

PN-ABR-604



KENYA EXPORT DEVELOPMENT SUPPORT

UK MARKET SURVEY
FOR
SELECTED KENYAN FRESH
AND PROCESSED PRODUCE

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

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U.K. Market Survey
for
Select Kenyan Fresh and Processed Produce

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OVERVIEW

Market Opportunities for Kenyan Exporters

The table below gives a brief overview of U.K. 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
- 3 Fair market prospect, high volume potential
- 2 Fair market prospect, low volume potential
- 1 Poor market prospect
- 0 No market prospects exist

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

Product	Rank	Note
Fresh Asparagus	4	Good opportunities for top quality green in winter months.
Frozen Asparagus	2	Extremely competitive and well-supplied market.
Avocados	3	Good existing market for Kenya; now lower value due to sea freight; intense competition.
Cherry Tomatoes	1	Intense competition from EC and Morocco.
Fine Beans	4	Good existing market and reputation; growing competition from Mediterranean, potential need for promotion.
Fresh Chilies	4	Good existing market but increasingly strong competition from the Gambia.
Dried Chilies	3*	Market for Birds' Eye, but no official statistics available; research recommended.
Fresh Mangoes	2	Falling market for Kenya; very variety conscious; low value because of sea freight.
Mango Juice	1	Variety problem with UK market; better to direct attention to blending companies in Netherlands and Switzerland.

Product	Rank	Note
Passion Fruit	2	Stable price needed.
Canned Mixed Exotic Fruit	3	Growing market; increasingly competitive but service of main distant supplier deteriorating; mixed range essential.
Canned Mango	2	Advisable only if part of a larger product line.
Dried/Sugared	1	Not a growing market; stagnant prices; goes against growing health trend.
Sun-Dried Mango	2*	Potential niche; regular quantities and suitable quality essential; more research required on both Kenyan capacity and market interest.
IQF mango, papaya	2	Mainly an intra EC-trade.
Mango in brine	2	Trade interested in other suppliers for chutney beyond India and Haiti exclusively.
Fresh Mangetout	3	Good market development by Zimbabwe and Zambia; worth watching. Also strong competition from Guatemala.
Fresh Strawberries	2	Very risky market; strong competition from Spain, Israel and USA; only chance from November to February for highest quality.
Frozen Strawberries	1	Market locked into northern European variety and supply.
Okra	4	Kenya is the major supplier in this slowly growing market.
Frozen Fine Beans	2	Niche exists for 300-400 tons per year into EC of high quality, smaller diameter fine green beans.
Frozen Mangetout	2	Potential niche for a few hundred tons of particularly high quality snow peas adhering to very strict specifications.

Country Profile

In terms of the size of the domestic market, the United Kingdom ranks with France and Germany as the largest in Europe. The Netherlands is a major importer of course, but its

domestic market is relatively small. The UK, with its population of more than 56 million has a relatively high per capita income and because of its maritime history, has a lot of experience importing and exporting fresh produce. It was for many years the most developed market for off-season produce.

British consumption of fresh produce has increased steadily during the 1980's, with growing awareness of the nutritional and health value of eating fresh foods. Furthermore, the changes in the retail distribution system have meant that a wider variety of well presented, reasonably priced produce is now available in stores all year round. Consumption patterns do tend to vary throughout the country, especially away from urban centers, but again, large shopping complexes have been established in the regions and these do make available the whole range of produce to the consumer. Value for money is still an important criterion in the U.K., although quality consciousness has increased rapidly during the 1980's as a result of active promotion by the major supermarkets. Because of the preponderance of supermarket shopping, the British housewife is now accustomed to buying produce ready packed, well presented, with sell-by dates, and, even instructions as to use -- depending on the nature of the product.

Distribution Structure

The structure of fresh fruit and vegetable distribution and retailing in the UK has changed significantly over the last 10 years. The old system essentially was one of imported produce coming into wholesale markets, either via agents selling on to the wholesale market, or direct to wholesale importers. A number of such markets existed throughout the country, notably in Covent Garden and Spitalfields in London, and Birmingham and Glasgow outside London. Other wholesalers and retailers visited these markets and purchased fresh produce according to need. The product was then distributed throughout the country. In many respects, the trade was by sight and personal contact, with prices being negotiated at point of sale.

A number of factors have emerged to radically alter that situation. Firstly, the development of sophisticated telecommunications allowed trading to take place more directly through telephone, telex and fax, without the need to spend time visiting wholesale markets. Secondly, the volume of imported and domestic produce increased significantly, and, to some extent, became too large for existing wholesale markets to handle. Thirdly, stricter demands for freshness and presentation required faster turnover of produce, which in turn required strict logistical organization of trade. This necessitated the development of integrated program planning for purchase and distribution of product, into which the relative lottery of a wholesale market did not easily fit.

Retailers and Importers

A major contributory factor to the relative demise of the wholesale market system was the emergence of the supermarkets as the predominant players in the retail sector. It is estimated that today 5 supermarkets control over 70% of the food trade in the UK and that for fresh produce, the same five account for over 50%.

The requirements of such supermarkets are for regular guaranteed delivery of top quality produce, properly packaged and according to strict specifications. They will therefore only deal with importers, repackers or distributors who can guarantee such a service and indeed will only consider dealing directly with the suppliers if the same conditions apply.

What has emerged is almost a two-tier market system, whereby the major retail chains buy produce via production and delivery programs from large importers/distributors or directly from suppliers of commodity type produce (e.g. citrus, potatoes, tomatoes and iceberg lettuce). Such a trade is normally Class 1 or "Extra" quality produce and is a high-tech carefully controlled business. The second tier of distribution is the wholesale market system, which still to some extent is very important in the UK. The market is used mainly by smaller sized retail outlets, or by the retail chains wishing to top up their supplier on a spot basis. In most cases, the majority of produce on this market is not quite the same quality as that required by the supermarkets, although the wholesale markets do still pay a proper price because quality and standards have generally improved. There is a further segment of the market, which is the catering and institutional demand for hotels, restaurants, airlines, Government services, etc. Again, such demand has become extremely sophisticated and requires programmed production and delivery according to strict specifications.

One of the results of this alteration in the UK distribution system has been a change in the type of company working within the system. The supermarket requirement for relatively large volumes of top quality produce, delivered daily to their shops or depots has led to the growth of large importer/distributor companies which organize production, specifications and packaging exactly according to the supermarkets' needs. Such packing can be done either at source of supply with, on occasion, the packing material being shipped out to the country concerned, or in the importers' depots where product comes in as bulk and is packed in the logos of the supermarkets.

The control exercised at all stages is stringent, with supermarkets themselves exercising their right to inspect produce on a regular basis. Such companies often have offices in supplying countries and they also have very large coldstores and packing houses at various points within the UK. These companies work closely with supermarkets and are mainly geared only to supplying them. What this means in effect is that if delivered produce does not match up to specifications, there is not a very well organized system of sale through secondary outlets. They do have contacts on the wholesale market and can sell produce which is unacceptable to the supermarkets, but this is not their main function and they are not as efficient at it as are, perhaps, companies working on the wholesale market themselves.

The implication therefore is that if a supplier is not fully confident that he can guarantee uniform quality and uniform specifications on a regular volume basis, he is increasing his risk by dealing with these new high-tech companies. In such instances, it is probably a wiser decision for such suppliers to trade with companies in the UK which have attempted to bridge the gap between operating on the wholesale market and with the supermarket chains. There are a number of companies who still have space on the major wholesale markets, but who also have offices

elsewhere which trade directly with the large chains. Such importers have maintained access to a wide range of secondary outlets through the wholesale market which they can use should produce destined for supermarkets not be acceptable. They are also increasing their access to the major supermarkets.

What is of note is the fact that because of the increasing importance of the supermarket demand, the standards of acceptability on the wholesale market have also increased in proportion. Generally, the average standards of acceptable produce in the UK are now far higher than before – a feature which has created a further change in the company structure in the trade, viz the emergence of specialist product and region companies working both on the wholesale markets and near to points of import. This last feature is more prevalent in the Netherlands and France than in the UK, but it is an increasing trend, especially as supermarkets tend to prefer to deal with product specialists for the non-volume aspects of their fresh produce sales. Some companies specialize solely in exotic produce, some concentrate on supplying catering and institutional sectors, some concentrate on airfreighted goods from distant areas such as the Far East and the West Coast of the USA. There are also importers of bulk produce by ship from distant sources and others who concentrate on regions such as Iberia, Middle East, South Africa, Greece, and Turkey. Indeed, some of the companies have their own import offices within the supplying country, or have "produce panels" which comprise a number of importers making decisions on marketing, grading and/or pricing within a specific country.

SECTION I: ASPARAGUS

Ranking Overview

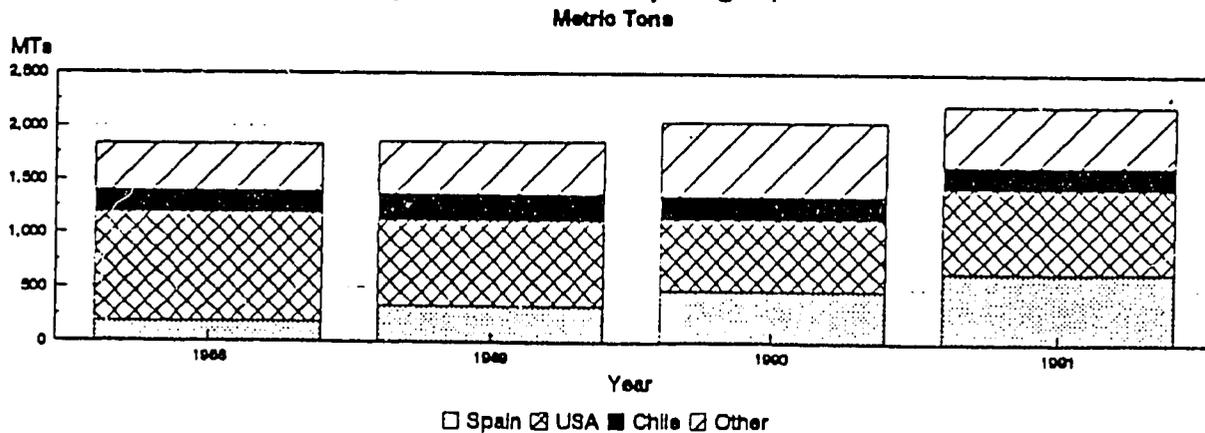
<u>Product</u>	<u>Ranking</u>	<u>Notes</u>
Fresh Asparagus	4	Good opportunities exist for top quality green in winter
Frozen Asparagus	2*	Demand does exist, but market is catered by suppliers with low prices, established distribution mechanisms and improving quality. Further research needed.

Domestic Production

UK domestic production is currently 1,200 tons per annum, with a market value of £3 million. Although UK production has increased steadily since the mid 1980's, farm-gate prices have fallen and UK producers are faced by a range of problems. These include fragmented production and marketing structures, high input costs, high interest rates, variable weather conditions and a short season. UK asparagus does, however, command a premium price, based on its freshness and it is regarded as a niche product. It is only available May through June (and a certain amount of the crop is frozen for annual distribution).

Imports

U.K. Imports of Fresh Asparagus, 1988-1991



The United Kingdom has gradually increased its imports of fresh asparagus in the last four years, from 1,400 tons in 1987 to 2,206 tons in 1991. Total values have increased from ECU 4.4 million to almost ECU 6 million over the same period.

But although imports of asparagus have increased significantly over the last 15 years, from around 300 tons in the late 1970's to 2,000 tons in 1991, overall, asparagus still only represent 0.18% of the total UK fresh produce industry.

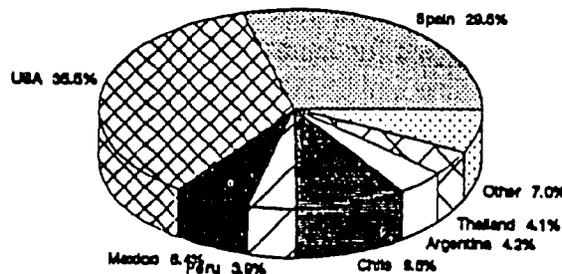
Frozen asparagus is not distinguished separately in the statistics and it is therefore not possible to get an indication of the volume or value of imports into the U.K.

Market Share

The UK fresh market is almost entirely a market for green asparagus and the major suppliers are USA, Spain and Chile, although there have been fluctuations in tonnages coming from the USA and Spain over the past five years. In 1991, the largest supplier to the market was the USA with 783 tons, followed by Spain with 650 tons, and Chile with 209 tons. In fourth place was Mexico, with 141 tons, followed by Argentina and Thailand with just over 90 tons each. During the year, the UK received over 7% of its green asparagus imports from outside the EC.

Frozen green asparagus is imported from Taiwan (China province), Chile, and Peru; frozen white asparagus is mainly supplied by Spain and France, although product has also arrived from Chile and Peru.

Import Share - Fresh Asparagus
1991, by weight



Source: EURCBSTAT

Consumer Preferences

In the UK, asparagus is traditionally considered a high value luxury item and is classified as a "specialty" crop. Between 1978 and 1990, consumption of specialty vegetables increased from 0.9 million tons to 1.5 million tons, with a value increasing from £40.8 million to over £200 million. Annual domestic expenditure on "specialties" per person is estimated to be around £3.40.

The main asparagus varieties, and the most popular, grown in the UK, are Cito (a French variety) and Limbras (a Dutch variety with derivatives Franklim, Bocklim, Boonlim, Venlim and Geymlim).

Imported varieties include Cito and Limbras, UC157, UC72, UC66, Jersey Giant and hybrids derived from the above.

Green is definitely preferred over white.

Seasonal Patterns of Demand

The USA supplies the market from early January through to July. Spain supplies from March to mid-June and Chile from September through to early December. Mexico supplies in two periods, viz from January to March and from July to September and Peru supplies in the winter period from September through to February. Thailand is on the market from February through to June and Australia between October and December. Asparagus from Africa comes from Zimbabwe between August and September and from Zambia in the two periods from January to March and from July to September.

The matrix below provides a breakdown of the major sources of supply, their availability on the UK markets, and the usual pack weights that they supply.

Fresh Asparagus Availability on the U.K. Market													
Source	Usual Pack Weights	Availability											
		J	F	M	A	M	J	J	A	S	O	N	D
Argentina	5kg												
Australia	5 kg												
Canada	9 kg												
Chile	5.5/6 kg												
Ecuador	10 lb												
France	5 kg												
Germany	5/6 kg												
Guatemala	11 lb												
Guernsey	12 x lb bundles												
Holland	5 kg												
Indonesia	various												
Ireland	10 lb												
Israel	4 kg												
Italy	5 kg												
Kenya	various	according to market requirements											
Malaysia	12 lb	according to market requirements											

Fresh Asparagus Availability on the U.K. Market													
Source	Usual Pack Weights	Availability											
		J	F	M	A	M	J	J	A	S	O	N	D
Mexico	6 kg	■	■	■				■	■	■			
New Zealand	12 lb										■	■	■
Pakistan	5 kg				■	■	■	■	■				
Peru	15/30 lb	■	■									■	■
South Africa	8 x 500 g									■	■	■	■
Spain	5/6/10 kg 8/10/16 x 500 g			■	■	■	■	■					
Thailand	5kg		■	■	■	■	■						
U.K.	10 x lb 5 x 2 lb					■	■						
U.S.	15/30 lb	■	■	■	■	■	■	■	■	■	■	■	■
Zambia	10 lb								■	■	■		
Zimbabwe	15 lb								■	■			

Source: The Fresh Produce Desk Book

Seasonal Prices

The key price in the marketing system for imported **fresh** asparagus is that paid by the retailer to the wholesaler/importer. All other prices in the marketing chain revolve around this and are either an addition or subtraction of marketing costs, margins and commissions.

Information on wholesale market prices is freely available from several sources, such as the UK Fruit Importers Association and the International Trade Centre, Geneva. It is also published in most of the leading trade magazines, notably Fresh Produce Journal.

Most import trade is undertaken on a commission basis (7½-10%), plus deduction of other UK costs for customs clearance, handling and distribution. Fixed price trading may be more common in the future, but is normally reserved for when importers/exporters have built up long-term working relationships. Retail margins for supermarkets vary between size of outlet, but 25% for standard items is typical. For a high value, low volume luxury product such as asparagus, however, the retail mark-up could be between 50-100%, depending on availability of supplies.

Wholesale prices at Covent Garden market vary from £2.20-£3.30 per kilo between March and June when Spanish, American and home-grown product is available. During July, August and September, the Mexican supplies show prices of £2.00-£3.50 per lb, but in October/November

the higher volumes from Chile reduce the price to £1.20-£1.80 per lb. Highest prices are for the smaller volumes of import between December and February.

Prices vary according to grade and size. Also, supermarkets have their own price arrangements with contracted suppliers.

For frozen asparagus, attainable prices vary significantly, but fluctuate between US\$2,700 and US\$3,000 per ton C&F main European port for whole spear green asparagus; settle at about US\$2,500 for cuts and tips; and round out at US\$3,500 per ton C&F main European port for whole spear white asparagus.

Market Distribution

The UK market for imported fresh asparagus is dominated by a small number of companies who handle relatively large quantities (i.e. 10 tons per week at airports). They are typically involved in supplying both the wholesale system and either supermarkets direct or nominated pre-packers. These companies have specific links with the retail chain stores, which have been developed over a long period of time. Contacts are jealously guarded and importers are reluctant to enter into dealing with new sources of supply, unless they are confident about regularity and quality of the produce.

For high value, low volume produce, such as asparagus, UK importers will normally require exclusive trading agreements with individual shippers. The criteria that a UK importer will be looking for when dealing with a supplier of asparagus (i.e. with the aim of selling to a supermarket) will be:

- top quality produce, packed to specification
- a steady price, combined with reliability and regularity of delivery.

Apart from these specialist importing companies, there are a group that are more committed to supplying the wholesale market system, with off-season/exotic and luxury produce, and as a result can provide a nationwide coverage. They normally handle smaller quantities of up to 5 tons per week.

Examples of companies that are primarily supplying the UK supermarket sector are: Exotic Farm Produce; Saphir; Wealmoor; Frumar; Mack Multiples; Geest and; Pascual. Between them, they supply Tesco, Sainsbury, Marks and Spencer, Asda, Safeway, Waitrose and Gateway.

Examples of companies that are primarily supplying the wholesale market sector, although they will have some links with supermarkets, are: American Fruit Importers; FTK (London); Janic; Kool Kat; Hoche International, and; Griffin and Brand.

Addresses are provided in Appendix B.

Grades and Standards

The statutory regulations concerning fresh asparagus in the UK are covered by both the EC and the United Kingdom Ministry of Agriculture, Fisheries and Food (MAFF). The EC regulations have basically remained unaltered since their introduction, although there was a later inclusion of a Class 3. The UK's MAFF provides a simplified version of the EC common standards, but does represent a legal requirement.

Four classes of asparagus have been established. They are:

"Extra" Class – should have shoots of superior quality only, well-formed and straight, very compact tips, and minimal traces of rust. If bundled together, slight bevelling is allowed, so long as the height of bevelling does not exceed 1cm.

Class 1 – allows a small degree of extra curving and a minute amount of rust and woodiness.

Class 2 – degree of tolerance increases

Class 3 – degree of tolerance increases still more; very difficult to find a UK market for this class anytime.

The UK commercial trade does not commonly refer to these standards, but uses descriptions such as "colossal", "jumbo", "extra large", "large", "standard", etc. It appears that no firm consensus exists for what constitutes each of these grades, particularly at wholesale level. During visits to some of the main wholesale markets, for example, it became apparent that "extra large" from one source of supply could easily be "jumbo" from another, etc.

The main retail chains, however, are more precise, having formulated written specifications detailing length, diameter, accepted variations, packaging and labelling requirements. These are very stringent and must be closely adhered to if a long-term trading relationship is to be developed with them.

It is highly unlikely that any of the leading supermarkets would consider handling produce less than Class 1 in quality and most will insist on handling "extra" quality as the norm rather than the exception. Certainly, any traces of either rust or woodiness must be absolutely minimal. Class 1 and Class 2 (only just) would be acceptable in a main wholesale market and Class 3 produce would be hard-pushed to find a market anywhere in the UK at any time of the year.

The acceptability of the asparagus itself is based on the following criteria:

- color
- diameter
- length
- uniformity

- maturity (i.e. tightness of head)
- fiber level
- spear straightness
- degree of spear tapering
- leaflet spacing
- level of mechanical damage
- level of shriveling
- dryness of butt
- level of softening
- smell
- pesticide residues

Rules regarding pesticides are contained in MAFF Statutory Instrument number 1378, entitled "The Pesticides (Maximum Residue Levels in Food) Regulations 1988".

Institutional grades for length of asparagus are as follows:

- "long" asparagus: 17-22cm; 17-27cm for green asparagus, of which 30% must be green.
- "short" asparagus: 12-17cm.
- "tips": under 12cm.

A further grade exists for Class 2 produce in bulk and in packages - between 12-22cm.

In terms of the long asparagus mentioned above, although 30% must be green, buyers for the retail market prefer 90% to be green.

Asparagus is also classified under EEC and MAFF regulations by diameter as follows:

- "Extra" Class: 12mm min., with a range of 12-16mm and a maximum variation of 8mm in any single package or bundle.
- Class 1: 10mm min. diameter, with a range of 10-16mm, with a maximum variation of 10mm in any single package or bundle.
- Class 2: 10mm min., with no requirements on range or sizing.
- Class 3: 10mm min., except for loose asparagus in packages which can be between 8-10mm, with no requirements on sizing.

Since the UK wholesale trade virtually ignores the above specifications, it is useful to identify the commercial specifications:

- "colossal": 22cm+ in length, 20-25mm mid-point diameter.

"jumbo":	22cm length, 16-20mm mid-point diameter.
"extra large":	18-20cm length, 16-18mm mid-point.
"standard":	18cm length, 12-16mm mid-point.
"large":	17-18cm length, 12-16mm mid-point.
"baby":	18cm length, 5-8mm mid-point.
"tips":	10-12cm length, 8-16mm at the base.
"sprue":	15-22cm length, 6-10mm base diameter.

Again, on commercial terms, any would-be importer should aim for a maximum variation of 5% on any of the above, since this is being achieved by many of the present major suppliers. With variations of only 5%, the cost would be absorbed by the importers into their selling prices. This minimal variation is particularly important when dealing with supermarket chains.

Packaging acceptability depends on the size of the pack and ease of stacking, unitization of spears inside pack, attractiveness of the pack and provision of information. Imported asparagus arrives in the UK in several different types of carton, depending on the country of supply. They can be classified as follows:

- wooden "pyramid" crates: 12lbs, 14lbs, 15lbs and 30lbs net weight.
- "waxed" pyramid fiberboard
- "flat" fiberboard cartons: 4kg and 5kg net weight.

The pyramid type of cartons are traditionally used by, among others, the USA, Mexico, Guatemala, Peru, New Zealand, Zimbabwe, Zambia and Chile. The smaller, "flat" fiberboard cartons are more commonly used by countries such as Spain and Israel, and they tend to send smaller grades of asparagus.

It is commonly thought that vertical packing in pyramid cartons prevents mechanical damage, compared with horizontal packing in flat cartons.

Shorter transport distances from countries such as Spain and Israel means that they can pack horizontally without suffering damage to quality. Thailand has experimented with sending asparagus in 18lb polystyrene boxes, packed with iced water to keep the produce cool. This has been altogether successful, as polystyrene boxes tend to retain both heat and condensation.

Although wooden cartons are acceptable to the UK, waxed fiberboard cartons are preferred, as

is white card rather than brown. The use of colorful printing logos is common, particularly for produce which is sold via the wholesale market. The style or visual appearance of packaging for produce that is going direct to pre-packers is less important.

Cartons of 30lbs are considered too large a unit for the wholesale market and should only be considered if being shipped to a pre-packer. Ideal weights are between 12-14lbs net.

At least 25mm clearance between spear tips and the top of the box is required to prevent spear damage and a moisture pad should be placed at the bottom of the carton to prevent dehydration. Some countries also use ice bags and cold gel-bags in order to limit heat build-up. 5% extra weight should be packed above the declared weight to allow for moisture loss.

Exporters from Spain and Israel have begun to mark boxes with the actual length and diameter ranges of asparagus, rather than grades. This helps to eliminate any confusion over standardization.

There are certain statutory regulations covering what information must be printed on cartons. This includes name of shipper, origin and nature of produce and commercial specifications such as grade, size and the number/weight of bundles per carton.

Labelling for supermarkets is either carried out by pre-packers or the labels are supplied direct to growers if this operation is carried out at source. Supermarket labelling requirements are very strict and daily checks are made to ensure that these are being met, even down to the size and position of label on the pack. Pre-pack stations are regularly inspected by the retail chains to ensure standards of hygiene etc. Often, retail chains will nominate the exact type of polystyrene trays or PVC over-wrap used, and its supplier.

Some asparagus (particularly from Israel) is wrapped with micro-perforated film, leaving the top and bottom of spears open. This helps reduce weight loss in transit, mechanical damage and avoids problems incurred by use of polybags which cause condensation. Logos and trade-marks are printed on the wrapper to enhance product image.

The specifications for frozen asparagus differ from green to white; on the average, green spears must be between 16-17cm in length, with diameters varying from 8mm-20mm (70% have between 9mm and 16mm – diameter is measured 120mm from the tip of the spear). Most importers only allow one broken spear per 5 packs of 1,250g. Packs contain 250g sachets, within plain polybags; cartons are normally of 10g.

The preferred diameter for frozen white asparagus is 17mm, with an average of 17-17cm in length, packed in either 4 x 2.5 kg or 10 x 1kg polybags within export quality cartons. Product must be pure white and well-peeled.

Import Regulations and Duties

Customs duty is payable for most countries on imported asparagus. The full rate of duty, 16%, is charged to product entered from most developed countries. Most developing countries are charged rates ranging from 12 percent (January, October-December) to 16 percent (February-September). However, some ACP countries have lower duty rates during some periods. Most EC countries have duty free access to the U.K. market, although one supplier (Spain) is charged small duties during the period February-September.

Market Opportunities for Kenyan Exporters

It is believed that the UK market for fresh asparagus will grow at a steady pace during the 1990s, as it is still largely regarded as a "luxury only" product by consumers. Although the majority of asparagus is still distributed via the wholesale market - trade sources suggest 80% of the total - it is widely recognized that the wholesale system is under some pressure from the leading retail grocery chains. The long-term future for specialty vegetables, including asparagus, is seen to be within the retail grocery sector, as they have the ability to soften the image of such products from the "luxury only" category.

Opportunities do still exist on the market, except for between March and June, when competition is intense, notably from domestic supplies. Prospects are most favorable in the seasonal gaps in the market in December/January and in August.

Supermarkets have identified asparagus as a "product of the '90s" and there is considerable interest in getting regular supplies. Some of the major retail chains are also expressing a preference for the smaller diameter or "sprue" asparagus which can represent a better value pack to the consumer. It is a market which merits further consideration by Kenya. (In 1991, of the total 2,206 tons imported by the U.K., Kenya supplied 1 ton.)

The market for frozen asparagus is well catered by suppliers with low prices, established distribution mechanisms and ever improving quality. South American countries were the traditional suppliers, but countries of the Far East (notably Taiwan and China) now have an increasing presence on the market. Kenya would have an advantage over some other distant suppliers who have to carry an import duty of up to 18% (though Spain and Portugal will soon have zero duties and are increasing their production). Demand continues to exist at present however, and there are gaps in the market which could justify further research if current Kenyan capacity warranted.

SECTION II: AVOCADOS

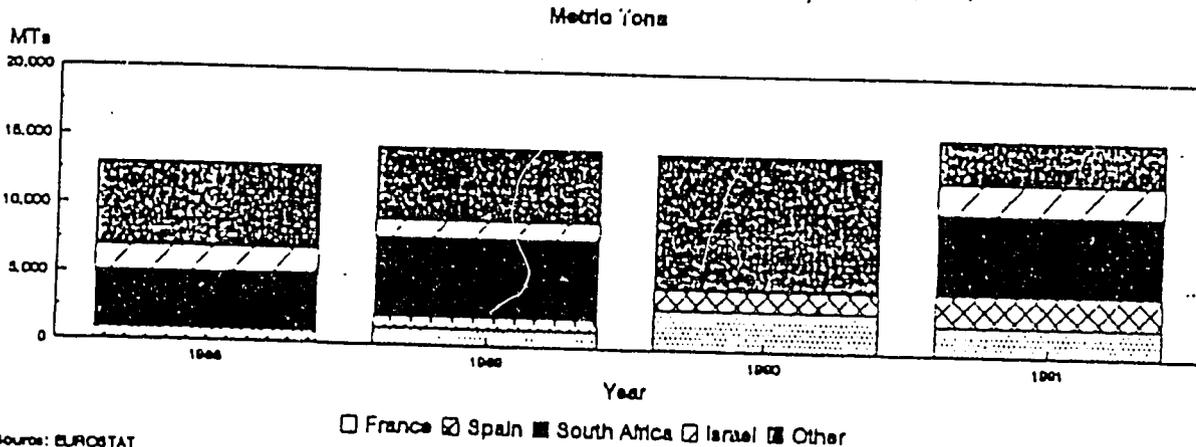
Ranking Overview

<u>Product</u>	<u>Ranking</u>	<u>Notes</u>
Avocado	3	Good existing market for Kenya; intense competition from Israel and South Africa

Imports

In 1991, the United Kingdom imported 15,657 tons of avocados, making it the second largest importer in Europe, although a very long way behind France, which imported 88,500 tons in the same year. The 1991 import total for the UK compares positively with earlier years with, for example, 13,000 tons in 1988, 14,400 tons in 1989 and 14,200 tons in 1990. The market, therefore, is relatively steady at around 15,000 tons and has remained at this level since 1986. The 1980's decade started with total imports of around 8,000-9,000 tons.

U.K. Imports of Fresh/Dried Avocados, 1988-1991



Source: EUROSTAT

Market Share

Traditionally, the major suppliers to the UK have been Israel and South Africa, which in the first half of the 1980s accounted for more than 80% of yearly imports - a period when Israel started to make major inroads into the market. Other relatively important exporters to the market in the 1980s were the Canary Islands, Kenya and the USA.

Taking the annual total of 15,600 tons for the UK in 1991, one can see that over 70% was supplied by three countries, viz South Africa, Israel and Spain. Compared with the early 1980's therefore, the market has become somewhat more diversified.

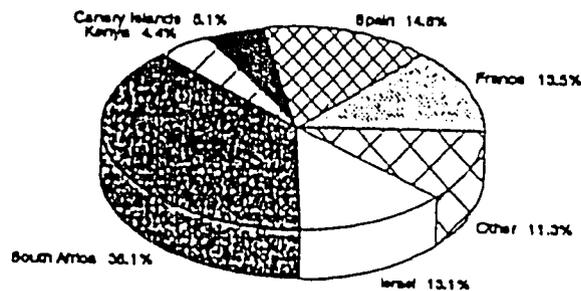
It is important to note how the market can fluctuate, however, with, for example, in 1990, total

Israeli exports to the UK only adding to some 89 tons - because of climatic problems in Israel. During that year, France became the major supplier to the UK, obviously re-exporting avocados from other sources. One also sees supplies from Mexico and other countries filling the gap left by the absence of the Israeli product. This seems to indicate that the market is an established one at around 15,000 tons and that if one of the major suppliers suffers crop shortages, that opportunities do exist for alternative suppliers. Of note, however, is the fact that when this situation has occurred, it is nearby European countries that are in a position to quickly re-channel product to the UK market.

Kenyan contributions have fluctuated over the last four years, starting at a figure of 774 tons in 1988, down to 681 tons in 1989, up to 831 tons in 1990 and back down to 685 tons in 1991.

Import Share - Fresh Avocados

1991, by weight



Source: EUROSTAT

Consumer Preferences

At the moment, average consumption in the UK is only one avocado per person per annum, which means that even though imports have trebled over the last fifteen years, there is still plenty of scope for further development. Tastes in the UK are changing too, with buyers for multiples seeking different sizes and different varieties to meet demand. Some have been selling size 6's, alongside standard size 12's (although 12's to 14's remain the most popular). The most popular varieties in the UK are "Hass," which turns a deep purple and has a wrinkled skin (and longer shelf-life) and "Fuerte," which is typified by a bright green color. Other acceptable varieties "Ettinger," "Nabel," and larger varieties such as "Lulu" and "Pollock".

The taste and texture should be smooth, creamy with no fiber or bitterness.

On average, demand patterns are that the product is increasing usage during the summer period because of its inclusion in salad type foods.

Seasonal Patterns of Demand

Two time periods are designated in the official statistics and the import of avocados into the UK are almost evenly split over the year, with 7,728 tons being imported between 1 December and

31 May and 7,929 tons being imported from 1 June to 30 November.

The import data for 1991 reveals that the major supplier of avocados to the UK in the period from December through May was South Africa, with just over 2,000 tons, followed by France, with 1,830 tons, Spain with 1,252 tons, Israel with just over 1,000 tons and the Canary Islands with 682 tons. During this time of the year in 1991, Kenya only supplied 187 tons to the UK, with most of its exports going to France. In fact, all the major suppliers to Europe in that year, viz Spain, Israel, South Africa and Mexico directed most of their exports to France.

During the summer months and carrying on to the end of November, the major supplier of avocados to the UK was, again, South Africa, with almost 4,000 tons, followed by Spain, Israel, Kenya and the USA. During this period of the year, of the 2,779 tons exported by Kenya to Europe, almost 500 tons found its way to the UK, compared with 1,300 tons to France.

Seasonal Prices

Wholesale prices for avocado in the UK average at around £5.00 for a 4kg carton. Fluctuations do occur, however, and prices can rise as high as £8.00 and drop as low as £3.50.

Market Distribution

Avocados enter the UK in two ways. One way, traditionally, is via the wholesale market and importers and the other is via specialist packers/distributors through to multiple chains.

Contact with either of the established importers or the new specialized packers would guarantee effective distribution throughout the UK. It must be emphasized, however, that the channel via the specialist packers/distributors is mainly for high quality avocados and often on a contract basis. Suppliers must be prepared for a system of total quality management if they are to enter into this relatively lucrative channel of distribution.

Grades and Standards

The standards for avocado are set under UN/ECE number FFV-42. EC minimum requirements are that the fruit must be:

- whole, intact
- sound: rotting and deteriorating produce which is unfit for consumption must be excluded
- clean and practically free of foreign matter
- maximum stalk length of 10mm - absent stalk acceptable
- free of abnormal external moisture
- free of foreign smell or taste and the ripe fruit free of bitterness
- free of damage due to low temperature
- sufficiently mature so that ripening process can be completed

- uniformly packaged 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.

Class 1 avocados must also be of good quality and typical, although some slight defects are allowed as long as the fruit is in keeping with its description. No more than 10% of fruit can fall below the Class 1 standard.

Class 2 avocados are not normally imported into the UK.

The most popular size in the past was from 270-330g, although a range of 150-400g is acceptable. Size requirements do vary for the different markets in the UK and accurate size grading is very important.

As regards standards, UN/ECE standards require that the minimum weight should not be less than 125g and buyers prefer weight to be guaranteed over that minimum.

The product should be pear-shaped, with no large loose stones. Stalks, if present, must be less than 10mm and cut cleanly. Uniformity of shape is important. Fruit should be firm, slightly unripe, with no bruising or disfigurement. The degree of shelf-life required depends on the distribution channel used, with the wholesale market requiring a longer shelf-life than the supermarket trade which sometimes ripens the fruit itself centrally to guarantee consistency.

Fruit should be packed in a single layer fiberboard box of around 4kg net weight and approximate size of 300mm x 390mm x 88mm. Fresh air ventilation is important and boxes should have ventilation holes. Strength and rigidity are given by fully lidded telescopic boxes. Dividers may be used to prevent rubbing during transportation, but are not essential.

The pack should be attractively presented and clearly labelled. Many buyers expressed a preference for white boxes, though the standard brown box is acceptable if clearly labelled, preferably with a colored sticker advertising its origin.

Import Regulations and Duties

Avocados fall under tariff 0804.40100100 (December 1 to May 31) and 0804.4090010 (June 1 to November 30). Products from ACP countries pay zero duty during both calendar periods, compared with, say 0.8% in Winter and 1.6% in Summer for Israel, Algeria and Morocco. The duty tariffs in the respective periods are 4% and 8%.

Market Opportunities

The UK market for avocados is worth around £30 million per annum. Sales are dominated by Israeli produce (imported by Agrexco) and South African produce (offered by the South Africa Marketing Board). Both use brand names - "Carmel" for Israel and "Outspan" for South Africa. These are top quality, well packaged and well advertised products and any other avocados have to compete with these established market brands. Given the relatively small segment of the market accruing to other distant suppliers, however, it seems difficult to justify any serious expenditure on promotion.

On the other hand, the events of 1990 when Israeli products practically disappeared from the market has encouraged major users to seek alternative sources and this has expanded opportunities available to new exporters.

Kenyan avocados have an additional advantage in that they are well-known in the UK market, although it is felt in the trade that supplies are drying up as Kenyans diversify to other high value crops. It is probably advisable that this continues, and that Kenya concentrates on sending its avocados to where the highest prices seem to be prevailing - something along the lines of the system used by Agrexco, which sends its avocados by ship to a main European port, usually Marseille, and re-directs from there according to price differentials. This does, however, require a reasonable amount of organization and efficient telecommunications. Kenya should take note of the changes in the tastes in the UK, i.e. towards a wider range of avocados, both in size and color, and should perhaps explore further the possibility of setting up contracts with specialized packers/importers for these slightly different products - unless, of course, this has been done.

One final note on transportation as it affects market opportunity - product is now mainly sea-freighted in containers, although some high quality avocados are sometimes imported by air, often in the period between the two major suppliers' seasons. Sea handling is possible because up to 14 days transport time is considered satisfactory, although unripe avocados can be held for up to 4 weeks if the temperature is kept between 5.5°C and 8°C. It is very difficult to attain a profitable price when avocados are air freighted. Kenya, which traditionally air freighted its high quality product, is increasingly moving the product by sea container, and should continue this trend.

SECTION III: CHERRY TOMATOES

Ranking Overview

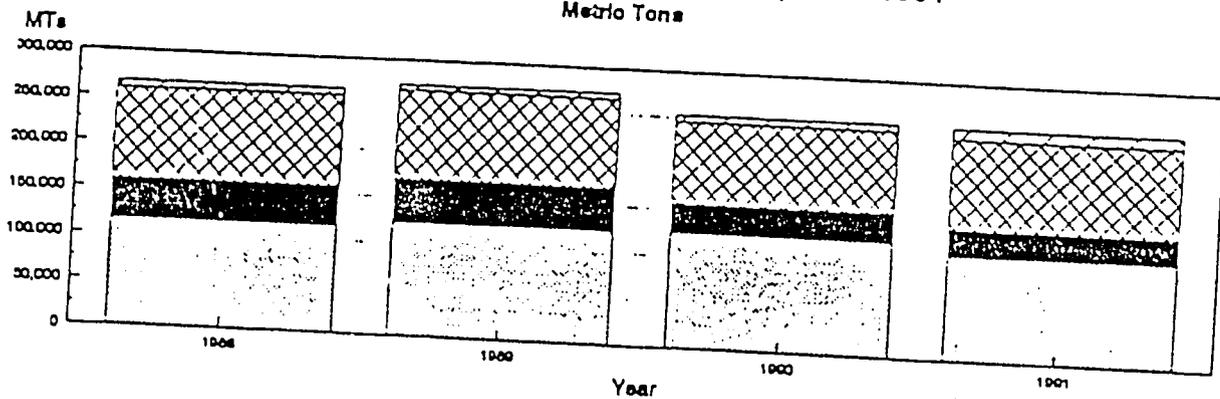
<u>Product</u>	<u>Ranking</u>	<u>Notes</u>
Cherry Tomatoes	2	Intense competition from other European countries and Morocco, but growing market

Domestic Production

The UK market is dominated by domestic English tomato production between the end of May and September.

Imports

U.K. Imports of Fresh Tomatoes, 1988-1991



Source: EUROSTAT

Netherlands
 Spain
 Canary Islands
 Other

Official statistics for the import of tomatoes into the UK do not distinguish cherry tomatoes from the bulk volume trade in normal, beef and plum tomatoes. In terms of total imports of tomatoes, the UK imported over 250,000 tons in 1991 which was 19% of total EC imports during that year.

Imports of 250,000 tons in 1991 compared with a similar figure in 1987, increasing to 266,000 tons in 1988, and 272,000 tons in 1989. Totals fell back slightly to 267,000 tons in 1990.

For tomatoes, imports are not an indication of the total size of the market, since, in many countries, it is domestic supplies that predominate during the summer months. Domestic supplies are prevalent in summer months and are very popular because of their freshness and relative sweetness.

Market Share

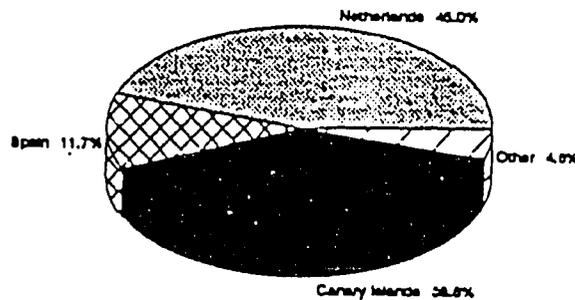
Looking at the statistics, which are split over two time periods, it can be seen that during the winter and spring months, the major supplier to the UK has traditionally been the Canary Islands which supplied over 100,000 tons in 1987, reducing only marginally to 96,000 tons in 1991. Spain and the Netherlands are the other suppliers of note between November and May, although they are significantly lower than the Canary Islands.

As regards distant suppliers during winter months, Morocco has steadily increased its position from that of supplying just over 600 tons in 1988 to 826 tons in 1990, with a sharp increase to 3,446 tons in 1991.

In 1991, small quantities of tomatoes were received from distant sources and it is likely that these were of the cherry tomato variety. 11 tons came from Zimbabwe, 5 tons from South Africa and 1 ton from Kenya. Venezuela supplied 81 tons and Cyprus 67 tons.

During the summer months, the Netherlands was easily the largest supplier of tomatoes, with some 85,000 tons, completely dominating all other suppliers - the nearest being Spain with 4,688 tons.

Import Share - Fresh Tomatoes
1991, by weight



Source: EUROSTAT

Consumer Preferences

The varieties of cherry tomatoes most in demand in the UK are: Gardener's Delight, Cherita and Evita. Cherry Wonder is also acceptable and new varieties and developments are always welcomed.

The shape should be uniform round. The color should be red, though an element of green is acceptable in some varieties. Some yellow tomatoes are sold in summer months.

Taste and texture for the cherry tomato should be sweet, firm and juicy. The flavor should be distinctive.

Acceptable size for cherry tomatoes ranges from 10-30mm depending on variety, although 2.30mm is the more popular size.

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

Seasonal Patterns of Demand

As mentioned above, the UK produces cherry tomatoes from May through to September. Major European suppliers during the winter are Spain, the Canary Islands and Portugal, whereas the Netherlands can supply cherry tomatoes for most of the year.

Zimbabwe supplies product between October and February, Zambia between May and August, Morocco between January and March, and Kenya between January and April.

Seasonal Prices

On average, prices on wholesale markets are around £1.10 - £1.25 per kg, although, once again, price fluctuates significantly, e.g. from a low of 50p to a high of £3.50 per kg. Premium prices can be attained at certain times during the Winter, although quality and color must be appropriate.

Cherry tomatoes are regarded as high value items and the multiple chains are keen to price them accordingly. They are, however, continually seeking ways of avoiding the significant variation in the price of this product and prefer to negotiate contracts with growers and packers. This has been successfully done with Zimbabwe in recent years, whereby the product is picked, cooled, packed and transported under the supermarket label from the farm/packing house. This is normally done through the specialized importers/distributors.

Market Distribution

Cherry tomatoes, being high value products, are increasingly being imported by specialist importers/distributors catering for the multiple chain supermarkets in the UK. These have the facilities to arrange for picking and packing in source country according to a planned program of production and "just in time" supply to supermarkets. It is through these companies that the top quality produce is channeled and the best prices can be obtained.

The traditional wholesale market is also active in buying and selling cherry tomatoes, although it is more flexible concerning quality standards and specifications.

The names of the specialist importers and the main traders in the wholesale market are included in the appendix section of this report.

Grades and Standards

Minimum EC quality requirements for tomatoes are also applicable to cherry tomatoes. The sizing provisions for general tomatoes do not apply, however. These minimum requirements are that tomatoes should 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.

Only two classes are defined for cherry tomatoes, viz "Extra" Class and Class 1, with Extra class requiring superior quality and no defects. Class 1 allows some slight defects. Cherry tomatoes must be "Extra" or Class 1 quality to be accepted on the market.

Cherry tomatoes are normally prepacked at source to minimize handling damage. Packing is normally in 250g punnets, with 8-12 per tray. At the time of packing it is advisable to include an additional 5-10% weight to make up for travel weight loss.

For the UK market, therefore, a 250g punnet will be sold at retail as representing 227g. The packages must be labelled by origin, with name of packer and/or despatcher, as cherry tomatoes, and optionally, by variety. The date of packing and class must be put on the carton as well as the normal side-up, fragility and temperature guidance symbols.

Import Regulations and Duties

Cherry tomatoes come under the same tariff heading as tomatoes, number 070200. Tariffs differ over two periods and therefore there are two separate numbers covering winter and summer. During the period from 1 November to 14 May, ACP countries pay 4.4%, except during the 1 - 14 May and 1 - 14 November when they pay the full 11% tariff. During the summer months, however, from May 15 to October 31, all ACP countries have to pay the full 18% duty. It is to be noted that this does not compare favorably with duties for Turkey, the Canary Islands and some North African, Mediterranean countries.

Market Opportunities

Because cherry tomatoes are not identified separately in the trade, it is difficult to get an estimate of the size of the market or the growth trend in the market. Earlier reports have suggested that the market must be of a minimum of £4 million at retail value and showing strong growth. It is certainly the case that multiples have identified cherry tomatoes as one of their "products of the '90s" and have set up a range of medium-term contracts with suppliers. On average, it is estimated by the trade that market volumes have increased by some 20% per annum and the forecast is that they will continue to increase.

There is very little promotion of the product although, as usual, the Dutch have carried out targeted promotions of cherry tomatoes as part of their overall national promotional campaign for vegetables. Spanish advertisements also include them in their general fresh produce promotions. Also, because multiples are keen on the product to create a high quality image for

their fresh produce department, they are occasionally prepared to accept in-store promotion during winter months when supplies of quality produce are low.

According to official statistics, Kenya is not active in the UK cherry tomato market or indeed that of Europe as a whole, supplying only 32 tons in 1991. This is, therefore, a market that should consider developing if production facilities are available.

If there is a gap in the market, it is from December to the end of February when buyers cannot locate the appropriate quality required, i.e. in terms of color, shape and flavor. It is known that Israel has been making attempts to enter the market during this period and has managed to obtain good prices. Portugal is also seeking to do the same, although its seasons do not quite suit. During festive times in the winter months, there is a small yet relatively undeveloped niche for yellow cherry tomatoes.

SECTION IV: GREEN BEANS

Ranking Overview

<u>Product</u>	<u>Ranking</u>	<u>Notes</u>
Fresh Fine Beans	4	Good existing market and reputation for Kenya; grow competition from Mediterranean countries; potential need to mount a promotional effort.

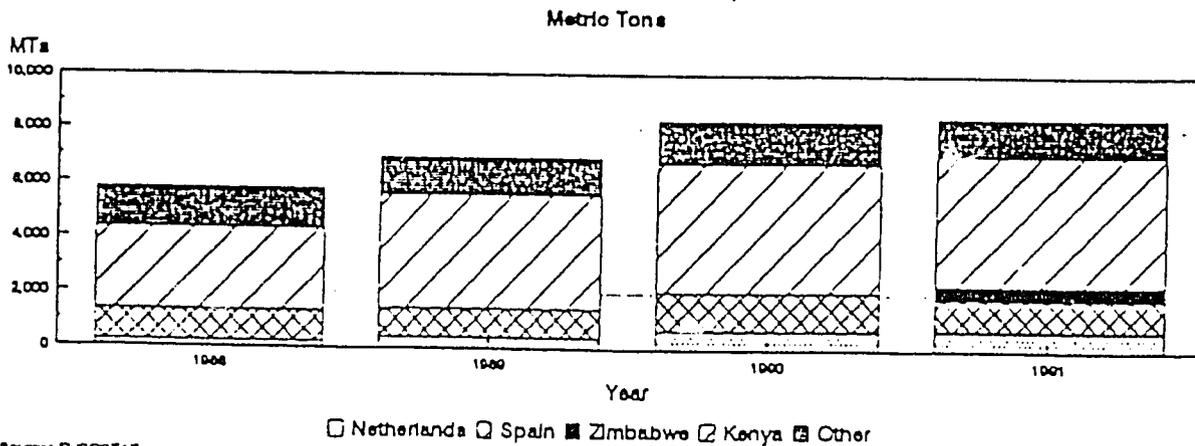
Domestic Production

The UK produces English broad and runner beans, which are available on the market June/July into September.

Imports

Fine and Bobby beans are not distinguished separately in the import statistics of beans into the UK. In the four years between 1988 and 1991, total bean imports increased from 5,800 tons to 8,500 tons. The intervening years saw imports of 6,900 tons in 1989 and 8,300 tons in 1990. It can be seen therefore, that the market has experienced relatively steady growth.

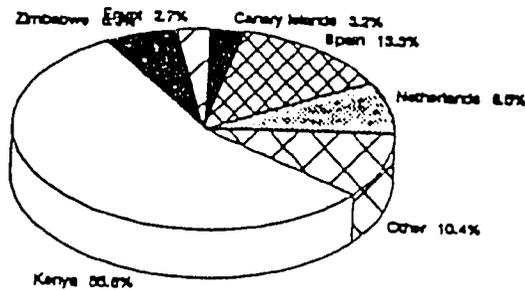
U.K. Imports of Fresh Beans, 1988-1991



The major importer of beans in Europe in 1991 was the Netherlands with some 28,600 tons, followed by France with 28,500 tons, Belgium/Luxembourg with 20,000 tons and Germany with 15,400 tons. Spain imported 14,000 tons, followed by the UK in 6th place in the European League of Importers.

Market Share

Import Share - Fresh Beans 1991, by weight



Source: EUROSTAT

In 1991, the major supplier of beans to the UK was Kenya, with 3,500 tons in the period from October through June. Kenya was also the major supplier in the three months from July through September, supplying 1,139 tons. Of the 13,580 tons supplied by Kenya to the whole of Europe in 1991, the UK took 35%, with most of the rest going to France and Belgium/Luxembourg.

There were supplies from other distant sources during 1991, but they were well below the volume received from Kenya. The second largest distant supplier was Zimbabwe, with 534 tons and Egypt with 230 tons. Spain was the largest European supplier, with just over 1,000 tons, followed by the Netherlands, the Canary Islands and Italy.

Kenya's total annual exports of 4,683 tons to the UK in 1991 compared with totals of 3,000 tons in 1988, 4,100 tons in 1989 and 4,650 tons in 1990. It seems obvious therefore that the market for Kenyan beans is established at a level of around 4,500 tons. There also doesn't seem to have been much of a change in the source of suppliers over the course of the four years.

Consumer Preferences

English runner beans, broad beans and french beans are the most popular consumption item in the UK. "Fine" and "Very Fine" beans supplied by Kenya are also popular, notably in the supermarkets. Consumption of fine beans is far more widespread in the UK than it is in Germany.

Seasonal Patterns of Demand

The UK crop is available from July through into September and during this time, the majority of British consumers will have a preference for the domestic product. Of the 8,400 tons imported into the UK in 1991, more than 6,700 tons were imported in the period between October and 30 June, with 1,700 being imported in the three months from July through September. Average monthly imports, therefore, in that period, were some 568 tons, whereas average monthly imports in the other nine months of the year were 747 tons.

Imports of beans from Kenya on a monthly basis averaged at 380 tons in the three months from July to September, and at 394 tons in the months from October through to the end of June. This indicates a steady all-year-round demand for the product in the UK. Much the same was true in 1990 when, in the October through June period, the average monthly import from Kenya was 397 tons, and for the period from July through September, it was 361 tons.

Most supplies from other European countries come in the period April to July when Spain, the Canary Islands and the Netherlands send significant quantities. During the winter, the major supplier is, again, Kenya, followed by Zimbabwe and Egypt.

Seasonal Prices

Prices tend to fluctuate considerably on wholesale markets and it is difficult to provide an average figure for general acceptability. A broad estimate would be between £2-£3 per kilo.

Market Distribution

Fine beans are distributed in two ways:

- 1) By direct contract with specialist importers/distributors who have contracts in turn, with the multiple supermarket chains. Under this system the beans are produced according to a production program, pre-packed "just in time", bar coded, labelled with supermarket label and transported according to a 24-hour delivery program. The names of these specialist importers are included in the appendices to this report.
- 2) By traditional importers and sold either via wholesale markets or direct to packers for on-shipment to supermarkets. Again, the names of these major importers are included in appendices.

Grades and Standards

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

- whole, intact
- free from soil, pest and disease and without mechanical crushing and bruising.
- free from break-down discoloration, yellowing, scorch and coarse string.
- unwithered from water loss
- free from foreign smell or taste
- free from all abnormal external moisture
- able to withstand transportation
- uniform in terms of origin, variety, quality and length.

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

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

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

The EC standard divides beans into two groups, viz fine beans (needle beans) and "other beans", e.g. Bobby beans.

Fine beans are graded into three classes, "Extra" Class, Class 1 and Class 2, while other beans are graded into two classes, Class 1 and Class 2.

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

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

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

Since pre-packing is the norm for fine beans in the UK market, the following regulations apply:

Inner: pre-packed in polypropylene bags, e.g. film code P30, 170 x 30mm bag or cryovac SM60, 170 x 250mm plus 40mm overlap bag. Product should not be crushed or bent. Fine beans are sold on retail shelves in 227g packs and 340g packs.

Outer: protective carton for pre-packs would allow 12 units in each for 227g fine beans or 8 units for the 340g packs.

For labelling, the inner pack should have a company label, with origin, date and display day of delivery, packer code and batch code. Label to be placed in the lower center of

The outer pack should be labelled with class, category/size, grade, date and display codes of inner packs, country of origin and name of supplier. It can also be color-coded to indicate day of delivery at the depot.

Import Regulations and Duties

ACP countries face a zero import tariff on green beans.

Market Opportunities for Kenyan Exporters

The market for Extra fine and Fine beans is now well established in the UK and has moved beyond the original specialized gourmet outlets to a regular presence on supermarket shelves.

Kenya has established itself as the major supplier of this type of bean to the UK market and is the country associated with the product – though the Kenya Extra Fine and Fine beans are a high value product, are imported by air and demand will always therefore be limited by the relatively high price. For the average British consumer therefore, traditional preference combines with low price to favor the domestic runner and broad beans.

For the last few years, average annual and monthly tonnages arriving from Kenya have been relatively stable, although the overall market is growing slowly. Increased competition is now coming from Spain, the Canary Islands, Portugal and Turkey.

There is some justification for launching a small promotional program to establish Kenya's position as the benchmark supplier and to consolidate consumer loyalty.

SECTION V: CHILIES

Ranking Overview

<u>Product</u>	<u>Ranking</u>	<u>Notes</u>
Fresh Chilies	4	A good existing market for Kenya; increasingly strong competition from the Gambia
Dried Hot Chilies	3*	Birds' Eye variety appears from conversations with importer/distributors to be in demand; would require on-site research (as statistics are unavailable).*

Domestic Production

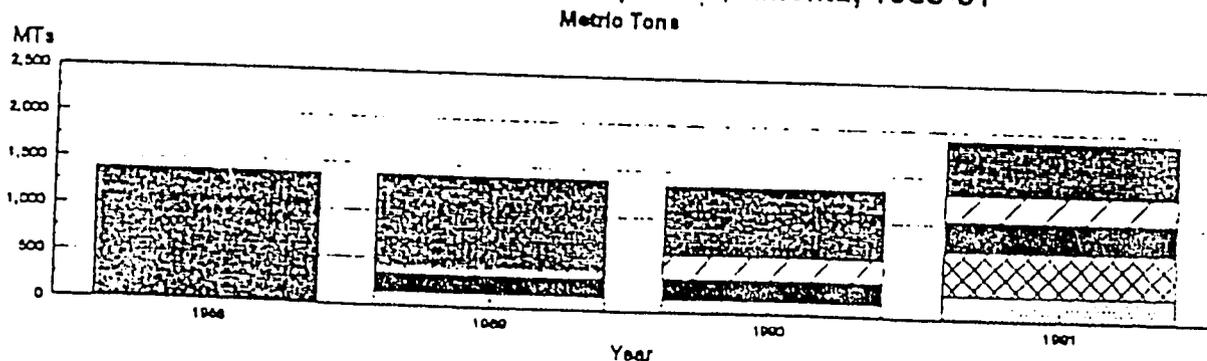
The UK produces small quantities available in June and July.

Imports

In 1991, imports of product under the category 0709.60.99 "fresh or chilled fruits of genus capsicum or pimenta" were 1,910 tons.

The general feeling in the trade is that the market is of some 2,000 tons in size and that, at last, official statistics have caught up with this fact. In 1988, 1989 and 1990, total imports into the UK were recorded as being between 1,400 and 1,800 tons and it was felt by the trade that this was an under-estimate. Officially, therefore, the market has grown over the last few years, but unofficially, it seems to be sticking at around the 2,000 ton mark.

U.K. Imports of Fresh Capsicum/Pimenta, 1988-91

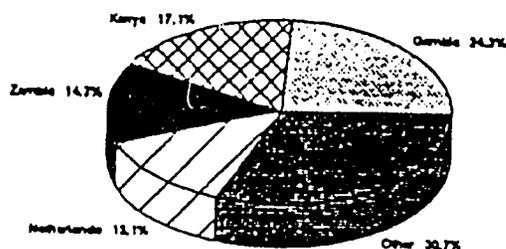


Note: "Other" countries in prior years may include Holland, Gambia, Kenya, Zambia.
Source: EUROSTAT

□ Netherlands ▨ Gambia ■ Kenya ▩ Zambia ▤ Other

Market Share

Import Share - Fresh Capsicum/Pimenta
1991, by weight



Source: EUROSTAT

Of the 1991 total of 1,910 tons, the major supplier to the UK was the Gambia with 465 tons. Kenya was in second place with 327 tons, followed by Zambia with 280 tons and the Netherlands with 250 tons. Apart from some exports to the Netherlands, practically all of the exports to Europe from the Gambia, Kenya and Zambia went to the UK market.

The interesting point to note about the figures for 1991 is the emergence of the Gambia as the major supplier. In the previous three years, it did not even rate in the official data.

Kenya has traditionally been the major supplier to the UK market of chilies.

Consumer Preferences

There are numerous varieties of chilies, including Long thin (Fresno and Jellapino), Scotch Bonnet (Lantern), Short (Piment), and Birdseye. Chilies come in many shapes, colors and sizes and there is no absolutely clear consensus within the trade on varietal types and/or names. Different sectors of the UK population have different preferences which can be classified as follows:

- Indigenous UK consumer: a demand for Piment and Thin chilies.
- Asian consumer: Thin or Kenyan (Fresno) and Birdseye chilies.
- Caribbean consumer: Scotch Bonnet/Lantern chilies.

The point is that each has a separate market category and there is not much cross-over between them, with, for example, it being very uncommon for Asian consumers to eat Scotch Bonnets and the indigenous UK consumer generally finds Birdseye, Scotch Bonnets and Kenyan peppers too hot for their tastes.

Chilies must all be with stalk, straight for "long" chilies, with pointed ends and regular features. The color is to be green for "long thin", "short" and "Birdseye". Red green or orange color for "Lanterns".

The texture of the skin is to be firm, not withered, and shiny. The taste is to be hot and spicy according to variety.

Seasonal Patterns of Demand

Peppers are available from a wide range of sources and as a result, there appears to be no period in the year when the product is especially short, though there are quality discrepancies during mid-winter. Market demand is steady all the year round from the ethnic population, and there is strong loyalty towards produce from their own country of origin.

The main periods of availability from different sources of supply on the UK market are as follows.

The Gambia	all year round
Kenya	all year round
Cyprus	April-November
Netherlands	March-December
Zimbabwe	all year round
Uganda	all year round
S. Africa	July-October
Mexico	September-January
Israel	July-February
France	June-July
Sri Lanka	June-September
Thailand	all year round
Spain	June-September

Seasonal Prices

There is considerable variation in the wholesale prices of chillies, depending on quality of products and volumes available on the market. Scotch Bonnet peppers, for example, have an average price of between 80p and £1.00 per lb, but can go up as high as £2.00 per lb or as low as 35p per lb. The market is very supply/price sensitive and there are times when it is said buyers will pay almost any price to get quality chillies.

Market Distribution

Chillies are handled mainly by traditional specialist importers and are sold either through wholesale markets or direct to supermarkets. Chillies are mostly pre-packed for sale by multiples, but the repacking is organized in the UK. Some of the leading supermarkets try to sell hot peppers in packs, i.e. 2 each of red, yellow and green, but are having problems in obtaining consistency of supply and quality. To break into this market would require significant quality control and close conjunction with a reputable pre-pack/distribution operation in the UK.

Chilies are air-freighted from Africa and transported by road from European sources. Some exporters have experimented with sea shipments.

Grades and Standards

No international standards are in force for the quality of chilies, but it is advisable that packaging is labelled by origin, variety, color, weight and date of packing. It is also a good idea to include a temperature guide, with fragility and "side up" symbols.

Normal packaging is in the jumble or loose format, in 2kg, 4kg or 5kg cartons. Occasionally, baskets of 12.5kg are shipped and wholesalers break bulk before passing on for retailing. There are several "market standards" which are now widely accepted, depending on the market sector being supplied. These are:

Kenyan Chilies

- 2-piece, part telescopic carton of brown Kraft, with printed information showing a brand name
- internal dimensions of 15.75" x 11.5" x 6"
- jumble-packed

Cyprus Chilies

- 1-piece carton with a tight lid and a net weight of 10lbs
- internal dimensions of 19" x 11" x 5"
- Oyster Kraft with two-color printing which indicates logo, brand name and weight
- jumble-packed but sometimes with internal dividers used to reduce bulk

Dutch Chili/Pepper

- standard wood tray with internal dimensions of 15" x 11" x 3"
- over-wrapped with a logo-printed polythene sheet
- jumble-packed

Import Regulations and Duties

Chilies are classified under tariff number 07096099 and ACP countries have duty-free access to EC countries.

Market Opportunities for Kenyan Exporters

As was said above, the normal size of the market is around 2,000 tons and although trade expectations are that there will be some growth, it is not expected to be significant. There is

certainly no justification for an expensive promotional campaign, given the relatively small size of the market, although an eye should be kept on the cross-over trade since chillies (notably Lantern) are becoming more popular with the indigenous UK population.

There will always be a steady demand for this product because of the preponderance of ethnic consumers in the UK and the widespread incidence of ethnic restaurants (notably Asian).

Kenya is believed to account for some 50% of the trade (in spite of 1991 figures) although, once again, it is felt that diversification to higher value crops such as flowers, is going to mean a reduction in Kenyan supplies. If this is not the case, a small information campaign might be justified in informing importers of this.

A point to note here is that the import statistics may be highly inaccurate and that the figure of 327 tons imported from Kenya in 1991 may be a gross under-estimate. Perhaps a more accurate estimate of the total size of the market would be of the order of 3,000 tons. It is, however, a highly volatile market in terms of price sensitivity to variable supplies. Any significant increase in the level of supply can see prices falling to very low levels and the same process occurs in reverse.

Again, this is a well established market for Kenya and they have a respected name as a regular supplier. Perhaps some small form of promotional campaign could be justified in order that this market be consolidated. The Netherlands and Israel do include chillies in their promotional campaigns and are gaining market share. There might also be a case for Kenya to direct their activities more towards the specialized re-packers and distributors who supply the major multiple chains.

SECTION VI: MANGOES

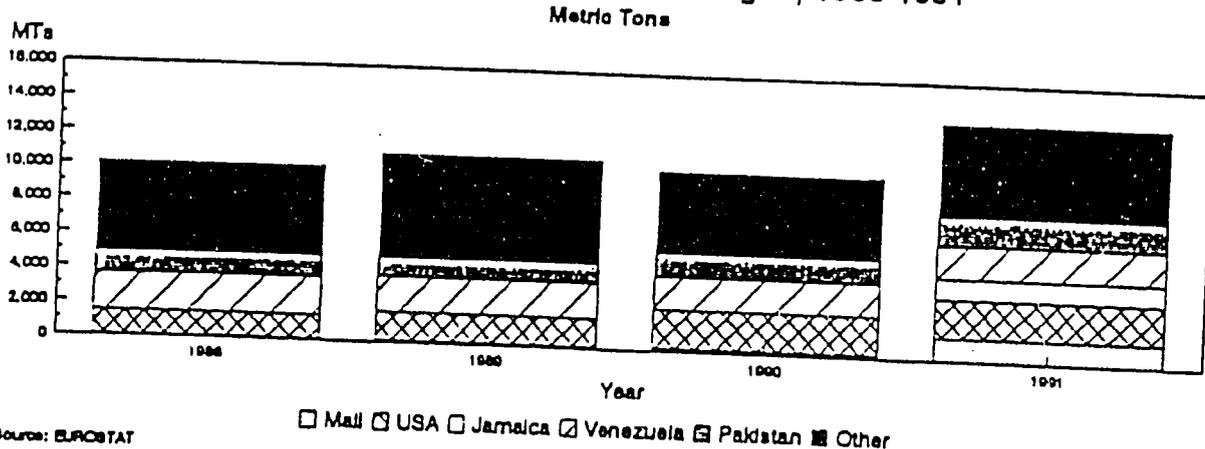
Ranking Overview

<u>Product</u>	<u>Ranking</u>	<u>Notes</u>
Fresh Mangoes	2	Falling market for Kenya; low value because of sea freight; very variety conscious

Imports

The market for mangoes in the United Kingdom is the largest in Europe, importing some 13,700 tons in 1991. The next largest European importer was France, with 10,000 tons, the Netherlands with 9,000 tons and Germany with 8,500 tons. The UK market has expanded significantly since the early 1980's when imports were of the order of 4,000 tons. Although the official statistics include guavas and mangosteens, it can be taken that these only represent around 2% of the quantities imported.

U.K. Imports of Fresh/Dried Mangoes, 1988-1991



Source: EUPROSTAT

Mail
 USA
 Jamaica
 Venezuela
 Pakistan
 Other

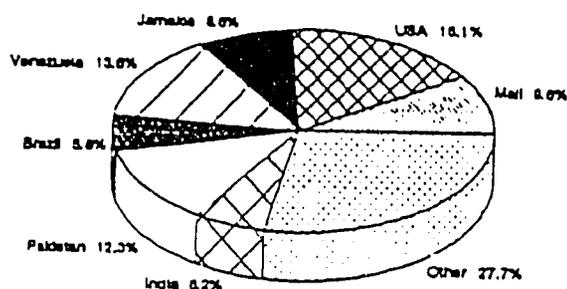
Market Share

Historically, the UK imported most of its mangoes from India, Pakistan and the West Indies, with ethnic consumers expressing specific requirements in terms of the taste and appearances to which they were accustomed. In the early 1980s Mexico emerged as the single most important supplier, eventually being overtaken by Venezuela. In 1988, the largest supplier to the UK was Venezuela, with over 2,000 tons, followed by the USA with 1,361 tons and Pakistan and India with 839 tons respectively. Venezuela maintained its predominant position in 1989 although the USA and Mexico were also very significant suppliers. By 1990 the USA had overtaken Venezuela, supplying 2,219 tons compared with Venezuela's 1,848 tons. Pakistan was in third place. In 1991 the top three positions re-mained the same. There were two other

suppliers with over 1,000 tons of exports to the UK in 1991, viz Mali, with 1,300 tons and Jamaica with almost 1,200 tons.

In the early 1980s, Kenya was an important supplier to the market and this continued to the mid-1980s, supplying, for example, 509 tons in 1986. Their total exports to the UK in 1991 amounted to some 121 tons, with their total exports to Europe being only 397 tons. This is quite a drop from their total European exports of 864 tons in 1988, 609 tons in 1989 and 904 tons in 1990. Of that 900 tons in 1990, just over 300 tons found its way to the UK market.

Import Share - Mangoes/Mangosteen 1991, by weight



Source: EUROSTAT

Consumer Preferences

The indigenous British market has a marked preference for varieties which indicate ripeness by an increasing red color against a basic green/yellow skin. The consumer buys on appearance rather than on taste. Haden, Tommy Atkins, Keith and Kent are most frequently cited, but other colored varieties are also acceptable (including Alfonso, Amelie, Apple, Graham, Erwin, Sensation and Zill). Ngowe is one of the less popular varieties, and while the introduction of new varieties is still possible, in addition to "looking good", the fruit should also have a good fragrance, a small stone and be non-fibrous.

Mangoes other than those mentioned above are usually imported from Pakistan and India and are varieties which are well known to the Sikh and Hindu population of Britain. They are mainly sold in their community shops. There is also a small market for the green pickling mango which is used in traditional Asian cooking.

Seasonal Patterns of Demand

The mango has a relatively short production season, which means that for year-round continuity, mango supplies to European countries must come from many different countries. The UK market, for example, sources from over 60 different countries during the course of the year. No other fruit comes from such diverse sources.

Mangoes from Central/South America and the Caribbean account for around 50% of the annual

supplies to Great Britain and arrive in the summer period from April to September. Venezuela supplies between March and August, Puerto Rico between May and September, Mexico - April to August, Pakistan - May to September, and India - sporadically in May/June, September/October and December. Zimbabwe, South Africa and Zambia supply product between January and April, whereas Kenya appears to have product available for most of the year.

Seasonal Prices

Although no official prices are published, analysis of price data in one of the main wholesale markets in the UK shows high prices in January/February and October/December. Lowest prices were in the May to September period. On average during the year, prices vary between £1.30 and £2.00 per kilo.

Grades and Standards

Export quality standards are provisional (see UN/ECE Agri/WP 1/R, 142 Rev.3). Normal EC minimum requirements are applicable, as with most other fruits and vegetables.

For mangoes, there are two classes: Class 1 and Class 2.

Class 1 fruit are to be superior in quality and size, with only a 10% tolerance.

Mangoes should be graded to size and coded as follows:

Size Code A - 200g-250g

Size Code B - 351g-550g

Size Code C - 551g-800g

Normal size is between 225 and 400g and accurate size grading is crucial.

The fruit should be fully mature, yet firm, with no bruising or disfigurement. There should be no fibrosity, no turpentine flavor, clear fragrance and easy removal of stone. If harvested too early, the mango will never ripen, but late harvesting can lead to unacceptable over-ripeness when the fruit is presented through supermarket outlets. Some mangoes are being shipped green and ripened on arrival, ready to be sold at the appropriate color level on the shelves.

Mango fruit are normally packed in 4-5kg single layer, full-lidded cartons, with counts of 8-12, i.e. 500g each approximately. It is essential that the fruits in each box are all the same size and maturity and show no blemish of the skin. Uniformity of the fruit in each box is extremely important because they are sold by the piece and not by weight. Smaller fruits (counts of 10-14) are preferred for the retail trade. The larger fruits are more suitable for catering outlets, though the multiples have noticed a consumer shift to larger sizes.

The box must have holes for adequate ventilation and polystyrene nets, paper or paper straw can be used to package individual fruits inside the carton.

Import Regulations and Duties

Mangoes come under tariff number 0804500091 and ACP countries have duty-free access to the UK market.

Market Opportunities for Kenyan Exporters

Transport of mangoes by sea is now prevalent on a commercial scale and prices have adjusted down accordingly. This makes it far more difficult for airfreighted mango to enter the market and make an acceptable price.

The opportunities for Kenya to develop a large export market for mangoes in the UK are somewhat limited. There is intense competition and although the market has grown over the decade, it is presently only moving at a moderate rate. Airfreighted fruit will need to command a significant premium over seafreighted supplies in order to cover the additional costs and this is unlikely to be achieved for the high volume supermarket outlets. It is countries that are able to produce the "red blush" fiberless mango and provide a regular seafreighting service that will be able to exploit whatever market opportunities exist.

There seems little justification for a branding or promotion program because mangoes entering the UK market come from so many supply sources that the effect of such a promotion may well be dissipated. The lack of a dominating supplier has also meant that there has been less generic advertising for this fruit.

SECTION VII: PROCESSED EXOTIC FRUITS

In 1991, the United Kingdom food and drink bill amounted to over £85 billion, which accounted for 23% of all consumer spending in the country. This places it as one of the major European markets for food and drink. Furthermore, because of its limited production base, the UK is a very significant import market. The balance of payments deficit on food and drink continues to widen and in 1990, increased by 9% to over £5 billion.

Ranking Overview

<u>Product</u>	<u>Ranking</u>	<u>Notes</u>
Mango Juice	1	Variety problem with U.K. market; better to direct attention to blending companies in Netherlands and Switzerland
Passion Fruit Juice	2	Stable price needed; Kenya currently exports fresh passion fruit
Canned Fruit Cocktail	3	Growing market; increasingly competitive, but service of main distant supplier deteriorating; mixed range essential
Canned Mango	2	Advisable only if part of a larger product line
Sun-Dried Mango	2*	Potential niche; regular quantities and suitable quality essential; more research* required on both Kenyan capacity and market interest
IQF Mango, Papaya	2	Mainly an intra-EC trade
Mango in Brine	2	Trade interested in other suppliers for chutney other than India and Haiti exclusively

OVERVIEW ON FRUIT JUICE TRADE

As in all other cases, no separate and significant statistics for individual exotic juices, other than pineapple, exist for imports into the UK. The only possible indication as to volumes is the source of supply. Unfortunately, much of the exotic juice coming into the UK comes via a third country, notably the Netherlands, and the situation is further confused by the fact that individual

juices are included as blends with other juices. It is thus practically impossible to get any sense of accurate trends from official statistics as to movements of volumes and values of individual exotic juices in the UK market. Estimates therefore have to come from primary information gained from interviews with the trade from other reports – hence the slightly different format of this section.

Imports

In the fruit juices sector, the steady growth in the market since the 1970's, has made the country one of the principal importers in Europe. After Germany, it is now the leading user of citrus concentrates, but also ranks highly in terms of pineapple juice and apple juice. Per capita consumption of juices has increased some 50% since 1985, although it is still only at 16 liters per head - less than half of the 42 liters per capita consumed in Germany.

Market Share

Major suppliers of exotic fruit concentrate and purée are India, South Africa, Brazil and other South American countries. Much product is also exported from the Netherlands and Belgium.

Market Distribution

The system of distribution of imported raw juice into the UK is essentially similar to that in other European countries, except, perhaps, for a smaller number of large blenders/compound companies. The trade in the UK does source a lot of product from such companies based in the Netherlands, Belgium and Denmark.

The basic structure for exotics is one in which raw imports, usually of frozen concentrates or purées are received by importers and/or agents. Apart from specialized Indian mango purée, which is brought in directly by specialist producers for the ethnic market, there is little, if any, instance of exotic juices being bought directly from source by packers, bottlers or any other processors in the UK.

After importation, the importer either breaks bulk or often channels entire container-loads to blending companies or direct to packers/bottlers of drinks and juices. The importers would also channel product via blenders to the yogurt, ice-cream and baby-food industries.

By far the greatest percentage of the product goes on to juice packers/bottlers and they in turn produce retail product, either under a private brand label or under "own label" for the major retailers in the UK.

In the case of imported exotic juices, there are few specialized traders in the UK that are the key players in the distribution mechanism. They are identified in Appendix B.

Those most active in trade in exotic juices in the UK in 1992 are: Fuerst Day Lawson, E.E.

Brian Smith, Wilson and Mansfield, Jack Israel, S & S Services, and Kirrel Mischieff. In terms of exotic juices, they are mainly interested in concentrates and purées of mango, passion fruit, guava and banana, although all are continually looking for any new ideas.

Agents/importers work in the normal manner, either charging between 3%-5% commission if they are performing an agency role, or purchasing "cash against documents" (occasionally letter of credit) on a CIF basis if buying in their own right. Most prefer to have some form of exclusivity, especially of a new source, and to work on a production and marketing "program" type relationship with a new supplier.

There is an established yet developing ethnic market for exotic juices in the UK. Two specialist companies have emerged who pack juices for this market - "Rubicon" and "Palm Oak", both based in North London. Their main import is of Tota Puri and Alfonso variety mango purée from India, but they also buy relatively large quantities of passion fruit and guava. The two latter juices are mainly purchased through the traders and agents mentioned above.

Import Regulations and Duties

The United Kingdom applies the EC common tariff, although ACP countries have duty-free access.

Food regulations are essentially governed by EC directives, but, of late, the UK has become particularly sensitive to quality control because of proven cases of juice adulteration. Certain packers in the UK have been accused of mixing beet sugar, corn syrup and pulp wash into what is described as a "pure juice". Although testing of the purity of juices is not yet perfected, it is essential for any new supplier to ensure that the product, on leaving his factory and en route to the UK is totally unadulterated. Some form of general certification from a recognized laboratory would greatly help in proving "due diligence" in this regard.

MANGO PUREE

Imports

It is estimated that the import of mango in single strength concentrate "already blended" into the UK is in excess of 2,000 tons per annum. The ethnic trade is an important one, presently consuming more than 2 million liters of fruit juices per annum. As a single drink, it is mango nectar that is by far the largest individual exotic product sold in the ethnic sector and indeed in the UK market as a whole. The ethnic market also sees some importation of ready-packed mango drinks from other countries and indeed from the Far East, although prices tend to act as a barrier to market success.

Consumer Preferences

There is a precise requirement for specific varieties, traditionally Alfonso and Tota Puri, mainly imported from India, because consumers will accept nothing else.

Prices

Prices for mango purée tend to vary between \$700-800 per ton Cif, i.e. for Alfonso and Tota Puri. Prices for other varieties, however, tend to be at a discount to the Indian varieties and sometimes can be as low as \$400 per ton.

Market Distribution

The main trade use of mango in the UK is as an ingredient in a multi-fruit tropical drink or cocktail. Some companies also sell mango nectar as a straight product. Most of the mango that is used by the major bottlers/packers is purchased in a ready-mixed format from blenders in the Netherlands, Belgium and Denmark. The product comes over in container trucks.

The market for mango concentrate and pulp can be split into: a) the purchase of ready-mixed blends from European blenders and b) a market which is characterized by a very distinct flavor profile.

This flavor profile market is mainly that of the ethnic community and is largely supplied by the two major packers mentioned above, viz Rubicon and Palm Oak. They normally purchase mango as a 14° brix, single strength product from India. The preference for this degree of brix is because apparently, as the product is increasingly concentrated, aroma tends to diminish along with taste. Furthermore, there is an increase in color variation.

Grades and Standards

Specifications are similar to those for other European countries and the major requirement is for a single strength pulp of around 14° brix. There is also some demand for a concentrate of between 28-30° brix.

Although normal packaging for fruit juice concentrate is in 250 liter drums with poly liners, mango concentrate and pulp is imported into the UK from India in hot-packed cans of 3.1kg. This is highly inconvenient for packers and bottlers, but it is the only form of packaging presently available.

Market Prospects

Although the "cross-over" trade is developing, it is unlikely that Kenya will be able to make much of a breakthrough with the ethnic suppliers. Of course, if the country could produce a high-quality mango with the same flavor and aroma profile as the Indian Alfonso, it could make

some progress. This would be particularly the case if the product could be packed frozen in 200 liter drums. Since this is unlikely, however, it is probably better for Kenya to direct its attention to the more mainline European type of trade in mango, which is characterized by the blended product. In that case, the major targets are not in the UK, but in the Netherlands and Switzerland, viz EuroCitrus and Cargill in the Netherlands and Passi in Switzerland. It is in this area of mixed tropical drinks that the particular flavor profile of a mango pulp or purée is not that important.

PASSION FRUIT CONCENTRATE

Imports

It is very difficult to get accurate statistics of the importation of passion fruit concentrate into the UK. Official data do exist for 1990 and 1991, but they do not give a proper indication of the size of the trade.

Although world-wide demand for passion fruit concentrate can vary between 6,000-8,000 tons per annum, most of that demand originates in Germany and the Netherlands. It can be reasonably safe to say that the UK market is circa 100 tons per year of direct import, most of which goes to the ethnic processors identified above.

Market Share

The major suppliers of fresh passion fruit to the UK are Peru, Colombia and Ecuador, although some product does come from Kenya, Zimbabwe and South Africa. Both purple and yellow varieties are in demand.

Consumer Preferences

For the main "Cross-over" trade, passion fruit is mainly consumed as part of a blended juice drink, i.e. combined with pineapple, mango, guava, etc. It is the yellow passion fruit that is predominantly in demand throughout Europe for this purpose.

The market for purple passion fruit juice is considerably smaller because it has a distinct flavor profile. For producers catering specially for the ethnic market in the UK, the purple variety is preferred because one of the main products produced for this trade is a pure passion fruit nectar.

Prices

The major problem with the market for passion fruit juice is the severe fluctuation in price that has been experienced during the last few years. This is probably caused by the fact that it is a vine product which can crop within a year and is therefore very sensitive to movement in prices. Prices have been known to fluctuate from \$2,000 per ton to over \$10,000 per ton (and higher)

within two seasons. The result of this is that processors have a considerable resistance to increasing the usage of passion fruit in their recipes and also purchase product in large quantities when they think price is "reasonable", holding inventory for long periods.

Some efforts have been made by a number of South American countries to establish price stability, although it is proving difficult to enforce.

Suffice to say that average CIF prices for passion fruit with a 15° brix specification are between \$2,000-\$3,000 per ton, whereas for the 50° brix purple passion fruit concentrate, prices can vary between \$3,000-\$5,000 per ton in "normal" times.

Market Distribution

At present, both the mainline packers and the specialized producers for the ethnic market are buying their product from traders in the UK and the Netherlands. Very little passion fruit concentrate is imported direct as a single product into the UK, but what there is is mainly purchased by importers and used by the main ethnic juice producers. None of the major processors are interested in receiving offers of passion fruit juice directly from suppliers.

Most of the passion fruit that comes into the UK is part of a multi-fruit blend. This blending is done by "compound" companies in Switzerland, the Netherlands, Belgium and Denmark according to recipes agreed with UK processors. Container-loads of mixed blend juices are then imported to the UK from these other European countries.

Grades and Standards

The normal demand is for single strength juice of 14-15° brix, deep frozen in 200kg drums with double polyliners. There is also a small demand for 50° brix product, sometimes packed aseptically, but again, mainly in drums.

In the case of the purple variety for pure passion nectar, the specifications are for a 50° brix concentrate (but total demand is unlikely to be more than 200 tons per annum).

Import Duties

Passion fruit juice from ACP countries enters the UK duty-free.

Market Prospects

It is probably best for prospective suppliers of passion fruit purée and concentrate to direct their marketing to European countries other than the UK, unless they can produce the very specialized flavor profiles required by the ethnic community. Since Kenya does supply a small amount of fresh passion fruit, this is a possibility – though consideration should also be given to the blending companies of the Netherlands, Switzerland and Belgium.

OVERVIEW ON CANNED EXOTIC FRUIT

Four fruits dominate the UK market for canned fruit, accounting for 60% of the total, of which peach has the highest percentage, followed by pineapple, pear and fruit cocktail. Retailers' "own label" accounted for 47% of the market in 1990, although Del Monte was the premium brand market leader with 17%, followed by Princes, with 8%.

The UK per capita consumption of some 3.4kg per annum puts it largely in line with Holland and Germany, although behind Finland, Norway and Belgium. The UK's average per capita consumption figure derives mainly from peaches and fruit cocktail, whereas its consumption of pineapples and other exotics is still below that of other European countries.

Imports

The United Kingdom market for canned fruit has been fairly static in volume terms for the last three to five years. In 1988, total market volume was at 200,000 tons, increasing to 204,000 tons in 1989, but falling back once again to 200,000 tons in 1990.

No separate statistics exist for the importation of canned exotic fruit into the UK. There have been some data for imported canned passion fruit and guava since 1990 and these are contained in the tables below. Other canned exotics are either contained in the category "Fruit and Edible Parts of Plants" or "Mixtures of fruit with added sugar, in packings of various sizes". It is within this latter category that the major canned exotic fruit item into the UK is included, viz exotic fruit cocktail.

In terms of value, the total canned fruit market was worth £202 million in 1990.

Market Share

Major suppliers of canned exotic fruit to the UK are Thailand, the Philippines, China and Taiwan. Attempting to identify market trends by source from the very generalized statistics available leads to the tentative conclusion that the only real growth market has been for exotic fruit cocktail and that this has largely been met by Thailand and, to a lesser extent, by China and the Philippines.

Market Distribution

There are two distinct lines of distribution for canned exotic fruit in the UK, depending on final usage. The largest by far is that for the retail market and this is essentially characterized by the importation of cans which are "retail ready". All the major UK importers and distributors bring in cans which are already labelled. These importers can either be pure traders, i.e. ordering and purchasing cans for others' labels, or they can be importers of cans under their own label. In some cases, they are both.

The other, smaller line of distribution is in A10 cans for the catering and food service sectors and again it is importers and agents that are mainly involved in this trade. The major traditional importer names are Del Monte, Libby's, Dole, Princes, Gerber, Peabody and Stephens & Brotherton. Del Monte, Dole, Libby and Princes are also long-established brand names throughout the world.

The two largest traditional import companies involved in exotic fruits are probably Peabody and Stephens & Brotherton.

Although debatable, one of the reasons put forward for the relative growth in the exotic fruit cocktail business in the UK in recent years, is the activities of two specialist companies, viz "B.E. International" and "G. Costa". They sell the "Lotus" and "Blue Dragon" brands respectively and, until recent years, were mainly concentrated on the ethnic trade. They have, of late, however, successfully crossed over to the established supermarket trade and are competing for shelf space with the majors mentioned above. They are more adventurous than the majors and offer a wide range of product, including cocktail, lychees, guava, papaya, mango, star fruit and rambutan stuffed with pineapple.

Grades and Standards

The optimum size of canned fruit for the retail trade in the UK is the A1 (425g) size can. These are normally packed in 12's on a cardboard tray and shrink-wrapped. Both individual cans and the outers should be bar-coded.

For the catering trade A10 (7lbs) is the standard size. Over the past two years, however, 30oz cans have become increasingly popular amongst restaurant owners. The A10's should be packed six to a tray and the 30oz cans should be packed 12 to a tray, both shrink-wrapped.

Import Regulations and Duties

Import duties on canned exotic fruit vary, but tend to average around 7%-9%, with that on mango being 9%, and on guava being 7% plus 2% sugar levy. On papaya the duty is 8%, for lychee in cans of 1kg it is 9% and for rambutan it is 20% plus 2% levy.

Market Prospects

The market for canned exotic products is a growing one, but it is becoming increasingly competitive and price-conscious. This is particularly the case for product which has "crossed over" into the major supermarket trade.

Price and quality have become very important and the days of retailers making higher profit margins on exotic products in mainline trade have disappeared. The Dole company has led the way in this with its pricing policy of below 50p per 425g can, although it must be said that this only really brings UK prices in line with those in the rest of Europe.

The trade is well established, comprising, inter alia, two companies which have been particularly active in the market and which have the widest range of products. The other mainline canners all carry, albeit limited, a range of exotic fruit. Much of the trade at the moment, does have firm links with specific factories in Thailand and the Far East, although the more adventurous are still looking for new suppliers, especially since service from Thailand is seen to be deteriorating. Any prospective supplier should be able to offer a range of products such as exotic fruit cocktail, mango slices (see next section), guava halves, papaya chunks, lychees and where possible, pineapple. More obscure products such as rambutan stuffed with pineapple, carambola in syrup, jackfruit in syrup and custard apple have elicited some interest in the trade and may be useful as part of a broad range offer in order to attract interest.

CANNED MANGO SLICES

Imports

Canned mango slices, although not nearly as popular as exotic fruit cocktail, are included within the range supplied by all major players in the trade. Again, they are mainly seen in 425g cans, but they are also available in A10's for the catering trade.

The product, although established in the market, has not been a great success. One of the reasons is the instability of the mango itself, which tends to crumble at the edges, causing clouding of the medium and an unsavory appearance generally.

Market Share

Practically all canned mango now arriving in the U.K. comes from Thailand or China.

Prices

Prices paid for mango slices in syrup from Thailand in January 1992 were \$6.65 for a carton of 12 x 425g CIF.

Market Prospects

All in all, the market for mango slices is a steady, but not exciting one. There will always be a demand, both at retail and catering levels, and any prospective factory should include it amongst its range.

DRIED EXOTIC FRUIT

Of the 145,000 tons of dried fruit imported into the UK in 1990, at least 120,000 tons were of vine fruit, i.e. dried grapes of one sort or another. The other 25,000 tons mainly consisted of tree fruit. Imports of exotics are relatively minute and only really comprise dried/sugared pineapple and papaya. In 1990, the market for dried fruit as a whole including raisins, currants, sultanas, figs, apricots, prunes, dates, apples, bananas and mixtures, was estimated at around £140 million at manufacturers' sales prices. This figure, apart from retail sales, includes the catering trade and the bakery trade. The value of the retail trade per se has also been increasing slowly but has not kept pace with inflation. Despite price increases by original suppliers, there has been intense competition between the major multiples, leading to price cuts at the retail level which have acted as a brake on value growth.

In most cases, dried fruit is imported in bulk into the UK and re-packaged within the country. The majority of dried fruits are sold as unbranded produce, either as supermarket "own label", in packs in healthfoods or loose in various types of containers, including flexiglass domes for self-mixing by consumers. Whitworth, Epicure (Petty Wood) and Percy Dalton are the main companies producing branded dried fruits across all segments. Other, smaller brand names in the market are Sun Maid (California), Valley Gold (Cromby Eustace), California Gold (Trustin Kenwood) and Windmill (Windmill Foods).

Of total dried fruit sales, 90% are made through grocery outlets, with 65% through the large multiples which have been increasing their share over the last few years. Specialist food shops remain significant suppliers with a share approaching 10% although the healthfood novelty seems to have worn off. Growth in such stores has slowed down as the boom in healthy eating has moved into the mainstream grocery trade and price competition from the grocery multiples has had an impact on specialist healthfood and wholefood stores.

Overall supply is increasing, although demand is also increasing at a relatively fast rate. It is unlikely, however, that there will be substantial value growth because of the very high degree of price competition in the market between the multiple stores.

In the area of dried/sugared exotic products, the market is so insignificant as to be virtually trend-free. There is a basic demand for sugared pineapple and papaya which are used either in mueslis, breakfast cereals or for snacks. Although to some extent, the fall off in the demand in the healthfood sector has been counterbalanced by the increase in demand in the mainline grocery sector, the sugared nature of the exotic products has worked against health consciousness and demand for them specifically has suffered a little during the last few years.

Imports and Market Share

As mentioned above, it is only dried/sugared pineapple and papaya that really feature in the UK market for dried exotic products. As can be seen from Table 1, imports of dried papaya increased significantly in 1990, i.e. from 25 tons in 1989 to 156 tons in 1990. Almost all of this

quantity came from Thailand, with 126 tons.

TABLE 1: DRIED PAWPAW IMPORTS - UNITED KINGDOM Jan - Dec 1988 - 1990

Quantity = Tons; Value = 1000 ECU

0813.40-50	1988		1989		1990	
	Quantity	Value	Quantity	Value	Quantity	Value
Thailand	20	80	11	18	126	188
World	29	96	14	25	156	224
Intra EEC	5	11	2	4	23	28
Extra EEC	24	86	12	21	133	196

Source: EUROSTAT

Looking at Table 2, it can be seen that dried mangoes are included in the same category as fresh. It is impossible to distinguish the percentage of these totals attributable to the dried/sugared product, although it is likely that it does not exceed 1/2%, i.e. less than 50 tons. Looking at Table 2 it is likely that most of the product coming from the South American countries is of the fresh variety, whereas that coming from Thailand could be dried/sugared. As can be seen, the quantities imported from Thailand have fallen progressively from 76 tons in 1988 to 18 tons in 1990. Imports from the Philippines have fluctuated and 1990 did see something of an increase to 116 tons. It is not known what percentage of these is made up of the dried product, although it is likely that it is insignificant.

TABLE 2: FRESH/DRIED MANGO/MANGOSTEEN IMPORTS - UNITED KINGDOM 1988 - 1990

Quantity = Tons; Value = 1000 ECU

0804.50-00	1988		1989		1990	
	Quantity	Value	Quantity	Value	Quantity	Value
Venezuela	2150	3386	2012	3012	1848	2750
Peru	299	554	379	695	279	524
Brazil	623	1234	789	1600	513	846
India	839	1597	856	1328	809	1208
Thailand	76	125	43	165	18	64
Philippines	106	300	78	184	116	287
World	10141	15370	10929	15714	10440	15203
Intra EEC	171	265	751	1075	489	916
Extra EEC	9970	15105	10179	14638	9950	14287

Source: EUROSTAT

Statistics do exist for the importation of other dried fruit into the UK, as can be seen in Tab. 3. These reveal that very little came from outside the EEC - a total of only 22 tons in 1990, although this was a significant reduction on the totals for the years before where large quantities of dried product, probably tamarinds, were coming in from India.

All in all, therefore, imports of dried/sugared exotic fruit products into the UK are negligible and general market views are that this is not a growing market.

TABLE 3: UK IMPORTS OF DRIED FRUIT (excl. 0801.10-10 to 0806.20-90 and 0813.10-00 to 0813.40-50)
D: Breakdown by countries incomplete
Quantity = Tons, Value = 1,000 ECU

0813.40-90	1988		1989		1990	
Country	Quantity	Value	Quantity	Value	Quantity	Value
India	234	172	301	217	1	6
Thailand	39	36	68	56	-	1
China	6	26	20	85	6	28
World	527	1106	797	1760	191	623
Intra EEC	180	745	360	1261	169	552
Extra EEC	347	361	437	499	22	71

Source: EUROSTAT

Market Distribution

Most of the traders agreed that both the snackfood and healthfood industries have, for the time being, peaked in the UK. This has had an impact on the demand for dried exotic fruit, with quantities imported being significantly less than those of some eight years ago and price in real terms also being at a lower level. The total market for dried exotic products, including pineapple, papaya, banana and coconut does not presently exceed 2,000 tons, whereas it was probably twice that figure in the mid-1980's.

Lines of distribution are relatively straightforward, and mainly involve traditional-style importers. The most important importers currently working in the business in the United Kingdom are H T Walker, Conagra and Voice Vale. For specialized items such as dried pineapple and papaya, most processors would source the product from such traders.

The lines of distribution after the traders are somewhat more complex. One route is via large wholesalers/processors who will receive container-loads, make up mixes, either under "own label" or for other labels, and distribute to the healthfood and grocery market. Such companies also sometimes have large cash and carry warehouses where small grocers and ethnic retailers collect either the product loose or, invariably, in some form of mix. A company operating in

this way is "Community Foods", which is one of the largest wholesaler/processors of dried foods in the United Kingdom. Another such company is T G Smith Limited. They both report that six years ago they used to take regular container loads of pineapple and papaya, i.e. 17 tons a month per year of a container made up of 50-50 pineapple/papaya, whereas now they only require some 100 cases at a time, or 4 tons per month.

Another line of distribution is from the importer direct to the major processors, especially those making muesli and breakfast cereal. Such companies include Kelloggs, Quaker Oats, Weetabix, Cheshire Wholefoods, and Morning Foods. None of these buy containers of exotic fruit any longer, although all used to do so some five to six years ago.

The other major players in the game are companies such as Peaty Wood (Epicure brand), Whitworth's, and Percy Dalton, who produce under their "own label" and have widespread distribution throughout the grocery and wholefood sector. In many cases, these companies have their packing done for them by contracted packers and it is these packers who are the more direct link with the importers.

The major supermarkets also have packing done by contracted packers to their "own label". Examples of such packers are Alara Wholefoods and T G Smith.

There is no doubt that the main point of contact for any prospective exporters should be specialist importers such as Voice Vale, H T Walker, and Conagra.

Summary of Product Characteristics

Apart from dried/sugared pineapple, the only other product for which there is any kind of demand in the United Kingdom is papaya/pawpaw. It is only pineapple and papaya that are normally included in ready made snacks.

Diced/cubed papaya, normally a 10mm or 15mm dice, is received in the UK mainly from Thailand. The product is bought in container-loads, packed in cartons of 4 x 5kg poly bags. Prices tend to vary between £1,100 and £1,150 per ton delivered duty paid, which works out at about US\$1.60 per kilo CIF.

This was a boom product some 7-8 years ago when it was first used in the manufacture of tropical snacks, breakfast cereals and mueslis. Essentially, it was seen as a new, colorful addition to the range available, adding some sweetness and giving the product a tropical/exotic image. The popularity of these exotic products has now waned somewhat and demand has stabilized at around 300-400 tons for the UK as a whole. This compares with an overall market of some 700-800 tons around eight years ago. As mentioned above, the main usage is in a tropical snack, normally mixed with nuts, banana chips and pineapple core.

There is normally no problem with aflatoxin because of the high sugar content and the SO₂ content is normally between 200 and 300 ppm, whereas the UK maximum is 2,000 ppm.

For papaya the import duty is 10%, plus 2% under GSP.

Market Prospects

Overall, there are no exciting market prospects for these products because prices have remained at around \$1.60/kilo CIF for eight years, which means a significant reduction in real terms. The high sugar content of traditionally dried exotic fruit is also in opposition with the increasing health consciousness in the UK.

A Special Note on Dried Mango

At the moment, there is no real market in the UK for dried mango, although there is interest in developing one. To date, supplies have been irregular and quality has not been consistent. There is apparently a problem of moisture content in the mango which means that it is difficult to mix with other dried products. There have been examples of sun-dried mango without sugar and preserved in SO₂ being received from Kenya, but no regular deliveries have been established. The dried food market is looking for new products, however and because the existing products have been on the market for a relatively long time, a new end use might well stimulate the market. Mango is being looked at as such a product if suppliers could guarantee regular quantities and suitable quality. To date the only offers coming into the UK have been from South America and have been too expensive at \$2.30 per kilo CIF for diced, dried, sugared mango. At such a price level, no one is interested.

It would be interesting to further examine the Kenyan experience however, and if capabilities still exist for supplying the sun-dried product, researching the European market in more detail for potential demand.

INDIVIDUALLY QUICK FROZEN EXOTIC FRUIT

For frozen fruit, the UK was the third largest European importer in 1990, after Germany and France. The major product imports into the UK are corn on the cob, peas, beans, cauliflower, broccoli, sweet peppers, strawberries, raspberries and black currants. There is an increasing trend towards individually quick frozen products, although block frozen is still acceptable, especially for some of the main line vegetable items.

The major uses for Individual Quick Frozen (IQF) exotic fruit are in the manufacture of yogurt and ice cream, the baby food industry, the ready-made meal industry and in the manufacture of exotic fruit cocktails, packed and frozen for sale in refrigerators in supermarkets.

For the frozen exotic fruit cocktail, some of the supermarkets, notably Marks & Spencer and Safeway, have their "own label" packed by contract packers who in turn receive the product from importers. Some packers also use their own private label and sell through the retail trade. In baby food, it is Heinz and Cow & Gate that are most active, whereas in ready-made meals,

it is Birds Eye, Ross-Young, and Campbell that are most important.

IQF fruit to be used in yogurt are purchased by compound/blending houses, which prepare taste bases for the yogurt and ice cream companies.

The main exotic products in demand in the IQF range are pineapple, mango, papaya, banana, melon and lychee.

There are no separate statistics for individually quick frozen exotic fruit, but the details are probably contained under CCN number 0811.90-90. As can be seen from Table 4, although imports into the UK of frozen unsweetened fruit and nuts increased from just over 8,500 tons in 1988 to over 10,000 tons in 1990, this was accounted for by an increase in imports from EEC countries at the expense of countries outside the EEC. Thailand exported 128 tons of frozen products to the UK in 1990, compared with 70 tons in 1988, although the 1990 figure was a reduction on the 332 tons for 1989. Again, the pivotal role of the Netherlands in trade in these processed agricultural products can be seen by the fact that it more than doubled its exports to the UK from 580 tons in 1988 to over 1,300 tons in 1990.

TABLE 4: IMPORTS - UNITED KINGDOM Jan - Dec 1988 - 1990

Quantity = Tons

Value = 1000 ECU

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

0811.90-90 Country	1988		1989		1990	
	Quantity	Value	Quantity	Value	Quantity	Value
Netherlands	584	743	901	1118	1362	1506
Guatemala	-	-	67	65	78	78
Chile	205	175	214	227	347	345
Israel	682	1524	15	34	368	888
Thailand	70	57	332	224	128	136
Philippines	51	101	3	4	37	72
New Zealand	52	92	109	134	24	32
World	8577	8509	7986	8017	10071	11019
Intra EEC	2461	2537	3201	3236	5650	6193
Extra EEC	6116	5971	4785	4781	4421	4826

Source: EUROSTAT

The main entry point into the UK in the distribution system for frozen exotic fruit is through established traders in the market. Although there is a large number of such companies, only a

few are well regarded by the trade. They include H & T Walker, Peter Collins Foods Limited, Sun Bird Foods Limited and H J Uren & Son.

The following are specifications for those products for which there is some demand in the UK.

Mango

This product is required, individually quick frozen (IQF), as a 10 x 10mm or 15 x 15mm dice. Acceptable varieties are Haden, Kent and Alfonso. The main suppliers at the moment are Peru, Brazil and Thailand. Other sizes in demand are 20 x 20mm and 25 x 25mm. Prices can vary between £700-£900 per ton.

There is also a requirement for sliced mango in lengths up to 6cm - of yellow color, and a small demand for 2 x 2cm chunks.

Papaya

IQF diced papaya is required for gateaux, yogurt and frozen exotic fruit cocktails. They are normally 10 x 10mm and 15 x 15mm packed in 10kg or 15kg cartons in poly bags with no staples. Prices can vary between £700-£900 per ton CIF.

Banana Slices

There was quite a lot of interest in the market for banana slices during 1991, although this seems to have leveled off somewhat in early 1992. Specifications are slices of between 1/4" and 1/2", packed in 50lb bags IQF. There is also a demand for small 5lb bags.

Pineapple

There is a demand for irregular pineapple chunks of 1 1/2-2 cm and regular sized pineapple tidbits, with 8 or 16 cuts from one slice. The major supplier used to be Brazil, although the product has also been coming from the Philippines.

Rates of Duty

IQF Mango (12kg carton) - 6% for all GSP countries
IQF Papaya (9.5kg carton) - 6% for all GSP countries
IQF Guava (9.5kg carton) - 6% for all GSP countries

Other Exotics

As regards the other products, apparently freeze-dried jackfruit was tried in the UK market, but did not succeed. All other products do not have any particularly distinguishing characteristics, especially in terms of flavor and color, which would give them potential in the market.

MANGOES IN BRINE

There is an active market in the United Kingdom for products which include brined mangoes, especially in the range of chutneys and pickles. For example, an informed trade estimate of the total size of the UK market for mango chutney is of some £10 million at re-sale price value. The major company operating in the business is Sharwood's which is owned by the food giant Rank Hovis McDougall. There is also a large number of small Indian and Pakistani companies producing authentic product, of which probably the largest is Patak Spices Ltd.

It is estimated that over 200,000 tons of mango slices in brine enter the UK in any one year. The mangoes must be peeled, de-stoned and sliced lengthwise in 0.5"-0.7" wide slices. They are fermented in salt-water and after fermentation, are packed in a 15% brine solution, with a maximum pH of 3.5 and a minimum salt content of 12%.

Major sources of mango at the moment are India and Haiti, although the trade is actively seeking alternative sources.

The type of mango required is a firm fleshed variety which is hard, like a turnip, and suitable for making chutney as the slices do not disintegrate. Some varieties of mango cannot be purchased, as they are too fibrous and cause too much wastage. There are strict guide-lines to exporters regarding the packing of mango slices in barrels, since experience has shown that if the plastic barrels are dark in color, or have been recycled, the mango will spoil quite quickly. The mangoes are to be packed in 200kg white food-grade quality barrels, made of virgin plastic. A half-lid insert must be placed inside the barrel to ensure that all the mangoes are submerged in the brined solution. If this is not included, the mangoes tend to turn waxy.

Of the 2,000 tons imported per annum into the UK, Sharwood's (RHM) take approximately 1,400 tons and the rest is accounted for by Pataks, Hillsdown ("own label) and Rowntree (Pan Yan).

As regards sales of mango chutney, the estimates are that 80% of the product is sold in multiples and independents, 10% in restaurants, food halls, etc, and 10% is sold in bulk for making sandwiches and prepared meals - the main customers being Birdseye and Heinz.

The market for authentic foods is growing at some 10% per annum and the range of foods offered is being widened. Target consumers are those interested in purchasing authentic ethnic foods. Asian consumers are targeted through the independent grocers, whereas British consumers are targeted via the major multiples.

Potential exporters of mango in brine could either contact companies such as RHM and Pataks directly, or via some of the established traders, e.g. H & T Walker and Sun Bird. Detailed specifications will be provided by the importers, with an indicative f.o.b. or delivered price. It is normal to airfreight a 50kg sample to the factory and, if acceptable, an order for one container-load would be placed from that particular crop. Most factories in the UK usually

allow a new supplier 3 crop years to get fully on stream.

Prices tend to vary and the trade is secretive concerning actual levels, but an indicative price of £600 per ton CIF is probably close to that normally pertaining.

SECTION VIII: MANGETOUT (SNOW PEAS)

Ranking Overview

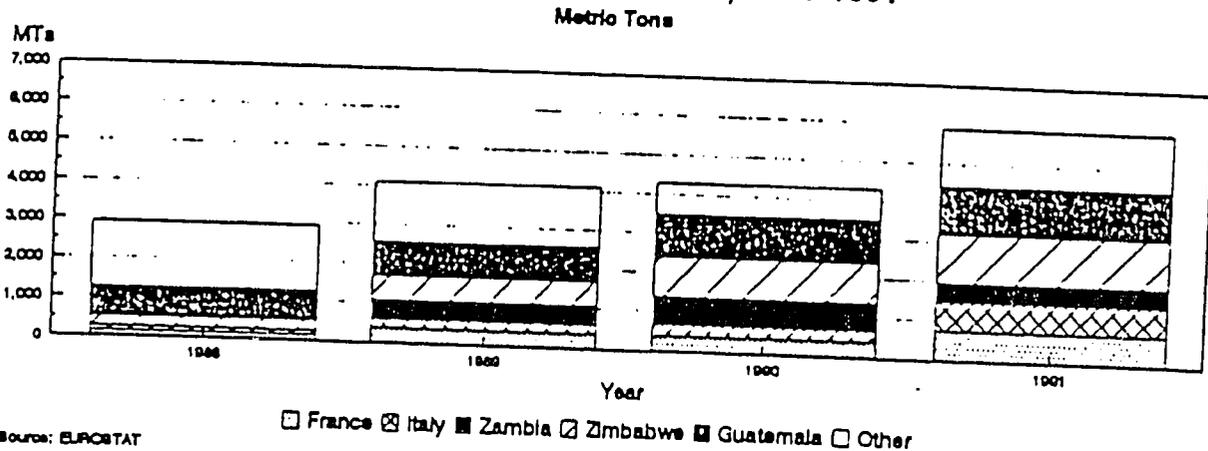
Product	Ranking	Notes
Mangetout	3	Worth watching; good market development by Zimbabwe and Zambia. Also strong competition from Guatemala

Domestic Production

The U.K. produces snowpeas during the summer months.

Imports

U.K. Imports of Fresh Peas, 1988-1991



As with other "small volume" products, snowpeas are not distinguished separately in the official data for the UK. They are absorbed within the category of "fresh or chilled peas" generally, of which, in 1991, the UK imported 5,887 tons. Of this total, almost 3,800 tons were imported during the period from 1 September to 31 May. The total for 1991 compares positively with some 2,900 tons in 1988, 4,000 tons in 1989, and 4,300 tons in 1990. The UK was the fourth largest importer of peas in 1991, although lagging well behind, Belgium/Luxembourg, which accounted for 24,700 tons out of total EC imports of some 54,000 tons.

Although it is impossible to specifically distinguish imports of snow peas, the source of supply does provide a clue as to the quantities actually being traded, and it is obvious that the UK is the major market in Europe for snowpeas from different sources, followed, though at a significantly lower level, by the Netherlands.

The vegetable trade in the UK estimates that market value for snowpeas in 1990 was 5 million pounds sterling.

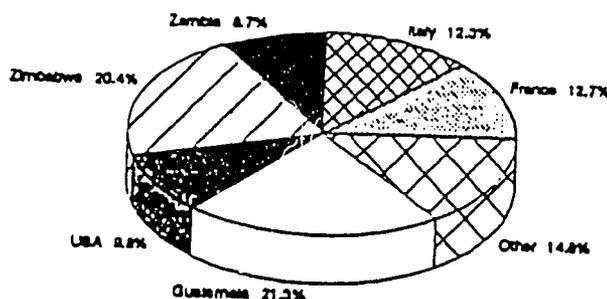
Market Share/Seasonality of Demand

During the months of September through May, the major supplier of snowpeas to the UK in 1991 was Guatemala, with 1,208 tons. Other major suppliers during this period were the USA, with 571 tons, Zimbabwe with 581 tons, and Italy with 387 tons. During the winter period of 1991, Kenya is only recorded as exporting 11 tons to the UK, whereas Nigeria and Zambia exported 102 tons and 195 tons respectively. During the summer months, from 1 June to 31 August, the major supplier was Zimbabwe, with 619 tons, followed by France, with 603 tons, Italy with 396 tons and Zambia with 320 tons. Kenya is not recorded as having any exports at all to the UK. Indeed, in total in 1991, Kenya is only reported as exporting 29 tons to the whole of Europe.

Looking at the spread of the statistics over the two calendar periods, it seems that most of the distant suppliers are able to deliver throughout the year, except for Guatemala, which seems to be a major producer during the winter period only.

Import Share - Fresh Peas

1991, by weight



Source: EUROSTAT

Consumer Preferences

Freshness is important and the buyer will want to be able to snap the pod in hand (long-stored pods tend to go limp). The taste and texture should be juicy, crunchy and sweet.

Seasonal Prices

On average, prices vary from £2.00 - £4.00 per kg, depending on supplies. At one time, it was a highly fluctuating market, but the increasing quantity traveling directly from supplier through specialized distributor to the multiple chains have helped to stabilize the situation. Multiples have been contracting with suppliers at agreed prices over medium-term periods and this has increased stability. These prices, however, are not publicly quoted.

Market Distribution

As mentioned above, mangetout are being increasingly channeled through specialist importers/packers/distributors set up outside the wholesale markets to create a direct link between supplier and multiple. These normally agree to short-to-medium term contracts with suppliers, provide them with production programs, quality criteria, packaging material. The best quality mangetout usually travels through this channel of distribution.

The wholesale market is still active in the trade and is slightly more flexible in its quality standards, although, it is becoming increasingly stringent because of the general improvement in quality conditions throughout the UK market.

Grades and Standards

There are no separate standards for mangetout, but they are included in the general quality standards for peas. These are the basically the same as for other fresh produce, in that the peas must be:

- whole
- sound
- fresh in appearance
- clean
- free from foreign smell or taste
- free from abnormal external moisture

Mangetout are only classified into two classes, viz 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 blemishes. 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, with some stringiness and minor superficial blemishes allowed.

All multi-noded plants are acceptable and varietal choice should depend on growing conditions to minimize harvest costs.

The market requires pale green pods of a length between 7-10cm. The pod should be straight with the peas just showing, but otherwise flat. A small stem should left on the pod.

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. A

temperature from 0 - 2°C and relative humidity of 95-100% is recommended.

Mangetout is normally packed in 5lb (2.25kg) cartons. There is an overall preference for well-ventilated, waxed cardboard boxes because they give better protection from desiccation. In the UK, the mangetout are usually sold to the consumer in PVC over-wrapped trays or packs, some of which are packaged at source (Zimbabwe and Zambia) and some on arrival in the UK. If not pre-packed at source, then the waxed 5lb cardboard box mentioned above is the preferred medium.

Import Duties and Regulations

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

Market Prospects

Competition in this growing and high value market is extremely intense, notably from Zimbabwe, Zambia and Guatemala. They are able to supply during the market windows that do exist and they have well-established positions in those market opportunities. Supplies from European, Mediterranean, North and West African countries are increasing. It is likely that with lower transport costs and transit times, they will make the market increasingly difficult to develop for new suppliers.

On the other hand, it is a growing market and the multiples are established in the product. It can be expected to grow further therefore, but probably at a slower pace than in the three years since 1989. The data seems to indicate that Kenya does not presently have a position in the market (although there is some doubt about the data) and it should therefore consider the product if it can compete with the CIF UK prices of product from other sources.

SECTION IX: OKRA

Ranking Overview

<u>Product</u>	<u>Ranking</u>	<u>Notes</u>
Okra	4	Kenya is the major supplier; market shows slow but steady growth.

Imports

Although no separate and distinct statistics exist for okra, trade sources reveal that the UK market has shown slow but steady growth during the latter half of the 1980's. The general feeling is that this trend will continue. At present, trade estimates of the overall size of the market are in the region of 2,500 tons, which give some indication of the relative importance of the UK market compared with, for example, the Netherlands, with its imports of 216 tons in 1991.

Market Share

The major supplier of okra to the UK is Kenya, with an estimated market share of some 75%. Other suppliers are Mexico, Trinidad, Barbados, Cyprus, Zimbabwe and Zambia.

There is some feeling in the UK market that Kenya is reducing its supplies because of growers diversifying into other crops, notably flowers. It is felt, however, that any gap in the market created by such crop diversion will be filled by emergent okra suppliers such as Cyprus, Turkey and Greece.

The latest figures available from Kenya show an export of 1,624 tons in 1988, compared with 1,873 tons in 1983. Although, there is therefore a reduction in supplies over this time period, it is to be noted that the 1988 figure is well in excess of the 920 tons exported by Kenya in 1987.

Consumer Preferences

In the UK, okra is mainly consumed by the large Caribbean, Asian and Mediterranean sections of the population. It has also in recent years begun to "cross over" to a wider UK market in the role of an "up-market" vegetable used in both salads and dishes such as curries, stews, spicy soups, or as a side dish.

Ridged cultivars, such as Clemson Spineless, Bindi and Annie Oakley are preferred. In terms of shape, they should be smooth-skinned with some ridging, representing their other name

"Ladies' Fingers".

Their color should be green, but not too light, and their level of ripeness should be at the immature stage in that the product can be easily snapped by hand.

In terms of texture, the contents should be sticky but unfibrous.

Seasonal Patterns of Demand

The main suppliers to the UK market are as follows:

Kenya	all the year round
Mexico	October-March
Cyprus	May-November
Caribbean	all the year round
India	July-October
Zambia	January-March
Zimbabwe	November-April
Nigeria	February-November
Egypt	June-August
Brazil	October-May

Kenya can supply the UK virtually all the year round and this has helped to create a balanced demand trend. There appears to be no distinct pattern of seasonal consumption amongst the ethnic populations, except perhaps between July and August when okra from Cyprus is in season and is available in large quantities at low prices. There is also some lull in the market between December and January, both because of supply shortage and because of difficulties of handling okra in cold temperatures.

Prices

Wholesale prices, predominantly for Kenyan produce, average around £2.00-£2.10 per kg.

Market Distribution

Apart from being constrained by the size of the specialized demand sector, the trade generally considers okra to be a difficult product because of its relatively short shelf-life. This high level of perishability has caused many importers to consider okra not worth handling because of the risk involved.

Consumption on the other hand is forecast by the import trade to increase gradually, although it is felt that a promotional campaign would be necessary to make any significant in-roads into the major market sector. Unfortunately, the size of the trade does not justify promotional expenditure and it is unlikely therefore, that it will be promoted as a product on its own. There

is some possibility of it being included in a "range of new, exciting gourmet products" and the promotional campaign would need to be informational and perhaps concentrate on the versatility of okra and its ease of preparation.

The main volume of okra is sold via the wholesale market system. Supermarkets do take relatively small-scale amounts in specialized regions in the UK, but again they are discouraged by the relatively short shelf-life.

The catering trade is a major distribution channel for okra, particularly for the wide-spread numbers of Indian and Pakistani restaurants in the UK.

Grades and Standards

There are no international quality standards issued for okra, although high quality is demanded. Immaturity is essential because of perishability. Homogeneity in the carton is also rewarded.

Okra can be loose-packed in 2.5kg-5kg boxes, which must be ventilated and, preferably, full-lidded. Lower capacity packs are preferred.

Import Regulations and Duties

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

Market Opportunities

The general feeling in the trade is that it is a steadily growing market. Kenya may have deliberately reduced its presence on the market because of diversion to higher value crops and, if this is the case, higher export revenue per unit would justify such diversion.

In terms of existing market position, their major threat will come from Cyprus and Greece, which have regular air freight connections with the UK, meaning that the market can be supplied with fresh okra every day. Because of its short shelf-life, this is a crucial factor in developing the market.

There is no economic justification in launching an expensive promotion campaign because the size of the trade does not justify it. It is likely, therefore, that the market will never become a very large one. It is a market, however, in which Kenya is the leading supplier and has an established reputation. This position should be consolidated.

Targeting the market is done mainly through existing specialized fresh produce importers. It is highly improbable that supermarkets will wish to trade directly in such a low volume item, although they do use specialized importers rather than wholesale markets. Names and addresses of established importers are contained in Appendix B.

SECTION X: FRESH STRAWBERRIES

Ranking Overview

<u>Product</u>	<u>Ranking</u>	<u>Notes</u>
Fresh Strawberries	2	Risky market; strong competition; only window November through February

Domestic Production

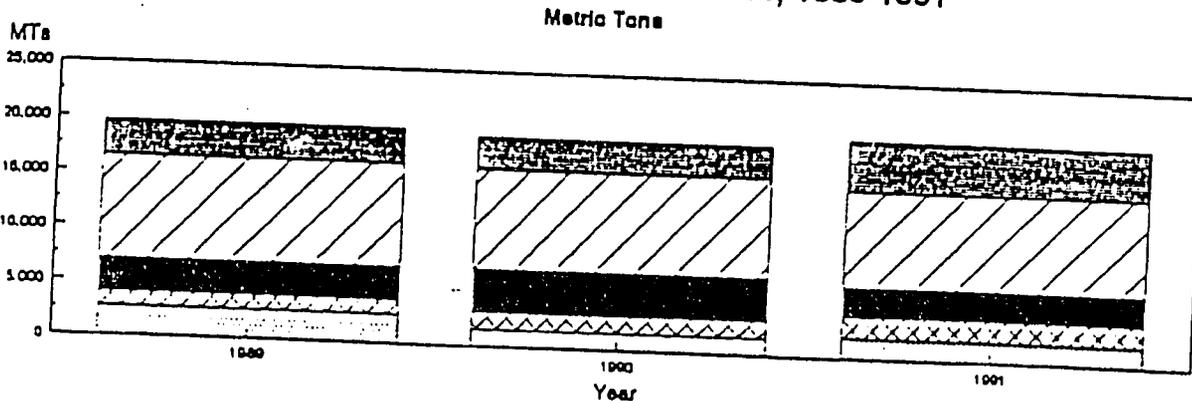
The U.K. Ministry of Agriculture, Fisheries and Food (MAFF) estimated domestic strawberry production during the 1990-1991 season at 47.9 thousand tons. Production occurred on 6,059 hectares, with a production value of £67.4 million.

Imports

In 1991, total imports of fresh strawberries into the UK amounted to slightly less than 20,000 tons. This compares with an import into Germany of 111,000 tons of fresh strawberries in the same year.

The UK market has been growing relatively steadily over the last five years from 15,400 tons in 1987 to 19,600 tons in 1989, falling back to just over 19,000 tons in 1990 and then increasing last year to 19,837 tons.

U.K. Imports of Fresh Strawberries, 1989-1991



Source: EUROSTAT

France
 Belgium/Lux.
 Netherlands
 Spain
 Other

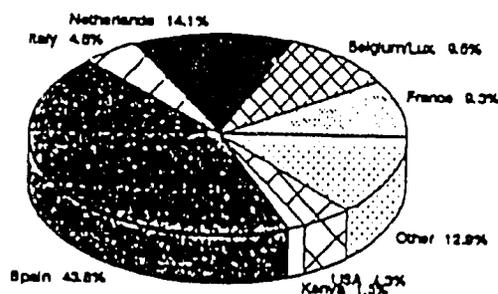
Market Share/Seasonal Patterns of Demand

Official statistics subdivide the United Kingdom market into two periods, viz from 1 August to 30 April and from 1 May to 31 July. The three months from May through July represent the

period when the domestic production season in northern European countries is in full swing, including that of the UK. During this period, the major supplier in 1991 was Spain, with 4,200 tons. Other suppliers were France, the Netherlands, Belgium/Luxembourg and Italy. It is during this period that consumers in the UK prefer the domestic varieties.

During the nine months from August through April, when northern European supplies are not available, the largest supplier is Spain, which starts supplying the market in February/March. Distant suppliers during winter months include the USA, which commences in March, Kenya, Colombia and Israel, which starts supplying normally in November. Some small quantities also arrive over the Christmas period from Australia, New Zealand, Chile, Costa Rica and Zimbabwe.

Import Share - Fresh Strawberries
1991, by weight



Source: EUROSTAT

Consumer Preferences

The main imported varieties are Chandler and Osso Grande from Spain, and Elsanta from France and Holland. Elsanta is the standard UK variety and is the most acceptable on the market (slight whitening of the tip is expected). Other acceptable varieties include Marmalada, Gorella, Rapella, Hapil Pandira and Pegasus. There has been criticism of Tioga and Selva in the past due to toughness and poor flavor.

Fruits should not be less than 25mm across the equatorial diameter and must weigh 15g or more. Most fruits should fall within the 30-40mm band. Wedge-shaped varieties such as Hapil must not be splayed or multi-lobed, but have a fairly regular shape. In any one batch, produce must be uniform in color and overall dimensions.

Market Distribution

During the last 10 years, the market for fresh strawberries in the UK has changed significantly, moving away from the traditional structure of New Covent Garden and the wholesale market towards telephone and telex ordering and placement, especially with the large supermarket chains. These large chains often prefer to buy directly or deal through specialized importers

who "custom package" the produce and distribute it directly to the outlets specified by the particular supermarket chain. This custom packaging can involve putting computer code, shelf-life and price on the wrapping, together with the logo of the supermarket chain. This can be done either in the importers' packhouses or in the packhouse of the supplier at source.

A number of supermarket chains have established pre-packing at source for strawberries, although they do not do so directly. Within such a system, demand is steady and on a contract basis. The supplier, however, must be prepared to accept a system of total quality management, "just in time" delivery, production programming, strict quality control and regular visits by representatives of both the supermarkets and of the specialized importers.

The names and addresses of the major specialized importers are included in Appendix B. They include Mack Multiples, Saphir, Poupart, Geest and Exotic Farm Produce.

There are, of course, still a large number of wholesale importers working in the UK market. They are facing difficult times, however and are faced with the prospects of either ceasing activities or becoming more attuned to the modern trading systems.

Grades and Standards

Strawberries must be of EC Class 1 standard. Must be mature, ripe, well balanced fruit with regular growth. Fruit must be of uniform bright red color, with glossy appearance and without greening, except minimally around the calyx in some varieties. Must be firm with smooth outlines and without hardened clefts in the flesh due to infertility (monkey nose/face). A short, clipped, unwithered stalk and green calyx should be attached. Taste should be sweet and devoid of earthiness and flesh should be moist, firm and juicy.

They should be whole, clean and free from soil, pest, disease and foreign material. Must be free from damage due to mechanical crushing and bruising, water marks, taints and pale pink or brown breakdown discoloration. Dull skin and softness due to over-ripeness will not be tolerated. Stalk should be trimmed as close as possible to the fruit without damaging it, but should remain attached.

Most supermarkets consider Class 1 a minimum standard and would expect more uniform grading and less defect than allowed for in Class 1. Flavor and shelf-life are particularly important and a retail shelf-life of 2 days at 10°C (50°F). And although EC Class 1 allows a minimum of 22mm diameter, most supermarkets require larger fruit and 25mm (1" approx.) is considered as the smallest allowable fruit. There is a tendency to prefer fruit in the 30-40mm range (1.2"-1.5").

There is no maximum size laid down for EC Class 1, but very large fruit - 45mm (1½") and above - can be marketed separately as a specialty line.

Fruit counts per pack are also laid down, and as a general rule, a ½lb (227g) pack would have 18 to 25 fruits, whereas a 1lb (454g) pack would have larger fruits and a count of 30–40 per lb.

For the UK market, packaging must be in 250g clear punnets. Normally between 10-12 fruits are packed into a 250g punnet, but to make up for weight loss in transportation, the punnet is normally sold in the UK as weighing 227g.

The bulk of supermarket fruit is sold in lidded punnets. This allows for fruit to be graded as picked in the field into open containers and final weight and quality checks to be carried out in the packhouse where the packs are also lidded. Labelling can either be done at the packhouse or in the UK. Often, because of the risk of delays in transit, or the need for further quality/weight checks on arrival in the UK, plus the shelf-life/sell-by date requirement, the packs are not labelled until just prior to despatch to the supermarket depot in the UK. Direct delivery from the UK airport to the supermarket depot can be undertaken if fruit quality and transport conditions have been good. Clear plastic punnets are preferred and because of environmental pressures, there is a tendency to move towards recyclable PET plastics rather than PVC.

The outer cardboard carton must also be of recyclable material and glued rather than stapled. Normal size should fit in with the EC module of 300 x 400mm or 400 x 600mm to fit the Europallet of 1,000mm x 1,200mm.

Some supermarkets require absorbent paper to be placed in the bottom of punnets, while others use bubble polythene pads.

The count of punnets per outer and size of punnet will depend on the unit value of the product. Counts may vary from 8 - 24 per outer, but too many packs per outer can reduce sales due to the short shelf-life of the product and slow turnover.

Under food safety and pesticide legislation, most supermarkets take precautions to show that they have practiced "due diligence" to ensure the safety and legality of the produce they sell. Main requirements are:

Pesticides: Records of pesticides used on the crop, including pre-planting and post-harvest treatments, must be available. In addition, only pesticides approved by local authorities may be used and a program of pesticide residue analysis needs to be in place, with results available to the supermarket if required. Pesticides which are banned in the UK must not be used.

Health & Safety: Following incidents where hepatitis and food poisoning have been transmitted from pickers and handlers through to consumers, most supermarkets will ask for field toilets with hand washing facilities to be provided for all personnel handling fruit. A personal hygiene training course and the non-employment of handlers suffering from food poisoning, hepatitis and other transmittable illnesses should be in place.

Contamination of

Product: The occasional presence of warm climate pests, such as Black Widow Spider in Californian grape, and lizards, frogs, cockroaches, etc. in other products, must cause growers and packers to be aware of such hazards and take due measures to prevent contamination. Similarly, contamination from petrol, diesel or other substances which may be used in crop production and handling must be guarded against. Packhouse hygiene and the protection of lights are necessary precautions and technologists from supermarkets may visit production sites to check on these matters.

Batch Coding: In order to be able to trace the source of any problem, outers need to be coded with the grower/producer marks. Date-coding of outers may also be requested to ensure proper rotation of stocks.

Handling &

Transport: Cold chain is essential throughout. Fruit should be chilled to at least 6°C (42°F) within 2 hours of harvest and maintained at temperatures not exceeding 8°C (46°F) and preferably at 2-4°C (36-40°F) throughout holding and transit. Records of temperature regimes may be required, especially on despatch and receipt.

Rejection of product at supermarket depot may result not only from quality defect, but also for product temperature out of acceptable range.

The above details are characteristic of the specialized distribution channels through supermarkets. The trade that goes through wholesale markets tends to apply the following criteria, although many are equally applicable to supermarket trade.

Labelling on inner packaging should show class, produce type, country of origin, date and display codes (day of delivery + 2 days), bar code, supplier code, batch code number. Main label should be placed neatly in the central panel of the lid, aligned with the length and breadth corresponding to the length and breadth of the punnet. Secondary label should be placed in the lower right hand corner of lid.

Outer packaging should be labelled with produce, class, variety, category, size/grade, date and display code of inner fruit, country of origin and name of supplier.

Other useful information on the package will include the symbols for "this side up", fragility and temperature. It is also useful to include the date of packing, often in code, the name of the variety, the tare weight in kg and the identity of the grower.

Market Opportunities

The UK market for fresh strawberries is well catered for by Spain, the Netherlands, France, Belgium/Luxembourg, and domestic production.

The only real gaps in the market are in the months from October through February, although the USA and Israel have been traditional suppliers during that period. Colombia is emerging as a winter supplier and Kenya is maintaining its regular position on the market at that time of year.

Winter markets will, however, never be very high volume, except for occasional times such as the Christmas and new year festivities. At these times, very good prices can be obtained.

Spain, which had been getting increasingly earlier with its first deliveries to the market, is not as well regarded as it used to be because of a slackening in quality control. Unfortunately for distant suppliers, however, some of the gaps are now being filled by Mediterranean and North African countries, notably Turkey and Morocco. Mexico also continues to supply reasonably large quantities during winter months.

If Kenyan suppliers have not already done so, it might be an idea to target some of the specialized importer/packers mentioned above and to organize pre-packing at source. Since this has already started to occur in Zimbabwe, it is probable that the situation in Kenya has been investigated by the supermarkets and their distributors and that if any possibilities do exist, they have already been exploited.

SECTION XI: FROZEN STRAWBERRIES

Ranking Overview

<u>Product</u>	<u>Ranking</u>	<u>Notes</u>
Frozen Strawberries	1	Market locked into Northern European varieties and suppliers.

Imports

UK import statistics for frozen strawberries in 1991 reveal a total volume of 12,500 tons entering the country in that year. The market has seen steady growth since 1987 when imports were just over 8,000 tons, increasing to almost 9,500 tons in 1990. The value of the market in 1991 was almost £10 million, compared with half that value in 1987. It can be seen therefore that there has been a significant growth in the market over the last four years.

Market Share

The major supplier of frozen strawberries to the UK is Poland which supplied almost 6,500 tons out of the total import of 12,500 tons in 1991. In fact, most of the significant growth in the UK market has accrued to Poland, which saw its exports practically doubling from 3,500 tons in 1990 to 6,500 tons in 1991. The Netherlands is also a major re-exporter of frozen strawberries and Spain and Turkey are increasing their presence in the market each year.

Seasonal Patterns of Demand

Poland, the main supplier of frozen strawberries to the UK market has its season in August and September. Normally, the major manufacturers enter into contracts with Polish suppliers in April and May, preceding the crop. It is at this time that prices are determined.

Frozen strawberries are, of course, bought all the year round, and are available from the Netherlands at all times, in spite of the fact that its season is similar to that of domestic supplies in the UK. There is also some freezing of strawberries within the UK itself.

If any gap appears on the market at all, it is in the period between February and April and it is at this time that frozen berries from distant sources are brought in. Chile, Ecuador, and Mexico are sporadic suppliers during this time of the year.

Market Distribution

The major users are jam and yogurt manufacturers. All buy "distant source" frozen strawberries

through specialist importers. There are only a few of the latter in the UK. Names and addresses are provided in Appendix B.

Grades and Standards

The northern European Senga Sengana variety is preferred to the exclusion of almost all others. The market will also accept some Chandler, Tioga, Selva and Pajaro; the preference is for Individual Quick Frozen (IQF) strawberries, although some purée is still required. There should be no added sugar. The strawberries should be without stalks and very clean, with a good strong color, red both inside and outside the fruit.

The most acceptable calibration is between 25-35mm. These berries attain premium prices and are used in quality jam and food product production. Another category is Class 1 calibrated. In most cases, these berries measure between 15mm and a maximum of 25mm and are used in food products where whole strawberries are required.

The third and very common category is the totally uncalibrated Class 2 berries. These normally measure between 10-14mm diameter, although there has to be a guarantee of a regular number of the smaller berries within the package. These berries are used for all general purposes for which a strawberry is required, notably jam manufacture.

Micro-biological conditions should be aerobic, mesophyllic bacteria, 10^3 /G yeasts and molds 10^2 GE. The contamination level must be fruits with cups; maximum: 10 pieces/100kg. The free contamination level must be 0.001 weight per cent.

The brix must be $9^\circ \pm 2$, the pH value 3.6 ± 0.3 . The color should be red, L34 ± 2 , A38 ± 2 and B18 ± 2 .

Market Opportunities

In spite of the fact that frozen strawberries are the single most important fruit in the frozen fruit markets of Europe, the markets are characterized by intense levels of competition, low cost supply and very low prices. Price levels for strawberries are lower than for all other frozen berries and rates of market growth have also been relatively slow.

Most importers in Europe do not expect to pay high prices for frozen strawberries. There are a few large suppliers and, in the past, prices have been notoriously low. This has been partly because the major suppliers were centrally controlled economies and often governments subsidized exports to earn scarce foreign exchange. This has created an expectation within the European market that the product is a relatively low-cost one. The situation has changed somewhat with the privatization of the industry in some of these countries, but, to some extent, market trends are set.

Equally, on the demand side, there are very large, powerful buying organizations which enter

and exit the market at will. They run down inventory when prices are rising and re-enter the market when prices are at levels low enough to attract them. Almost all major users carry inventory as a matter of course, although the increasing need for "just in time" delivery and production makes this practice less justifiable than in the past.

The trade in the UK, like that of Germany, is totally locked in to the Senga Sengana variety of strawberry from northern Europe. They are bought in large quantities at prices which are around \$1.10 per kilo delivered duty paid. It will be practically impossible for Kenya to compete at this level, either in terms of variety or landed price. Kenyan berries would probably be discounted because of the fact that they were not the right varieties and it is unlikely that a break even level would be reached.

The total market for frozen strawberries from countries other than Poland, the Netherlands and other European countries is negligible and is unlikely to exceed 600 tons per annum. It is not a market to which Kenya should devote time or money.

SECTION XII: SELECT FROZEN VEGETABLES

Ranking Overview

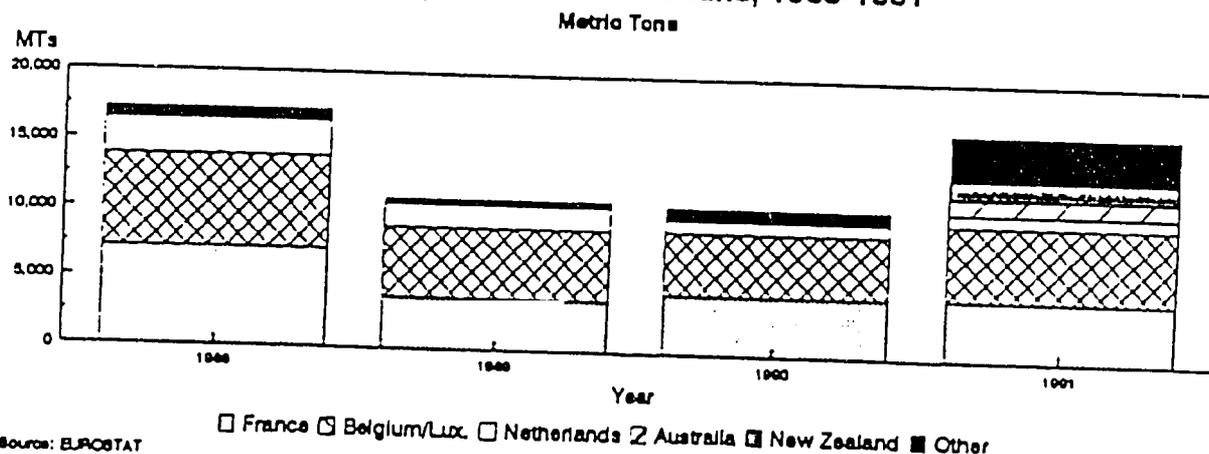
<u>Product</u>	<u>Ranking</u>	<u>Notes</u>
Frozen Fine Beans	2	A niche exists for 300 to 400 tons per year into the EC of high quality, smaller diameter green beans
Frozen Mangetout	2	A potential niche for a few hundred tons of particularly high quality snow peas adhering to very strict specifications

GREEN BEANS

Imports

The United Kingdom was the third largest importer of frozen beans in the European Community, behind Germany and France. 1991 imports stood at 16,438 tons. This was lower than 1988 imports of 17,276 tons, but up dramatically from the 10,934 tons recorded in 1989 and the 10,675 tons recorded in 1990.

U.K. Imports of Frozen Beans, 1988-1991



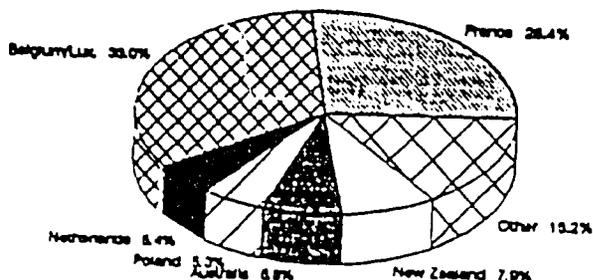
Market Share

The major supplier of frozen beans to the United Kingdom in 1991 was Belgium/Luxembourg with 5,420 tons. France was the second largest supplier with 4,342 tons. Distant source suppliers were New Zealand (1,302 tons), Australia (1,122 tons), Canada (513 tons), and South Africa (506 tons). There were also supplies from the central European countries of Poland (875 tons) and Hungary (650 tons).

In total, the UK received 70% of its imports from other EC countries, with only 5,000 tons coming from countries outside the Common Market.

Import Share - Frozen Beans

1991, by weight



Source: EUROSTAT

Specifications

The only prospects for frozen beans from distant sources is for the extra fine beans. All other beans are available from relatively nearby suppliers.

The length of the extra fine beans should be around 3.5", with a diameter of between 5-7mm. If a product of 5mm can be produced, there is a good market, both in the UK and Germany. The length is not that crucial, but the diameter is.

Price

Attainable prices would vary around the US\$1.00/lb FOB Mombasa, but this would be attainable only if specifications adhered strictly to the 5-6mm diameter requirement.

Packaging

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

Market Prospects

France and Belgium/Luxembourg are supplying very large quantities of frozen beans to other European countries. Some of these are imported fresh from Kenya and frozen in France. They deliver them at around US\$1.31 per kilo. This is a very low price, but it is for beans which vary in diameter up to 10mm.

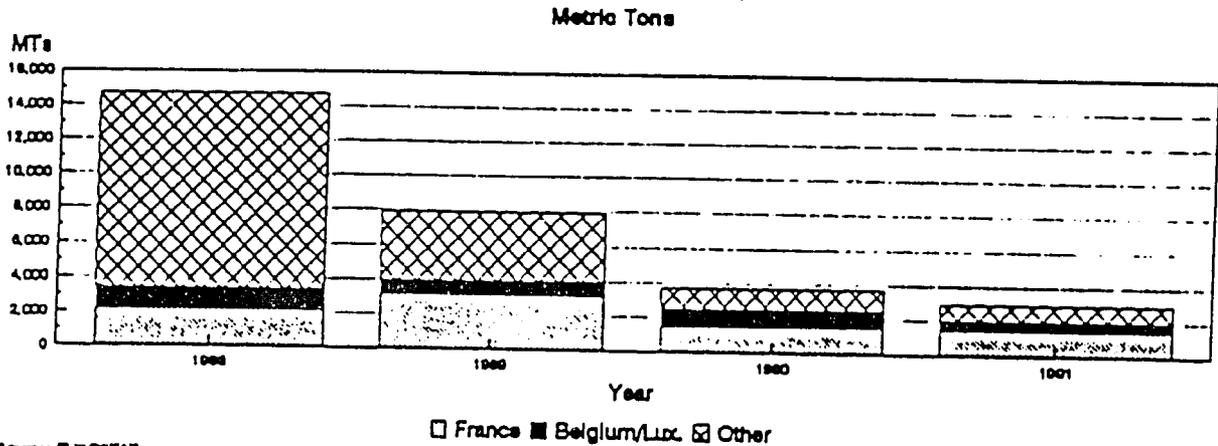
A definite niche does exist in the market for the smaller diameter bean and it is estimated that a potential European market of around 300-400 tons per year could be established. Quality would have to be consistently high, however.

MANGETOUT (SNOWPEAS)

Imports/Market Share

In 1990, the total market in the EC for imported frozen peas amounted to some 98,000 tons. Of this total, by far the largest importer was Italy, followed by Germany and Spain. During that year, the UK only imported some 3,700 tons of frozen peas, of which over 3,000 tons came from within the EEC itself. This total for 1990 represented a significant reduction on over 7,800 tons being imported in 1989 and over 14,600 tons in 1988.

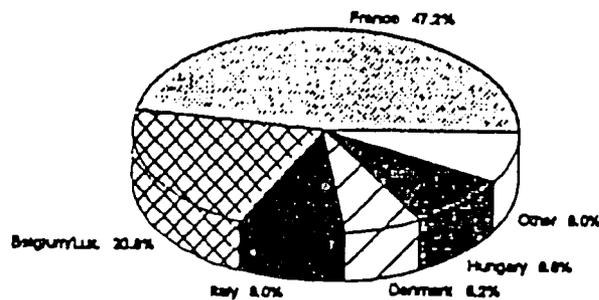
U.K. Imports of Frozen Peas, 1988-1991



Source: EUROSTAT

The major suppliers to the UK were France and Belgium/Luxembourg, with some product coming from central European countries.

Import Share - Frozen Peas 1991, by weight



Source: EUROSTAT

Since the statistics do not differentiate between ordinary peas and snow peas, it is difficult to get a clear indication as to the total amounts of the latter product actually imported.

Specifications

The peas should not be in excess of 8cm in length, should be dark green in color, non-stringy and medium-sweet.

Price

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

Market Prospects

The major problem facing new entrants to the market is the emergence of China as a supplier of extremely cheap product. The above quoted prices are those for Chinese snowpeas arriving in the UK and it is not expected that the situation is going to alter very much. Although political disturbances in China did lead to the belief that there would be some disruption to the supply, it appears that this has not happened. Production facilities and quality control are increasing apace in China and there is consistent improvement in landed quality.

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

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APPENDIX A

EUROPEAN COMMUNITY IMPORT STATISTICS

Table 1: U.K. Imports of Fresh/Chilled Asparagus, 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
Spain	184	334	480	650	727	1,384	1,538	1,521
Kenya	n/a	n/a	n/a	1	n/a	n/a	n/a	1
USA	1,006	790	659	783	2,700	2,263	1,930	1,970
Mexico	n/a	152	n/a	141	n/a	602	n/a	300
Peru	n/a	72	227	86	n/a	281	727	278
Chile	202	245	214	209	731	815	623	638
Argentina	49	5	71	92	111	19	230	349
Thailand	n/a	n/a	127	90	n/a	n/a	577	512
Other	388	260	267	154	1,419	969	661	385
Total	1,829	1,858	2,045	2,206	5,688	6,333	6,286	5,954
Intra-EC	237	413	540	723	880	1,595	1,702	1,672
Extra-EC	1,592	1,445	1,505	1,483	4,808	4,738	4,584	4,282

Source: EUROSTAT

Table 2: U.K. Imports of Fresh/Chilled Asparagus, 1988-1991, Unit Value

	ECU/MT			
	1988	1989	1990	1991
Spain	3,951	4,144	3,204	2,340
Kenya	n/a	n/a	n/a	1,000
USA	2,684	2,865	2,929	2,516
Mexico	n/a	3,961	n/a	2,128
Peru	n/a	3,903	3,203	3,233
Chile	3,619	3,327	2,911	3,053
Argentina	2,265	3,800	3,239	3,793
Thailand	n/a	n/a	4,543	5,689
Other	3,657	3,727	2,476	2,500
Total	3,110	3,409	3,074	2,699

Source: EUROSTAT

Table 3: U.K. Imports of Fresh/Dried Avocados, 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
France	85	1,220	2,943	2,113	161	1,698	4,054	2,535
Netherlands	333	250	451	343	473	325	661	452
Spain	672	766	1,459	2,283	1,013	1,155	1,468	2,885
Canary Islands	1,251	965	1,050	801	1,854	1,545	1,414	913
Kenya	774	681	831	685	1,115	909	1,082	1,029
South Africa	4,387	5,956	0	5,958	7,080	8,531	0	7,205
Namibia	n/a	n/a	4,854	0	n/a	n/a	7,119	0
USA	2,360	1,795	217	496	3,377	2,660	290	491
Mexico	1,161	1,232	1,818	564	1,639	1,428	2,293	645
Israel	1,705	1,133	89	2,047	3,190	1,808	139	2,239
Other	282	402	513	367	448	607	1,402	532
Total	13,010	14,400	14,225	15,657	20,350	20,666	19,922	19,107
Intra-EC	1,205	2,471	5,015	4,938	1,857	3,542	7,168	5,372
Extra-EC	11,805	11,929	9,210	10,719	18,493	17,124	12,754	12,735

Source: EUROSTAT

Table 4: U.K. Imports of Fresh/Dried Avocados, 1988-1991, Unit Value

	ECU/MT			
	1988	1989	1990	1991
France	1,894	1,392	1,378	1,238
Netherlands	1,420	1,300	1,466	1,318
Spain	1,507	1,508	1,006	1,264
Canary Islands	1,482	1,601	1,347	1,140
Kenya	1,441	1,335	1,302	1,502
South Africa	1,614	1,432	n/a	1,209
Namibia	n/a	n/a	1,467	n/a
USA	1,431	1,482	1,336	990
Mexico	1,412	1,159	1,261	1,144
Israel	1,871	1,596	1,562	1,094
Other	1,589	1,510	2,733	1,722
Total	1,564	1,435	1,400	1,220

Source: EUROSTAT

Table 5: U.K. Imports of Fresh/Chilled Beans (*vigna* spp., *phaseolus* spp.), 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
France	101	109	84	84	97	121	90	74
Belgium/Lux.	105	53	20	12	80	34	29	11
Netherlands	222	394	675	713	471	793	1,304	2,281
Italy	82	57	236	166	107	65	245	187
Spain	1,114	1,035	1,390	1,122	1,219	1,215	1,970	1,600
Canary Islands	373	234	294	270	551	407	483	407
Morocco	23	0	0	0	36	0	0	0
Egypt	239	192	176	230	316	244	237	194
Ethiopia	107	126	15	20	146	169	22	21
Zimbabwe	n/a	n/a	n/a	534				1,067
Kenya	2,977	4,119	4,652	4,683	5,273	7,129	8,765	10,234
Other	436	613	760	590	530	594	929	485
Total	5,779	6,932	8,302	8,424	8,826	10,771	14,074	16,561
Intra-EC	1,804	2,055	2,712	2,463	2,129	2,542	3,891	4,317
Extra-EC	3,975	4,877	5,590	5,961	6,697	8,229	10,183	12,244

Source: EUROSTAT

Table 6: U.K. Imports of Fresh/Chilled Beans (*vigna* spp., *phaseolus* spp.), Unit Value

	ECU/MT			
	1988	1989	1990	1991
France	960	1,110	1,071	881
Belgium/Lux.	762	642	1,450	917
Netherlands	2,122	2,013	1,932	3,199
Italy	1,305	1,140	1,038	1,127
Spain	1,094	1,174	1,417	1,426
Canary Islands	1,477	1,739	1,643	1,507
Morocco	1,565	n/a	n/a	n/a
Egypt	1,322	1,271	1,347	843
Ethiopia	1,364	1,341	1,467	1,050
Zimbabwe	n/a	n/a	n/a	1,998
Kenya	1,771	1,731	1,884	2,185
Other	1,216	969	1,222	822
Total	1,527	1,554	1,695	1,966

Source: EUROSTAT

Table 7: U.K. Imports of Frozen Beans, 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
France	7,132	3,725	4,275	4,342	5,387	3,141	3,927	3,851
Belgium/Lux.	6,729	5,126	4,553	5,420	4,172	3,309	3,201	4,793
Netherlands	2,529	1,582	838	882	1,880	1,209	628	586
Germany	n/a	40	155	413	n/a	33	101	265
Poland	208	58	22	875	83	21	10	359
Hungary	n/a	235	298	650	n/a	140	157	318
South Africa	n/a	n/a	n/a	506	n/a	n/a	n/a	348
Canada	n/a	n/a	n/a	513	n/a	n/a	n/a	210
Australia	n/a	n/a	n/a	1,122	n/a	n/a	n/a	676
New Zealand	n/a	n/a	n/a	1,302	n/a	n/a	n/a	913
Other	678	168	534	413	416	124	387	312
Total	17,276	10,934	10,675	16,438	11,938	7,977	8,411	12,653
Intra-EC	16,667	10,640	10,260	11,444	11,616	7,814	8,163	9,792
Extra-EC	609	294	415	4,994	322	163	248	2,861

Source: EUROSTAT

Table 8: U.K. Imports of Frozen Beans, Unit Value

	ECU/MT			
	1988	1989	1990	1991
France	755	843	919	890
Belgium/Lux.	620	646	703	884
Netherlands	743	764	749	664
Germany		825	652	642
Poland	399	362	455	422
Hungary		596	527	489
South Africa				688
Canada				409
Australia				602
New Zealand				701
Other	614	738	725	755
Total	691	730	788	770

Source: EUROSTAT

Table 9: U.K. Imports of Fresh/Chilled Capsicum or Pimenta, 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
Netherlands	n/a	133	127	250	n/a	291	266	475
Gambia	n/a	n/a	n/a	465	n/a	n/a	n/a	796
Kenya	n/a	215	236	327	n/a	492	525	763
Uganda	n/a	n/a	n/a	132	n/a	n/a	n/a	272
Zambia	n/a	n/a	240	281	n/a	n/a	562	686
Jordan	n/a	n/a	n/a	111	n/a	n/a	n/a	74
Other	1,387	1,042	745	344	1,793	1,382	1,071	634
Total	1,387	1,390	1,348	1,910	1,793	2,165	2,424	3,700
Intra-EC	633	544	182	327	465	698	322	616
Extra-EC	754	846	1,166	1,583	1,328	1,467	2,102	3,084

Source: EUROSTAT

Table 10: U.K. Imports of Fresh/Chilled Capsicum or Pimenta, 1988-1991, Unit Value

	ECU/MT			
	1988	1989	1990	1991
Netherlands		2,188	2,094	1,900
Gambia				1,712
Kenya		2,288	2,225	2,333
Uganda				2,061
Zambia			2,342	2,441
Jordan				667
Other	1,293	1,326	1,438	1,843
Total	1,293	1,558	1,798	1,937

Source: EUROSTAT

Table 11: U.K. Imports of Fresh/Dried Mangos and Mangosteen, 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
Netherlands	132	350	303	299	211	511	516	516
Mali	66	116	179	1,321	515	159	1,234	516
Gambia	n/a	n/a	n/a	461	n/a	n/a	n/a	656
Kenya	358	258	302	121	601	483	546	576
South Africa	253	381	314	179	500	643	552	251
USA	1,361	1,628	2,219	2,219	1,662	1,837	2,491	322
Mexico	788	1,086	433	509	1,193	1,513	441	2,777
St. Lucia	n/a	n/a	n/a	449	n/a	n/a	n/a	514
Jamaica	n/a	n/a	n/a	1,189	n/a	n/a	n/a	439
Venezuela	2,150	2,012	1,848	1,872	3,386	3,012	2,750	2,245
Peru	299	379	279	199	554	695	504	2,672
Brazil	623	789	513	796	1,234	1,600	846	352
Pakistan	1,278	1,082	1,377	1,694	1,391	166	1,485	1,118
India	839	856	809	859	1,597	1,328	1,208	1,874
Israel	n/a	277	89	226	n/a	356	116	1,195
Other	1,994	1,715	1,775	1,368	2,526	3,611	2,514	307
Total	10,141	10,929	10,440	13,761	15,370	15,714	15,203	17,883
Intra-EC	171	751	489	732	265	1,075	916	1,218
Extra-EC	9,970	10,178	9,951	13,029	15,105	14,639	14,287	16,665

Source: EUROSTAT

Table 12: U.K. Imports of Fresh/Dried Mangos and Mangosteen, 1988-1991, Unit Value

	ECU/MT			
	1988	1989	1990	1991
Netherlands	1,598	1,460	1,703	1,732
Mali	7,803	1,371	6,894	479
Gambia				1,249
Kenya	1,679	1,872	1,808	2,074
South Africa	1,976	1,688	1,758	1,799
USA	1,221	1,128	1,123	1,251
Mexico	1,514	1,209	1,018	1,010
St. Lucia				973
Jamaica				1,888
Venezuela	1,575	1,497	1,488	1,427
Peru	1,853	1,834	1,806	1,769
Brazil	1,981	2,028	1,649	1,405
Pakistan	1,088	153	1,078	1,106
India	1,903	1,551	1,493	1,391
Israel		1,285	1,303	1,358
Other	1,267	2,106	1,416	1,528
Total	1,516	1,438	1,456	1,300

Source: EUROSTAT

Table 13: U.K. Imports of Canned Passionfruit and Guavas, 1990-1991

	Metric Tons		1,000 ECUs		Unit Value, ECU/MT	
	1990	1991	1990	1991	1990	1991
Netherlands	n/a	2	n/a	6		3,000
Zimbabwe	n/a	46	n/a	30		652
South Africa	n/a	205	n/a	198		966
Mexico	n/a	6	n/a	9		1,500
Thailand	n/a	3	n/a	4		1,333
Other	232	0	208	0	897	
Total	232	262	208	247	897	943
Intra-EC	9	2	15	6	1,667	3,000
Extra-EC	223	260	193	241	865	927

Source: EUROSTAT

Table 14: U.K. Imports of Fresh/Chilled Peas (*Pisum Sativum*), 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
France	139	369	387	746	181	342	315	
Netherlands	19	35	18	93	23	47	34	
Italy	118	200	274	726	161	236	382	893
Spain	61	75	12	67	95	140	25	174
Morocco	151	202	61	117	306	483	178	302
Nigeria	n/a	n/a	n/a	102	n/a	n/a	n/a	195
Kenya	n/a	n/a	n/a	11	n/a	n/a	n/a	26
Zambia	n/a	541	731	515	n/a	1,246	1,404	1,027
Zimbabwe	260	572	996	1,200	701	1,353	1,999	2,603
USA	n/a	n/a	n/a	575	n/a	n/a	n/a	845
Guatemala	737	893	1,108	1,251	1,425	1,895	2,415	2,958
Other	1,429	1,214	708	484	2,442	1,274	1,042	285
Total	2,914	4,101	4,295	5,887	5,334	7,016	7,794	9,912
Intra-EC	591	1,370	816	1,010	680	1,261	873	1,822
Extra-EC	2,323	2,731	3,479	4,877	4,654	5,755	6,921	8,090

Source: EUROSTAT

Table 15: U.K. Imports of Fresh/Chilled Peas ("*Pisum Sativum*"), 1988-1991, Unit Value

	ECU/MT			
	1988	1989	1990	1991
France	1,302	927	814	654
Netherlands	1,211	1,343	1,889	1,247
Italy	1,364	1,180	1,394	1,230
Spain	1,557	1,867	2,083	2,597
Morocco	2,026	2,391	2,918	2,581
Nigeria				1,912
Kenya				2,364
Zambia		2,303	1,921	1,994
Zimbabwe	2,696	2,365	2,007	2,169
USA				1,470
Guatemala	1,934	2,122	2,180	2,365
Other	1,709	1,049	1,472	589
Total	1,830	1,711	1,815	1,684

Source: EUROSTAT

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Table 16: U.K. Imports of Frozen Peas, 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
France	2,107	3,138	1,454	1,405	1,665	2,440	1,177	1,067
Belgium/Lux.	1,279	841	1,090	618	840	615	783	495
Netherlands	561	120	39	72	324	83	24	33
Germany	614	27	84	26	385	21	56	14
Italy	n/a	1,914	30	267	n/a	1,144	27	255
Denmark	2,232	783	393	185	1,892	640	395	174
Sweden	2,655	0	0	0	1,812	0	0	0
Yugoslavia	120	0	0	0	63	0	0	0
Hungary	688	529	280	261	271	206	134	117
USA	1,528	n/a	n/a	0	1,044	n/a	n/a	0
China	n/a	0	47	90	n/a	0	66	120
New Zealand	2,577	n/a	n/a	0	1,618	n/a	n/a	0
Other	322	522	290	51	254	403	264	66
Total	14,683	7,874	3,707	2,975	10,168	5,552	2,926	2,341
Intra-EC	9,622	7,322	3,143	2,594	7,050	5,304	2,501	2,061
Extra-EC	5,061	552	564	381	3,118	248	425	280

Source: EUROSTAT

Table 17: U.K. Imports of Frozen Peas, Unit Value

	ECU/MT			
	1988	1989	1990	1991
France	790	778	809	759
Belgium/Lux.	657	731	718	801
Netherlands	578	692	615	458
Germany	627	778	667	538
Italy		598	900	955
Denmark	848	817	1,005	941
Sweden	682			
Yugoslavia	525			
Hungary	394	389	479	448
USA	683			
China			1,404	1,333
New Zealand	628			
Other	789	772	910	1,294
Total	693	705	789	787

Source: EUROSTAT

Table 18: U.K. Imports of Fresh Strawberries, 1989-1991

	Metric Tons			1,000 ECUs		
	1989	1990	1991	1989	1990	1991
France	2,600	1,496	1,836	4,648	2,914	3,448
Belgium/Lux.	1,285	1,545	1,891	3,106	3,382	6,315
Netherlands	3,117	4,046	2,803	8,831	10,606	8,956
Germany	40	211	202	49	242	241
Italy	734	470	896	1,429	2,750	2,128
Portugal	592	502	699	998	940	1,261
Spain	9,342	8,944	8,693	17,378	18,915	18,094
Poland	423	31	59	202	8	49
Kenya	476	467	303	1,173	827	545
USA	353	552	851	561	1,097	1,368
Colombia	n/a	156	320	n/a	518	1,235
Israel	224	169	131	945	601	568
Other	500	487	1,154	1,096	905	1,838
Total	19,686	19,084	19,838	40,416	43,705	46,046
Intra-EC	17,869	17,432	17,595	36,618	40,053	41,029
Extra-EC	1,817	1,652	2,243	3,798	3,652	5,017

Source: EUROSTAT

Table 19: U.K. Imports of Fresh Strawberries, Unit Value

	ECU/MT		
	1989	1990	1991
France	1,788	1,948	1,878
Belgium/Lux.	2,417	2,189	3,340
Netherlands	2,833	2,621	3,195
Germany	1,225	1,147	1,193
Italy	1,947	5,753	2,375
Portugal	1,686	1,873	1,804
Spain	1,860	2,115	2,081
Poland	478	258	831
Kenya	2,464	1,771	1,799
USA	1,589	1,987	1,608
Colombia		3,321	3,859
Israel	4,219	3,556	4,336
Other	2,192	1,858	1,593
Total	2,053	2,290	2,321

Source: EUROSTAT

Table 20: U.K. Imports of Fresh/Chilled Tomatoes, 1988-1991

	Metric Tons				1,000 ECUs			
	1988	1989	1990	1991	1988	1989	1990	1991
France	1,735	901	1,321	2,856	1,336	847	1,288	2,438
Belgium/Lux.	1,383	1,660	1,624	2,106	1,279	2,190	1,875	2,407
Netherlands	116,061	122,080	124,772	113,086	128,222	128,782	126,318	116,746
Germany	39	151	75	31	32	236	94	68
Italy	735	151	268	271	362	104	150	205
Spain	43,514	48,048	32,178	29,492	22,954	28,135	23,662	25,397
Canary Islands	99,097	96,547	88,400	96,911	78,164	66,915	83,877	85,847
Turkey	2	160	10	23	2	91	6	14
Morocco	632	775	826	3,446	533	551	626	2,833
Kenya	n/a	n/a	n/a	1	n/a	n/a	n/a	1
Israel	773	533	865	474	1,339	385	808	408
Other	2,142	1,572	2,817	2,457	1,940	1,399	2,890	2,312
Total	266,113	272,578	253,156	251,154	236,163	229,635	241,594	238,676
Intra-EC	165,998	174,187	162,599	149,838	155,598	161,348	155,729	149,032
Extra-EC	100,115	98,391	90,557	101,316	80,565	68,287	85,865	89,644

Source: EUROSTAT

Table 21: U.K. Imports of Fresh/Chilled Tomatoes, Unit Value

	ECU/MT			
	1988	1989	1990	1991
France	770	940	975	854
Belgium/Lux.	925	1,319	1,155	1,143
Netherlands	1,105	1,055	1,012	1,032
Germany	821	1,563	1,253	2,194
Italy	493	689	560	756
Spain	528	586	735	861
Canary Islands	789	693	949	886
Turkey	1,000	569	600	609
Morocco	843	711	758	822
Kenya				1,000
Israel	1,732	722	934	861
Other	906	890	1,026	941
Total	887	842	954	950

Source: EUROSTAT

APPENDIX B

REPRESENTATIVE LIST OF U.K. IMPORTERS

Appendix B: Representative List of U.K. Importers

H & T Walker Ltd
Walker House
London Road
Riverhead
Sevenoaks

Kent TN13 2DN
Tel: 0732 450712
Fax: 0732 459288
Tlx: 95679

Dried Fruit, IQF

Voicevale Limited

Middlesex House
29-45 High Street
Edgware

Middlesex HA8 7HH

Tel: 081 952 7841

Fax: 081 951 5606

Tlx: 295523 VOVALE G

Dried Fruit

E E & Brian Smith (1928) Ltd.

76 Banbury Road

Oxford

OX2 6JT

Tel: 0865 311222

Fax: 0865 310662

Tlx: 83380

Juice

Fuerst Day Lawson Citrus Limited

St. Clare House

30-33 Minories

London EC3N 1LN

Tel: 071 488 0777

Fax: 071 488 9927

Tlx: 8952097

Juice

Peabody

Peabody House

Trading Estate

Addlestone

Weybridge

Surrey

KT15 2RP

Tel: 0932 853322

Fax: 0932 847533

Tlx: 934438 (A/B PEABODY G)

Canned Fruit

Stevens & Brotherton Ltd.

S & B House

2 Vinson Close

Knoll Rise

Orpington

Kent BR6 0XG

Tel: 0689 77799

Fax: 0689 75887

Tlx: 8956864 KNOBBY G

Canned Fruit

B E International Foods Ltd.

Grafton House

Stockingswater Road

Enfield

Middlesex EN3 7JZ

Tel: 081 804 8788

Fax: 081 804 1006

Tlx: 22740 BELDN G

Canned Fruit (Private Brand)

Biddle Sawyer Foods Ltd.
Unit 76 Lakeside Business Park
Powdermill Lane
Dartford
Kent DA1 1LP
Tel: 0322 287 797
Fax: 0322 287 785
Tlx: 893311 BSGRP
Dried Fruit, IQF

Jack L. Israel Group plc
JLI House
P O Box 54
Guildford Street
Chertsey
Surrey KT16 9ND
Tel: 0932 569600
Fax: 0932 569582/3/4
Canned Fruit, Juice, IQF

Gerald McDonald & Co. Ltd.
1 St. Andrew's Hill
London EC4V 5HA
Tel: 071 236 3695
Fax: 071 248 7267
Tlx: 8812098
Juice

Kiril Mischeff (Juices) Ltd.
Broad Wall House
21 Borad Wall
London SE1 9PL
Tel: 071 928 8966
Fax: 071 261 9085
Tlx: 25450 & 88220
Juice

S & S Services Ltd.
Abford House
15 Wilton Road
London SW1V 1NE
Tel: 071 828 9351/6
Fax: 071 630 6303
Tlx: 21621
Juice

Jren H J & Sons Ltd.
Orchard House
50 Pensby Road
Heswall, Wirral
Merseyside L60 7RE
Tel: 051 342 6276
Fax: 051 342 8604
Tlx: 627903
IQF

Wilson & Mansfield Ltd.
Haddon House
Hindhead Road
Haslemere
Surrey GU27 1LH
Tel: 0428 651331
Fax: 0428 61438
Tlx: 858613
Juice

Sunbird Foods Limited
New Lodge
Drift Road
Windsor
Berkshire
Tel: 0344
Fax: 893333
Tlx: 848752
IQF, Mango in Brine

Hoo Hing Limited
Eastway Commercial Centre
Eastway
Hackney
London E9 5NR
Tel: 071 533 2811
Canned Fruit

Geest Produce Marketing Division
Whitehouse Chambers
Spalding
Lincolnshire
Tel: 0775 61111

Growers Choice
Western International Market
Hayes Road
Southall
Middx
Tel: 081 848 4445
Fax: 081 569 3189

Mack Multiples
Transfesa Road
Paddock Wood
Kent TN12 6 UT
Tel: 0892 835577
Fax: 0892 834890
Tlx: 95215

Puopart Limited
Station Approach
Waltham Cross
Hertfordshire EN8 7LU
Tel: 0992 700711
Fax: 0992 768223
Tlx: 266351

Saphir Produce Limited
The Old Malt House
Minnis Road
Birchington
Kent CT7 9SG
Tel: 0843 45671
Fax: 0843 45621
Tlx: 965775
Contact: Mr. P.N. West

J O Sims Limited
16 Winchester Walk
Borough Market
London SE1 9AQ
Tel: 071 407 0756
Fax: 071 403 4889
Tlx: 885386
Contact: Mr. C.O. Simms, Director

Snaith Salad Growers Limited
West Bank
Carlton Goole
North Humberside DN14 9QA
Tel: 0405 860354
Fax: 0405 860502

American Fruit Importers Ltd.
Unit T
Paddock Wood Distribution Centre
Paddock Wood
Kent TN12 6UU
Tel: 089283 4911
Fax: 089283 4065
Contact: Mr. D. Kemp, Managing Director
Mr. D. Tunbridge, Sales Executive

Exotic Farm Produce
628 Spur Road
Feltham
Middlesex TW14 05X
Tel: 081 890 2222
Fax: 081 890 2621
Contact: Mr. M. Paske

Frumar Ltd.
Tolworth Tower
Tolworth
Surbiton
Surrey KT6 7EL
Tel: 081 390 1133
Fax: 081 399 3499
Contact: Mr. M. Bradnum, Dept. Dir.

FTK (London) Ltd.
Room 58-59
London Fruit Exchange
London E1
Tel: 071 247 0661
Fax: 071 375 2050
Contact: Mr. B. James, Managing Dir.

Geest Industries, Ltd.
White House Chambers
Spalding
Lincolnshire PE11 2AL
Tel: 0775 761111
Fax: 0775 760254
Contact: Mr. N. Pell, Exotics Division

Koolkat (UK) Ltd.
37/38 Bridge Street
Godalming
Surrey GU7 1HP
Tel: 0483 426777
Fax: 0483 426937
Contact: Mr. T.R. Nicholson, Director

Griffin & Brand (European) Ltd.
Trophy House
Leacon Road
Ashford
Kent TN23 2TY
Tel: 0233 645941
Fax: 0233 639340
Contact: Mr. A.J. Elliot, Chairman

Hoche International Ltd.
Ikea Tower
4th Floor
255 North Circular Rd.
NW10
Tel: 081 459 8822
Fax: 081 451 1807
Contact: Mr. T. Galeotalanza, Director

Janic (Import-Export) Ltd.
Orchard Court
4 Station Square
Balgores Lane
Gidea Park
Essex RM2 6AT
Tel: 0708 766455
Fax: 0708 732535
Contact: Mr. T. Watts, Managing Director

Mack Multiples Ltd.
Transfesa Road
Paddock Wood
Kent TN12 6UT
Tel: 089283 5577
Fax: 089283 4890
Contact: Mr. D.C. Nastri, Sales Director

Sunzest Ltd. (part of Polly Peck Int. plc)
Paddock Wood Distribution Centre
Paddock Wood
Kent TN12 6UU
Tel: 089283 6111
Fax: 089283 2862
Contact: Mr. C. Reece, Sales Executive

Wealmoor Ltd.
Jetha House
Springfield Road
Hayes
Middlesex UB4 0JT
Tel: 081 569 1760
Fax: 081 569 1755
Contact: Mr. H. Dodhia

Wentworth Import & Export Limited
124/130 Wandsworth Road
London SW8 2LB
Tel: 071 720 5864
Fax: 071 622 3076
Tlx: 8954927

White & Son Ltd. (J P Produce)
London Fruit Exchange
Spitalfields
London E1 6EU
Tel: 071 247 1401
Fax: 071 377 6452
Tlx: 887324

World Fresh Organisation Limited
290a Ewell Road
Surbiton
Surrey KT6 7AQ
Tel: 081 390 8416
Fax: 081 390 4338
Tlx: 914800

Packers/Bottlers

Realfruit
Palm Oak Corporation (UK) Ltd
150 Ealing Road
Wembley
Middlesex
Tel: 081 903 7211
Fax: 081 903 2156
Packer/Bottler: Juices (Private Brand)

St.Ivel Ltd.
St.Ivel House
Interface Business Park
Wootton Bassett
Swindon SN4 8QF
Tel: 0793 848444
Fax: 0793 848555
Tlx: 444510
Packer/Bottler: Juice, IQF

Whitworths Limited
Victoria Mills
Wellingborough
Northants
NN8 2DT
Tel: 0933 441000
Fax: 0933 227420
Tlx: 311352
**Packer/Bottler: Dried Fruit
(Private Brand)**

Del Monte Foods Ltd.
Del Monte House
London Road
Staines
Middlesex
TW18 4JD
Tel: 0784 461555
Fax: 0784 460281
Tlx: 295991
**Packer/Bottler: Juice, Canned Fruit
(Premium Brand)**

Princes Foods Ltd.
6th Floor
Royal Liver Building
Liverpool L3 1NX
Tel: 051 236 9282
Fax: 051 236 1057
Tlx: 628095 PRINFD G
**Packer/Bottler: Canned Fruit, Juices
(Premium Brand)**

J.A. Sharwood & Co. Ltd.
Sharwood House
Church Road
Egham
Surrey
TW20 9QG
Tel: 0784 473000
Fax: 0784 437093
Tlx: 911744
**Packer/Bottler: Mango in Brine
(Premium Brand)**

Gerber Foods International Ltd.
Northway House
1379 High Road
Whetstone
London N20 9LP
Tel: 081 446 1424
Fax: 081 446 4128
Tlx: 269379 GFILDN G
Packer/Bottler: Juice (all brands)

Britvic Soft Drinks Ltd.
Britvic House
Broomfield Road
Chelmsford
Essex CM1 1TU
Tel: 0245 261871
Fax: 0245 267147
Tlx: 99173
Packer/Bottler: Juice (Premium Brand)

Cadbury Schweppes plc.
1/4 Connaught Place
London W2 2EX
Tel: 071 262 1212
Fax: 071 262 1212
Tlx: 334413
Packer/Bottler: Juice (Premium Brand)

CWS Retail Ltd (Drinks Factory)
45-75 Bogmoor Road
Shield Hall
Glasgow
Scotland G51 4TJ
Tel: 041 440 2585
Fax: 041 445 3053
Tlx: 776171
Packer/Bottler: Juice (Private Brand)

County Dairies
Langford Lane
Kidlington
Oxfordshire
OX5 1JB
Tel: 08675 78111
Fax: 08675 78334
Tlx: 037392
Packer/Bottler: Juice (all brands)

Heald's Dairies
3 Elm Grove
Didsbury
Manchester M20 0RL
Tel: 061 445 8841
Fax: 061434 5602
Tlx: 669208
Packer/Bottler: Juice (all brands)

Community Foods Limited
Micross
Brent Terrace
London NW2 1LT
Tel: 081 450 9411
Fax: 081 208 1803
Tlx: 8955257
Packer/Wholesaler: Dried Fruit

Alara Wholefoods Ltd.
Units 4 & 5 Camley Street
London NW1 1XX
Tel: 071 387 9303
Fax: 071 388 6077
Packer - Wholesale: Dried Fruit

Rubicon Products Limited
Rubicon House
Orinbridge Close
Great Central Way
London
NW10 0UF
Tel: 081 451 4434
Fax: 081 451 0344
Packer: Juice (Private Brand)

Cima Foods Limited
Portmanmoor Road
East Moors
Cardiff
CF2 2HB
Tel: 0222 465335
Fax: 499425
Tlx: 497109 CIMA G
Packer: Juice (all brands)

G Costa & Co. Ltd
Marlborough Works
39 Staffordshire Street
Peckham
London SE15
Tel: 071 639 3456
Packer: Canned Fruit (Private Brand)

A G Barr & Co. plc
1306 Gallow Gate
Glasgow G31 4DS
Tel: 041 554 1899
Fax: 041 554 5768
Tlx: 778807
Bottler: Juice

Kimpton Brothers Ltd.
10-14 Hewett Street
London EC2
Tel: 071 247 2072
Fax: 071 247 2784
Tlx: 263061 KIMBRO G
Dried Fruit

Lane & Ballard Ltd.
3rd Floor
Laurence House
91-93 Southwark Street
London SE1 0HX
Tel: 071 928 1298
Fax: 071 261 0607
Tlx: 888653 BLB G
Dried Fruit

Compound/Essence Companies

Barnett & Foster International
Dennington Estate
Wellingborough
Northants NN8 2QJ
Tel: 0933 440022
Fax: 0933 440053
Tlx: 311342

Bush-Boake-Allen
Black Horse Lane
Walthamstow
London E17 5QP
Tel: 081 531 4211
Fax: 081 531 7413
Tlx: 897808
Juice

International Flavourings and Fragrances
(GB) Ltd.
Duddery Hill
Haverhill
Suffolk
CB9 8LG
Tel: 0440 704488
Fax: 0440 61599
Tlx: 818881
Juice

Quest International
Kennington Road
Ashford
Kent TN24 0LT
Tel: 0233 644444
Fax: 0233 644146
Tlx: 96369
Juice

R C Treat & Co.
Northern Way
Bury St. Edmunds
Suffolk
IP32 6NL
Tel: 0284 702500
Fax: 0284 703809
Tlx: 8i583 G
Juice

Food Processors

Hillsdown Holdings plc
Hillsdown House
32 Hampstead High Street
London NW1 1QD
Tel: 071 794 0677
Fax: 071 435 1355
Tlx: 297220
Canned Fruit, Dried Fruit

H J Heinz Company Ltd
Hayes Park
Hayes
Middlesex UB4 8AL
Tel: 081 573 7757
Fax: 081 848 2325
Tlx: 261477
Canned Fruit, Dried Fruit

J Lyons & Co. Ltd.
Cadby Hall
London W14 0PA
Tel: 071 603 2040
Tlx: 224220
Canned Fruit, Dried Fruit

Peter Collins Foods Ltd.
Dartel House
2 Lumley Road
Horley
Surrey RH6 7JL
Tel: 0293 776771
Fax: 0293 820560
Tlx: 87502

Milk Marketing Board
Thames Ditton
Surrey KT7 0EI
Tel: 081 398 4101
Juice

Rank Hovis McDougall plc
RHM Centre
Alma Road
Windsor
Berkshire
SL4 3SD
Tel: 0753 857123
Fax: 0753 846537
Canned Fruit, Dried Fruit, IQF

Unigate plc
Unigate House
Western Avenue
London W3 0FH
Tel: 071 992 3400
Yogurt Manufacturer, Juice, IQF.

Multiple Retailers

Argyll Group plc
Argyll House
Millington Road
Hayes
Middlesex
UB3 4AY
Tel: 081 848 8744

Asda Group plc
Asda House
Southbank
Great Wilson Street
Leeds LS11 5AD
Tel: 0532 435435

Co-operative Retail Services Ltd
29 Dnatzic Street
Manchester M4 4BA
Tel: 061 832 8152

The Gateway Corporation plc
Stockley House
130 Wilton Road
London SW1V 1LU
Tel: 071 233 5353
Fax: 071 233 5254

Kwik Save Group plc
Warren Drive
Prestatyn
Clwyd LL19 7HU
Tel: 07456 87111

Marks & Spencer plc
Michael House
37-67 Baker Street
London W1A 1DN
Tel: 071 935 4422

J Sainsbury plc
Stamford House
Stamford Street
London SE1 9LL
Tel: 071 921 6000

Tesco plc
Tesco House
Delamere Road
Cheshunt
Herts EN8 9SL
Tel: 0992 32222
Fax: 0992 30794
Tlx: 24138

Waitrose Limited
Doncaster Road
Southern Industrial Estate
Bracknell Berkshire
RG12 4YA
Tel: 0344 424680
Tlx: 847271

W Wing Yip Ltd
96-98 Coventry Street
Birmingham B5 5NY
Tel: 021 643 2851

**Ethnic Supermarket: Canned Fruit,
Dried Fruit**

Campbells Frozen Foods Limited
Vegetable Division
Focus 31
Mark Road
Hemel Hempstead
Herts HP2 7BW
Tel: 0442 61116
Fax: 0442 212302
Tlx: 825552
Food Service Industry: IQF

Other Useful Addresses

The Foodnews Company
22a Sidcup High Street
Sidcup
Kent DA14 6EH
Tel: 081 300 7864
Fax: 081 302 8121
Tlx: 8954 109 FNLDN G

British Soft Drink Association Ltd (BSDA)
Catherine Street
London WC2B 5UA
Tel: 071 379 5737
Fax: 071 836 0580
Tlx: 299388

Leatherhead Food Research Association
Randalls Road
Leatherhead
Surrey
KT22 7RY
Tel: 0372 376761
Fax: 0372 386228
Tlx: 929846