/Chilled Beans (vigna spp., phaseolus spp.), 1988-1991								
	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
Belgium/Lux.	2,902	5,511	1,824	1,205	1,515	2,887	1,190	538
Netherlands	267	2,424	1,127	491	270	665	652	392
Italy	5,298	4,360	4,217	2,605	5,699	4,408	4,038	3,180
Spain	10,754	9,493	9,640	8,597	12,737	10,812	12,606	12,741
Morocco	2,028	1,844	2,591	2,531	2,637	2,268	3,808	4,394
Burkina Faso	3,002	2,599	3,329	3,347	5,261	4,736	6,271	6,085
Senegal	1,598	1,386	1,093	987	3,141	2,793	2,167	2,300
Kenya	3,914	5,196	6,619	6,190	8,421	11,076	14,267	13,790
Other	1,605	1,840	1,725	1,654	2,819	2,828	2,420	671
Total	31,368	34,653	32,165	27,607	42,500	42,473	47,419	44,091
Intra-EC	19,443	21,967	16,995	13,019	20,674	18,834	18,574	15,237
Extra-EC	11,925	12,686	15,170	14,588	21,826	23,639	28,845	28,854

Source: EUROSTAT

Seasonality

The chart below gives months of highest import volumes from key ACP suppliers. As can be seen, Kenya is the only year-round ACP supplier of fine and very fine french beans. Mali and Burkina supply chiefly during the winter months, while Morocco's product enters France during the period April-June.

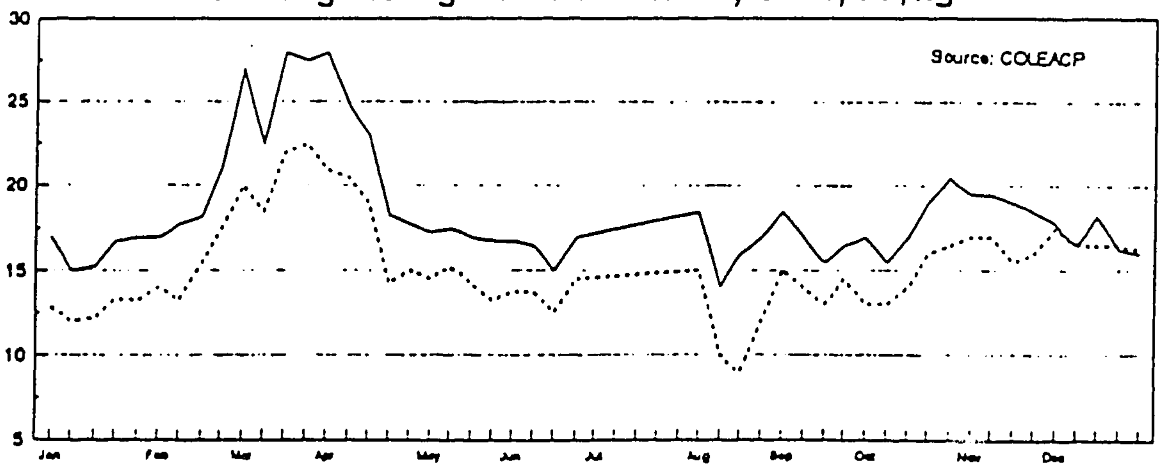
Seasonal Supply Chart - Fine & Very Fine French Beans												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Kenya												
Mali												
Burkina Faso												
Morocco												

Source: Taken from COLEACP price reporting data

Prices

The chart below summarizes 1991 COLEACP wholesale prices for fine and very fine french beans from key ACP suppliers to the French market. Table 17 (at the end of this section) provides detailed weekly prices from supplying countries. As can be seen, very fine beans receive a premium over fine varieties, and the price trends for each mirror each other. Average prices for very fine beans ranged between FF15 and FF20 per kilogram for most of the year. However, from the end of February to the beginning of April prices were considerably higher (between FF20 and FF28 per kilogram). Likewise prices for fine beans generally ranged between FF12.50 to FF17.50 for most of the year, except for the same February-April period when prices ranged from FF17.50 to FF22.50 per kilogram.

Average Rungis Market Prices, 1991, FF/kg



During the week of November 16, 1992, Kenyan very fine beans received FF18-FF22 per kilogram at the Rungis wholesale market. Kenyan fine beans received FF15-FF18 per kilogram during the same week.

Import unit values of Eurostat data have increased overall during the period 1988 to 1991, going from ECU 1,355/MT to ECU 1,597/MT. Of the four major suppliers Kenya has the highest unit value at ECU 2,228/MT.

Table 14: French Imports of Fresh/Chilled Beans (vigna spp., phaseolus spp.), Unit Value				
	ECU/MT			
	1988	1989	1990	1991
Belgium/Lux.	522	524	652	446
Netherlands	1,011	274	579	798
Italy	1,076	1,011	958	1,221
Spain	1,184	1,139	1,308	1,482
Morocco	1,300	1,230	1,470	1,736
Burkina Faso	1,752	1,822	1,884	1,818
Senegal	1,966	2,015	1,983	2,330
Kenya	2,152	2,132	2,155	2,228
Other	1,756	1,537	1,403	406
Total	1,355	1,226	1,474	1,597

Source: EUROSTAT

Specifications

The beans must be green, fresh, whole and healthy in appearance and with straight pods. Their internal characteristics are that stringless bobby beans should have round cross sections and be harvested when the seeds are still small, the pod stringless but beginning to swell. Fine beans normally need to be harvested daily while bobby beans can be harvested on alternate days.

The EEC have a common quality standard for beans, applied to the varieties *phaseolus vulgaris L* and *phaseolus coccineus L.* The standard is EC regulation No. 58/62 - the most recent amendment No.920/89 being in April 1989. EC minimum requirements are that the vegetable must be:

- Whole, intact;
- Sound, rotting and deteriorating produce which is unfit for consumption must be excluded;
- Of fresh appearance;
- Clean, in particular free from any impurity or any visible trace of the chemicals used;
- Free from foreign smell or taste;
- Free from all abnormal external moisture;
- The beans must be of sufficient size and the state of the produce must be such as to enable it to be able to withstand transport and handling, to be kept in good

condition until it reaches its place of destination and to meet market requirements there; and

- The contents of each packet should be uniform in terms of origin, variety and quality, and, in the case of needle beans, the same size.

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 turgescent, very tender, seedless and stringless and free from any defect. Extra Class Beans 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 Extra Class quality standards and then not below Class I standards. A maximum of 10% can be outside the size specifications.

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 quality standards.

For other beans, such as Bobby beans, Class 1 must be of good quality and must have the shape, size and coloring characteristic of the variety. Such beans must be in such a condition that they can be easily broken by hand, young and tender, stringless - except in the case of beans for slicing, and practically blemish free. The seeds must be small and tender for the variety concerned; pods must be closed. Quality tolerances are the same as those for Class 1 Needle Beans.

Frozen Beans

French import statistics for frozen beans are given in Tables 15 and 16. Imports increased over the period 1988 to 1990, going from 13,528 MTs to 19,533 MTs. However, in 1991, imports fell back to 17,416 MTs.

Morocco and Belgium supply almost all current French imports, with import shares of 47 percent and 38 percent, respectively. The remaining 16 percent of imports is chiefly supplied by the Netherlands, Cameroon, and Italy.

Table 15: French Imports of Frozen Beans, 1988-1991								
	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
Belgium/Lux.	7,161	8,142	7,829	6,606	4,524	4,965	5,241	5,551
Netherlands	579	740	823	646	665	734	638	655
Italy	8	39	1,221	513	10	42	1,100	525
Morocco	5,205	6,164	8,195	8,186	8,591	9,125	12,526	12395
Cameroon	n/a	n/a	n/a	569	n/a	n/a	n/a	606
China	n/a	n/a	n/a	154	n/a	n/a	n/a	188
Other	575	524	1,465	742	281	302	1,017	520
Total	13,528	15,609	19,533	17,416	14,071	15,168	20,522	20,440
Intra-EC	7,905	9,427	10,836	7,981	5,311	6,016	7,686	6,897
Extra-EC	5,623	6,182	8,697	9,435	8,760	9,152	12,836	13,543

Source: EUROSTAT

Table 16: French Imports of Frozen Beans, Unit Value				
	ECU/MT			
	1988	1989	1990	1991
Belgium/Lux.	632	610	669	840
Netherlands	1,149	992	775	1,014
Italy	1,250	1,077	901	1,023
Morocco	1,651	1,480	1,528	1,514
Cameroon	n/a	n/a	n/a	1,065
China	n/a	n/a	n/a	1,221
Other	489	576	694	701
Total	1,040	972	1,051	1,174

Source: EUROSTAT

Market Prospects

Despite the considerable demand for off-season green beans, this product remains a luxury item. Consumers are prepared to pay high prices for green beans of excellent quality. Beans intended for the French market should consist almost exclusively of fine or extra-fine beans. Kenya currently enjoys a high reputation in this market, as evidenced by its position as the second largest supplier of all beans to the market and its current 22 percent import share.

Of all the EEC countries, France is the second largest importer of frozen beans, accounting for 18 percent of the total imported by twelve EC countries. Unfortunately, little desk top information was available on this large market. Given the possibilities of increased value added (and that French companies may already be freezing fresh beans imported from Kenya), the frozen bean market in France warrants further study.

Table 17 1991 Importer to Wholesaler Prices in the French Market – Fresh French/Bobby Beans FF/kg

		Very Fine French						Fine French						Bobby				AVG	AVG	AVG
Month	Week	Kenya	Mali	B Faso	Morocco	France	Cameroon	Kenya	B Faso	Mali	Morocco	France	Poland	Senegal	Mali	Kenya	Spain	VF	F	BOBBY
Jan	1	17 50	16 50					14 50	12 00	12 00								17 00	12 83	ERR
	2	17 00	13 00					13 50	11 50	11 00				15 50				15 00	12 00	15 50
	3	17 00	13 50					14 00	12 00	10 50					13 50			15 25	12 17	13 50
	4	18 50	15 00					15 50	11 50	13 00								16 75	13 33	ERR
	5	19 00	15 00					15 00		11 50				15 00	9 50			17 00	13 25	12 25
Feb	6	19 00	15 00					15 00	13 50	13 50					11 00			17 00	14 00	11 00
	7	18 50		17 00				13 50	13 00					14 50	12 00			17 75	13 25	13 25
	8	19 50	19 00	16 00				16 00	14 00	16 50				17 00	14 00			18 17	15 50	15 50
	9	21 00	21 00					17 00	18 50	17 00					15 50			21 00	17 50	15 50
Mar	10	27 00						21 00	19 00									27 00	20 00	ERR
	11	22 50						19 00	18 00									22 50	18 50	ERR
	12	28 00						21 50	22 50									28 00	22 00	ERR
	13	27 50						22 50										27 50	22 50	ERR
Apr	14	28 00						21 00										28 00	21 00	ERR
	15	26 50			23 00			22 00			19 00							24 75	20 50	ERR
	16	24 50			21 50			20 00			18 00					14 50		23 00	19 00	14 50
	17	20 00			16 50			15 50			13 00					15 00		18 25	14 25	15 00
	18	18 50			17 00			15 00			15 00					11 00		17 75	15 00	11 00
May	19	18 50			16 00			15 00			14 00					11 50		17 25	14 50	11 50
	20	19 50			15 50			16 50			14 00					15 00		17 50	15 25	15 00
	21	18 00			16 00			15 00			13 50					11 00		17 00	14 25	11 00
	22	18 50			15 00			15 50			11 00					14 50		16 75	13 25	14 50
Jun	23	18 50			15 00			15 50			12 00							16 75	13 75	ERR
	24	17 00			16 00			14 50			13 00							16 50	13 75	ERR
	25	17 50			12 50			14 50			10 50							15 00	12 50	ERR
	26	17 00						14 50										17 00	14 50	ERR
Jul	27																			
	28																			
	29	NO REPORTING						NO REPORTING						NO REPORTING				NO REPORTING		
	30																			
	31																			
Aug	32	18 50						15 00										18 50	15 00	ERR
	33	17 00				11 00		13 50					6 50					14 00	10 00	ERR
	34	16 00						11 00				7 00						16 00	9 00	ERR
	35	17 00						12 00										17 00	12 00	ERR
Sep	36	18 50						15 00										18 50	15 00	ERR
	37	17 00						14 00										17 00	14 00	ERR
	38	15 50						13 00										15 50	13 00	ERR
	39	16 50						14 50										16 50	14 50	ERR
Oct	40	17 00						13 00										17 00	13 00	ERR
	41	15 50						13 00										15 50	13 00	ERR
	42	17 00						14 00										17 00	14 00	ERR
	43	19 00						16 00									16 50	19 00	16 00	16 50
	44	20 50						16 50									18 00	20 50	16 50	18 00
Nov	45	19 50						17 00										19 50	17 00	ERR
	46	19 50						17 00										19 50	17 00	ERR
	47	19 00						15 50										19 00	15 50	ERR
	48	18 50						16 00										18 50	16 00	ERR
Dec	49	17 50					18 00	15 00	19 00									17 75	17 50	ERR
	50	16 50						16 50	16 50									16 50	16 50	ERR
	51	19 50					17 00	16 50	16 50									18 25	16 50	ERR
	52	17 50					15 00	16 00	17 00									16 25	16 50	ERR
	53	18 50					13 50	16 50	16 00									16 00	16 25	ERR

Source COLEACP

Domestic Production

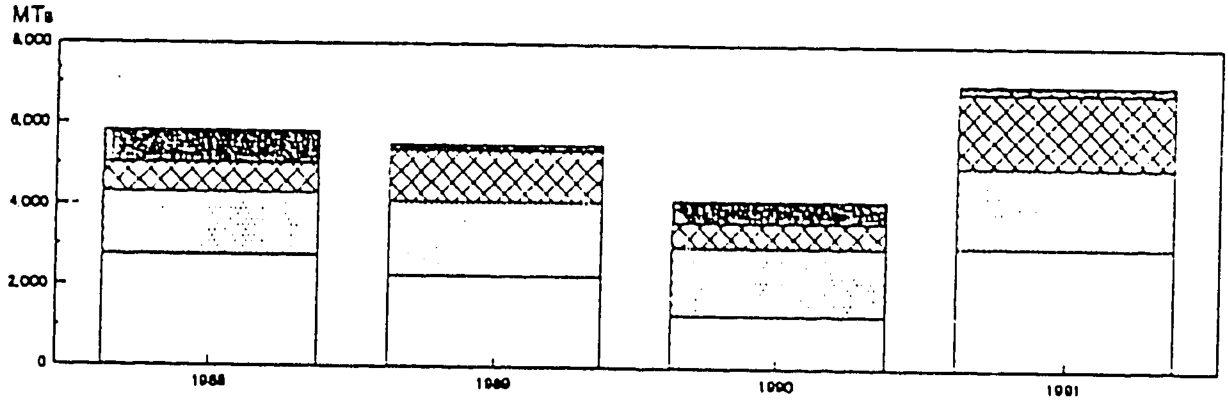
While there is local French production, no official statistics are available.

Imports

Mangetout are not broken down in Eurostat statistics, but are included in one overall category for fresh peas (*Pisum sativum*). Imports under this category stood at 5,834 MTs in 1988, before decreasing for two consecutive years. Imports rebounded strongly in 1991, reaching 7,049 MTs.

French Imports of Fresh Peas, 1988-1991

Metric Tons



Source: EUROSTAT

Market Share

Spain is by far the largest supplier of fresh peas to the French market, with a 43 percent import share in 1991. Italy and Morocco, which account for the vast majority of remaining imports, have import shares of 28 percent and 25 percent, respectively. Other distant suppliers, but minor, suppliers include Zimbabwe, Guatemala, and Kenya. Kenya's exports to France in 1991 totalled only 4 MTs.

French Import Share - Fresh Peas

1991, based on weight

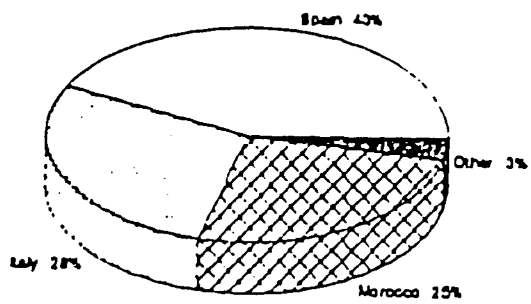


Table 18: French Imports of Fresh/Chilled Peas (Pisum Sativum), 1988-1991								
	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
Belgium/Lux.	n/a	39	304	101	n/a	13	75	32
Netherlands	644	28	11	26	163	35	33	50
Italy	1,566	1,867	1,699	2,004	1,482	1,969	1,778	1,982
Spain	2,735	2,231	1,289	3,016	3,812	3,930	2,449	6,920
Morocco	713	1,245	605	1,793	1,281	2,630	1,618	2,606
Kenya	n/a	n/a	n/a	4	n/a	n/a	n/a	11
Zimbabwe	1	22	70	66	3	45	178	181
Guatemala	n/a	2	7	9	n/a	5	17	24
Other	175	88	185	30	259	136	230	69
Total	5,834	5,522	4,170	7,049	7,000	8,763	6,378	11,875
Intra-EC	5,045	4,175	3,466	5,153	5,569	5,953	4,526	8,995
Extra-EC	789	1,347	704	1,896	1,431	2,810	1,852	2,880

Source: EUROSTAT

Seasonality

Mangetout has become more popular in the French market in recent years and this has prompted many suppliers to export this item. It is available on a year round basis. Based on reporting for the U.K. market (which should approximate season.'ity in France), Spain's supplies of mangetout are probably strongest during the period January-April, while Morocco production is highest during the period November-May. While Kenya and Guatemala are both capable of supplying the market year-round, Zimbabwe product probably enters during the period April-December.

Prices

The 1991 average import unit price for fresh peas is the highest in four years (ECU 1,685/MT in 1991). This compares to ECU 1,200/MT in 1988. Kenya had the largest import unit value of all suppliers in 1991, with ECU 2,750/MT, followed closely by Zimbabwe (ECU 2,742/MT) and Guatemala (ECU 2,667/MT).

French mangetout was being sold on the Rungis market during the week of November 16, 1992, where it fetched FF10 to FF12 per kilogram.

Table 19: French Imports of Fresh/Chilled Peas ('Pisum Sativum'), 1988-1991, Unit Value				
	ECU/MT			
	1988	1989	1990	1991
Belgium/Lux.		333	247	317
Netherlands	253	1,250	3,000	1,923
Italy	946	1,055	1,046	989
Spain	1,394	1,762	1,900	2,294
Morocco	1,797	2,112	2,674	1,453
Kenya				2,750
Zimbabwe	3,000	2,045	2,543	2,742
Guatemala		2,500	2,429	2,667
Other	1,480	1,545	1,243	2,300
Total	1,200	1,587	1,529	1,685

Source: EUROSTAT

Specifications

There are common quality standards for peas which include mange-tout. 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.

The French consumer prefers a medium or small sized product with a dark green color and containing as few peas as possible. It must be packed in the same way as green beans, in small 3kg cartons, and remain as fresh as possible. Premium prices can be obtained for a high quality, fresh product.

Frozen Peas

Frozen pea import statistics, like that for fresh peas, does not break out mangetout into its own category. French imports of all frozen peas has dropped over the period 1988-1991, going from 4,489 MTs to 3,156 MTs. Belgium supplied 60 percent of all imports in 1991. Other suppliers included the U.K., Hungary, Italy, Germany, and Poland.

Table 20: French Imports of Frozen Peas, 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
Belgium/Lux.	3,650	3,306	2,394	1,894	2,200	1,908	1,392	1,152
Netherlands	492	431	336	93	461	331	316	117
Germany	1	34	18	113	1	65	15	78
Italy	n/a	19	22	258	n/a	17	31	238
U.K.	0	86	178	363	0	82	108	206
Yugoslavia	85	177	134	0	31	83	62	0
Poland	n/a	0	18	104	n/a	0	10	41
Hungary	0	0	0	276	0	0	0	141
China	n/a	58	117	16	n/a	90	161	29
Other	261	29	0	39	349	65	2	54
Total	4,489	4,140	3,216	3,156	3,042	2,641	2,097	2,056
Intra-EC	4,174	3,876	2,947	2,741	2,692	2,403	1,863	1,807
Extra-EC	315	264	269	415	350	238	234	249

Source: EUROSTAT

Table 21: French Imports of Frozen Peas, Unit Value				
	ECU/MT			
	1988	1989	1990	1991
Belgium/Lux.	603	577	581	608
Netherlands	937	768	940	1,258
Germany	1,000	1,912	833	690
Italy		895	1,409	922
U.K.		953	607	567
Yugoslavia	365	469	463	
Poland			556	394
Hungary				511
China		1,552	1,376	1,813
Other	1,337	2,241		1,385
Total	678	638	652	651

Source: EUROSTAT

Market Prospects

There is demand for a small volume of mangetout in France but it is much less important than the green bean market.

SECTION VIII: CHERRY TOMATOES

Domestic Production

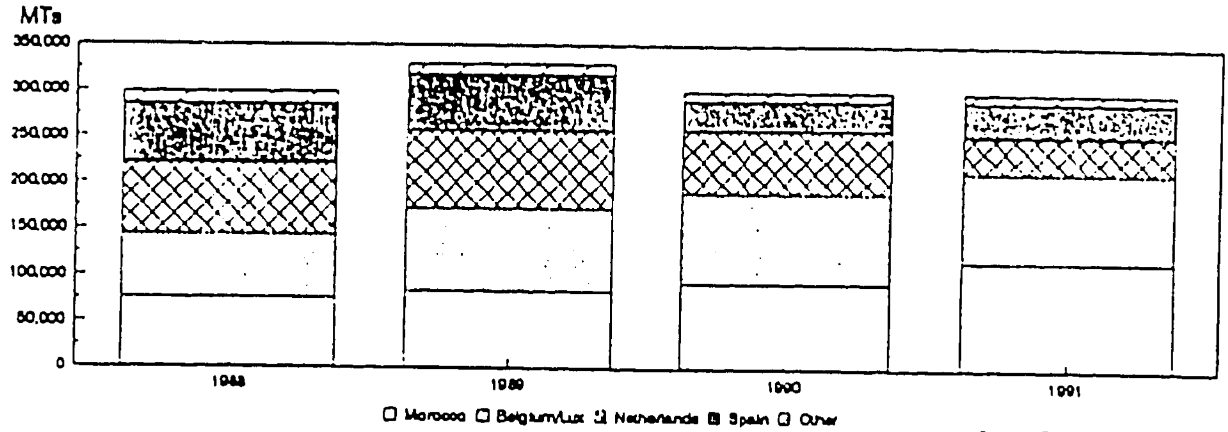
Cherry tomato production levels are unavailable. Production of all tomatoes stood at 756 thousand MTs in 1989. Production fell slightly by 1991 to 720,000 MTs.

Imports

There are no separate statistics for cherry tomatoes. The Imports over the period 1988-1991 have remained relatively stable, with 1991 imports at 298,732 MTs.

French Imports of Fresh Tomatoes, 1988-1991

Metric Tons



Source EUROSTAT

Market Share

Morocco, Spain, the Netherlands and Belgium/Luxembourg are the main suppliers of tomatoes, but distant suppliers include Israel and Kenya. All of these countries supply cherry tomatoes. Morocco, Belgium, and Israel have gained substantial market shares over the period 1988-1991, primarily at the expense of Spain and the Netherlands. Kenyan exports to France totaled only 19 MTs in 1991.

Table 22: French Imports of Fresh/Chilled Tomatoes, 1988-1991								
	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
Belgium/Lux.	68,129	88,928	96,881	95,630	57,176	72,122	76,447	88,372
Netherlands	76,619	83,603	68,351	40,153	75,455	81,322	61,903	42,813
Germany	1,627	901	148	202	1,082	572	140	142
Italy	7,733	8,837	3,666	4,667	5,855	6,270	2,383	3,273
Spain	65,503	62,340	33,454	38,031	44,783	40,389	26,704	31,759
Canary Islands	808	221	741	292	654	149	815	273
Turkey	30	99	86	0	25	87	99	0
Morocco	75,416	83,289	92,323	116,435	56,914	53,715	86,822	95,845
Kenya	n/a	n/a	n/a	19	n/a	n/a	n/a	15
Israel	225	157	2,406	2,751	186	108	2,249	2,599
Other	2,359	681	1,654	552	2,120	653	1,549	464
Total	298,449	329,056	299,710	298,732	244,250	255,387	259,111	265,555
Intra-EC	220,421	244,989	202,940	178,952	185,066	201,068	168,105	166,538
Extra-EC	78,028	84,067	96,770	119,780	59,184	54,319	91,006	99,017

Source: EUROSTAT

Seasonal Supply

The season is split into the two periods of 1 November to 14 May, and 15 May to 31 October. Imports during the summer months, when domestic production is strongest, are somewhat lower than those for the winter months.

Prices

Import unit prices for all tomatoes have been generally increasing from 1988 to 1991, going from ECU 818/MT to ECU 889/MT. The Netherlands had the highest import unit value in 1991 (ECU 1,066/MT), followed by Israel (ECU 945/MT), the Canary Islands (ECU 935/MT), and Belgium/Luxembourg (ECU 924/MT). Kenya had one of the lowest import unit values with ECU 789/MT.

Table 23: French Imports of Fresh/Chilled Tomatoes, Unit Value				
	ECU/MT			
	1988	1989	1990	1991
Belgium/Lux.	839	811	789	924
Netherlands	985	973	906	1,066
Germany	665	635	946	703
Italy	757	710	650	701
Spain	684	648	798	835
Canary Islands	809	674	1,100	935
Turkey	833	879	1,151	
Morocco	755	645	940	823
Kenya				789
Israel	827	688	935	945
Other	899	959	937	841
Total	818	776	865	889

Source: EUROSTAT

Specifications

The varieties of cherry tomatoes most in demand in France are: Sweet 100, Cherita, Evita and Gardener's Delight.

As regards appearance, the product should be of a small size with a good, ripe red color. Their flavor should be distinctive and should meet the minimum acid/sugar levels to achieve a flavor balance, i.e. titratable acids 1.1%, sugars by refractometry 5.5% of minimum soluble solids. These properties should be tested three days after picking.

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.

- Acceptable size ranges for cherry tomatoes are from 10 - 30mm diameter, depending upon variety. 25-30mm are most popular, although uniformity within the punnet is essential.

- Taste and texture must be sweet/juicy. Product must be ripe (color 8/9 on the Dutch color chart), although green is allowed provided it reaches the store ready to eat.

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.

SECTION IX: OKRA

The French market for okra is still thought to be rather small, although it is growing at a steady rate. Okra is not specified in import statistics, but rather included in tariff heading 0709.90.90 (fresh or chilled vegetables).

The vegetable is consumed mostly by ethnic (Asian, West Indian, Mediterranean) groups. Although there are indications that okra is also finding its way into the luxury vegetable trade, this market segment remains small.

The French market is supplied in the summer months from French Overseas Departments in the Caribbean, and from Mediterranean countries such as Cyprus. In the winter, supplies arrive from Kenya and other African countries.

Consumers prefer young, tender, seedless okra 6-8 cm in length and of a uniform light green color. The usual packing for the ethnic market is 4-5kg cartons, whereas the 2kg cartons are preferred by the luxury trade.

Although some promotional efforts are being made for this product, the French market for okra is only a fraction of the British one. Trade sources do not foresee any spectacular growth in imports into France.

Domestic Production

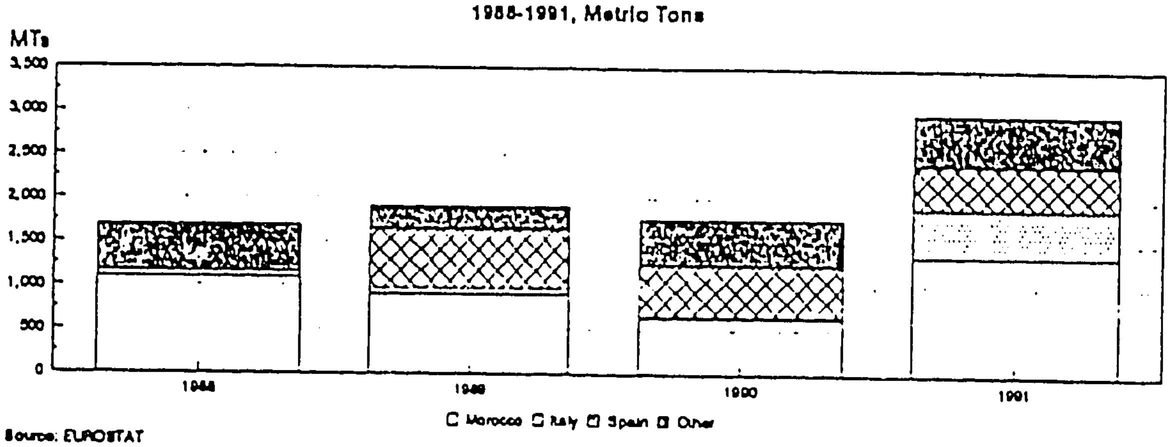
UN/FAO estimates that French domestic production of green chilies and peppers stood at 33 MTs in 1989, up from 21 MTs in 1980.

Imports

Chilies are classified under tariff number 0709.60.99 (fresh chilled capsicum or pimenta). French imports of this category reached 2,988 MTs in 1991, valued at around ECU 4.1 million. This represents an increase of 76% in volume and 96% in value on the level imported in 1988. Imports in 1989 and 1990 from non-EC member states were actually lower than those recorded in 1988, at around 1,150 MTs per year.

French Imports of Fresh Capsicum/Pimenta

1988-1991, Metric Tons



Source: EUROSTAT

Market Share

Imports supply most domestic demand. The main suppliers were Morocco (45 percent of 1991 imports), Italy (18%) and Spain (17%) although smaller volumes were provided by distant suppliers including Senegal, Martinique, Thailand and Jordan.

French Import Share - Fresh Capsicum/Pimenta

1991, based on weight

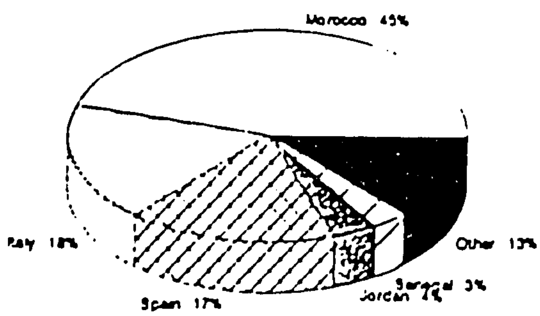


Table 24: French Imports of Fresh/Chilled Capsicum or Pimenta, 1988-1991								
	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
Italy	58	72	33	542	66	89	38	558
Spain	n/a	667	576	505	n/a	715	685	643
Morocco	1,093	901	630	1,357	1,128	936	713	1,777
Kenya	n/a	0	1	0	n/a	0	4	1
Senegal	n/a	n/a	n/a	84	n/a	n/a	n/a	179
Jordan	n/a	n/a	n/a	111	n/a	n/a	n/a	271
Thailand	n/a	n/a	n/a	59	n/a	n/a	n/a	170
Other	542	273	532	330	893	571	1,002	488
Total	1,693	1,913	1,772	2,988	2,087	2,311	2,442	4,087
Intra-EC	379	762	614	1,094	487	844	732	1,239
Extra-EC	1,314	1,151	1,158	1,894	1,600	1,467	1,710	2,848

Source: EUROSTAT

Prices

During the week of November 12, 1992, air shipments of Martinique chilies earned FF30-FF38 per kilogram. Imports which take place year-round generally receive higher prices in the winter months, when most supplies arrive by air.

Average import unit values for the period 1988-1991 have remained in the range ECU 1,200 to ECU 1,400 per MT. The largest suppliers (Italy, Spain, and Morocco) had the lowest unit values in 1991, ranging between ECU 1,030 and ECU 1,310 per MT. Distant supplier unit values were generally well above ECU 2,000/MT.

Specifications

French chilies are consumed mainly by ethnic groups of Mediterranean, African, Caribbean and Asian origin. Consumption appears to be increasing among the French population.

The French market prefers the Suzette variety. Quality requirements are strict but may vary according to the tradition of use by the various ethnic groups. There are no official quality standards but the pods should have a fresh, bright appearance, be clean and free from blemishes or bruises. The type usually preferred is the thin-walled elongated fruit, 6-9cm long and 2 to 2.5 cm in diameter. Both green and red pods are accepted but should not be mixed in the same lot. Chilies which are transported by air are usually packed in 2.5kg fiberboard cartons; those arriving by road in season may also be packed in larger containers. The taste must be juicy and hot according to the variety.

Table 25: French Imports of Fresh/Chilled Capsicum or Pimenta, 1988-1991, Unit Value

	ECU/MT			
	1988	1989	1990	1991
Italy	1,138	1,236	1,152	1,030
Spain		1,072	1,189	1,273
Morocco	1,032	1,039	1,132	1,310
Kenya			4,000	
Senegal				2,131
Jordan				2,441
Thailand				2,881
Other	1,648	2,092	1,883	1,479
Total	1,233	1,208	1,378	1,368

Source: EUROSTAT

REFERENCES

1988-1992 import statistics, EUROSTAT.

Various Monthly Information Bulletins (1990-1992), including price statistics, COLEACP (Market in Tropical Fruit, Off-Season Vegetables, Flowers, Ornamental Plants and Spices, Rungis, France.

1989 FAO Production Yearbook, Food and Agriculture Organization of the United Nations, volume 43, 1990.

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

Rungis wholesale market prices (various weeks in November, 1992), Ministry of Agriculture (Service des Nouvelles des Marches).

"UN/ECE Standard FFV-04 Relating to the Marketing and Commercial Quality Control of Asparagus," Economic Commission for Europe (Geneva), the United Nations, 1991.

"UN/ECE Standard FFV-06 Relating to the Marketing and Commercial Quality Control of Beans," Economic Commission for Europe (Geneva), the United Nations, 1991.

"UN/ECE Standard FFV-27 Relating to the Marketing and Commercial Quality Control of Shelling Peas," Economic Commission for Europe (Geneva), the United Nations, 1991.

"UN/ECE Standard FFV-35 Relating to the Marketing and Commercial Quality Control of Strawberries," Economic Commission for Europe (Geneva), the United Nations, 1991.

"UN/ECE Standard FFV-36 Relating to the Marketing and Commercial Quality Control of Tomatoes," Economic Commission for Europe (Geneva), the United Nations, 1991.

"UN/ECE Standard FFV-42 Relating to the Marketing and Commercial Quality Control of Avocados," Economic Commission for Europe (Geneva), the United Nations, 1991.

"UN/ECE Standard FFV-45 Relating to the Marketing and Commercial Quality Control of Mangoes," Economic Commission for Europe (Geneva), the United Nations, 1991.

APPENDIX A: REPRESENTATIVE LIST OF FRENCH IMPORTERS

Georges Helfer SA
1 Rue des Tropiques
Entrepot 133-94538
Rungis
Cedex
Tel: 1 468 72517
Fax: 1 456 04852
Tlx: 263288

Pomona
21 Rue du Pont Neuf
75039 Paris Cedex 01
Tel: 1 40 28 30 00
Fax: 1 40 26 58 95
Tlx: 210970

Fruidor "Les Crudettes"
ZAC de St. Barthelemy
45 110 Chateauneuf-sur-Loire
Tel: 38 58 99 00
Fax: 38 58 65 15
Tlx: 783771

Fruidor Perpignan
Z I Marche St. Charles
BP 5355
66033 Perpignan
Cedex
Tel: 68 85 21 21
Fax: 68 54 60 67
Tlx: 500056 / 500994

Malet Azoulay SA
24 Rue du Pont des Halles
94656 Rungis
Cedex
Tel: 1 49 78 20 00
Fax: 1 46 87 16 45
Tlx: 260351

Primeurope
12 Rue des Lar[illegible]es
Senia 602
94667 Orly
Cedex
Tel: 1 46 87 22 40
Fax: 1 46 87 65 32

Centre Francais du Commerce Exterieur (CFCE)
10 Avenue d'Iena
75783 Paris
Cedex 16
Tel: 1 40 73 32 54
Fax: 1 40 73 39 79
Tlx: CFCE 611934 F

Roland Lacour SA
2 Rue des Tropiques
Zone Entrepot
F-94538 Rungis
Cedex
Tel: 1 46 87 24 27
Fax: 1 45 60 42 93
Tlx: 270961

E Azoulay & Cie
18-28 Rue du Puitis-Dixme
Senia 547 Thiais
F-94577 Rungis
Cedex
Tel: 1 46 87 25 40
Fax: 1 46 86 23 16
Tlx: 270079

Pascual France
Cour D'Alsace
Batiment C6A
BP 391
F-94155 Rungis
Cedex
Tel: 1 468 72515
Fax: 1 45 609510
Tlx: 270310

Semaris
1 Rue de la Tour
BP 316-94152 Rungis
Cedex
Tel: 1 46 87 35 35

51

All numbers shown on the following pages are prices in FF per 100 kg unless noted otherwise. Tonnage #s are found only on page 1 (B-2) in the box. While not stated by SNM, the three numbers (prices) after product name are "low", "high", and "most".

SERVICE DES NOUVELLES DES MARCHES
202, rue de la tour
centra 124
94566 RUNGIS CEDEX
tel. (1) 46.87.35.09

* LES COURS EN TEMPS REEL *
3617 S.N.M

MERCURIALE FRUITS ET LEGUMES RUNGIS

MERCURIALE FRUITS ET LEGUMES RUNGIS
Cotations du Lundi 16/11/92

Mercuriale nr 6222

ARRIVAGES JOURNALIERS (source SEMMARIS)

PRODUITS	ARRIVAGES EN TONNES		
	METRO	IMP	TOTAL
- ARTICHAUT	30	4	34
- CAROTTE	224	14	238
- CHOU-FLEUR	116	/	116
- CONCOMBRE	21	46	67
- COURGETTE	18	64	82
- ENDIVE	177	1	178
- POIREAU	98	8	106
- SALADE	244	3	247
- TOMATE	178	256	434
- CITRON	/	82	82
- CLEMENTINE	18	508	526
- ORANGE	/	474	474
- POIRE	139	13	152
- POMME	362	9	371
- RAISIN	27	378	405

MARCHE CALME TEMPS COUVERT T=+9° A 12H COURS HT AUX 100KG SAUF INDICATION SPECIALE DEPART RUNGIS STADE GROSSISTE DETAILLANT.

-LEGUMES=OFFRE ASSEZ LARGE DEMANDE MODEREE COURS DIF-SOUTENUS.
RESSERRES ASSEZ FORTES.
-FRUITS=OFFRE LARGE DEMANDE MOYENNE COURS DIF-SOUTENUS.
RESSERRES ASSEZ FORTES.

-ENDIVE=UNE PROGRESSION DES ARRIVAGES EN FIN DE SEMAINE PROVOQUE UN FLECHISSEMENT DES COURS.
TOMATE=LES DISPONIBILITES PLUS IMPORTANTES
EN PROVENANCE DU MAROC ENTRAINENT UN TASSEMENT DES COURS.

63

AIL MID-PYR I 60-80	850/1050/950	
ARTICH BL ESPAGNE I 9-11	850/950/900	-100
ARTICH CAMUS BRETAGNE I 9-11	600/800/700	-150
AUBERG ESPAGNE I 60-80	800/1000/900	
AUBERG ITALIE I 60-80	600/800/700	
AUBERG P-BAS I 60-80	1800/1900/1850	
BETTE FRANCE	300/450/350	
BETTERAV CUIT FRANCE	250/300/280	-20
CAROT FRANCE I	120/160/140	
CAROT MANCHE EXT PLT	180/220/200	
CAROT SABLE MANCHE EXT PLT	220/260/240	
CEL-BR FRANCE I	240/300/260	
CEL-RAVE FRANCE	280/320/300	
CHAMPI CHANTEREL FRANCE LE-KG	10/15/12	
CHAMPI CHANTEREL JNE FRANCE LE-KG	18/25/20	
CHAMPI DE-PARIS FRANCE I	900/1100/1000	
CHAMPI DE-PARIS FRANCE I PLT	1000/1250/1100	
CHAMPI GIROL FRANCE LE-KG	120/150/140	
CHAMPI PD-MOUTON FRANCE LE-KG	25/30/28	
CHAMPI PLEUR FRANCE LE-KG	22/30/26	
CHAMPI TR-MORT FRANCE LE-KG	20/25/22	
CHOU BL FRANCE I	180/220/200	
CHOU BL P-BAS I SAC	180/220/200	
CHOU BROCOL FRANCE I	550/750/650	-50
CHOU BROCOL ITALIE I	400/600/500	-50
CHOU RGE FRANCE I	180/200/190	
CHOU RGE P-BAS I SAC	180/200/190	
CHOU VERT FRANCE I LE-COLI-6	20/28/24	
CHOU-BRUX FRANCE I	350/400/380	
CHOU-BRUX P-BAS I GROS	300/350/320	+20
CHOU-BRUX P-BAS I MOY	300/350/320	+20
CHOU-FL COUR BRETAGNE I GROS LE-COLI-6	22/26/24	
CONCOMB ESPAGNE I 500-600G LE-COLI-12	20/25/22	-2
CONCOMB ESPAGNE I 600-750G LE-COLI-10	20/25/23	-1
CONCOMB SERRE FRANCE I 500-600G LE-COLI-12	NCO	
COURGET ESPAGNE I 14-21	250/400/300	
ECHALOT 1-2LG FRANCE	400/500/450	
ECHALOT LG FRANCE	450/550/500	
ENDIVE NORD-PICARD EXT COLI-5KG	800/950/880	-50
ENDIVE NORD-PICARD I COLI-5KG	650/750/700	-60
ENDIVE NORD-PICARD I PLT-8KG	600/700/650	-50
ENDIVE NORD-PICARD II	450/600/520	-30
EPINARD FRANCE I	400/550/500	
EPINARD PCA I	650/750/700	
FENOUIL ITALIE	500/600/550	
H-VERT COCO-PL ESPAGNE I	900/1000/950	
H-VERT KENYA EXT T-FIN	1800/2200/2000	+200
H-VERT KENYA I FIN	1500/1800/1700	+200
H-VERT MAROC I FIN	NCO	
H-VERT MGTOUT FRANCE I	900/1100/1000	
H-VERT STRIKE ESPAGNE I	1000/1200/1100	-100
NAVET FRANCE	200/250/230	
OIGNON GRELOT JNE P-BAS II	300/400/350	
OIGNON LG FRANCE I	320/500/450	
OIGNON RD FRANCE I 40-60	90/110/100	
OIGNON RD FRANCE I 60-80	90/110/100	
PERSIL FRANCE	500/600/550	
PIMENT VERT ITALIE	700/900/800	
POIREAU FRANCE I	400/500/430	
POIVRON RGE-CAR ESPAGNE I GROS	800/900/850	
POIVRON RGE-CAR P-BAS I GROS	1000/1200/1100	-100

POTIRON MUSCADE FRANCE	:220/260/240	
RADIS FRANCE LES-100BOT	:280/350/300	
TOMAT ESPAGNE I 47-57	:NCO	
TOMAT ESPAGNE I 57-67	:450/500/470	-50
TOMAT ESPAGNE I 67-82	:NCO	
TOMAT ITALIE I	:500/600/550	-20
TOMAT MAROC I 47-57	:350/400/380	-40
TOMAT MAROC I 57-67	:400/500/450	-30
TOMAT MAROC I 67-82	:480/550/530	-20
TOMAT MAROC I 67-82 PLT	:550/650/600	-50
TOMAT RD SERRE P-BAS I 47-57	:NCO	
TOMAT RD SERRE P-BAS I 57-67	:NCO	
TOMAT RD SERRE P-BAS I 67-82 PLT-1RG-ALV	:NCO	
TOMAT SERRE BELG I 57-67	:NCO	
TOMAT SERRE BELG I 67-82	:NCO	
TOMAT SERRE FRANCE EXT 47-57	:450/500/480	-50
TOMAT SERRE FRANCE EXT 57-67	:600/650/620	-50
TOMAT SERRE FRANCE EXT 67-82	:NCO	
TOMAT SERRE FRANCE I 47-57	:350/400/380	-20
TOMAT SERRE FRANCE I 57-67	:550/600/550	-50
TOMAT SERRE FRANCE I 67-82	:650/750/700	-50
TOMAT SERRE FRANCE I 67-82 PLT-1RG-ALV	:NCO	
-- POMME DE TERRE --		
PDT B-FONT FRANCE	:300/350/320	
PDT BF15 FRANCE	:150/200/170	
PDT BF15 LAVE FRANCE	:200/250/220	
PDT BINTJE FRANCE 40-75	:50/70/60	
PDT BINTJE FRANCE 55-75	:60/90/70	
PDT BINTJE LAVE FRANCE 40-75	:90/110/100	
PDT BINTJE LAVE FRANCE 55-75	:100/140/120	
PDT CHARLOTTE FRANCE	:180/220/200	
PDT CHARLOTTE NOIRMOUT	:320/380/350	
PDT FRANCE 40-75	:50/70/60	
PDT FRANCE 55-75	:60/80/70	
PDT RATTE FRANCE	:550/600/580	
PDT ROSEVAL FRANCE	:300/350/320	
-- SALADE --		
CHICOR CORNET FRANCE I	:NCO	
CHICOR FRISE FRANCE I LE-COLI-12	:42/48/45	
CHICOR FRISE PCA I LE-COLI-10	:52/56/54	+2
CHICOR R-TREVIS FRANCE I	:600/800/700	
CHICOR R-TREVIS ITALIE I	:600/800/700	
CHICOR SCAROL PCA I 670G+ LE-COLI-10	:52/56/54	+2
CRESSON FRANCE LES-100BOT	:NCO	
LAITUE BATAVIA FRANCE I 250G+ LE-COLI-12	:NCO	
LAITUE BATAVIA FRANCE I 300G+ LE-COLI-12	:35/40/38	
LAITUE BATAVIA FRANCE I 380G+ LE-COLI-12	:NCO	
LAITUE BATAVIA PCA I LE-COLI-12	:42/48/45	
LAITUE FEUIL-CH FRANCE I LE-COLI-12	:38/42/40	
LAITUE FRANCE I 250G+ LE-COLI-12	:NCO	
LAITUE FRANCE I 300G+ LE-COLI-12	:35/40/38	
LAITUE FRANCE I 380G+ LE-COLI-12	:40/45/42	
LAITUE LOLO-ROSS FRANCE I LE-COLI-12	:38/42/40	
LAITUE PCA I LE-COLI-12	:NCO	
LAITUE ROMAINE FRANCE I LE-COLI-12	:38/42/40	
MACHE VERT P-LOIRE LA-BARQ-150G-FILM	:4.00/4.50/4.20	
MACHE VERT P-LOIRE PLT	:1000/1300/1200	-100

65

ANANAS C-IVOIRE B BT-CONT	400/500/450	
AVOCAT FUERTE ESPAGNE LE-COLI-14-16	30/34/32	
AVOCAT FUERTE ESPAGNE LE-COLI-18-20	24/28/26	
AVOCAT ISRAEL LE-COLI-14-16	30/36/34	-1
BANANE AFRIQUE EXT	580/620/600	-30
BANANE AFRIQUE I	550/580/570	-30
BANANE DOM-TOM EXT	570/600/590	-40
BANANE DOM-TOM I	540/570/560	-40
CHATAIG FRANCE GPE-2	700/800/750	
FIGUE NOIR FRANCE	NCO	
FIGUE NOIR FRANCE MOY PLT-1RG	NCO	
KIWI CORSE I	450/550/500	
KIWI GRECE I LE-COLI-30-33	15/20/18	
KIWI HAYWARD N-ZELANDE I LE-COLI-27-30	30/34/32	
KIWI HAYWARD N-ZELANDE I LE-COLI-33-36	24/28/26	
MARRON FRANCE GPE-1	1200/1600/1300	
MARRON FRANCE GPE-2	700/1000/900	
NOIX SEC FRANCE 28+	900/1100/1000	
NOIX SEC FRANCE 32+	1500/1700/1600	
POIRE COMICE FRANCE I 70-75	320/380/350	
POIRE COMICE FRANCE I 75-80	380/420/400	
POIRE COMICE FRANCE I 80-85	450/500/480	
POIRE COMICE FRANCE I 80-85 PLT	540/580/550	
POIRE COMICE FRANCE I 85-90	420/460/440	
POIRE CONFER FRANCE I 65-70	280/340/300	
POIRE CONFER FRANCE I 70-75	380/420/400	
POIRE HARDY FRANCE I 70-75	350/400/380	
POIRE HARDY FRANCE I 75-80	380/420/400	
POIRE L-BON FRANCE I 55-65	300/350/320	
POMME BOSK-R FRANCE I 80-85	250/300/280	
POMME BOSK-R P-BAS I 75-85	280/320/300	
POMME CANADA-G FRANCE I 80-85	320/380/350	
POMME COX-OR FRANCE EXT 75-80 PLT	500/600/550	
POMME E-RED-ONE FRANCE EXT 75-80	350/400/380	
POMME E-RED-ONE FRANCE EXT 80-85	400/450/420	
POMME ELSTAR FRANCE I 75-80	250/300/280	
POMME ELSTAR P-LOIRE EXT 70-75	280/320/300	
POMME ELSTAR P-LOIRE EXT 75-80	350/400/380	
POMME ELSTAR P-LOIRE EXT 80-85	380/430/400	
POMME GOLDEN COL-2-3 P-LOIRE I 70-75	220/280/250	
POMME GOLDEN COL-2-3 P-LOIRE I 75-80	300/350/320	
POMME GOLDEN COL-2-3 P-LOIRE I 80-85	330/380/350	
POMME GOLDEN COL-3-4 PCA I 70-75	180/220/200	
POMME GOLDEN COL-3-4 PCA I 75-80	220/260/240	
POMME GOLDEN COL-3-4 PCA I 80-85	250/300/280	
POMME GRANNY FRANCE I 75-80	300/360/330	
POMME GRANNY P-LOIRE I 75-80	320/380/350	
POMME JONAGOLD FRANCE I 80-85	300/350/320	
POMME MELROSE FRANCE I 80-85	220/280/250	
POMME RE-REINET FRANCE II 70-75	200/250/220	
POMME RE-REINET P-LOIRE EXT 75-80	380/430/400	
POMME RE-REINET P-LOIRE EXT 75-80 PLT	480/520/500	
POMME RE-REINET P-LOIRE EXT 80-85	400/450/430	
POMME RE-REINET P-LOIRE I 65-70	180/220/200	
POMME RE-REINET P-LOIRE I 70-75	220/260/240	
POMME RE-REINET P-LOIRE I 75-80	280/320/300	
POMME RE-REINET P-LOIRE I 80-85	320/370/350	
POMME ROY-GALA P-LOIRE I 75-80	350/400/380	+30
POMME ROY-GALA P-LOIRE I 80-85	420/480/450	+30
POMME STKRIMS PCA I 70-80	200/260/230	
RAISIN ITALIA ITALIE I	500/650/600	+100

RAISIN MUSC-HBG FRIGO FRANCE EXT..........:1400/1700/1600
RAISIN NAPOL ESPAGNE I....................:500/600/550
RAISIN RIBOL FRANCE I.....................:700/800/750
-- FRUIT ROUGE --
FRAISE PERIGORD EXT 25+ BARQ-500G.........:NCO
-- AGRUME --
CITRON ESPAGNE I 5........................:500/650/550
CITRON TURQUIE I 5........................:450/500/480
CLEMENT ESPAGNE I 1.......................:700/800/730
CLEMENT ESPAGNE I 2.......................:650/750/680
CLEMENT ESPAGNE I 3.......................:550/650/580
CLEMENT ESPAGNE I 4.......................:400/450/420
CLEMENT ESPAGNE I 5.......................:300/350/330
CLEMENT ESPAGNE II 2......................:550/600/580
CLEMENT ESPAGNE II 3......................:450/550/500
CLEMENT MAROC I 3.........................:500/600/550
ORANGE DELT-SEDLES RSA I COLI-72..........:460/500/480
ORANGE DELT-SEDLES RSA I COLI-88..........:NCO
ORANGE NAVLINE ESPAGNE I 3................:350/400/380
ORANGE NAVLINE ESPAGNE I 4................:340/380/360
ORANGE NAVLINE ESPAGNE I 5................:300/340/320
POMELO ROSE FLORIDE COLI-40...............:500/550/520
POMELO ROSE HONDURAS COLI-36..............:450/500/480
-- FRUIT EXOTIQUE --
KAKI ESPAGNE..............................:600/800/700
KAKI ITALIE...............................:500/600/550
LITCHI MADAGAS............................:NCO

SERVICE DES NOUVELLES DES MARCHES
202, rue de la tour
centra 124
94566 RUNGIS CEDEX
tel. (1) 46.87.35.09

* LES COURS EN TEMPS-REEL *
3617 S.N.M

MERCURIALE FRUITS ET LEGUMES RUNGIS

MERCURIALE FRUITS ET LEGUMES EXOTIQUES
Cotations du Jeudi 12/11/92

Mercuriale nr 664

SEMAINE DU 05-11-92 AU 10-11-92
PRODUITS EXOTIQUES : FRUITS ET LEGUMES - CONTRE SAISON - FINES HERBES - CHAMPIGNONS.
COURS HT AUX 100KG SAUF INDICATION SPECIALE DEPART RUNGIS.

-- LEGUME --		
ARTICH POIVR ESPAGNE II	700/1000/850	
ASPERGE VERT CHILI	3000/3500/3200	-400
BANANE-P MARTINIQ AVION	1200/1300/1250	
CHAMPI MOUSSERON FRANCE LE-KG	NCO	
CHAMPI SHEE-TAKI FRANCE LE-KG	60/85/70	+5
CHOU CHINO P-BAS	450/550/500	
CROSNE FRANCE	2200/2800/2400	-800
MAIS DOUX FRANCE LA-BARQ-2EPI	3.00/3.80/3.50	-1
MELON GALLIA ISRAEL	800/1000/900	
PIMENT MARTINIQ AVION	3000/3800/3200	+200
RADIS NOIR FRANCE	250/320/280	
SOJA FRANCE SACH-500G	1000/1200/1050	
SOJA FRANCE VRAC	500/550/520	
TOMAT CERISE ISRAEL BARQ-250G	3200/4400/4000	
TOPINAMB FRANCE	500/600/550	
-- SALADE --		
MESCLUN FRANCE	3000/3500/3200	
PISSENLIT BL FRANCE	NCO	
PISSENLIT VERT FRANCE	1400/1600/1500	
-- LEGUME EXOTIQUE --		
BANANE-P COLOMBIE BT-CONT	700/800/750	
DACHINE MARTINIQ	1300/1400/1350	+50
GINGEMB BRESIL AVION	1600/1900/1700	
GINGEMB BRESIL BT-CONT	1200/1400/1300	
GOMBO MEXIQUE	1900/2100/2000	+100
IGNAME BRESIL BT-CONT	550/650/600	+50
MANIOC COSTA-R	750/1000/850	
PAT-DOUCE BRESIL	750/850/800	
PATISSON FRANCE	400/500/450	
-- HERBE --		
ANETH ISRAEL LES-10BOT	30/35/32	
BASILIC ISRAEL LES-10BOT	35/40/38	
CERFEUIL ISRAEL LES-10BOT	30/35/32	
CIBOULET ISRAEL LES-10BOT	30/35/32	
CORIAND ISRAEL LES-10BOT	30/35/32	
ESTRAGON ISRAEL LES-10BOT	30/35/32	
LAURIER ISRAEL LES-10BOT	30/35/32	
MENTHE ISRAEL LES-10BOT	25/30/28	

ROMARIN ISRAEL LES-10BOT	[illegible]	
THYM ISRAEL LES-10BOT	30/35/32	
-- FRUIT --		
ANANAS GHANA AVION	1000/1100/1050	
ANANAS VICTORIA REUNION AVION	1700/2200/2000	
BANANE ROSE MARTINIQ	1800/2000/1900	
DATTE FRAIS EGYPTE	1400/1600/1500	
FIGUE BARBARI ITALIE	400/550/450	
MANGUE BRESIL AVION	1600/1800/1650	
MANGUE ISRAEL AVION	1400/1600/1500	
POIRE NASHI FRANCE PLT-12	400/800/600	
-- FRUIT ROUGE --		
FRAISE COLOMBIE LE-KG	28/32/30	
FRAMB FRANCE BARQ-125G LE-KG	100/120/110	-10
-- AGRUME --		
MANDARINE URUGUAY I	NCO	
-- FRUIT EXOTIQUE --		
ANONE ESPAGNE	1100/1300/1200	
CARAMBOLE MALAISIE AVION	2400/2800/2600	
F-PASSION COL-VIOL KENYA	2000/2200/2100	
GOYAVE BRESIL	2800/3000/2900	-100
GOYAVE COL-BL BRESIL	2500/2700/2600	
GRENADE ESPAGNE	450/550/500	-50
GRENADILLE COLOMBIE	3000/3500/3200	
KIWANO PORTUGAL	800/900/850	-50
LIME BRESIL BT-CONT	1100/1300/1200	
LIME MEXIQUE AVION	1400/1500/1450	-50
MANGOUST THAILANDE	NCO	
NX-COCO R-DOMINIC LE-COLI-15	30/45/40	
PAPAYE BRESIL AVION	2000/2400/2200	
PAPAYE C-IVOIRE	2000/2400/2200	
PHYSALIS FRANCE LES-100P	50/60/55	
PITAHAYA COLOMBIE	3500/4000/3800	
SHARON ISRAEL	900/1300/1100	+250
TAMARILLO COLOMBIE	2600/3500/2800	
TAMARIN THAILANDE	NCO	

59