Morocco's Horticultural Exports to Europe
A Quantitative and Qualitative Review

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1 Introduction

The objective of this study was to provide the Morocco Agribusiness Promotion Program (MAPP) with information about Morocco s exports to Europe of a variety of fresh and processed horticultural products and an analysis of Morocco s competitors In particular this study provides both a quantitative and qualitative look at Moroccan products by examining EU import statistics and the results of a questionnaire distributed to European buyers In addition this report provides information on countries competing with Morocco their exports to Europe participation in two important European tradeshows products and promotional materials

A survey of European buyers was undertaken to evaluate sales of Moroccan product and buyer attitudes regarding Moroccan products packaging quality and business practices Importers of a range of agricultural products including fresh, canned dried and frozen fruits and vegetables spices and essential oils were asked to fill out a two-page questionnaire on their purchases of and opinions about Moroccan products This questionnaire is attached as Annex 1 A total of 60 buyers were surveyed including 25 fresh produce importers, 7 buyers of canned products 14 importers of frozen fruits and vegetables 11 buyers of dried fruits and vegetables herbs and spices and 3 essential oil companies There were 29 respondents from the UK 5 from Holland 3 from Belgium 13 from Germany 1 from Switzerland and 9 from France

While the questionnaire did ask buyers how much product they had purchased from Morocco during the last year a fuller picture is provided by EU import statistics for 1992-1996 EU imports for a whole range of key products are examined in Section 2 of this report and Morocco s performance can be seen and compared to that of its competitors

The questionnaire did provide an interesting look at European buyer opinion regarding Moroccan products, which is presented in Section 3 of this report Buyers rated Moroccan products on a scale of 1 to 10 in several areas, including overall quality price supplier business practices and packaging In addition, buyers were asked to name specific strengths and weaknesses of Moroccan products and packaging

Both the Anuga and Food Ingredients Europe (FIE) tradeshows were also attended in order to evaluate the activities of Morocco's competitors The level of participation, exhibition booths, promotional materials and products of several competing countries are analyzed in Sections 4 and 5 of this report Section 6 of this report presents conclusions about Morocco s horticultural export performance drawn from a comparison of European buyer attitudes toward Moroccan products in 1995 and 1997 and analyses of trade statistics and tradeshow participation

2 European Imports of Moroccan Products - A Quantitative Analysis

2 1 Results of Buyer Survey

On the Buyer Survey questionnaire distributed to 60 European buyers (Annex 1) buyers were

Table 1 Volume and Value of Questionnaire Respondents Imports from Morocco Oct 96 Oct 97

Importer	Germany			France and Switzerland			UK			Benelux			Total	
Products	volume (MTs)	value (US$)	unit value (US$/kg)	volume (MTs)	value (US$)	unit value (US$/kg)	volume (MTs)	value (US$)	unit value (US$/kg)	volume (MTs)	value (US$)	unit value (US$/kg)	volume (MTs)	value (US$)
Fresh Strawberries							36						36	0
								320 000					0	320 000
Fresh Tomatoes	160	125 120	0 78	120	85 680	0 71	54						334	210 800
				2 500			20	9 600	0 48				2 520	9 600
Fresh Potatoes				3 000									3 000	0
Fresh Citrus				2 750			5 465			9 000	6 150 000	0 68	17 215	6 150 000
							100	48 000	0 48				100	48 000
							909	640 000	0 70				909	640 000
							70	40 000	0 57				70	40 000
Fresh Peppers	30	24 795	0 83				54						84	24 795
Fresh Unspecified	300	296 400	0 99										300	296 400
Subtotal Fresh Products	490	446 315		8 370	85 680		6 708	1 057 600		9 000	6 150 000		24 568	7 739 595
Canned Apricots				15			540	599 400	1 11/kg				555	599 400
Canned Olives							50						50	0
Canned Capers							80						80	0
Subtotal Canned Products	0	0		15	0		670	599 400		0	0		685	599 400
Fzn Strawberries	60	51 000	0 85	200			300	255 000	0 85	1 520			2 080	306 000
	40						300						340	0
Fzn Wild Straw				14									14	0
Fzn Blackberries				6									6	0
Fzn Orange Segments	20												20	0
Fzn Apricots										40			40	0
Subtotal Frozen Products	120	51 000		220	0		600	255 000		1 560	0		2 500	306 000
Coriander							180	144 000	0 80				180	144 000
Thyme				50	21 000	0 42	10	12 800	1 28				60	33 800
Fenugreek							5	5 600	1 12				5	5 600
Iris Roots				10	30 000	3 00							10	30 000
Verveine				50	340 000	6 80							50	340 000
Paprika				75	150 000	2 00							75	150 000
Rosemary	12	n/a											12	0
Peach leaves	2	n/a											2	0
Basil	4	n/a											4	0
Calendula	10	n/a											10	0
Subtotal Dried Veg/Spices	28	n/a		185	541 000		195	162 400		0	0		408	703 400
Orange Oil	13	n/a											13	0
Rosemary Oil							1	27 200	27 20				1	27 200
Subtotal Essential Oils	13						1	27 200					14	27 200
Orange Juice	400	800 000	2 00										400	800 000
Subtotal Juice	400	800 000											400	800 000
TOTAL	1 051	1 297 315		8 790	626 680		8 174	2 101 600		10 560	6 150 000		28 575	10 175 595

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asked how much product they bought from Morocco in the past year what they paid for it and what the final market for the product was Many importers were unwilling to divulge information about their trading activities and in particular information about prices However information from several companies surveyed is presented in Table 1 It should be kept in mind when reading this table that many respondents provided volumes but no prices or value information In some cases respondents estimated total value but would not hazard a guess as to the total volume Unit values are only provided when price or value information as well as volume information was given by the respondent

In all a total of 28 575 tons of horticultural products from Morocco were reportedly purchased by the respondents companies The vast majority of this amount (24 568 tons) was *fresh produce* and 74 percent of this was citrus This is no doubt due to the fact that 25 of the 60 survey respondents were fresh produce importers Only 685 tons of *canned products* were imported most of this accounted for by 540 tons of canned apricots 2 500 tons of *frozen products* were imported 97 percent of which was frozen strawberries A wide range of *dried products herbs and spices* were imported totalling 408 tons In addition 14 tons of *essential oils* (orange and rosemary) and 400 tons of *orange juice* were imported

The total value reported was only US$10 2 million, but this number doesn t nearly take into account all of the product reported shipped In many cases, buyers gave volumes but no prices or value figures with the result that the total volume of products imported from Morocco does not in any way correspond with the total value

2 2 EU Import Statistics

In order to provide a fuller picture of the market for key Moroccan products in Europe, we analyzed European Union import statistics for the period 1992-1996 The findings are presented below, as well as in the tables in Annex 2 Please note that we have only analyzed EU imports from non-EU sources, as cross-border EU trade statistics are unreliable especially for the period 1992-1994

Olive Oil

EU imports of olive oil fell by 54 percent in 1996, from 157 505 tons worth US$429 1 million to 72 795 tons worth US$300 8 million Tunisia is the main supplier but Tunisia s market share has dropped from 97 to 48 percent since 1992 Morocco, which supplied 13 094 tons worth US$53 5 million in 1996, has increased its exports of olive oil to Europe more than eight-fold since 1992 Morocco now accounts for 18 percent of European olive oil imports and is the third-largest supplier after Tunisia and Turkey The 1996 unit value of imports from Morocco at $4 087/ton, is the second-highest of the major suppliers, after Tunisia

Canned Apricots

South Africa and Morocco together account for 87 percent of EU canned apricot imports which totaled 32 013 tons worth US$35 4 million in 1996 Imports of canned apricots were up by 3 percent in 1996 and by 28 percent compared to 1992 Morocco has basically the same market share (43 percent) as in 1992 when it was the leading supplier but has since been overtaken by South Africa whose market share by volume is now 50 percent There is only an insignificant difference between the unit value of Moroccan product ($1 132/ton) and South African product ($1 054/ton)

Canned/Preserved Olives

Morocco dominates the European import market for canned and preserved olives accounting for 82 percent of the market by volume in 1996 Total EU imports stood at 69 278 tons worth US$113 7 million in 1996 a 6 percent decrease from 1995 but 45 percent higher than in 1992 Turkey is the second-largest supplier after Morocco accounting for 16 percent of the market The unit value for Turkish olives is considerably higher than for Moroccan product $2 403/ton versus $1 495/ton

Canned/Preserved Capers

The European import market for capers is relatively small, at 735 tons worth US$3 5 million 1996 imports were less than half 1994 levels Turkey is the leading supplier by volume but Morocco is the leader by value The unit value of Moroccan product was $6,325/ton in 1996 compared to $3,824 for Turkish product

Canned/Preserved Cucumbers and Gherkins (Cornichons)

The EU member nations imported 94,371 tons of canned/preserved cucumbers and cornichons in 1996, worth US$89 5 million European imports rose from less than 80 000 tons in 1993 to a high of 140,000 tons in 1994 and then fell to about 94,000 tons in 1995 Turkey is the leading supplier, with 62 percent of the market by volume and 64 percent by value, followed by Hungary (15 and 11 percent, respectively), Morocco (7 and 11 percent) and Croatia (7 and 4 percent) Moroccan product had the highest unit value in 1996, at $1,479/ton while the unit value for Turkish product was $983/ton

Dried Tomatoes

Turkey is the leading supplier of dried tomatoes to the EU an import market of 2,262 tons worth US$9 9 million in 1996 Import volumes of dried tomatoes grew by 27 percent in 1996 and by 46 percent since 1992 Turkey s market share by volume has increased from 25 to 55 percent since 1992, Chile's has increased from 8 to 12 percent and Israel s has increased from 2 to 10 percent Morocco s share of the market by volume has decreased from 16 to 7 percent over the same time period Moroccan and Chilean product have the highest unit values at around $6 000/ton while the other major suppliers have unit values of closer to $4 000/ton

Dried Apricots

In 1996 the EU imported 23 495 tons of dried apricots worth US$60 1 million Though imports were 7 percent less in 1996 than in 1995 the market has grown by 31 percent since 1992 Turkey is the dominant supplier accounting for 94 percent of the market by volume Iran the next largest supplier accounts for only 4 percent of the market Morocco sent 55 tons of dried apricots to the EU in 1996 compared to Turkey s 22 022 tons

Dried Peppers

This category includes both dried bell peppers and dried chilli peppers but is mostly made up of the latter There are many suppliers but Morocco is the largest accounting for 21 percent of the market As recently as 1992 Morocco held 48 percent of the market by volume but its exports to Europe have steadily declined since that time Zimbabwe in the meantime has increased its exports of dried peppers by over 2 000 percent since 1992 and is now the second-largest supplier by volume Of the leading suppliers, Hungary has the highest unit value at over $3 000/ton while Morocco and Zimbabwe have unit values of closer to $2 000/ton

Coriander

Russia has become the leading supplier of coriander to Europe in recent years, mainly by virtue of its low prices In 1996, Russia accounted for 43 percent of total European coriander imports of 10 887 tons, compared to only 7 percent in 1992 Morocco is the second-largest supplier behind Russia but despite having grown by 75 percent in 1996, Morocco s exports of coriander to Europe were still 42 percent lower than in 1992 Russian and Bulgarian coriander had unit values of around $400/ton in 1996, while Moroccan Indian and Egyptian product sold for twice this amount

Cumin

European imports of cumin increased by 21 percent in 1996 to 5 612 tons Iran is the leading supplier accounting for 37 percent of total imports by volume In 1992 Iran was the dominant supplier with 68 percent of the market, but Turkey Syria and India have since increased their market shares (so has the UAE, but these are mostly transshipments from other suppliers) The total market for cumin imports was worth $8 3 million, which was 15 percent less than in 1992 despite higher volumes, suggesting a decline in prices The unit value for product from the major suppliers ranged from US$1 463 for Turkey to US$1 889 for India

Frozen Beans

European imports of frozen beans have fallen by 42 percent since 1992 and stood at 18 487 tons worth US$18 3 million in 1996 Both Poland and Morocco two of the largest suppliers have seen their exports to Europe tumble by 60 and 70 percent respectively since 1992 while Hungary s have grown by 70 percent and China s by 43 percent over the same time period Morocco only accounted for 10 and 20 percent of total 1996 EU import volume and value respectively The unit value of Moroccan product at $1 488/ton is quite high compared to Polish product at $489/ton

Frozen Mixed Vegetables

The EU import market for frozen mixed vegetables is fairly small at just over US$4 million annually Hungary is the leading supplier with a 52 percent share of the market by volume in 1996 Morocco has 11 percent of the market, followed by Taiwan with 6 percent Imports have fluctuated in the last four years, from a high of almost 5 000 tons in 1992 to a low of less than 2 000 tons in 1994 and the subsequent recovery to 1996 import levels of 4 344 tons Morocco exported 467 tons of frozen mixed vegetables to Europe in 1996 worth US$550 000 1996 represented the third consecutive year of decline for Morocco in this category

Frozen Strawberries

EU imports of frozen strawberries reached a record 110,857 tons in 1996 worth US$107 6 million Poland accounted for 73 percent of all imports in 1996, followed by Turkey with 7 percent and Morocco with 4 percent Moroccan exports had risen from basically zero to almost 10,000 tons in 1995, but declined by 51 percent in 1996, to 4,796 tons with a value of US$4 1 million At $653/ton, the unit value of Moroccan product is lower than that of Poland at $701/ton

Frozen Raspberries

The re-emergence of Serbia as an official supplier in 1996 caused higher volumes and lower prices in the EU frozen raspberry market For the past several years, Serbian product had been sent to Europe through Macedonia because of trade sanctions against Serbia Poland and Chile had taken advantage of this opportunity to increase their market share during this time In 1996 however the market was flooded with relatively low-priced Serbian product causing the total volume of imports to rise 15 percent, while total value fell by 17 percent

Frozen Orange Juice

EU imports of frozen orange juice reached a record 760 194 tons worth US$959 6 million in 1996 Brazil is the dominant supplier, accounting for 82 percent of the market by volume The United States accounts for 13 percent Morocco Belize and Cuba are the next-largest suppliers, but none of them accounts for more than 1 percent of Europe s total imports Morocco s exports of frozen orange juice to the EU leapt from just over 1 000 tons in 1992 to over 13 000 tons in 1994 but since that time have decreased to about 7 000 tons worth US$11 9 million Morocco had the highest unit value of any major supplier of frozen orange juice at $1 313/ton

Apricot Pulp

EU imports of apricot pulp were down by 17 percent in 1996 to 9 083 metric tons Imports have grown however by 52 percent since 1992 South Africa is the leading supplier to this $14 3 million market with a 50 percent market share by volume followed by Morocco with 42 percent Moroccan supplies which have a per-ton unit value of $300 less than South Africa fell by more than 2 500 tons in 1996 while South Africa increased its supply to Europe for the third consecutive year

Fresh Apricots

The EU nations imported 6 729 tons of fresh apricots worth US$10 4 million in 1996 the third year of consecutive increase Almost the entire rise in imports however is accounted for by Hungary which sent 3,665 tons to the EU in 1996 Hungarian apricots have the lowest unit value of any of the major suppliers at only $928/ton South Africa is the leading supplier in terms of value The other major suppliers are the United States Chile and Turkey

Fresh Asparagus

EU imports of asparagus increased by 57 percent between 1992 and 1996, to 9,643 tons worth US$32 7 million Peru is the leading supplier, followed closely by the United States South Africa Hungary and Poland all of which supplied over 1,000 tons in 1996 Among the top suppliers the unit value varied from a low of $1,976/ton for Polish product to a high of $3 873/ton for South African product

Fresh Peppers

EU fresh pepper imports increased by 16 percent in 1996 to 58,110 tons worth US$75 8 million Turkey is the top supplier with 44 percent of the market by volume followed by Israel, Hungary Canary Islands and Morocco Since 1992, imports from Hungary the Canary Islands and Morocco have fallen while imports from Turkey have grown by 63 percent and imports from Israel shot up by 311 percent The Canary Islands and Israel have the highest unit values for imported peppers, each at around US$2,400/ton, while Turkey and Morocco have unit values of roughly US$1,100/ton

Fresh Citrus Fruit

Morocco is the leading supplier of fresh citrus fruit to the EU and has held its market share steady at just under 25 percent since 1992 Morocco s citrus exports to Europe in 1996 were worth US$322 8 million EU citrus imports have grown by 22 percent since 1992 and have been a growth area for all the major suppliers which include South Africa Argentina Israel and Turkey Of these countries Turkey has shown the most growth since 1992 with exports to Europe more than doubling to 163 358 tons The unit value of citrus imports for all major suppliers in 1996 was around $700/ton except for South Africa which was $620/ton

Fresh Melon

EU imports of fresh melons and papayas are grouped together and the total of these imports was 158 867 tons worth US$156 1 million in 1996 Papayas only account for about $20 million worth of these imports however and, aside from Brazil which supplies roughly 5 000 tons of papayas worth $10 million annually to the EU, none of the other major melon suppliers is a papaya supplier Several countries have seen remarkable growth in the melon market as Brazil has essentially stood still since 1992 Costa Rica's share of the melon market by volume has increased from 7 to 16 percent, Morocco's from 2 to 6 percent, and Honduras from 1 to 7 percent Moroccan melon exports to Europe have increased by 374 percent by volume since 1992 Of the major suppliers Israel and Morocco have the highest unit values at around US$1 400/ton and Brazil has the lowest at US$828/ton

Fresh Peaches

Despite having increased for three consecutive years up to 1996, EU peach imports were still ten percent less in volume terms than they were in 1992 Chile is the leading supplier, accounting for 65 percent by volume and 56 percent by value of this 15,175 ton, US$24 7 million market Morocco, meanwhile is the only major supplier to have increased its market share (from 2 to 7 percent by volume) between 1992 and 1996 Morocco is the most expensive supplier with a unit value of US$2,842/ton in 1996, compared to $1,972/ton for next-highest South Africa

Fresh Potatoes

The EU imported 649 793 tons of potatoes in 1996 with a value of US$256 6 million Though Egypt is the leading supplier in terms of volume, Cyprus is the leading supplier in terms of value Morocco is the fourth-largest supplier in terms of volume but saw its exports slip by 41 percent in 1996 Morocco s share of the market by volume fell from 21 to 9 percent between 1992 and 1996 Israel more than doubled its exports (and its market share) in 1996 Of the major suppliers Cypriot product had the highest 1996 unit value at over $533/ton while Egypt had the lowest at $290/ton Moroccan product came in on the high side at $490/ton

Fresh Raspberries

The EU market for fresh raspberries is somewhat peculiar, in that Chile which accounts for only 2 percent of the market by volume, has a 25 percent market share by value The unit value for

Chilean product at US$12 912/ton is almost twenty times higher than that of Poland which accounts for 56 percent of total import volume EU imports have grown by 75 percent in volume and 18 percent in volume to 18 856 tons worth US$20 0 million since 1992 with Hungary Romania and Poland the main beneficiaries

Fresh Strawberries

As is the case with raspberries Poland accounts for roughly half of the EU import market by volume yet Polish product is inexpensive compared with that of other suppliers Though Morocco s strawberry exports to the EU decreased by 16 percent in 1996 they were up 245 percent since 1992 and Morocco is now the largest supplier in terms of value (45 percent market share) and second-largest by volume (26 percent market share) Two up-and-coming suppliers of strawberries to Europe are Egypt and Israel which together accounted for nearly 15 percent of the market by value in 1996 compared to only 7 percent in 1992

Fresh Tomatoes

European tomato imports topped half a million tons in 1996 and were worth US$436 4 million The Canary Islands and Morocco dominate this market together accounting for 98 percent of the market by volume and 96 percent by value The Canary Islands has increased its shipments every consecutive year and by 80 percent since 1992 while Morocco's performance over the same time period has been more erratic, with total shipments increasing by only 10 percent over the same time period The unit value of Canary Islands tomatoes was $830/ton in 1996 while the unit value for Moroccan product was $721/ton

3 European Buyer Survey - Rating Morocco as a Supplier

A group of European importers was surveyed with a questionnaire (Annex 1) and asked to rate Morocco relative to other suppliers in five different areas prices quality business practices packaging, and overall For each area, they were to rank Morocco on a scale of 1 to 10 with 1 being the worst and 10 being the best Respondents were also asked to identify Morocco s main competitors, and to identify weak and strong points of Moroccan products and packaging

A total of 60 importers were surveyed, including 25 fresh produce importers 7 buyers of canned products, 14 importers of frozen fruits and vegetables, and 11 buyers of dried fruits and vegetables, herbs and spices, and 3 essential oil companies There were 29 respondents from the UK 5 from Holland, 3 from Belgium, 13 from Germany 1 from Switzerland and 9 from France For statistical purposes the Dutch and Belgian companies responses were considered together while the Swiss company's responses were considered together with those of the French companies Responses are summarized in Table 2 and presented below

Table 2 Respondents Ratings of Moroccan Suppliers on a 1 10 Scale

Question	2	4	5	6	7
	Overall	Prices	Quality	Business Practices	Packaging
All	**6 44**	**6 11**	**6 61**	**4 49**	**6 52**
Product					
Fresh	6 88	6 04	7 48	4 40	7 00
Canned	6 67	7 50	6 79	5 75	6 57
Frozen	5 64	6 11	5 93	4 35	6 58
Dried	6 00	5 90	5 32	4 85	5 86
Ess Oil	6 75	4 17	6 83	5 50	4 67
Country					
UK	6 91	5 79	7 05	5 05	6 89
Benelux	6 21	6 38	5 94	4 31	5 57
Germany	5 04	6 29	6 38	4 00	6 31
France	6 33	6 60	6 80	3 90	6 40

Table 3 Responses to Questions Regarding Moroccan Products and Packaging

Question	Response	Fresh (25)	Canned (7)	Frozen (14)	Dried (11)	Ess Oil (3)	Total	Percent
3	Spain	23	4	12	3	1	43	72
Main	Turkey	2	5	3	3		13	22
Competitors	Poland		1	3			4	7
	Italy		1	3			4	7
	France	2	1		1		4	7
	Egypt				3		3	5
	Greece		1	2			3	5
	Eastern Europe				2		2	3
	Israel			1	1		2	3
	Tunisia				1	1	2	3
	Chile			1			1	2
	Central America	1					1	2
	South Africa				1		1	2
	Brazil					1	1	2
8	a grades	6	1	1	3	1	12	20
Product	b-sizes	4	1	1	2		8	13
Strengths	c color	11	3	4	2	1	21	35
	d-cleanliness	2		1	2		5	8
	e-appearance	10	2	1	3		16	27
	f-varieties	4		1	2		7	12
	g season	11	1	8	3		23	38
	h (taste)	6	3				9	15
	h (price)			1			1	2
	h (aroma)					1	1	2
	h (uniqueness)					1	1	2
9	a grades	4		4	1		9	15
Product	b-sizes	7	1	7	1		16	27
Weaknesses	c color	4		4			8	13
	d-cleanliness	4	3	4	6		17	28
	e-appearance	2			1		3	5
	f-varieties	3					3	5
	g-season	4	1	1	1		7	12
	h (traceability)	1					1	2
	h (inconsistency)					1	1	2
	h (timeliness)					1	1	2
10	a homogeneity	1	1	2	2		6	10
Packaging	b quality	11	2	6	1	1	21	35
Strengths	c-design	11	1		1		13	22
	d-color	7		1			8	13
	e-labelling	4	1		1		6	10
11	a-homogeneity	7					7	12
Packaging	b quality	5		3	2		10	17
Weaknesses	c-design	4			1		5	8
	d-color	3			1		4	7
	e labelling	8	1	5			14	23

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3 1 Overall

As an overall supplier Morocco received an average rating of 6 44 Fresh produce importers gave Morocco a 6 88 canned product importers a 6 67 frozen fruit and vegetable importers a 5 64 dried product and spice importers a 6 00, and essential oil importers a 6 75 UK importers gave Morocco an average rating of 6 91 Benelux importers a 6 21 German importers a 5 04 and French a 6 33

3 2 Prices

Importers were asked to rate the competitiveness of Moroccan prices on a 1 to 10 scale with 1 being uncompetitive and 10 being extremely competitive Overall Moroccan prices received an average rating of 6 11 Fresh produce importers gave Morocco a 6 04 canned product importers a 7 50 frozen fruit and vegetable importers a 6 11, dried product and spice importers a 5 32 and essential oil importers a 6 83 UK importers gave Morocco an average rating of 5 79 Benelux importers a 6 38 German importers a 6 29 and French a 6 60

3 3 Quality

On a scale from 1 (poor) to 10 (excellent), Moroccan products received an average quality rating of 6 61 Fresh produce importers gave Morocco a 7 48 canned product importers a 6 79 frozen fruit and vegetable importers a 5 93, dried product and spice importers a 5 32 and essential oil importers a 6 83 UK importers gave Moroccan products an average quality rating of 7 05 Benelux importers a 5 94 German importers a 6 38, and French a 6 80

3 4 Business Practices

On a scale from 1 (poor) to 10 (excellent), Moroccan suppliers received an average rating of 4 49 for their business practices Fresh produce importers gave Morocco a 4 40 canned product importers a 5 75, frozen fruit and vegetable importers a 4 35, dried product and spice importers a 4 85 and essential oil importers a 5 50 UK importers gave Moroccan suppliers business practices an average rating of 5 05, Benelux importers a 4 31, German importers a 4 00 and French a 3 90

3 5 Packaging

On a scale from 1 (poor) to 10 (excellent), Moroccan packaging received an average rating of 6 52 Fresh produce importers gave Morocco a 7 00, canned product importers a 6 57 frozen fruit and vegetable importers a 6 58, dried product and spice importers a 5 86 and essential oil importers a 4 67 UK importers gave Moroccan packaging an average rating of 6 89 Benelux importers a 5 57, German importers a 6 31 and French a 6 40

3 6 Competitors

Questionnaire respondents were asked to identify Morocco s main competitor They were given the choice of the following countries Spain Turkey Italy France Tunisia Egypt Israel and Greece and were also given space to identify other countries if needed (see Buyer Survey Questionnaire Annex 1) Though the questionnaire called for only one answer several respondents replied with two or more (see Table 3 for responses)

3 61 By Country

A full 72 percent of the respondents cited Spain as the main competitor to Morocco Buyers of fresh and frozen products in particular chose Spain much more often than any other country The products carried by buyers who chose Spain were most often fresh citrus and frozen strawberries, though Spain was cited as a competitor by buyers of each category of products

Turkey was cited by 22 percent of the respondents as a competitor to Morocco Turkey was the leading competitor cited by buyers of canned fruits and vegetables but was also cited by buyers of fresh frozen and dried products

After Turkey the numbers drop off quickly Poland, Italy and France were cited by only 7 percent of the respondents Poland and Italy each were cited, however by 3 of the 14 buyers of frozen products (21 percent) Similarly, Egypt was cited as a competitor by 3 of the 11 buyers of dried products and spices (27 percent) Among the countries mentioned by respondents as competitors were Eastern Europe (because of coriander), South Africa (for paprika), and Brazil (for citrus oil)

3 62 By Product

Buyers of *fresh product* overwhelmingly cited Spain as the main competitor to Morocco Of 25 buyers surveyed, 23 chose Spain, while 2 buyers each chose Turkey and France and one cited Central America Of 7 buyers of *canned product*, 5 chose Turkey and 4 chose Spain as major competitors to Morocco, while one each chose Poland, Italy, France and Greece Out of 14 buyers of *frozen products*, 12 chose Spain as the main competitor while 3 each chose Turkey, Poland and Italy, 2 chose Greece, one chose Israel and 1 Chile The 11 buyers of *dried products and spices* were split with 3 each choosing Spain, Turkey and Egypt 2 choosing Eastern Europe and one each choosing Israel Tunisia, and South Africa Of the 3 essential oil buyers one each chose Spain, Tunisia, and Brazil

3 7 Specific Strengths and Weaknesses

Respondents were asked to identify the strengths and weaknesses of Moroccan products and packaging For the products respondents could identify one or more of the following as a strength or weakness grades offered calibers and sizes color cleanliness appearance varieties available season of availability and other For the packaging, respondents could identify one or more of the following as a strength or weakness homogeneity of pack packaging quality design of packaging use of color clear labelling and other The responses are presented in Table 3 and summarized below

3 71 Product Strengths and Weaknesses

The main strength of Moroccan products identified by 38 percent of all respondents was the season of availability 35 percent also identified also color and 27 percent identified appearance as strengths of Moroccan products Grades offered was chosen as strength of Moroccan products by 20 percent of respondents and 15 percent wrote in taste as a strength Among the 25 buyers of *fresh produce* surveyed 11 each chose season of availability and color as strengths of Moroccan produce and 10 chose appearance Of 7 buyers of *canned product* 3 each chose color and taste and 8 of the 14 buyers of *frozen product* chose season of availability

The main weaknesses of Moroccan products as identified by 27 and 28 percent of the respondents respectively were calibers and sizes and cleanliness 15 percent of respondents cited grades offered as a weakness, and 13 percent cited color Calibers and sizes was the top weakness cited by buyers of both *fresh produce* and *frozen products* while cleanliness was the top concern of importers of *dried products and spices*

3 72 Packaging Strengths and Weaknesses

With regards to Moroccan packaging, respondents were asked to identify one or more of the following as strong or weak features, homogeneity of pack packaging quality design of packaging, use of color, clarity of labelling, and other Outside of fresh produce buyers many respondents did not answer these questions because they received product packaged in industrial-sized containers (rather than retail packs) and felt the questions didn't apply to them

35 percent of respondents identified quality of packaging as a strength, while 22 percent identified packaging design as a strength Quality and design were each chosen by 11 of 25 *fresh produce* buyers, and packaging quality was cited by 6 of 14 buyers of *frozen products*

The main weakness of Moroccan packaging, as identified by 23 percent of survey respondents was unclear labelling This was the top concern of both *fresh produce* and *frozen product* buyers 17 percent of respondents (5 fresh produce buyers 3 frozen product buyers and 2 *dried and spice product* buyers) cited overall packaging quality as a weakness Lack of homogeneity of pack was cited by 7 fresh produce buyers (12 percent of all respondents) as a weakness of Moroccan packaging

3 9 Other Comments by Buyers

Several buyers offered additional comments on Moroccan products Most of these comments regarded areas in which it was felt Moroccan shippers could improve Some of the companies offering comments said they had stopped buying from Morocco because of various problems they had encountered

Fresh produce buyers in general seemed pleased with the quality of Moroccan produce and citrus buyers in particular said that the packaging and product quality were comparable if not better than that of Spain Some wholesalers complained however about the small commissions offered on Moroccan product

One large buyer of *canned olives and capers* said that the main problem with Morocco was that not enough flexibility was offered in terms of packaging He felt that the range of pack sizes was rather limited

More than one buyer of *frozen strawberries* complained that the color of Moroccan strawberries was often too pale Hygiene was also cited as a problem with this product One frozen fruit buyer said that he felt Morocco wasn t taking advantage of the market for frozen citrus segments He said he had worked with several companies in Morocco but that he was always disappointed by poor quality and contaminated product Several importers of frozen products also noted that Moroccan producers often failed to supply product to exact specifications

At least two buyers of *spices* said that microbiological contamination was the main problem with Moroccan product They said the cost of disinfestation always had to be factored into the cost of Moroccan spices rendering them less competitive One buyer of *essential oils* said that Morocco continues to use non-approved drums to ship its product

Finally the professionalism of Moroccan suppliers was often questioned Buyer complaints in this realm included not receiving product on time unavailability of product demand from Moroccan suppliers for advance payment, and difficulty in communication with suppliers

4 National Stand Comparisons

Two food industry tradeshows, Anuga and Food Ingredients Europe (FIE) were attended and the national stands of Morocco and its competitors were analyzed If a country lacked a national stand its participation in terms of individual exhibitors was examined Photographs were not allowed at Anuga but were allowed at FIE and photos referred to in this report can be found in Annex 3 Many of the brochures referred to in this report can be found in the accompanying binder

4 13 Tunisia

Tunisia had 10 exhibitors at Anuga including CEPEX the Tunisian Center for Export Promotion Most of the Tunisian companies were offering dates or olive oil

4 14 Turkey

Turkey had over 100 exhibitors at Anuga offering a wide variety of food products Some of the products Turkish firms had on display included pulses (lentils chickpeas other beans) dried fruits (raisins figs and apricots) canned vegetables and vegetables in brine (tomatoes tomato paste red peppers olives gherkins peas beans mixed vegetables) spices (anise cumin fennel sesame seed laurel leaves, oregano) juices and nectars (sour cherry orange, apricots peach apple lemon), frozen foods (pizza, french fries fruits vegetables) tea cocoa pasta olive oil seeds nuts and confectionary items

The Ankara Chamber of Commerce distributed color brochures which contained listings of the Turkish participants at Anuga as well as advertisements from individual companies The brochures entitled "Natural Food from Turkey" were in English and also included background on Turkey s agricultural sector, a map of Turkey's national stand and listings of the individual exhibitors (see binder)

4 15 Egypt

Egypt had 28 exhibitors, including the Trade Development Centre, the Arab Agency for Trade and Distribution, and Aegypten, the General Organization for International Fairs and Exhibitions Egyptian exhibitors included purveyors of dried fruits and vegetables biscuits and confectionary olives, and other products

4 16 Italy

Italy had around 800 exhibitors at Anuga in every imaginable food category, including many varieties of dried, canned, and frozen fruits and vegetables In addition to ICE the National Institute for Foreign Trade, there were representatives from dozens of regional trade organizations and chambers of commerce German translators were available and there were ample samplings and tastings of Italian products

4 17 Greece and Spain

Greece had about 175 exhibitors, including the Hellenic Foreign Trade Board Spain had roughly 250 exhibitors, including ICEX, the Spanish Institute for Foreign Trade and various regional trade associations and promotional bodies Products from these two countries were similar to those of Italy

4 2 Food Ingredients Europe

Food Ingredients Europe (FIE) held in London November 4-6 1997 was a smaller but more focused tradeshow than Anuga As the name implies the emphasis of the show was on food ingredients and a wide range of both natural and artificial ingredients were displayed Dried vegetables, spices and essential oils were the main offerings of Morocco s competitors Roughly 900 companies from forty countries exhibited at FIE and there were over 23 000 visitors

Germany Chile Peru, Sri Lanka Scotland, the United States and Canada had national stands at FIE In addition CBI the Netherlands-based Center for the Promotion of Imports had a pavilion which included exhibitors from several developing countries including Turkey Colombia Mexico and Zimbabwe Provided below are reviews of the Chilean Peruvian and Sri Lankan national stands since to some extent these are competitors with Morocco In addition a review of exhibitors from some of Morocco s traditional competitors such as Turkey and Spain is provided

4 21 Chile

The Chilean stand consisted of eleven exhibitors in a circular-shaped pavilion Exhibit areas were quite small about enough room for a table and two chairs but the stand was nicely designed so that each exhibitor had ample space to display product behind glass (see photos Annex 3) Most of the Chilean companies were offering dehydrated vegetables and some were also supplying frozen fruits In general, brochures were of very professional quality (see binder) Salespeople were knowledgeable and readily approached prospective buyers

4 22 Peru

The Peruvian stand consisted of 10 exhibitors in an open, L-shaped pavilion (see photos Annex 3) Most of the exhibitors were producers of cochineal and carmine extracts Several companies displayed the different types of powders and oleoresins they were capable of supplying and all possessed brochures and product lists, though these were of varying quality

4 23 Sri Lanka

The Sri Lankan national stand was quite modest Consisting of a series of tables arranged in a rectangle, the Sri Lankan pavilion included 13 companies which were supplying spices oleoresins and canned curries Most of the companies were spice purveyors Product samples were displayed on the tables, behind which sat the representatives of the companies There was plenty of space for meeting with prospective buyers in the inner part of the pavilion though any privacy was essentially sacrificed (see photos, Annex 3)

4 24 CBI (Center for Promotion of Imports)

The CBI pavilion consisted of 20 companies from 13 different developing countries (Bangladesh Chile China Colombia Ecuador Ghana India Mexico Pakistan Peru the Philippines Turkey and Zimbabwe) The space given to each company was ample with enough room to display product and have private discussions with buyers Decoration of the booth promotional materials aggressiveness of sales staff and English ability varied widely between exhibitors Many of the exhibitors were offering spices and dehydrated vegetables The two Turkish exhibitors Figsan and Pamsan had dried apricots and bell peppers as well as cumin and a variety of other spices (see photos Annex 3) CBI printed a brochure which provided contact product and bank information for each of the participants (see binder)

4 25 Morocco

Morocco had only one exhibitor at FIE Setexam, a producer of seaweed hydrocolloids

4 26 Turkey

Turkey had five exhibitors at FIE Two exhibitors (Figsan and Pamsan) were part of the CBI pavilion (above) another (Balsu) was a large producer of hazelnuts One Nature took part in the organic pavilion and was offering dried organic fruit, and Etem Oszoy had a booth of its own and offered a variety of products

Etem Oszoy was the most impressive of the Turkish exhibitors, as it had a wide range of products, including canned and preserved pears, peaches, grapes, sour cherries, and apricots, dried pears, prunes, peaches, figs, apricots, and purees Two shelves on either side of the exhibit were stacked with this company's products in varying sizes retail and foodservice packs, and different brand names A television set in the booth played a well-produced video of the company's plant in Turkey, emphasizing quality control and hygienic preparation at the factory (see photos, Annex 3)

Etem Oszoy s brochure is mediocre, but contains pull-out product sheets of very high quality for the following categories of products frozen fruits and vegetables (iqf and block), processed fruits (dried, purees pastes, and candied fruits) organic fruits and nuts, canned fruits and vegetables jams and preserves, dried fruits, tomato products (sun-dried, strips, slices pellets roasted pizza sauce) and processed vegetables (see binder) The company's representatives were attentive asked what products the writer of this report was interested in, and sent him a fax post-show detailing fob prices for dried apricots and figs

4 27 Italy

Italy had 28 exhibitors at FIE eight of which were involved in dried or aseptically packed fruits and vegetables The main products on display were dried apples pears peaches onions peppers and carrots as well as canned and dried mushrooms and the whole range of tomato products (canned dried powders and flakes) In general the Italian exhibitors were very professional with high quality brochures and expensive displays Allione an Italian multinational company producing fruit preparations and aromatic herb products is an example (see photo Annex 3)

4 28 Spain

Spain had 15 exhibitors at FIE five of whom produced products which compete with Morocco Two of the companies were offering tomato paste and powder two were selling citrus oils and other flavorings and one was a manufacturer of paprika oleoresin The Spanish companies had professionally printed brochures in English showing the products and the companies sparkling modern factories Two essential oil companies Evesa (Extractos Vegetales S A) and Bordas Chinchurreta had particularly attractive brochures (see binder)

4 29 India

A total of 14 Indian companies exhibited at FIE including the Spice Board of India Most of the Indian companies were offering dehydrated onion and garlic although one company Farm Fresh/Jain was offering other dehydrated products such as bell peppers as well as tropical juice concentrates This company had a very impressive booth and promotional materials but most of the Indian companies had modest booths and less professional promotional materials (see binder)

5 Specific Company/Product Comparisons

Certain key products were chosen for evaluation, because of their importance to Morocco At the FIE show, brochures were collected and products were photographed when possible Photographs are included in Annex 3 of this report and brochures are included in the accompanying binder Presented below is an analysis, by item, of the products displayed and promotional materials which accompanied them In some cases, promotional materials supplied by AMI from Moroccan companies are analyzed in lieu of Moroccan exhibitors at the tradeshows

Olives, Canned

An Italian company exhibiting at Anuga, Castellino, has a brochure which shows five of the eight different kinds of olives offered by the company The inside of the brochure has photos of thirty types of processed vegetables and pre-mixed antipasti offered by this company On the back of the brochure which is in Italian, English, and German the company mentions that its products are available in three types of packaging, a plastic box, a professional box and a glass pot No further details are available regarding packaging sizes (see binder)

Brochures for Moroccan olive suppliers were supplied by AMI Les Conserves de Meknes has an attractive brochure but the text is almost entirely in French The spec sheets for individual products however are in English as well as French The company offers green and black olives in 250g 500g and 2 75kg cans as well as in 165kg drums The product comes under the brand name Aicha and labels are in French English Italian and German (see binder) This company has a World Wide Web site (www aicha com) which does not appear on its brochure

Framaco a joint venture subsidiary in Morocco of Tramier, a French company offers black and green olives in 250g and 500g cans as well as in plastic bags of 125g and 400g Spec sheets are entirely in French "Greek style" black olives are available in jars of 250g and 400g natural black olives are available in jars of 230g pitted green olives are available in 185g jars All of these products are also available in 1700ml jars (see binder) The parent firm Tramier has a World Wide Web site (www fine asso fr/tramier/ahome html) which does not appear on its brochure

Capers, Canned and Glass Jars

The best capers exhibited belonged to a Moroccan company Marocapres which was being represented at FIE by its UK agent Marocapres has used the same brochure since at least 1994 but it is effective and informative Inside the brochure is a brief history of the company and some information about the nutritional value of capers as well as details on the size of standard bulk drum packs of capers (how many kg per drum, how many drums per container) On the back is a chart which details all the different retail and foodservice packs in which their capers are available, with the capacity net weight, height, weight per case cartons per case, and cases per pallet All of this information is given in French and English, metric and non-metric equivalents (see binder)

Framaco a French-Moroccan company not represented at the tradeshows offers capers in jars of 60g 120g and 1100g, according to the company's brochure

Apricot Halves, Canned

Etem Ozsoy of Turkey was the only company at FIE exhibiting canned apricots According to its brochure the company offers canned apricots in 430g jars (photo 7 5), as well as 5 different sizes of tins 850ml to 4,200ml Customized labels are available for the tins Turkish company One Nature was offering organic canned apricots in boxes containing six 700ml jars or six 5kg cans (see binder)

Dried Apricots

Etem Ozsoy the Turkish company displayed dried apricots at its FIE stand in 250g retail packs The spec sheet for the company s dried fruit products shows that product can be packed in 250g 400g and 500g cellopacks as well as in a 250g plastic cup and bulk-packed in 10kg 12 5kg and 12 7kg boxes Product is said to be available with customized labels Ozsov also had dried apricots available for sampling (see photos Annex 3 and binder)

One Nature a Turkish company offering organic products had a booth with a rather unimpressive display of apricots and other dried fruit simply sitting on a shelf (see photo Annex 3) Some product was available for sampling Through its European agent One Nature was offering organically-certified dried apricots in 250g 500g 1kg, and 12 5kg packings (see binder)

Two Italian companies Allione and Veba listed dried apricots among their products Allione is a large company producing a variety of fruit preparations for the baking industry as well as dried aromatic herbs Veba a cooperative had an impressive brochure which included glossy color four-language spec sheets for its products Veba offered 1/8" and 1/4" dried apricot dices as well as flakes and granules, in 7kg or 10kg thermosealed polybags (see binder)

Kinay a French company offered a variety of dried fruits including dried apricots Kinay s dried apricots are from Turkey and the spec sheet is very detailed with five different sizes three different grades and three dices listed Kinay s brochure is imaginative with the company s name spelled out in dried fruit (see binder)

Cornichons, Canned and Glass Jars

None of the companies at FIE concentrated on cornichons and there were none on display Brochures provided by AMI from several Moroccan companies, however included cornichons among their product offerings (see binder)

Fresh Citrus

Moroccan fresh citrus was viewed at the New Covent Garden Wholesale Market in London Product viewed was Menara brand oranges, packaged in 15kg boxes Appearance of the oranges was very good and the packaging was rated highly by wholesalers at the market Quality of the product was judged to be as good as, or better than, Spanish product (see photos Annex 3)

Frozen Berries

Scotland was the only country to display frozen berry products on display at FIE The Scottish Soft Fruit Growers, Ltd had a freezer full of frozen raspberries and was offering samples Product was available in different-sized packs (retail wholesale and industrial whole and broken fruit, puree, and straight pack bulk frozen) and they were heavily promoting a large-berry variety The brochure for the Scottish Soft Fruit Growers also listed individually frozen strawberries available in 10kg cartons with a plastic liner, and frozen strawberry puree in blocks (see binder)

A couple of the Turkish companies at FIE mentioned IQF strawberries in their brochures The distributor for One Nature lists organic IQF strawberries in 20kg packings and Etem Ozsoy in its spec sheet for frozen fruits lists IQF and block-frozen strawberries in 10kg bulk in-carton boxes and 2 5kg polyethylene bags (see binder)

SVZ a Dutch company with a factory in Morocco listed IQF strawberries in one its products but had none of display A detailed product listing provided in SVZ s brochure says that IQF and block frozen whole fruits and slices size-graded and not size-graded, of both the Red and Senga Sengana varieties are available Morocco produces mainly Chandler Camarosa and Oso Grande varieties Product is packed in cartons (see binder)

Mondi Foods of Belgium is a buyer of Moroccan strawberries, though there were no Moroccan strawberries on display at their FIE booth Mondi s product list includes IQF diced sliced size-graded and ungraded strawberries as well as block-frozen whole fruit Mondi packs its frozen fruit in three ways cartons with plastics innerbags of 10, 15 and 20kg bags of 20 and 25 kg, and food grade waxed cartons of 20kg (see binder)

Truffles

A UK company L Aquila Importers and Distributors was the only supplier of truffles at FIE L Aquila s truffles are imported from Italy, and are divided into 3 categories summer truffles winter truffles and white truffles The truffles are available in jars of 30g 50g and 100g as well as tins of 50g, 100g and 200g In addition to the company brochure L Aquila hands out an information sheet on truffles, explaining why they are so rare (and expensive) In addition, the company distributes a recipe book with over 20 truffle recipes (see binder)

Coriander

Figsan, one of the Turkish participants in the CBI pavilion, displayed coriander in a burlap sack Figsan s brochure, while it mentions coriander as one of its products concentrates mainly on sun-dried tomatoes and dried figs (see photo, Annex 3, and binder)

Lukus, a Moroccan/Spanish/U S co-venture which didn't participate in the trade fairs, has a professionally printed spec sheet for coriander, which lists the characteristics of the product (moisture, volatile oils color and smell), cleaning specifications, packing (jute bags of 50kg), and pesticide compliance standards (see binder)

Dehydrated Peppers and Tomatoes

Chilean companies were the main suppliers of dehydrated peppers and tomatoes exhibiting at FIE Several companies displayed product at the Chilean pavilion, both loose and in plastic bags The most sophisticated brochure was handed out by Invertec Deshidratados whose main products are dried bell peppers and apples Green and red bell pepper dices of 1/4" and 3/8" are specified in Invertec s brochure, as well as strips of 3/8"x1", and powder Similarly tomato flakes of 3/8" and tomato powder are listed (see binder)

AgroCepia another Chilean firm has a brochure which shows photographs of available dices of bell peppers and tomatoes and emphasized that it would cut to client specifications (see binder)

Kinav a French company was represented at FIE by its UK agent The cover of Kinav s brochure is a simple arrangement of perfect-looking tomatoes Inside pull-out sheets list the products offered which include diced tomatoes from Turkey tomato flakes from France with varying mixes of corn starch and pectin to affect color and tomato powder from France and Portugal (see binder)

Paprika, Ground and Oleoresin

Paprika powder is one of the specialties of Evesa, a Spanish exhibitor at FIE Evesa s brochures are nicely illustrated and contain a history of the company photographs of the factory and modern equipment and a pull-out list of products Evesa s ground paprika is available in 40-140 ASTA units The only problem with the brochure, which is entirely in English is with the proofreading 'oleoresin' and fragrance are misspelled (see binder)

Lukus has a detailed spec sheet listing the physical and chemical characteristics granulometry available qualities (by ASTA unit), and packing (multiwall paper bags of 25kg or 50kg) (see binder)

Paprika oleoresin is the Spanish company Evesa's main product The brochure for the company is described above Evesa says in the brochure that it produces up to 200 tons of paprika oleoresin per year, and that product is available in 5,000 to 180 000 c u Lukus is also a producer of paprika oleoresin As is the case with all products listed in the Lukus brochure there is a detailed spec sheet Lukus packs product in enamel-coated metal drums of 24kg or 180kg

Worth a mention just for their eye-catching design are the oleoresin handouts of Henry Lamotte a German importer Though the only information given is the type of oleoresins available and contact information for the company, these handouts are brilliantly designed with bright colors that reflect the brightness of the products themselves (see binder)

Other Essential Oils

Most of the essential oil companies at FIE were European importers although two or three of the Sri Lankan exhibitors displayed essential oils (see photo, Annex 3), and the Indian Spices Board handed out a brochure on essential oils and oleoresins from India (see binder)

One Spanish company Bordas Chinchurreta, had an attractive set of brochures which advertised their oil and oleoresin, botanical pharmaceutical, citrus and aroma compounds The brochure was printed in Spanish and English on high quality paper with photographs of the company s plant and products interspersed with the narrative (see binder)

Graham Page Ltd a UK importer of essential oils had a fact sheet on rosemary oil explaining the differences between Tunisian Spanish Moroccan and English product A U K subsidiary of a French company Adrian Essential Oils offered Moroccan chamomile myrtle rose and rosemary oils Extrerel, another French company, listed laurel oregano rosemary and thyme oils and oleoresins from Morocco Finally System Bio-Industries a French company with a subsidiary in Morocco had a very attractive brochure listing its wide variety of flavoring and other compounds (see binder)

6 Conclusions on the Moroccan Position

6 1 Tradeshow Participation

6 12 Anuga

Morocco s participation at Anuga in 1997 was similar to its participation in 1995 Although the design of the stand changed in 1997 to accentuate Morocco s sunny Mediterranean climate and half of the Moroccan exhibitors were different many of the problems noted two years earlier were still present These included sporadic attendance by CMPE staff passive salespeople and price quotes given solely in French francs Some Moroccan exhibitors suffered from a lack of brochures, product sheets, price lists and business cards English and other language capability both verbally and on promotional materials, is another area that still needs improvement The final copy of translated text should be edited by a native speaker

The size of Morocco s Anuga contingent was larger in 1997 than in 1995, increasing by two firms to 21 In both cases fisheries was the main sector represented followed by canned and preserved fruits and vegetables Most of Morocco's competitors including Turkey Tunisia Egypt, Greece, and Spain increased their number of exhibitors at Anuga in 1997 compared to 1995 Tunisia, which lacked a national stand in 1995 had ten exhibitors in 1997 albeit with a limited product range The number of Turkish exhibitors increased by about 25 percent and in general the Turkish companies were superior to the Moroccan ones in terms of marketing and promotional materials, linguistic ability, provision of information, and aggressive/attentive sales staff

6 13 Food Ingredients Europe

Morocco s participation at FIE 1997 was minimal In 1995 Morocco had five exhibitors at Food Ingredients Europe but in 1997 that number was reduced to one Setexam the sole Moroccan exhibitor at FIE 1997, is a producer of seaweed hydrocolloids such as agar-agar and was an exhibitor at FIE 1995 as well Two other Moroccan companies dealing in agar-agar and natural gums Colloides Naturels International and Pharmagum exhibited in 1995 but not in 1997 Lukus and Sebtigrains which supply dehydrated products spices oils and oleoresins exhibited in 1995 but not in 1997

6 2 Exports to Europe - Quantitative

Morocco s exports of horticultural products to Europe have had mixed results Exports of fresh citrus have been extremely successful and account for 45 percent of the value of all total selected products Of the remaining products Morocco seems to be doing better in the fresh than in the processed product area

Moroccan exports of 20 key horticultural products to Europe totalled nearly 800 000 tons worth US$738 4 million in 1996 (see Table 4) This represented an increase of 12 and 38 percent respectively in terms of volume and value since 1992 However once citrus products are removed from the total the 1996 figures drop to about 334 000 tons worth US$408 7 million (see Table 5) Moroccan exports of selected non-citrus horticultural products to Europe actually decreased by 3 percent in volume, but increased by 26 percent in value compared to 1992 (see Figure 1)

Morocco s share of the EU import market in terms of value increased for ten of the twenty products examined, and decreased for the other ten Most of the canned products and all of the dried and spice products, saw decreases in European market share during this time period Some of the decreases were quite large, Morocco's share of the EU caper market for example declined from 73 to 58 percent in terms of value, while the country s share of the EU dried paprika pepper market declined from 35 to 17 percent

It is in the area of fresh produce that Morocco has had the best success increasing its share of the European import market Though its share of the fresh bell pepper and potato markets have waned in recent years, Morocco has increased its share of the citrus, melon, peach strawberry and tomato markets In the case of strawberries, Morocco s share of the European market has grown from 19 to 45 percent since 1992

6 3 Exports to Europe - Qualitative

The results of a buyer survey questionnaire given to sixty European importers of Moroccan products in late 1997 are given in Section 3 of this report These are compared below to quantified impressions from the Anuga 95 tradeshow No questionnaire was used in 1995 however and the sample of buyers was substantially different mostly French as opposed to the 1997 buyers, who were mostly English While not strictly comparable it is still interesting to examine buyers' impressions from both years in order to get a full picture of the image Moroccan suppliers present in Europe

Overall Ranking In 1995, Morocco received an overall ranking of 5 00 with a stronger ranking as a fresh product supplier Morocco s ranking tended towards 6 00 for cut flowers and towards 4 00 for dried fruit and vegetable products In 1997 Morocco received a rating of 6 44 with

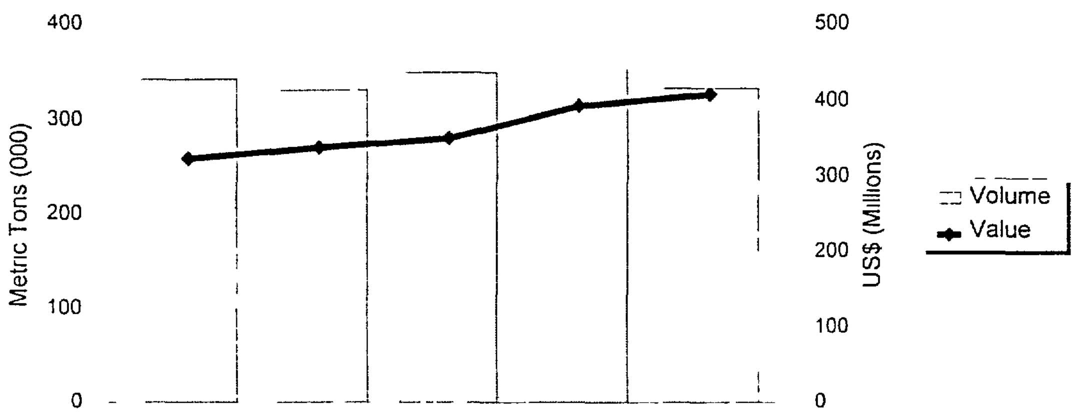
Table 4 Moroccan Exports to EU of Selected Horticultural Products, 1992-1996

	1992	1993	1994	1995	1996
Volume (MTs)	709,873	687,486	706,782	644,534	797,673
Value (US$000)	535 703	530 995	557 639	593 286	738 410

Table 5 Moroccan Exports to EU of Selected Non Citrus Horticultural Products, 1992-1996

	1992	1993	1994	1995	1996
Volume (MTs)	343 279	331,825	350,079	367,711	333,735
Value (US$000)	323 926	338 484	351 108	393 925	408 639

Figure 1 Moroccan Exports to Europe of Selected Non-Citrus Horticultural Products
Volume and Value 1992-1996



Source Eurostat

Table 6 Moroccan Share of EU Import Market by Product, 1992 and 1996, Percentage

	Volume			Value		
	1992	1996	Change	1992	1996	Change
Olive Oil	2	18	16	1	18	17
Canned Apricot	44	43	(1)	42	44	2
Olives	88	82	(6)	84	75	(9)
Capers	50	44	(6)	73	58	(15)
Cornichons	9	7	(2)	13	11	(2)
Dried Tomatoes	16	7	(9)	21	9	(12)
Dried Peppers	48	21	(27)	35	17	(18)
Coriander	25	11	(14)	31	16	(15)
Froz Beans	19	10	(9)	37	20	(17)
Froz Mix Veg	8	11	3	11	13	2
Froz Strawberrie	0	4	4	0	4	4
Froz OJ	0	1	1	0	1	1
Apricot Pulp	47	42	(5)	40	35	(5)
Peppers	9	6	(3)	12	5	(7)
Citrus	23	24	1	23	25	2
Melons	2	6	4	4	9	5
Peaches	2	7	5	2	12	10
Potatoes	21	9	(12)	27	11	(16)
Strawberries	8	26	18	19	45	26
Tomatoes	6	10	4	2	5	3

fresh produce importers giving the highest average ranking of 6 88 Importers of frozen products gave Morocco a 5 64 which was the lowest for all product groups surveyed while dried product and spice importers gave Morocco a 6 00

Competitors In 1995 Spain was considered to be Morocco s main competitor for fresh and dried products Turkey for canned and dried products and Egypt for fresh potatoes Israel was also mentioned as a major competitor for fresh produce and flowers In 1997 Spain was mentioned most often as the largest competitor for fresh and frozen products Turkey for canned products and Spain Turkey and Egypt for dried products

Prices In 1995 Moroccan prices ranked between 5 00 and 6 00 overall and were said to be lower than EU and Turkish origin for fresh products In 1997 Moroccan prices were given a rating of 6 11 overall with the most favorable rating from canned product importers (7 50), and the least favorable from dried product and spice importers (5 32) Not many importers mentioned high prices as a significant obstacle to buying from Morocco although some complained of high freight costs compared to other origins

Quality In 1995 the quality of original raw material was rated a 7 00 while final packed or packaged product was between 5 00 and 6 00 Tomatoes, citrus potatoes and carnations garnered higher quality rankings than processed olives, cornichons and apricots In 1997 fresh produce importers gave Morocco the highest quality ranking of 7 48 while dried product and spice importers gave Morocco the lowest ranking of 5 32

Business Practices In 1995, this was the area in which Moroccan suppliers received the lowest rankings In general, they averaged a 4 00 or below that year In 1997 Moroccan suppliers received an average ranking of 4 49 in this area There seems to be a general consensus among European buyers that Moroccan suppliers are undesirable business partners While some buyers were quick to point out exceptions to this 'rule', most nonetheless felt wary about doing business in Morocco and some were of the once bitten, twice shy' attitude vowing not to do business with Morocco again because of bad experiences in the past

Packaging In 1995 packaging was a consistent problem across all product areas and the rankings received by Moroccan suppliers were generally between 4 00 and 5 00 Most comments were related to fill weights, carton failure, dented cans, poor labelling, inaccurate labelling, unattractive designs and poor color Although some of these problems were also cited by respondents to the 1997 survey Moroccan packaging was given an average rating of 6 52 Fresh citrus importers in particular gave Morocco high marks for packaging

Strong Points In 1995, the main strong points of Moroccan products as cited by European buyers were their color and season of availability In 1997 the same two qualities were chosen especially by buyers of fresh and frozen fruits and vegetables

Weak Points In 1995 the main weak points of Moroccan products as cited by European buyers were a lack of cleanliness and not enough varieties available In 1997 incorrect or improper calibers (sizes) was the main weakness cited by buyers with lack of cleanliness close behind General availability reliability and consistency of supply were also mentioned by several importers as weak points of Moroccan products but these comments more readily fit under the area of business practices

6 4 Summary

After comparing the rankings of European buyers and European import statistics it becomes clear that Moroccan suppliers are doing a better job on the whole with fresh products than they are with processed products Most of the buyers interviewed both in 1995 and 1997 rated Moroccan fresh products higher than processed products and reported less difficulties with suppliers As one can see from the earlier analysis of trade statistics Morocco's share of the European import market for processed (especially canned) fruits and vegetables has declined, while it has increased its market share for many fresh produce items

It seems that Moroccan fresh produce exporters have succeeded in meeting market demands, while many producers of processed horticultural products are being out-performed by their competitors In general, buyers of fresh produce (and especially citrus) gave Morocco high marks for delivering tasty quality product in attractive packaging Many buyers of processed products, however, complained about seemingly avoidable mistakes with out-of-spec or unclean product and unreliable suppliers being the most common problems

Annex 1 : Questionnaire

AMI Buyer Survey - Moroccan Food Products

AMI (Agribusiness Marketing Investissement) is a non-profit project devoted to improving the quality of Moroccan agri-products AMI values your opinion as a prominent food buyer and will use this information to help us target our assistance to Moroccan producers processors and exporters Thank you very much for taking time out of your busy schedule to fill out this questionnare

I Contact Information

Name ______________________

Position ______________________

Company Name ______________________

Address ______________________

Country/Postal Code ______________________

Telephone/Fax ______________________

II Product Groups (please circle all which apply)

a) Fresh Produce b) Canned Fruit/Veg c) Frozen Fruits/Vegetables

d) Dried/Dehydrated Fruits and Vegetables Herbs Spices

e) Vegetable Oils f) Essential Oils

III Survey on Moroccan Products

1 Have you ever bought Moroccan food products?

2 How would you rank Morocco overall as a supplier, on a scale of 1 to 10?

POOR 1 2 3 4 5 6 7 8 9 10 EXCELLENT

3 Which origin do you consider to be Morocco's biggest competitor for your product line (please circle one)?

Spain Turkey Italy France Tunisia Egypt Israel Greece

Other________________

4 How do Moroccan prices rank compared to other origins?

NON-COMPETITIVE 1 2 3 4 5 6 7 8 9 10 COMPETITIVE

5 How does Moroccan quality rank compared to other origins?

POOR 1 2 3 4 5 6 7 8 9 10 EXCELLENT

6 How do Moroccan suppliers' business practices compare to those of other suppliers?

POOR 1 2 3 4 5 6 7 8 9 10 EXCELLENT

7 How would you rank Moroccan packaging compared to that of other suppliers?

POOR 1 2 3 4 5 6 7 8 9 10 EXCELLENT

8 What are the strongest features of Moroccan products ? Please circle all which apply

a) grades offered b) calibers sizes c) color d) cleanliness e) appearance

f) varieties available g) season of availability h) other ____________________

9 What are the weakest features of Moroccan products? Please circle all which apply

a) grades offered b) calibers sizes c) color d) cleanliness e) appearance

f) varieties available g) season of availability h) other ____________________

10 What are the strongest features of Moroccan packaging? Please circle all which apply

a) homogeneity of pack b) packaging quality c) design of packaging d) use of color

e) clear labelling f) other ______________ g) other _____________

11 What are the weakest features of Moroccan packaging? Please circle all which apply

a) homogeneity of pack b) packaging quality c) design of packaging d) use of color

e) unclear labelling f) other ______________ g) other _____________

12 Please fill out the following chart to indicate the volume/value of products you have purchased from Morocco in the past year (October 1996-October 1997)

Product	Amount purchased in last year, please specify units (MT, kg, etc)	Total value (please specify currency)	Price per unit (kg, MT,etc)	Final Destination (Country)

AMI ON BEHALF OF MOROCCO S AGRIBUSINESS COMMUNITY THANKS YOU VERY MUCH FOR YOUR ASSISTANCE!

Annex 2:
Moroccan Exports to the EU of Selected Products, 1992-1994

European Imports of Olive Oil, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Tunisia	88 068	91 549	179 653	113 253	34 719	(69)	(61)	97	48
Turkey	438	68	2,120	37,544	15,471	(59)	3,432	0	21
Morocco	1 372	373	253	3 183	13 094	311	854	2	18
Syria	0	0	3	1,733	3,579	107		0	5
Slovenia	0	0	0	0	2 514			0	3
Egypt	5	22	1	1	485	48,400	9 600	0	1
Total	90 793	92 126	183 852	157 505	72 795	(54)	(20)		

European Imports of Olive Oil, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Tunisia	161 691	167 047	298 587	310 684	151 433	(51)	(6)	97	50	4 362
Turkey	936	194	3,128	98,515	61,588	(37)	6 480	1	20	3 981
Morocco	2 301	776	663	9 026	53 512	493	2 226	1	18	4 087
Syria	0	0	8	5,117	13,745	169		0	5	3,840
Slovenia	0	0	0	0	9 422			0	3	3 748
Other	17	56	3	3	1,751	67,250	10,262	0	1	3 611
Total	166 219	168 555	306 303	429 091	300 833	(30)	81			

European Imports of Canned Apricots, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
South Afric	10 736	11 279	16 670	14 192	16 099	13	50	43	50
Morocco	10,868	12,216	12,398	13,764	13,872	1	28	44	43
Argentina	942	672	1 162	1 066	417	(61)	(56)	4	1
Austria	40	18	32	395	427	8	968	0	1
Turkey	880	384	511	1 102	571	(48)	(35)	4	2
Other	1,483	1,323	485	511	627	23	(58)	6	2
Total	24 949	25 892	31 258	31 030	32 013	3	28		

European Imports of Canned Apricots, 1992 1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
South Afric	13 443	11 527	14 575	12 867	16 962	36	32	45	48	1 054
Morocco	12 390	11,812	11,213	14,934	15,700	(1)	28	42	44	1,132
Argentina	1 174	906	1 472	1 095	550	(38)	(42)	4	2	1 319
Austria	40	59	102	261	636	112	1,968	0	2	1 488
Turkey	585	318	314	683	561	(20)	(26)	3	2	982
Other	1,946	1,289	711	1 687	968	(56)	(59)	6	2	1 544
Total	29 579	25 913	28 387	31 527	35 377	10	22			

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European Imports of Canned Olives, 1992 1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Morocco	42 287	42 626	49 199	62 041	57 015	(8)	35	88	82
Turkey	4,321	4,363	6 702	11,034	10,941	(1)	153	9	16
Tunisia	323	205	229	132	312	136	(3)	1	0
USA	386	199	70	136	87	(36)	(77)	1	0
Canada	41	51	0	25	79	216	93	0	0
Other	458	379	381	489	844	73	84	1	1
Total	47 816	47 823	56 581	73 857	69 278	(6)	45		

European Imports of Canned Olives, 1992 1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95-96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Morocco	50 359	55 223	66 912	81 570	85 266	5	69	84	75	1 495
Turkey	7 587	7,653	11 055	20,365	26,296	29	247	13	23	2 403
Tunisia	542	337	334	287	566	97	4	1	0	1 813
USA	772	393	177	326	226	(31)		1	0	2 600
Canada	64	92	0	60	185			0	0	2 337
Other	716	594	582	694	1,143	65	60	1	1	1 354
Total	60 041	64 292	79 061	103 302	113 681	10	89			

European Imports of Canned Capers, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Morocco	207	288	514	446	326	(27)	57	50	44
Turkey	197	121	833	352	377	7	91	47	51
Croatia	0	0	0	0	4			0	1
USA	0	2	0	0	18			0	2
Cyprus	1	1	3	3	5	67	400	0	1
Other	10	87	164	22	5	(77)	(50)	2	1
Total	415	499	1 514	823	735	(11)	77		

European Imports of Canned Capers, 1992 1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Morocco	1 487	1 704	2 790	2 451	2 062	(16)	39	73	58	6 325
Turkey	533	555	2 583	1,229	1,442	17	170	26	41	3 824
Croatia	0	0	0	0	14			0	0	3 575
USA	0	5	0	0	13			0	0	722
Cyprus	4	4	7	7	5	(20)	33	0	0	1 040
Other	18	228	395	13	4	(70)	(79)	1	0	780
Total	2 042	2 496	5 775	3 699	3 540	(4)	73			

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European Imports of Canned Cornichons, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Turkey	34 904	47 962	105 642	55 090	58 095	5	66	39	62
Hungary	29,014	13 402	14,167	16,173	13,803	(15)	(52)	33	15
Morocco	7 879	6 197	5 994	6 743	6 495	(4)	(18)	9	7
Croatia	258	308	1,058	6,628	6,352	(4)	2,362	0	7
India	33	48	1 425	1 075	2 753	156	8 242	0	3
Other	16 634	10 848	11 884	8,136	6,873	(16)	(59)	19	7
Total	88 722	78 765	140 170	93 845	94 371	1	6		

European Imports of Canned Cornichons, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Turkey	40 048	53 543	110 245	57 646	57 090	(1)	43	50	64	983
Hungary	18,366	8,700	11 350	11,519	10,039	(13)	(45)	23	11	727
Morocco	10 720	9 380	10 631	10 620	9 608	(10)	(10)	13	11	1 479
Croatia	140	195	638	4,303	3,962	(8)	2,722	0	4	624
India	31	34	1 420	863	2 155	150	6 808	0	2	783
Other	11 315	8 636	9 864	7,090	6,616	(7)	(42)	14	7	963
Total	80 621	80 487	144 149	92 041	89 470	(3)	11			

European Imports of Dried Tomatoes, 1992 1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Turkey	386	404	640	920	1 248	36	223	25	55
Chile	122	84	182	147	263	79	116	8	12
Morocco	253	241	262	241	154	(36)	(39)	16	7
Israel	24	56	38	38	234	516	875	2	10
USA	27	38	37	82	88	7	226	2	4
Other	733	739	584	351	275	(22)	(62)	47	12
Total	1 545	1 562	1 743	1 779	2 262	27	46		

European Imports of Dried Tomatoes, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Turkey	1 245	1 617	2 341	3 522	5 213	48	319	16	53	4 177
Chile	670	502	1 154	849	1,616	90	141	9	16	6 144
Morocco	1 596	1 476	1 524	1 301	898	(31)	(44)	21	9	5 833
Israel	191	218	147	181	871	382	356	2	9	3,722
USA	200	315	283	410	265	(35)	32	3	3	3 014
Other	3,825	1,544	1 284	1,494	1,006	(33)	(74)	49	10	3 659
Total	7 727	5 672	6 734	7 756	9 870	27	28			

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European Imports of Dried Apricots, 1992 1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Turkey	15 846	16 898	18 632	23 150	22 022	(5)	39	88	94
Iran	1,435	1,370	1,135	1,317	919	(30)	(36)	8	4
South Afric	248	294	330	344	210	(39)	(15)	1	1
Australia	45	52	29	50	69	38	53	0	0
Morocco	9	36	103	54	55	2	511	0	0
Other	339	127	277	245	220	(10)	(35)	2	1
Total	17 922	18 777	20 506	25 160	23 495	(7)	31		

European Imports of Dried Apricots, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95-96	% inc 92-96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Turkey	43 258	48 580	44 685	47 939	57 330	20	33	92	95	2 603
Iran	1 379	1 554	1,300	1,249	1,014	(19)	(26)	3	2	1,103
South Afric	992	1 149	1 101	1 292	785	(39)	(21)	2	1	3 739
Australia	347	287	237	372	358	(4)	3	1	1	5 181
Morocco	23	105	270	182	196	8	739	0	0	3 569
Other	995	432	839	594	449	(25)	(55)	2	1	2 039
Total	46 994	52 107	48 432	51 628	60 132	16	28			

European Imports of Dried Peppers, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95-96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Morocco	19 753	11 244	9 484	8 990	7 068	(21)	(64)	48	21
Hungary	4 382	3,162	2 510	3,894	4,289	10	(2)	11	13
Zimbabwe	184	1 327	5 210	5 772	4 337	(25)	2 257	0	13
Turkey	1,388	1,423	1,422	1,153	1,304	13	(6)	3	4
South Afric	3 429	5 424	6 608	5 304	3 676	(31)	7	8	11
Other	11,961	13 494	12,128	14,372	13,548	(6)	13	29	40
Total	41 097	36 074	37 362	39 485	34 222	(13)	(17)		

European Imports of Dried Peppers 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Morocco	29 220	16 455	12 288	14 444	15 451	7	(47)	35	17	2 186
Hungary	13 749	11,957	9,538	12,034	13,122	9	(5)	16	15	3,060
Zimbabwe	348	3 098	8 576	8 714	9 799	12	2 713	0	11	2 259
Turkey	5 649	5 971	5,591	7 387	8,410	14	49	7	9	6 449
South Afric	6 796	10 946	10 500	7 976	7 355	(8)	8	8	8	2 001
Other	27,990	30,092	26 681	33,287	34,797	5	24	33	39	2 568
Total	83 753	78 520	73 174	83 841	88 934	6	6			

European Imports of Coriander, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Russia	626	1 849	2 199	3 550	4 670	32	646	7	43
Morocco	2 095	1,091	656	692	1,209	75	(42)	25	11
India	851	1 321	676	877	849	(3)	(0)	10	8
Egypt	586	756	844	894	957	7	63	7	9
Bulgaria	1 700	1 178	1 676	2 371	1 165	(51)	(31)	20	11
Hungary	2,683	2,806	2,256	2,214	2,037	(8)	(24)	31	19
Total	8 541	9 001	8 307	10 598	10 887	3	27		

European Imports of Coriander, 1992 1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Russia	276	768	783	1 058	1 807	71	556	5	28	387
Morocco	1 804	1,141	540	538	1,015	89	(44)	31	16	840
India	703	1 048	581	666	842	27	20	12	13	992
Egypt	499	620	724	705	839	19	68	9	13	876
Bulgaria	923	601	688	918	517	(44)	(44)	16	8	444
Other	1,587	1,879	1,316	1,154	1 372	19	(14)	27	21	673
Total	5 793	6 057	4 631	5 039	6 392	27	10			

European Imports of Cumin, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Iran	3 169	2 071	1 548	888	2 062	132	(35)	68	37
Turkey	404	1,578	757	836	957	14	137	9	17
Syria	410	591	1 227	1 291	781	(40)	90	9	14
UAE	148	265	601	718	543	(24)	267	3	10
India	230	418	520	455	386	(15)	68	5	7
Other	295	252	306	453	883	95	199	6	16
Total	4 656	5 175	4 959	4 641	5 612	21	21		

European Imports of Cumin, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Iran	6 685	4 313	2 313	1 191	3 133	163	(53)	68	38	1 519
Turkey	1 015	2,868	1,208	1,095	1,400	28	38	10	17	1,463
Syria	871	1 125	1 676	1 559	1 167	(25)	34	9	14	1 495
UAE	316	533	889	967	832	(14)	163	3	10	1 532
India	517	949	853	716	729	2	41	5	9	1 889
Other	423	502	554	720	1,066	48	152	4	13	1 207
Total	9 827	10 290	7 492	6 248	8 328	33	(15)			

European Imports of Frozen Beans, 1992 1996 Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Poland	15 660	9 515	9 655	9 399	6 241	(34)	(60)	49	34
Morocco	6,237	5,095	3,298	2,614	1,864	(29)	(70)	19	10
Hungary	1 867	1,444	1 700	5 179	3 182	(39)	70	6	17
Cameroon	835	212	934	891	921	3	10	3	5
China	879	1,080	709	890	1 259	41	43	3	7
Other	6,651	1,908	1,746	3,670	5,020	37	(25)	21	27
Total	32 129	19 254	18 042	22 643	18 487	(18)	(42)		

European Imports of Frozen Beans, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Poland	8 598	4 425	4 736	5 948	3 969	(33)	(54)	28	22	489
Morocco	11 540	10,066	6,367	4,908	3,605	(27)	(69)	37	20	1 488
Hungary	1 408	1 060	1 323	3 523	2 230	(37)	58	5	12	539
Cameroon	1 266	456	1,847	1,881	1,928	2	52	4	11	1 610
China	1 238	1 594	1 032	1 268	1 583	25	28	4	9	967
Other	7,105	2,735	2,556	4,940	4,948	0	(30)	23	27	758
Total	31 155	20 336	17 862	22 467	18 262	(19)	(41)			

European Imports of Frozen Mixed Veg 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Hungary	1 200	566	431	2 004	2 248	12	87	24	52
Taiwan	268	307	250	281	258	(8)	(4)	5	6
Morocco	420	735	907	639	467	(27)	11	8	11
Austria	27	0	0	1	271	27,000	904	1	6
Sweden	3	0	0	45	195	333	6 400	0	4
Other	3,038	835	402	1,012	905	(11)	(70)	61	21
Total	4 956	2 443	1 990	3 982	4 344	9	(12)		

European Imports of Frozen Mixed Veg, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92-96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Hungary	750	363	343	1 756	1 873	7	150	22	44	641
Taiwan	696	832	605	616	564	(8)	(19)	20	13	1,682
Morocco	393	729	930	699	550	(21)	40	11	13	906
Austria	23	0	0	3	394	15 050	1,583	1	9	1 118
Sweden	3	0	0	94	372	297	14 200	0	9	1 467
Other	1,564	680	488	894	478	(47)	(69)	46	11	407
Total	3 428	2 604	2 365	4 063	4 232	4	23			

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European Imports of Frozen Strawberries, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Poland	80 299	60 413	52 417	54 338	80 724	49	1	78	73
Turkey	6,342	8,647	10,207	5,511	7,637	39	20	6	7
Morocco	69	1 543	7 552	9 707	4 796	(51)	6 851	0	4
Serbia	0	12	0	0	1,246			0	1
China	0	15	647	269	461	71		0	0
Other	16,494	13,202	20,729	15,586	15,993	3	(3)	16	14
Total	103 204	83,832	91 552	85 411	110 857	30	7		

European Imports of Frozen Strawberries, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Poland	72 081	74 679	90 264	62 737	73 564	17	2	74	68	701
Turkey	9 673	13,572	18,837	10,260	13,647	33	41	10	13	1,375
Morocco	170	1 448	7 604	9 320	4 074	(56)	2 292	0	4	653
Serbia	0	7	0	0	1,167			0	1	721
China	1	14	840	296	450	52	34 500	0	0	751
Other	15,263	15,122	33,387	19,291	14 737	(24)	(3)	16	14	709
Total	97 189	104 841	150 931	101 903	107 640	6	11			

European Imports of Frozen Raspberries, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Serbia	0	65	17	493	29 138	5 810		0	46
Chile	8,300	7,860	9,166	16,166	14,510	(10)	75	17	23
Poland	5 124	9 192	7 198	9 301	11 412	23	123	11	18
Hungary	6,281	3,734	3,228	3,473	5,254	51	(16)	13	8
Macedonia	0	15 530	28 573	22 751	1 716	(92)		0	3
Other	28 030	4,723	2,597	3,179	1 637	(49)	(94)	59	3
Total	47 735	41 104	50 779	55 363	63 667	15	33		

European Imports of Frozen Raspberries, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95-96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Serbia	0	75	12	1 039	40 377	3 787		0	37	1 066
Chile	18,899	21 468	26 771	42,515	38 315	(10)	103	23	35	2,031
Poland	6 557	16 271	15 934	20 639	15 243	(26)	132	8	14	1 027
Hungary	12 588	9,525	8 726	10,033	10,407	4	(17)	15	9	1 524
Macedonia	0	27 339	63 161	51 180	2 800	(95)		0	3	1 255
Other	44,205	9,166	6,660	7 203	3 173	(56)	(93)	54	3	1 491
Total	82 250	83 845	121 263	132 609	110 314	(17)	34			

European Imports of Frozen Orange Juice, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Brazil	441 325	431 984	529 634	598,514	622 174	4	41	89	82
United States	21,266	24,389	62,361	75,753	98,833	30	365	4	13
Morocco	1 094	2 646	13 274	3 818	6 964	82	537	0	1
Belize	0	18	3,323	5,338	8,684	63		0	1
Cuba	1 582	2 859	4 977	8 034	6 875	(14)	335	0	1
Other	31,893	26,869	18,953	29,523	16,664	(44)	(48)	6	2
Total	497 160	488 765	632 522	720 980	760 194	5	53		

European Imports of Frozen Orange Juice, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Brazil	615 690	472 961	588 556	702 225	829 284	18	35	88	86	1 025
United States	31,676	29,104	50,839	62,127	73,964	19	134	5	8	576
Morocco	1 401	3 458	17 906	5 997	11 890	98	748	0	1	1 313
Belize	0	29	2,136	7,478	10,712	43		0	1	949
Cuba	1 825	3 081	4 724	9 350	8 818	(6)	383	0	1	987
Other	47,129	35,338	24,710	39,880	24 870	(38)	(47)	7	3	1 148
Total	697 722	543 971	688 871	827 056	959 538	16	38			

European Imports of Apricot Pulp, 1992 1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
South Africa	1 941	928	1 980	2 902	4 570	57	135	33	50
Morocco	2,804	6 947	3,785	6,368	3,833	(40)	37	47	42
Argentina	287	107	158	304	334	10	16	5	4
Switzerland	0	0	0	11	14	27		0	0
Chile	186	18	41	133	59	(56)	(68)	3	1
Other	748	397	305	1,230	273	(78)	(64)	13	3
Total	5 966	8 397	6 269	10 948	9 083	(17)	52		

European Imports of Apricot Pulp, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
South Africa	3 231	1 367	2 156	3 696	7 646	107	137	36	53	1 673
Morocco	3 573	6,043	3 975	9,366	5,063	(46)	42	40	35	1,321
Argentina	556	208	250	504	867	72	56	6	6	2 596
Switzerland	0	2	2	132	198	50		0	1	14 124
Chile	365	29	66	204	145	(29)	(60)	4	1	2 463
Other	1,234	531	463	1,648	402	(76)	(67)	14	3	1,473
Total	8 959	8 180	6 912	15 550	14 321	(8)	60			

European Imports of Fresh Apricots, 1992 1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
South Africa	2 481	2 160	1 781	1 717	1 598	(7)	(36)	51	24
Hungary	**675**	**576**	**273**	**778**	**3,665**	**371**	**443**	**14**	**54**
United State	364	311	208	198	220	11	(40)	7	3
Chile	**460**	**174**	**152**	**284**	**221**	**(22)**	**(52)**	**9**	**3**
Turkey	286	119	290	179	173	(3)	(40)	6	3
Other	**640**	**858**	**280**	**1,864**	**852**	**(54)**	**33**	**13**	**13**
Total	4 906	4 198	2 984	5 020	6 729	34	37		

European Imports of Fresh Apricots, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
South Africa	3 684	3 678	2 760	3 046	4 156	36	13	56	40	2 601
Hungary	**385**	**423**	**254**	**959**	**3,400**	**254**	**783**	**6**	**33**	**928**
United State	659	746	416	473	976	106	48	10	9	4 438
Chile	**719**	**283**	**334**	**741**	**728**	**(2)**	**1**	**11**	**7**	**3,294**
Turkey	385	300	391	290	316	9	(18)	6	3	1 826
Other	**745**	**1,065**	**386**	**1,881**	**829**	**(56)**	**11**	**11**	**8**	**973**
Total	6 577	6,495	4 541	7 391	10 405	41	58			

European Imports of Fresh Asparagus, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Peru	830	1 001	1 328	1 741	2 197	26	165	13	23
United State	**1,561**	**1,344**	**1,254**	**1,173**	**1,451**	**24**	**(7)**	**25**	**15**
South Africa	238	593	954	814	1 168	43	391	4	12
Hungary	**132**	**113**	**211**	**746**	**1,060**	**42**	**703**	**2**	**11**
Poland	934	927	1 082	1 249	1 055	(16)	13	15	11
Other	**2 460**	**1 957**	**1,932**	**2,118**	**2,712**	**28**	**10**	**40**	**28**
Total	6 155	5 935	6 761	7 841	9 643	23	57		

European Imports of Fresh Asparagus, 1992 1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Peru	3 432	4 844	5 298	6 700	8 506	27	148	16	26	3 872
United State	**6 206**	**5,896**	**5,378**	**4,267**	**5 632**	**32**	**(9)**	**29**	**17**	**3 881**
South Africa	603	2 391	2 747	1 390	4 524	226	650	3	14	3 873
Hungary	**225**	**216**	**462**	**1,871**	**2,453**	**31**	**991**	**1**	**8**	**2,314**
Poland	1 724	1 583	1 990	2 881	2 085	(28)	21	8	6	1 976
Other	**9,515**	**8 380**	**6 881**	**7,242**	**9 464**	**31**	**(1)**	**44**	**29**	**3 490**
Total	21 705	23 309	22 755	24 350	32 664	34	50			

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European Imports of Fresh Peppers, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Turkey	15 846	16 155	19 950	24 088	25 813	7	63	32	44
Israel	1 851	2 421	3,240	2,577	7,599	195	311	4	13
Hungary	16 764	13 290	13 556	13 349	11 800	(12)	(30)	34	20
Canary Island	4,310	1,959	1,143	1,757	1,606	(9)	(63)	9	3
Morocco	4 424	4 393	4 240	2 820	3 221	14	(27)	9	6
Other	5,633	5,075	5,628	5,329	8,071	51	43	12	14
Total	48 828	43 293	47 757	49 920	58 110	16	19		

European Imports of Fresh Peppers, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95-96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Turkey	17 727	20 557	24 198	26 400	28 493	8	61	33	38	1 104
Israel	2,521	4,642	4,830	5,866	17 649	201	600	5	23	2 323
Hungary	11 470	9 848	10 526	11 517	10 426	(9)	(9)	21	14	884
Canary Island	6,241	2,665	2,105	3,414	3,965	16	(36)	12	5	2 469
Morocco	6 491	5 080	5 617	3 331	3 814	15	(41)	12	5	1 184
Other	9 334	12,191	12,060	8 549	11,476	34	23	17	15	1,422
Total	53 784	54 984	59 336	59 076	75 824	28	41			

European Imports of Fresh Citrus Fruit 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Morocco	365 500	353 015	343 429	273 005	456 974	67	25	23	24
South Africa	236 997	193,839	259,524	258,102	332,525	29	40	15	17
Argentina	172 270	129 516	188 667	200 128	231 391	16	34	11	12
Israel	219 608	149,033	97,823	157 522	223,539	42	2	14	12
Turkey	76 083	66 734	77 405	94 537	163 358	73	115	5	8
Other	519 646	587 451	650 601	760 918	529 380	(30)	2	33	27
Total	1 590 104	1 479 588	1 617 449	1 744 212	1 937 167	11	22		

European Imports of Fresh Citrus Fruit, 1992 1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Morocco	210 683	189 865	193 257	195 543	322 807	65	53	23	25	706
South Africa	131,238	111,136	152,355	164,454	206,023	25	57	14	16	620
Argentina	103 217	78 922	122 425	134 571	166 353	24	61	11	13	719
Israel	135,844	75,431	50,934	98,172	154,489	57	14	15	12	691
Turkey	50 092	44 698	49 284	62 492	119 479	91	139	5	9	731
Other	289 364	328 199	370 250	485,481	324,071	(33)	12	31	25	612
Total	920 438	828 251	938 505	1 140 714	1 293 222	13	41			

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European Imports of Fresh Melon and Papaya, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Brazil	41 104	52 202	54 975	49 517	42 422	(14)	3	36	27
Costa Rica	8 014	6,357	9,846	15,031	25,827	72	222	7	16
Israel	14 699	13 773	14 445	17 481	16 020	(8)	9	13	10
Morocco	2,165	4,952	8,026	7,306	10,264	40	374	2	6
Honduras	970	2 478	5 712	8 016	10 394	30	972	1	7
Other	46,084	29,746	51 949	56,934	53,940	(5)	17	41	34
Total	113 036	109 508	144 953	154 285	158 867	3	41		

European Imports of Fresh Melons and Papaya, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Brazil	29 991	41 369	40 011	36 236	35 135	(3)	17	27	23	828
Costa Rica	11,694	9,000	13 868	20,488	27,764	36	137	11	18	1,075
Israel	21 415	20 196	19 833	23 622	22 655	(4)	6	19	15	1 414
Morocco	3,887	6,960	9,166	9,107	14,703	61	278	4	9	1,432
Honduras	997	2 903	5 723	7 836	9 208	18	823	1	6	886
Other	42,865	39,088	45 308	48,346	46 589	(4)	9	39	30	864
Total	110 848	119 516	133 909	145 635	156 055	7	41			

European Imports of Fresh Peaches, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Chile	11 936	4 602	6 008	8 627	9 926	15	(17)	71	65
South Africa	2,996	2,399	2 323	1 953	2,699	38	(10)	18	18
Morocco	300	817	1 333	1 062	1 033	(3)	244	2	7
United State	168	305	112	15	454	2,927	170	1	3
Turkey	790	345	602	191	458	140	(42)	5	3
Other	652	376	458	688	605	(12)	(7)	4	4
Total	16 842	8 844	10 836	12 536	15 175	21	(10)		

European Imports of Fresh Peaches, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95-96	% inc 92-96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Chile	17 787	7 749	9 458	11 924	13 763	15	(23)	69	56	1 387
South Africa	5,664	5,225	4 523	4,499	5 324	18	(6)	22	22	1 972
Morocco	612	1 429	3 966	2 547	2 935	15	379	2	12	2 842
United State	302	447	163	20	809	4,047	168	1	3	1 781
Turkey	703	303	490	195	586	201	(17)	3	2	1 280
Other	642	491	607	1,300	1 325	2	106	2	5	2,190
Total	25 710	15 644	19 206	20 484	24 742	21	(4)			

European Imports of Fresh Potatoes, 1992 1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Cyprus	150 091	145 476	100 367	163 089	176 884	8	18	30	27
Egypt	159,720	124,366	99,501	277,288	309,669	12	94	32	48
Morocco	106 849	62 382	86 897	95 243	56 033	(41)	(48)	21	9
Israel	25,696	34,369	25,640	25,192	61,922	146	141	5	10
Canada	22 056	3 221	3 173	10 295	10 208	(1)	(54)	4	2
Other	37,859	25,499	110,799	104,781	35,077	(67)	(7)	8	5
Total	502 271	395 313	426 377	675 888	649 793	(4)	29		

European Imports of Fresh Potatoes, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Cyprus	51 201	59 974	48 738	96 613	94 294	(2)	84	26	37	533
Egypt	58 331	48,140	43,638	131,923	89,705	(32)	54	30	35	290
Morocco	52 944	32 767	44 012	64 996	27 446	(58)	(48)	27	11	490
Israel	12 838	17,134	12,159	15,291	25,303	65	97	7	10	409
Canada	6 426	902	1 351	3 990	4 147	4	(35)	3	2	406
Other	12 783	8,455	33,567	39 166	15 682	(60)	23	7	6	447
Total	194 522	167 372	183 465	351 979	256 577	(27)	32			

European Imports of Fresh Raspberries, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Poland	6 748	10 810	6 367	11 911	10 530	(12)	56	63	56
Chile	398	309	307	324	399	23	0	4	2
Hungary	261	417	545	1 560	2 222	42	751	2	12
Romania	454	1 657	452	1,281	806	(37)	78	4	4
Serbia	0	0	0	0	804			0	4
Other	2 904	4 177	4 604	3,885	4,095	5	41	27	22
Total	10 765	17 370	12 275	18 961	18 856	(1)	75		

European Imports of Fresh Raspberries, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Poland	6 549	15 835	13 917	20 046	7 115	(65)	9	38	35	676
Chile	5 372	3 647	4 022	3 766	5,152	37	(4)	31	25	12,912
Hungary	269	677	966	3 017	1 756	(42)	553	2	9	790
Romania	471	2,122	932	2,263	1,037	(54)	120	3	5	1 287
Serbia	0	0	0	0	731			0	4	909
Other	4,581	6 826	11 323	8,094	4 637	(43)	1	27	23	1 132
Total	17 242	29 107	31 160	37 187	20 428	(45)	18			

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European Imports of Fresh Strawberries, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Morocco	2 025	5 054	5 619	8 296	6 987	(16)	245	8	26
United States	3,751	2,164	4 503	3 578	4,157	16	11	16	15
Poland	15 405	15 231	7 993	15 653	13 156	(16)	(15)	64	49
Israel	397	647	870	661	1,247	89	214	2	5
Egypt	73	132	161	218	497	128	581	0	2
Other	2,426	1,294	1,952	1,419	1,011	(29)	(58)	10	4
Total	24 077	24 522	21 098	29 825	27 055	(9)	12		

European Imports of Fresh Strawberries, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Morocco	6 640	13 776	16 696	22 380	21 844	(2)	229	19	45	3 126
United States	9 680	5,420	10,500	10,052	9 456	(6)	(2)	27	19	2,275
Poland	8 037	12 912	11 294	8 472	7 560	(11)	(6)	22	16	575
Israel	1,988	3,171	4,549	3,368	5,162	53	160	6	11	4,140
Egypt	393	683	802	985	1 929	96	391	1	4	3 882
Other	9 086	4 311	3,132	3,019	2 575	(15)	(72)	25	5	2 547
Total	35 823	40 271	46 973	48 276	48 526	1	35			

European Imports of Fresh Tomatoes, 1992-1996, Volume (MTs)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96
Canary Islands	210 891	217 671	306 616	335 095	379 806	13	80	59	71
Morocco	131,920	164,360	148,297	136,442	145,205	6	10	37	27
Israel	5 033	3 860	4 073	5 470	6 985	28	39	1	1
Turkey	3,926	1,820	2,829	2,186	3,425	57	(13)	1	1
Senegal	283	290	444	606	562	(7)	99	0	0
Other	4 555	3 479	1,879	3,716	2,141	(42)	(53)	1	0
Total	356 608	391 480	464 138	483 515	538 124	11	51		

European Imports of Fresh Tomatoes, 1992-1996, Value (US$000)

	1992	1993	1994	1995	1996	% inc 95 96	% inc 92 96	Mkt Shr 92	Mkt Shr 96	US$/ton 96
Canary Islands	162 673	159 721	235 222	298 640	315 180	6	94	60	72	830
Morocco	99 805	110 640	90,567	103,032	104,753	2	5	37	24	721
Israel	3 930	2 872	2 833	7 134	9 834	38	150	1	2	1 408
Turkey	2,740	1 464	2 109	1,922	3 502	82	28	1	1	1,022
Senegal	263	222	335	1 224	1 203	(2)	357	0	0	2 141
Other	2,801	2 313	1,314	2,715	1,924	(29)	(31)	1	0	899
Total	272 212	277 232	332 380	414 667	436 396	5	60			

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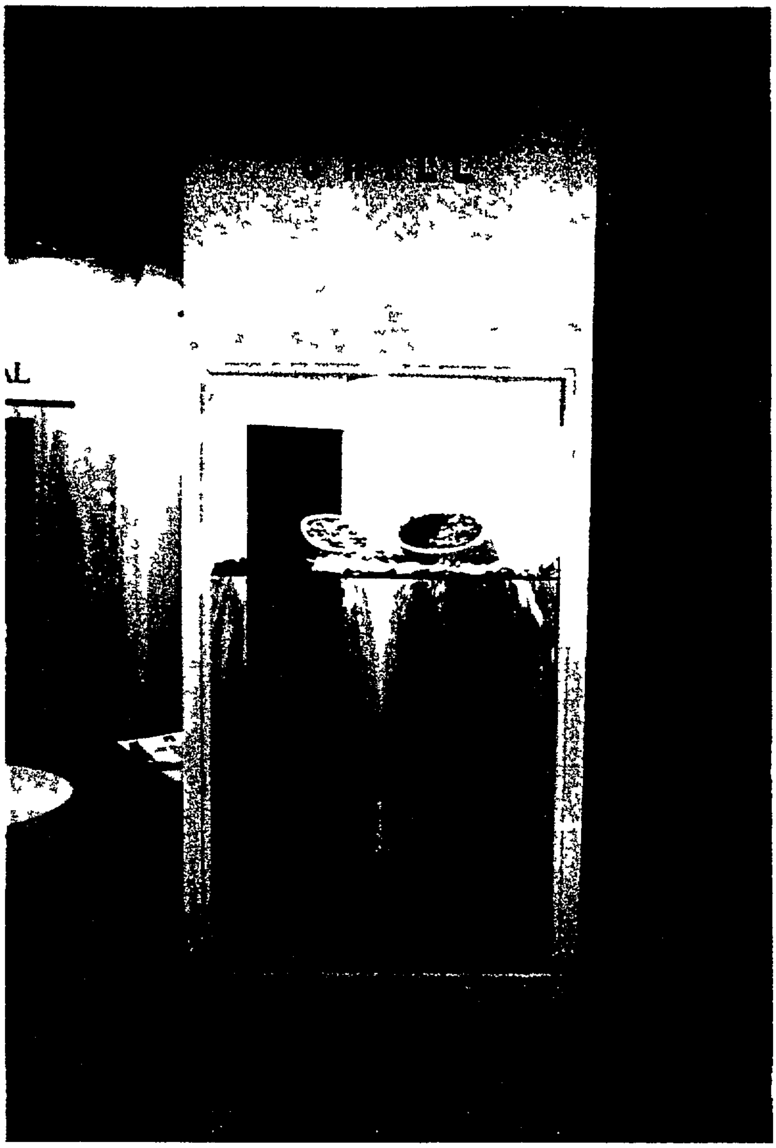
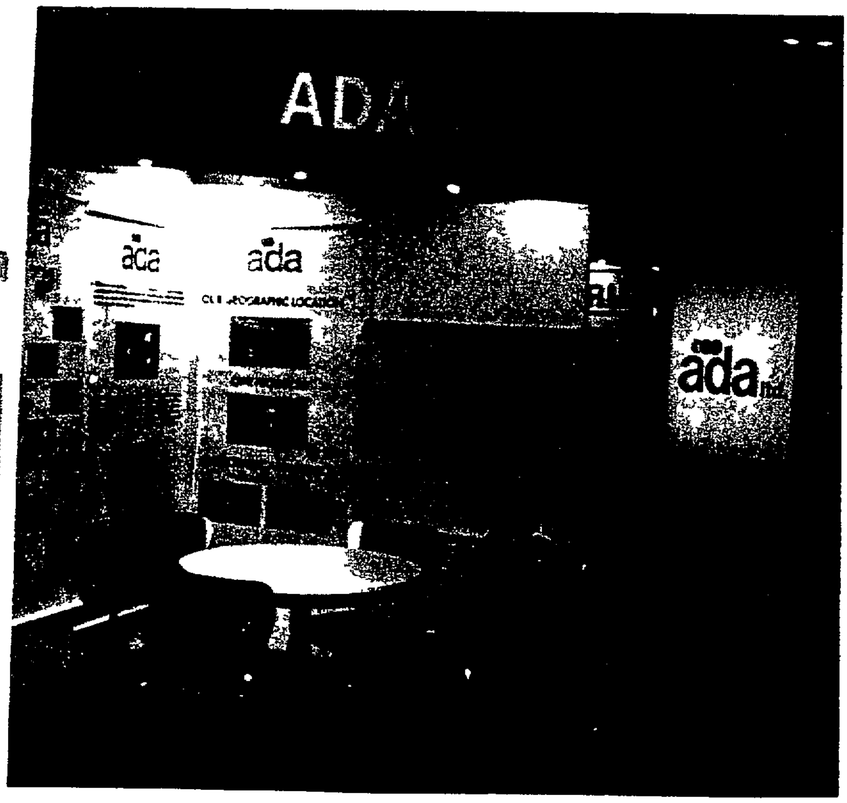
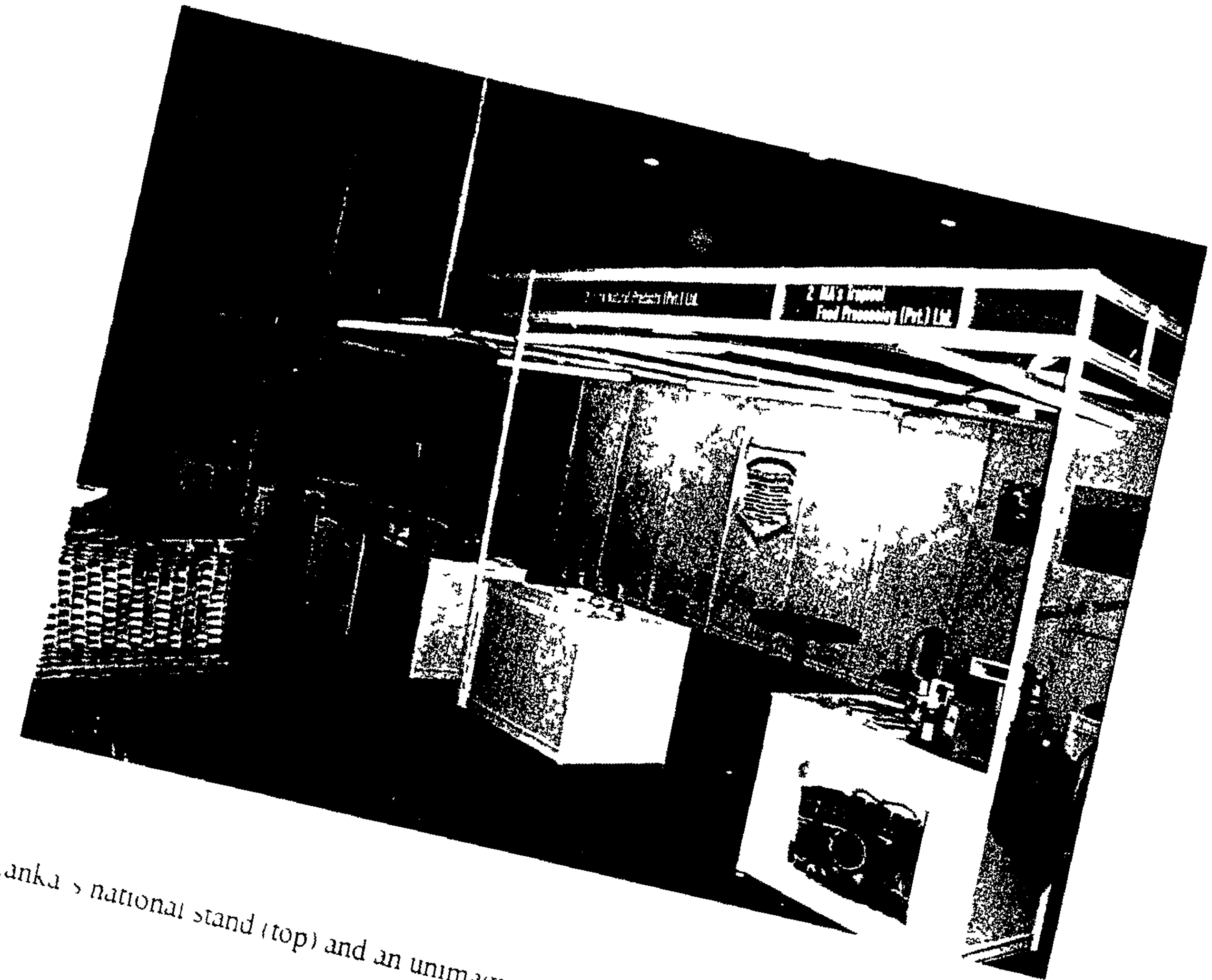
Annex 3: Photos from Food Ingredients Europe 1997



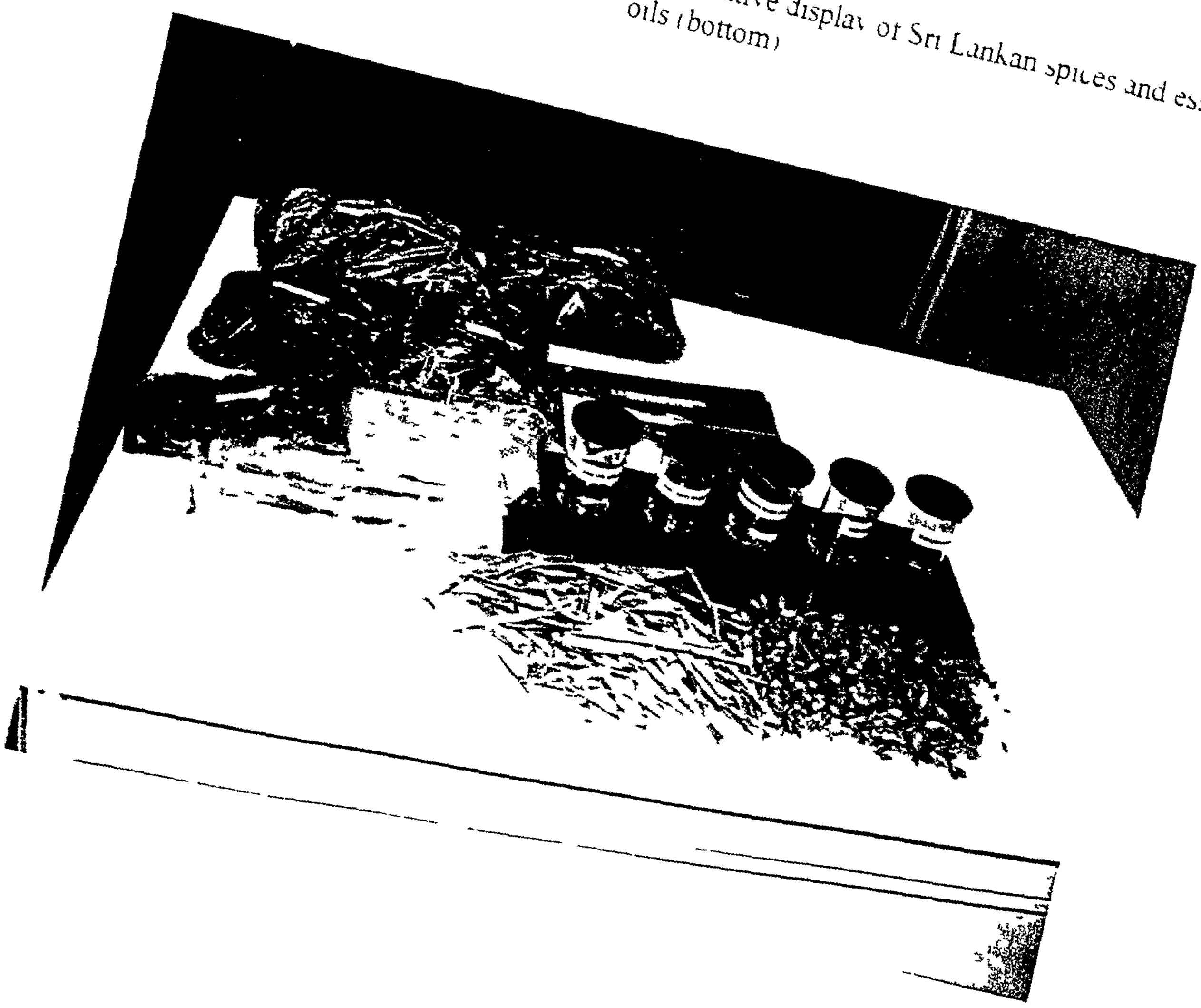
(Left) Chilean National Stand
(Below) Ada a Chilean Supplier of Dehydrated Vegetables



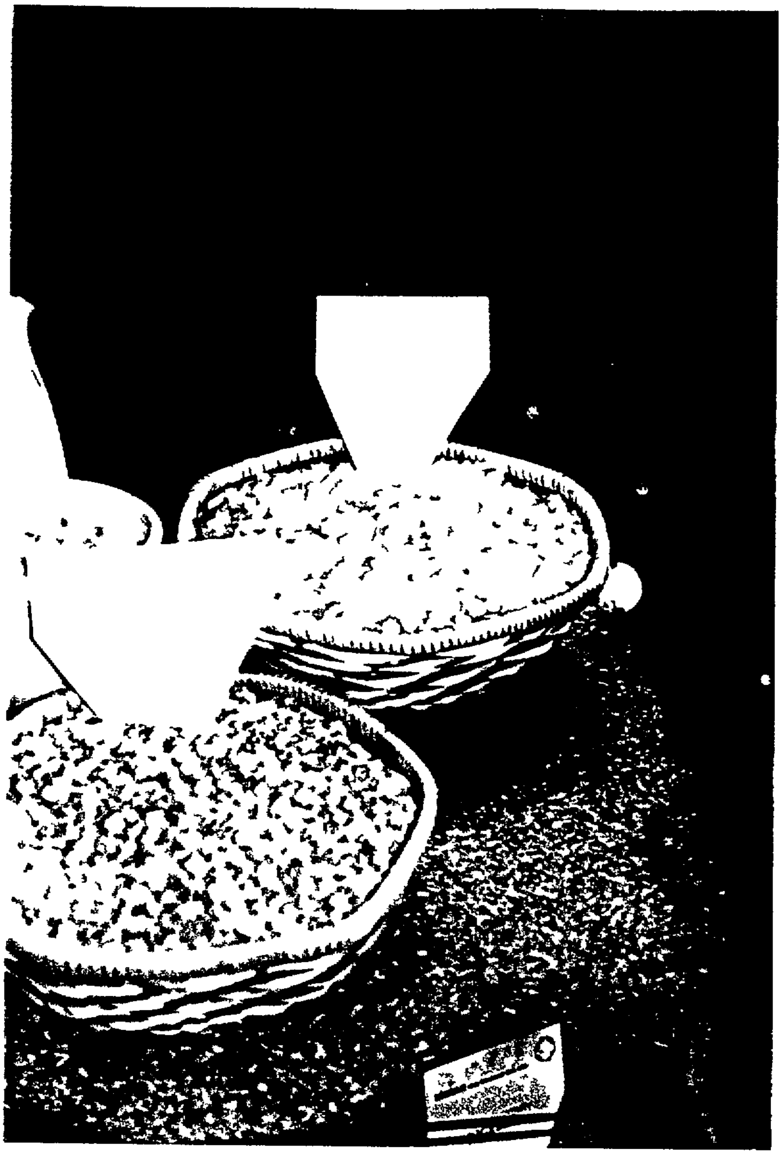
The Peruvian National Stand. Most of the Peruvian companies were cochineal suppliers



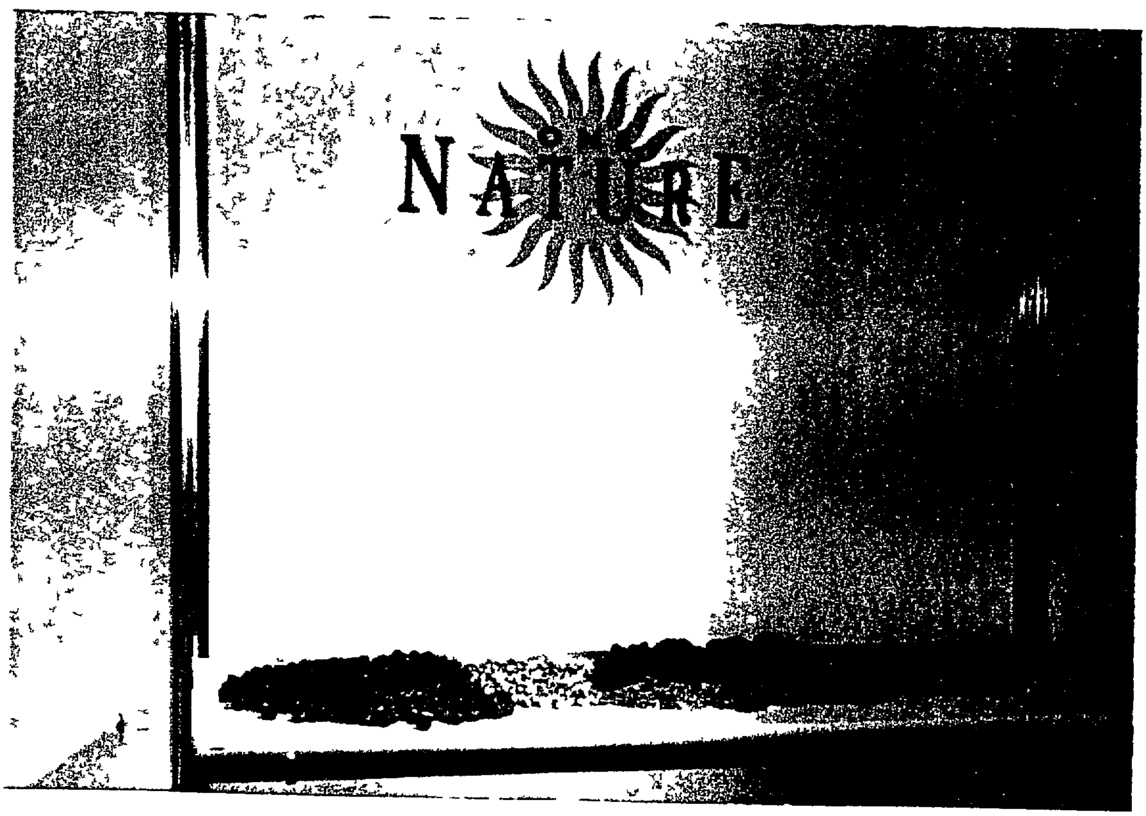
Sri Lanka's national stand (top) and an unimaginative display of Sri Lankan spices and essential oils (bottom)

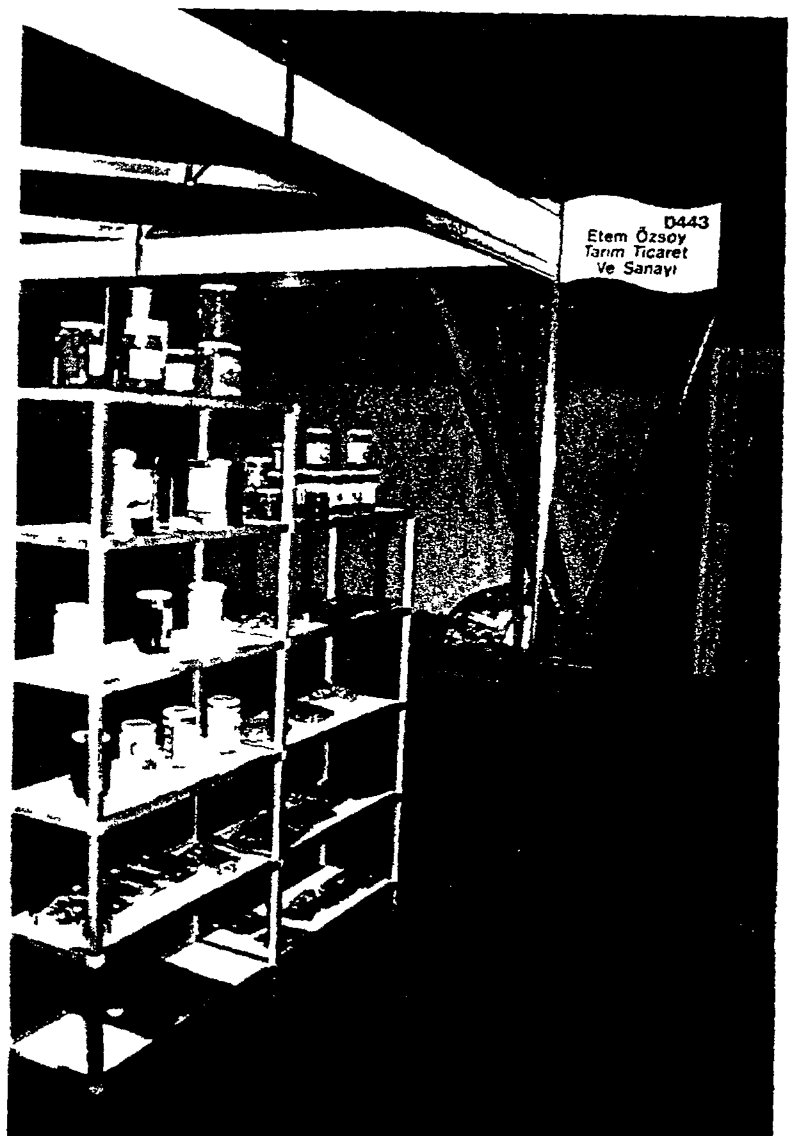


Two Turkish Exhibitors at the CBI Pavilion, Pamsan (above) with a variety of spices and closeup of Figsan's coriander and rosemary (left)

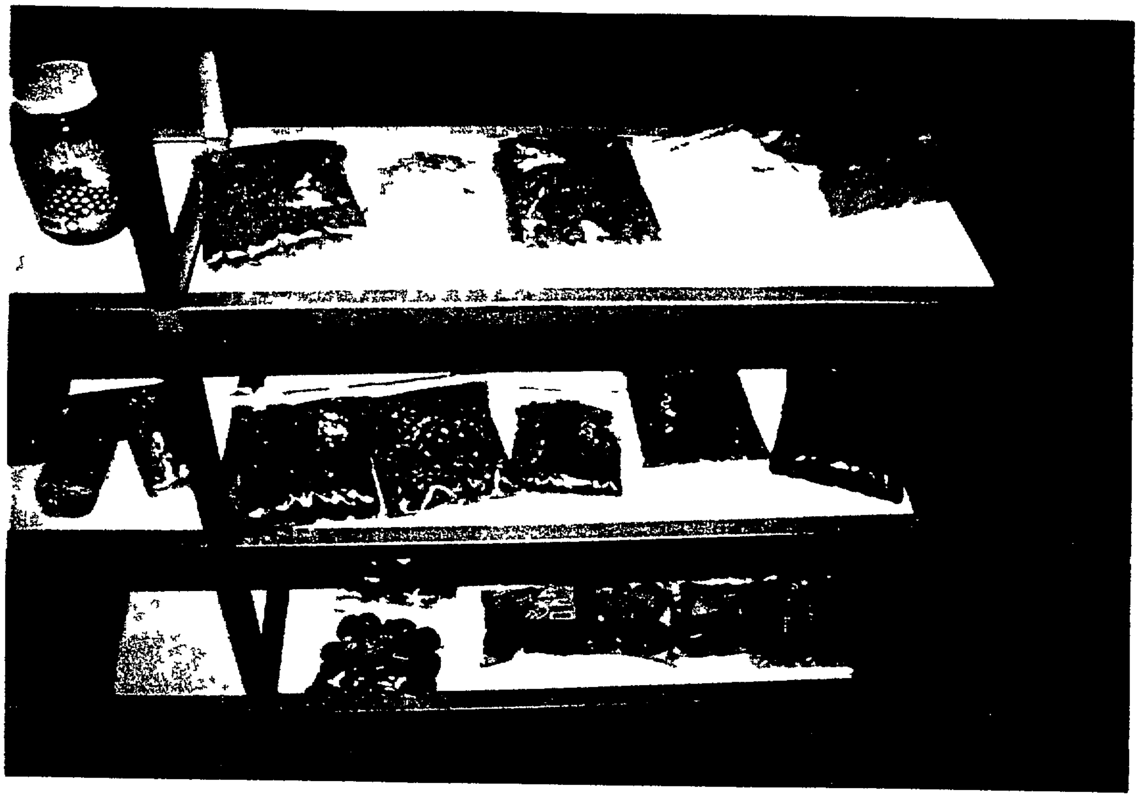


Diced apricots and figs from Figsan (left) and lackluster display of organic figs and beans from One Nature (below)





Turkish exhibitor Etem Ozsoy (right) with close-up of the company's retail-packed dried fruits (above)



Etem Ozsoy's bulk-packed dried fruits (above) and fruits in syrups and water (below)

Etem Ozsov's canned cherries, preserved peppers and plums (top)

Allione a large Italian manufacturer of dried fruit and aromatic herbs (left)

Moroccan oranges at New Covent Garden Wholesale Market London

SV

Annex 4. Contact Information for Buyer Survey Respondents

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