MARKETS FOR HEARTS OF PALM

Prepared for USAID/Ecuador

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U.S. Agency for International Development
Washington, DC 20523, USA

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Markets for Hearts of Palm

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MARKETS FOR HEARTS OF PALM

Description of Study:

This brief report has been prepared in response to a request, from USAID/Ecuador, for information on the U.S. market for hearts of palm. Import statistics are included also for western Europe, Canada and Japan, all of which buy more of the product than does the USA.

Please note that this is not a complete market study. It has, however, produced information that should be useful to export development organizations that are considering encouraging farmers to plant palms with the intention of selling hearts of palm.

U.S. Market Demand:

All or nearly all palm hearts on the U.S. market are imported, and all or nearly all of the imports are in processed form.

U.S. imports were about 2 million kilograms in 1989 and rose to 2.8 million kg in 1990. The amount imported dropped back to about 2 million kg in 1991 and rose slightly in 1992. Imports in the first 2 months of 1993 were back at the 1991 level.

Please see Annex I, Graph 1, "U.S. imports, Hearts of Palm" and Graph 2, "U.S. Imports, January and February (only)."

Palm hearts are largely an ethnic and a gourmet product in the United States and are sold in ethnic stores and in the gourmet sections of supermarkets. They are not bought by the mainstream U.S. consumer. They are sometimes served in salads in expensive restaurants, but the total volume is small. They are sometimes included in salad bars in lower priced ethnic, e.g., Korean-owned, restaurants.

The Food Institute Report for July 26, 1993 reported that 1.34 million pounds of palm hearts were sold in U.S. supermarkets in 1992, an increase of 9.5% over the year before. The dollar value of sales was reported at $4.41, an increase of just 3.5% over the year before. This means that the average reported retail price of hearts of palm in U.S. supermarkets in 1992 was about $3.43 per pound. It means also that the average supermarket price decreased from 1991 to 1992.

If 1992 U.S. imports were about 2.2 million Kg, and supermarket sales the same year were just 1.34 million pounds, then supermarkets accounted for only about 28% of total sales (ignoring changes in stocks, re-exports, spoilage, and statistical errors).
One supermarket executive reports that sales in their 80 stores have increased, in the past 3 years, from 2 cases to 40 cases per week. Import statistics indicate, however, that this performance is far from typical.

One reason for the sluggish demand is the almost total lack of promotion of the product. In spite of the large number of brands, brought by numerous importers from a variety of countries, it appears that no one is doing an effective job of expanding the market through promotion.

In fact, one supermarket specialty foods buyer asked if LAC TECH had promotional literature that he could place on shelves to help promote the product. He thought that if palm hearts were promoted effectively they could achieve the popularity of artichoke hearts, which are used in a variety of recipes including appetizers, salads, and main dishes.

Prices must be competitive, but not necessarily lower than those of the competition. It is more important to provide a high quality product, a very attractive label, on-time delivery, and assistance with promotion. For example, a palm heart supplier could help its U.S. importer to exhibit the product in fancy food shows in New York and San Francisco. The supplier could pay part of the cost of the exhibit, provide literature on the product, and provide samples and a representative to encourage interested persons to taste it.

The selection of an importer is also quite important. The ideal is to persuade a major importer of specialty foods, with established distribution, to replace the brand he/she is currently handling with the new one. The product and the label can then be made to the buyer's specifications and adapted to the particular market segment (gourmet or ethnic) and part of the country to which the buyer distributes.

Suppliers to the U.S.:

For calendar year 1992, Brazil was by far the largest supplier to the USA with about 1.8 million kilograms. It was followed distantly by Costa Rica with 320,000 kg and even more distantly by Thailand, the Philippines, Colombia, Venezuela, Guatemala, El Salvador, and the Dominican Republic.

Brazil is said to be the dominant supplier because of its large production and low prices. Production in that country (and in neighboring countries) is said to be decreasing because of clear cutting of forests, however, much of the production from wild palms is being replaced by production from cultivated palms. The emphasis is on varieties that begin producing in just 2-3 years.

Several Asian and Latin American countries have potential to expand production and will surely do so if prices should begin to increase.
Prices:

The average c.i.f. (cost, insurance, and fright paid to destination) price of hearts of palm imported to the USA was about $2.50 in 1989 and 1990, $2.39 in 1991, $2.62 in 1992, and $2.10 in the first 2 months of 1993. There is, however, a wide variation in price due mainly to differences in quality. One distributor said that case prices varied from $26.00 to about $35.00.

The average retail price in U.S. supermarkets in 1992, mentioned in an earlier section of this report, was $3.43 per pound.

On June 21, 1993 The Food Institute reported that the price of 24 14 ounce cans was $21.00, f.o.b. Brazil. That works out to $2.20 per kg, not including the cost of international shipping and insurance.

Product Quality:

Important characteristics relating to the quality of palm hearts are diameter, color, tenderness, and uniformity. Buyers like small, white, tender palm hearts of uniform size. Of course the packaging (canning) must be done correctly to maintain product quality.

We have noted that the labels on several imported brands are less attractive than they could be. This gives an impression of low quality, even though the product itself might be excellent.

The trend toward cultivation of palm hearts, rather than harvesting wild palms, is expected to have a favorable effect on product quality. The selection of varieties for cultivation is critical and should be done in concert with buyers in the target market.

Packaging and Regulations:

Palm hearts are normally packed in saline solutions, with Ph (a measure of alkilinity) above 4.6. This makes them "low acid canned foods," in which the deadly bacteria, clostridium botulinum can survive. Because of this, processing plants from which palm hearts are exported to the USA must normally obtain "Food Canning Establishment" (FCE) numbers from the federal Food and Drug Administration (FDA).
In order to obtain an FCE number, the exporting firm must convince FDA that its processing plant, equipment, and process are adequate to kill the bacteria. This is done by filing a form with FDA (copy included in Annex II to this report). Two documents explain this process:

Requirements for Establishment Registration, Thermal Process filing, and Good Manufacturing Practice for Low-Acid Canned Foods and Acidified Foods (a compilation of applicable parts of The Federal Register, undated, and


Both can be obtained from the LACF Registration Coordinator (HFF-233), Center for Food Safety & Applied Nutrition (FDA), 200 C Street SW, Washington, DC 20204, or photocopies can be obtained from LAC TECH.

The process of obtaining an FCE number can be simple and inexpensive, however, if FDA has doubts about whether a firm can produce to the required standard it may withhold certification pending a physical inspection and testing of the plant by an organization approved by FDA and must be paid for by the applicant.

Two pages of information on regulation of processed food imports are also included in Annex II.

Strategies for U.S. Market Entry:

Before encouraging farmers to plant palms or entrepreneurs to install canning facilities, personnel of agricultural and export development agencies should do additional market research including meeting with prospective buyers and analyzing possible future supplies in competing countries. This should be followed by visits by processors to buyers to try to obtain their commitments to purchase the product if specified conditions are met. Only then should consideration be given to encouraging farmers to plant palm and to helping them with variety selection and cultural practices.

A list of some U.S. importers is annexed to this report. Mr. Bob Pincus of American Roland Food Corporation, expressed interest in hearing from possible new suppliers, as did Mr. Peter Horn of John S. Horn and Company. Buyers in general prefer to speak with prospective exporters who understand U.S. regulations and have obtained FCE numbers. LAC TECH can provide names of private consultants whose work includes helping producers apply for FCE numbers.
Since palm hearts are a small volume product, canners should consider combining shipments with exporters of other canned food products or contracting with these firms to export their products. Shipping is not economical except in full 40 foot containers, and importers generally prefer a few large transactions to many small ones.

**U.S. Buyers of Hearts of Palm:**

Annex III to this report lists importers of hearts of palm who are listed in the current edition of The Journal of Commerce Directory of United States Importers. Most of the firms listed in this directory are likely to import the product, however, like other directories this one is incomplete. Exporters who attend fancy food shows in the United States or simply look for palm hearts on store shelves will find importers other than the ones listed.

**Developed Country Imports:**

Annex I, Graphs 3 and 4, "Quantities Imported, Hearts of Palm" and "Values Imported, Hearts of Palm," show that the U.S. is a very small importer of palm hearts compared with other developed countries. In fact, much greater volumes are trans-shipped from the U.S. to Canada than remain in the U.S. itself.

The world’s largest buyer by far is Japan, with imports in 1992 of 63 million kilograms. About half its supply is from China, and the rest is from numerous countries including the USA as a trans-shipper. At least four Latin American countries are shipping to Japan, however, showing that the market is open and should definitely be investigated. Japanese officials in Ecuador can put exporters in contact with the Japan External Trade Organization (JETRO), 2-5 Tarananomon, Tokyo 105, Japan. Hearts of palm are exhibited in trade shows including the Osaka Iternational Food & Beverage Exhibition held semi-annually in the fall.

Canada also is a major importer of palm hearts, with 1992 imports of 31 million kg. It buys directly from numerous countries, especially Australia and Thailand, and indirectly from U.S. trans-shippers. Within Canada, the major consuming region is said to be the province of Quebec because of its large population of French heritage. Assistance in entering the Canadian market is available from the Trade Facilitation Office, 56 rue Sparks St, Suite 500, Ottawa, Ontario K1P 5A9, Canada.

The European Community also imports significantly more hearts of palm than the USA, about 7.5 million kg in 1992. Of this, nearly 6 million kg were imported by France. By far the largest supplier to France was Brazil, and most other supplies were from Latin American countries. France is not a significant re-exporter to other European countries. The other significant importer in western Europe is Spain, with imports in 1992 of 1 million kilograms. Assistance on selling in Europe can be obtained from import facilitation organizations, especially
the Centrum tot Bevordering van de Import uit ontwikkelingslanden (CBI), P.O. Box 30009, 3001 DA Rotterdam, The Netherlands.

Graphs 3 and 4 show, however, that the prices paid for hearts of palm are higher in the USA than in Japan, Canada, or Europe. This creates a rationale for trying to sell in the U.S. market, especially if supplies are limited.

The final annex to this report gives import statistics for hearts of palm, quantity and value from 1989 through 1992, for the USA, Canada, Japan, the EC as a whole, and individual western European countries. These statistics, taken from different sources, have been put into the same format with the quantities translated to kilograms and the values to U.S dollars.
Annex I

IMPORT STATISTICS:
U.S. AND DEVELOPED COUNTRY
U.S. Imports
Hearts of Palm

Millions


- Quantity
+ CIF-Value
U.S. Imports
January and February (only)

Hearts of Palm
Quantities Imported
Hearts of Palm

In kilograms
Values Imported
Hearts of Palm

In U.S. Dollars
Annex II

FOOD CANNING ESTABLISHMENT REGISTRATION FORM

and

REGULATIONS ON IMPORTING PROCESSED FOODS
Public reporting burden for this collection of information is estimated to average 0.17 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to: Reports Clearance Officer, PHS, Hubert H. Humphrey Building, Room 721-B, 200 Independence Avenue S.W., Washington, D.C. 20201. Attn: PRA. Washington, DC 20503.

DEPARTMENT OF HEALTH AND HUMAN SERVICES - PUBLIC HEALTH SERVICE
FOOD AND DRUG ADMINISTRATION
FOOD CANNING ESTABLISHMENT REGISTRATION

<table>
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<th>TYPE OF SUBMISSION</th>
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<td>Change of Registration Information</td>
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FOOD PROCESSING PLANT LOCATION

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<tr>
<th>Establishment Name</th>
<th>Number and Street</th>
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LOW ACID AND/OR ACIDIFIED FOODS PROCESSED AT THIS LOCATION

<table>
<thead>
<tr>
<th>Food Product Name, Form or Style, and Packing Medium</th>
<th>(Do not list foods processed under the continuous inspection of the Meat Inspection Service or the Poultry Inspection Service of the Animal and Plant Health Inspection Service of the U.S. Department of Agriculture)</th>
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PLEASE SEND THE FOLLOWING:

<table>
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<tr>
<th>Number of Copies</th>
<th>Low-Acid</th>
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<tr>
<td>Process filing forms used for all processing methods except aseptic process combination</td>
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<tr>
<td>Registration and Process Filing Instructions</td>
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<tr>
<td>LACF &amp; Acidified Regulations (21 CFR 108.113, 114)</td>
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See "Instructions for Establishment Registration and Process Filing for Acidified and Low-Acid Canned Foods" for guidance in completing this form. Forward all copies of completed form to:

LACF Registration Coordinator (HFF-233)
Center for Food Safety & Applied Nutrition (FDA)
200 C Street SW.
Washington, D.C. 20204

AUTHORIZED COMPANY REPRESENTATIVE

Phone Number: ( ) at Plant Location □ Mailing Address Signature: Date:

NOTE: No commercial processor shall engage in the processing of low-acid or acidified foods unless completed Forms FDA 2541 and FDA 2541a or FDA 2541c have been filed with the Food and Drug Administration, 21 CFR 108.25(c)(1) and (2) and 108.35(c)(1) and (2).
### D. SCHEDULED PROCESS:

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<tr>
<td>ML</td>
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<tr>
<td>Other</td>
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<td>Other</td>
</tr>
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**CONTAINER DIMENSIONS (Check Only One in Each Column)**

| Shop No. | Temp. (°F) | Process Time (Minutes) | Sterilization Temp. (°F) | Least Sterilizing Value of Live Scheduled Process |
|_________ |_________ |_________ |_________ |_________ |
|_________ |_________ |_________ |_________ |_________ |
|_________ |_________ |_________ |_________ |_________ |
|_________ |_________ |_________ |_________ |_________ |
|_________ |_________ |_________ |_________ |_________ |

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<tr>
<td>Minimum Container Size</td>
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<tr>
<td>Minimum Container Capacity</td>
</tr>
</tbody>
</table>

**FDA USE ONLY**

**PLANT NAME & ADDRESS**

**AUTHORIZED INDIVIDUAL**

**PREFERRED MAILING ADDRESS**

**Mailing Address**

**NOTE:** No commercial processor shall engage in the processing of low-acid or acidified foods unless completed forms FDA 2541 and FDA 2541a have been filed with the Food and Drug Administration. 21 CFR 108 and 108a.22
FDA IMPORT PROCEDURES

1. Importer or agent files entry documents with U.S. Customs Service within five working days of the date of arrival of a shipment at a port of entry.

2. FDA is notified of an entry of a regulated food through:
   - Importer's Entry Notice (FDA Form FD 700 set) or Land Port Entry Notice (FDA Form FD 701),
   - Copy of U.S. Custom's Form 7501 "Summary Sheet for Consumption Entry",
   - Copy of commercial invoice, and,
   - Surery to cover potential duties, taxes and penalties.

3. FDA reviews importer's Entry Notice (FDA Form FD 701) to determine if a physical examination (wharf examination, sample examination should be made.

4A. Decision is made not to collect a sample, FDA sends a "May Proceed Notice" (FDA Form FD 702) to U.S. Customs and the importer of record. The shipment is released as far as FDA is concerned.

4B. Decision is made to collect a sample based on:
   - Nature of the product,
   - FDA priorities, and,
   - Past history of the commodity.

FDA sends a "Notice of Sampling" (FDA Form FD 712) to U.S. Customs and the importer of record. The shipment must be held intact pending further notice. A sample will be collected from the shipment. The importer of record may move the shipment from the dock to another port or warehouse (contact U.S. Customs for details).

5. FDA obtains a physical sample. The sample is sent to an FDA District Laboratory for analysis.

6A. FDA analysis finds the sample to be in compliance with requirements. FDA sends a Release Notice (FDA Form FD 711) to U.S. Customs and the importer of record.

6B. FDA analysis determines that the sample "appears to be in violation of the FD&C Act and other related Acts." FDA sends U.S. Customs and the importer of record a Notice of Detention and Hearing (FDA Form FD 777) which:
   - Specifies the nature of the violation, and,
   - Gives the importer of record 10 working days to introduce testimony as to the admissibility of the shipment.

The hearing is the importer's only opportunity to present a defense of the importation and/or to present evidence as to how the shipment may be made eligible for entry.

7A. Consignee, true owner, importer of record, or a designated representative responds to the Notice of Detention and Hearing. The response permits the introduction of testimony, either orally or written, as to the admissibility of the shipment.

7B. Consignee, true owner, importer of record, or a designated representative neither responds to the Notice of Detention and Hearing nor requests an extension of the hearing period.

8A. FDA conducts a hearing concerning the admissibility of the product. The hearing is an opportunity to present relevant matters and is confined to the submission of pertinent evidence.

8B. FDA issues a Notice of Refusal of Admission (FDA Form FD 772) to the importer of record. This is the same person or firm who was sent a Notice of Sampling. All recipients of the Notice of Sampling and the Notice of Detention and Hearing are sent a copy of FDA Form FD 772.

9A. Importer of record presents evidence indicating that the product is in compliance. Certified analytical results of samples, examined by a reliable laboratory and which are within the published guidelines for levels of contaminants and defects in food for human use, may be presented.

9B. Importer of record submits an Application for Authorization to Recon­dite or to Perform Other Action (FDA Form FD 766). The form requests permission to try to bring a food that is adulterated or misbranded into compliance by relabeling or other action, or by converting to a non-food use. A detailed method to bring the food into compliance must be given.

9C. FDA receives verification of the exportation or destruction of the shipment from U.S. Customs. The exportation or destruction of the merchandise listed on the Notice of Refusal of Admission is carried out under the direction of U.S. Customs.

10A. FDA collects follow-up sample to determine compliance with guidelines.

10B. FDA evaluates the reconditioning procedure proposed by the importer. A bond is required for payment of liquidated damages.

11A. FDA finds that the sample is "in compliance." A Release Notice (FDA Form FD 717) with the statement "Originally Detained and Now Released" is sent to U.S. Customs and the importer.

11B. FDA finds that the sample is not in compliance. The importer may either submit an Application for Authorization to Recon­dite or to Perform Other Action (see 9B), or, FDA will issue a Notice of Refusal of Admission (see 9B).

11C. FDA approves importer's reconditioning procedures. The approved application contains the statement "Merchandise Should Be Held Intact Pending the Receipt of FDA's Release Notice."

11D. FDA disapproves applicant's reconditioning procedure if past experience shows that the proposed method will not succeed. A second and final request will not be considered unless it contains meaningful changes in the reconditioning operation to ensure a reasonable chance of success. The applicant is informed on FDA Form FD 766.

12. Importer completes all reconditioning procedures and advises FDA that the goods are ready for inspection/sample collection.

13. FDA conducts follow-up inspection/sample collection to determine compliance with the terms of the reconditioning authorization.

14A. FDA analysis finds that the sample is in compliance. A Release Notice (FDA Form FD 717) is sent to the importer and to U.S. Customs. The charges for FDA supervision are assessed on FDA Form FD 790. Copies are sent to U.S. Customs which is responsible for obtaining total payment including any expenses incurred by their personnel.

14B. FDA analysis finds that the sample is still not in compliance. Charges for FDA supervision are assessed on FDA Form FD 790. Copies are sent to U.S. Customs which is responsible for obtaining total payment including expenses incurred by their personnel.

IMPORTERS CAN SPEED FOOD ENTRIES!

- Determine before shipment that the product to be imported is legal.
- Have private laboratories examine samples of foods to be imported and certify the analysis of the processor. While not conclusive, these analyses might serve as an indication of the processor's ability to produce acceptable, legal products.
- Become acquainted with FDA's legal requirements, before contracting for a shipment.
- Request assistance from the FDA District Office responsible for your port of entry.
- Know the food importing procedures described on this information sheet.
A Summary of the Procedures U. S. Importers Must Follow When Handling Food Products
(Shaded boxes are importer responsibilities)

1. Importer files "Entry Notice" with U.S. Customs.

2. FDA notified of entry.

3. FDA reviews "Entry Notice."

4A. FDA does not want sample. "May Proceed Notice" sent to U.S. Customs and importer.

4B. FDA wants sample. "Notice of Sampling" sent to U.S. Customs and importer.

5. U.S. Customs/FDA collects physical sample. Sample is analyzed by FDA.

5A: FDA finds sample is in compliance. "Release Notice" sent to U.S. Customs and importer.

5B. FDA determines sample is violative. "Notice of Detention and Hearing" sent to U.S. Customs and importer.

6A: FDA finds sample is in compliance. "Release Notice" sent to U.S. Customs and importer.

6B. FDA determines sample is violative. "Notice of Detention and Hearing" sent to U.S. Customs and importer.

7A. Importer responds to "Notice of Detention and Hearing."

7B. Importer does not respond to "Notice of Detention and Hearing."

8A. FDA holds hearing on detained product.

8B. FDA sends "Notice of Refusal of Admission."

9A. Importer presents evidence that product is "in compliance."

9B. Importer submits application to recondition.

9C. FDA receives verification of exportation or destruction.

10A. FDA collects follow-up sample.

10B. FDA reviews reconditioning procedure proposed by importer.

11A. FDA finds sample is in compliance. "Release Notice" sent to U.S. Customs and importer.

11B. FDA finds that sample does not comply.

12. Importer completes all reconditioning procedures.

13. FDA conducts follow-up inspection/sample collection.

14A. FDA finds that sample is in compliance. "Release Notice" sent to U.S. Customs and importer.

14B. FDA finds that sample does not comply.

Note: Explanation of each step on reverse side.

Food and Drug Administration, Center for Food Safety and Applied Nutrition, Industry Activities Section, Washington, DC 20204
Annex III

U.S. IMPORTERS OF HEARTS OF PALM

*
Annex III

U.S. IMPORTERS OF HEARTS OF PALM

Altapac Trading Co., Inc.
700 Union Street
Montebello, CA 90640
phone: (213) 722-2472
fax: (213) 726-3452

First Asian Foods Corp.
4567 Loma Vista Avenue
Vernon, CA 90058
phone: (213) 581-9884
fax: (213) 581-8639

Gourmet France, Inc.
9373 Remick Avenue
Arleta CA 91331
phone: (818) 768-4300
fax: (818) 504-9126

H & J Trading Co.
P.O. Box 369
San Leandro, CA 94577

Apollo Ship Chandlers
6900 N.W. 43rd Street
Miami, FL 33166
phone: (305) 592-8790

Specialty Food Distributors, Inc.
4006 Airport Road
Plant City, FL 33567
phone: (813) 752-8558
fax: (813) 754-7971

Variety Import Co.
4006 Airport Road
Plant City, FL 33567
phone: (813) 752-8558
fax: (813) 754-7971
Progress Grocery  
915 Decatur Street  
New Orleans, LA 70116  
phone: (504) 525-6627  
fax: (504) 561-8877  

Liberty Richter, Inc.  
Park 80, W., Plaza 1  
Saddle Brook, NJ 07662  
phone: (201)843-8900  

Phil Am Food Mart  
685 Newark Avenue  
Jersey City, NJ 07306-2803  
phone: (201) 963-0455  

Reese Finer Foods, Inc.  
300 Broadacres Drive  
Bloomfield, NJ 07003  
phone: (201)338-0300  
fax: (201) 338-0382  

Schreiber Foods International, Inc.  
10 S. Franklin Turnpike  
P.O. Box 299  
Ramsey NJ 07446  
phone: (201) 327-3535  
fax: (201) 327-2812  

EFCO Importers  
261 Old Yord Rd  
P.O. Box 741  
Kenkintown, PA 19046  
phone: (215) 885-8597  
fax: (215) 885-4584  

Tripper, Inc.  
50 Palmetto Pl.  
Hilton Head Island, SC 29928  
phone: (803) 671-3494  
fax: (803) 671-6415  

McLane America  
1857 S. 3850, W.  
Salt Lake City, UT 84104-4912  
phone: (801) 973-7999
American Roland Food Corporation
71 West 23rd Street - 4th floor
New York, NY 10010
phone: (212) 741-8799
fax: (212) 741-8855
contact: Mr. Bob Pincus

John S. Horn Company
World Trade Center Suite 340
San Francisco, CA 94111
phone: (415) 781-6789
fax: (415) 781-0629
contact: Mr. Peter Horn

Annex IV

DEVELOPED COUNTRIES IMPORT STATISTICS

FOR HEARTS OF PALM
HEARTS OF PALM IMPORTS

UNITED STATES

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Source: U.S. Department of Commerce
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Source: TRADSTAT World Trade Statistics

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**Quantity = kilograms**  
**Value = US $1000**

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Source: EUROSTAT