PROEXAG
NON-TRADITIONAL AGRICULTURAL EXPORT SUPPORT PROJECT

REPORT ON THE UNITED FRESH FRUIT AND VEGETABLE ASSOCIATION INTERNATIONAL TRADE FORUM AND 83rd ANNUAL CONVENTION AND EXPOSITION

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SUBMITTED TO:

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U.S. Agency for International Development
Guatemala City, Guatemala

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REPORT ON THE UNITED FRESH FRUIT AND VEGETABLE ASSOCIATION INTERNATIONAL TRADE FORUM AND 83RD ANNUAL CONVENTION AND EXPOSITION, FEBRUARY 14-18, 1987, ORLANDO, FLORIDA

Prepared by Pamela D. Michel, February 23, 1987

BACKGROUND

The annual UFFVA convention is one of the largest gatherings in the United States for the produce industry, bringing together some 6,000 participants, including growers, shippers, retailers, wholesalers, brokers, agents, allied suppliers, and exhibitors.

OBJECTIVES

PDM's representation at the UFFVA convention and trade forum was predicated on the following scope of work:

1. To conduct outreach for the ROCAP project with a targetted group of individuals/companies with a view toward expansion of the Market Technology Access Group, the cadre of technical assistance short-term advisors, and current/potential buyers of Central American produce;

2. To liaise with Central American country representatives participating in Caribbean Pavillion;

3. To acquire information on new techniques and specific issues;

4. To produce contact reports on the targetted groups/individuals and issues, commodities of interest, areas of expertise, and ad hoc meetings; and

5. To assess the Caribbean Pavillion, make recommendations for future Central American representation, and suggest future follow-up with UFFVA.

PROGRAM SUMMARY

The two-day international trade forum preceding the convention drew some 220 participants, and featured both general as well as concurrent educational sessions. The discussion tables attended by PDM are summarized later in this report as are recommendations resulting from the sessions to the UFFVA international trade committee; handouts for sessions not attended by PDM have been forwarded to the PROEXAG team together with handouts obtained at the exposition. None of the trade forum sessions were taped.

The exposition featured exhibits ranging from fresh produce to packing materials and machinery, and informational booths. It began immediately following the trade forum and was open for three afternoons, allowing for morning educational sessions on a range of subjects. A capsulized version of the programs is found on the next page, and is followed by a more detailed summary of the trade forum sessions and recommendations, the convention educational sessions, and contact reports in response to requests from the ROCAP field team.

INTERNATIONAL TRADE FORUM CAPSULE

SATURDAY, FEBRUARY 14
Forum Registration ..... 9 a.m. - 6 p.m.
Opening General Session .... 1 p.m. - 1:30 p.m.
Forum Session I ..... 1:45 p.m. - 3:15 p.m.
- Trade With China
- Free Trade With Mexico
- Countertrade and Barter
- Meeting U.S. Quarantine Requirements

Forum Session II ..... 3:45 p.m. - 5:15 p.m.
- Doing Business in Korea
- The Chilean Deal: Points of View
- Packing for the European Community
- Selling to the U.S. Institutional Market

International Reception ... 5:30 p.m. - 6:30 p.m.

SUNDAY, FEBRUARY 15
Breakfast General Session ..... 8 a.m. - 9 a.m.
General Session ..... 9 a.m. - 9:30 a.m.
Forum Session III ..... 9:45 a.m. - 11:15 a.m.
- Meeting Japanese Quarantine Requirements
- CBI: Finding a Market Niche
- Overseas Shipping: How to Start and Where to Go
- Doing Business in the Middle East

Luncheon General Session... 11:30 a.m. - 1 p.m.
EXPO 87--The Produce Show .... 1 p.m. - 5 p.m.

EDUCATIONAL SESSION CAPSULE

Monday, February 16, 10:15 a.m. - 11:45 a.m.
- Family Communication
- Distribution: Teamwork Counts
- Merger Mania: Effects on the Produce Industry
- Finding Your Way in the Software Maze
- Read any Good Labels Lately?
- Marketing, Merchandising & Agrichemicals: Managing Situations in the Apple Industry
- The Produce Broker: The Vital Link in Distribution
- Breaking Foodservice Sales Barriers
- New Products and Beyond

Tuesday, February 17, 8:15 a.m. - 9:45 a.m.
- Family Business—Be, and Survival
- Intermodal: A Transportation Network
- The Future of Branded Produce
- Foodservice Packaging: Where Do We Go From Here?
- Perfect Produce: The Food Revolution Ahead
- What's New in Onions
- A Produce Success Story: The Independent Retailer
- Immigration Reform: The Changes Ahead

Tuesday, February 17, 10:00 a.m. - 11:45 a.m.
- Crisis Management: Taking Control
- Saving Money Under '86 Tax Reform
- Shippers and Retailers: Keep Talking
- Coping with the Insurance Liability Crisis
- Merchandising Programs
- Fresh Profit Trends in Restaurants
- Potatoes: Can A Good Year Bring on a Better One?
- The Dynamic Tomato Industry—Changes are Coming
- Reprogramming Yourself for Success

Wednesday, February 18, 10:45 a.m. - 12:15 p.m.
- The PACA and Inspection Services: Tools for the Industry
- Diet Crazes: Cutting Calories and Increasing Profits
- The Supermarket of the Future
- Getting into the Business of Floral

CONVENTION CAPSULE

Note: Most events are scheduled in the Orange County Convention Center. Please consult program for specific locations.

SATURDAY, FEBRUARY 14
Exhibitor and General Registration ... 9:00 a.m. - 6:00 p.m.
*International Trade Forum ..... 1:00 p.m. - 5:30 p.m.

SUNDAY, FEBRUARY 15
Exhibitor and General Registration ... 8:00 a.m. - 5:00 p.m.
*International Trade Forum ..... 8:00 a.m. - 1:00 p.m.
United Run for Fresh ..... 9:00 a.m.
Grand Opening, EXPO 87-The Produce Show ... 1:00 p.m.
EXPO 87-The Produce Show ..... 1:00 p.m. - 5:00 p.m.
Culinary Contest Presentations ..... 1:00 p.m. - 5:00 p.m.
Chairman's Reception ..... 6:00 p.m. - 7:30 p.m.

MONDAY, FEBRUARY 16
Continental Breakfast ..... 7:30 a.m. - 8:15 a.m.
Registration ..... 7:30 a.m. - 5:00 p.m.
Opening General Session ..... 8:30 a.m. - 10:00 a.m.
Concurrent Educational Sessions
ROUND 1 ..... 10:15 a.m. - 11:45 a.m.
Concurrent Spouses Educational Sessions ..... 10:15 a.m. - 11:45 a.m.
Luncheon and General Session .... 12:00 noon - 1:30 p.m.
Spouses Luncheon ..... 12:30 p.m. - 2:00 p.m.
EXPO 87-The Produce Show ..... 1:30 p.m. - 5:00 p.m.
UNIPAC Reception ..... 5:30 p.m. - 7:00 p.m.

TUESDAY, FEBRUARY 17
Continental Breakfast ..... 7:30 a.m. - 8:00 a.m.
Registration ..... 7:30 a.m. - 5:00 p.m.
Concurrent Educational Sessions
ROUND 2 ..... 8:15 a.m. - 9:45 a.m.
Spouse Program Tours ..... 9:00 a.m. - 2:00 p.m.
Concurrent Educational Sessions
ROUND 3 ..... 10:00 a.m. - 11:30 a.m.
Luncheon and General Session .... 12:00 noon - 1:30 p.m.
EXPO 87-The Produce Show ..... 1:30 p.m. - 5:00 p.m.

WEDNESDAY, FEBRUARY 18
Registration ..... 8:00 a.m. - 1:00 p.m.
Continental Breakfast ..... 8:15 a.m. - 9:00 a.m.
Closing General Session ..... 9:00 a.m. - 10:30 a.m.
Concurrent Educational Sessions
ROUND 4 ..... 10:45 a.m. - 12:15 p.m.
Golf Tournament ..... 11:30 a.m.
Retail Tour ..... 12:30 p.m.
Tennis Tournament ..... 1:00 p.m.
Closing Party ..... 7:00 p.m. - 10:30 p.m.

*Separate Registration Fee Required

SATURDAY, FEBRUARY 14, 1987

1:00-1:30 p.m.

Opening Welcome

1:45-3:15 p.m.

Session I

TRADE WITH CHINA

The People's Republic of China is potentially one of the largest markets for U.S. produce. Steps to open markets and to join the General Agreement on Tariffs and Trade could increase U.S. exports. How much opportunity does China offer? What problems and barriers exist now? Will China actually open its doors to ...reased imports of American fruits and vegetables?

FREE TRADE WITH MEXICO

With Mexico shipping 80 times more produce to the United States than it receives, any free trade negotiations between these two neighboring countries will have a tremendous impact on the U.S. produce industry. This session will focus on the implications a free trade agreement with Mexico will have on all segments of the industry from the growers to the retailers. What will be the major issues affecting the produce industry should free trade negotiations begin? Is a free trade agreement even feasible between the U.S. and Mexico?

COUNTERTRADE AND BARTER

The 1985 Farm Bill directs the U.S. Department of Agriculture to carry out pilot projects on barter and countertrade transactions. Some argue about how advantageous and useful these financing techniques are for the produce industry. How successful are these transactions and what kind of risk is involved? Should produce exporters pursue these alternative types of trading?

MEETING U.S. QUARANTINE REQUIREMENTS

What can you do if the U.S. Department of Agriculture prohibits entry of a particular produce item because of foreign pests or diseases? It is not necessarily a dead end. U.S. importers and overseas exporters can play an important role in coordinating research to solve particular import restrictions.

3:15-3:30

Coffee Break

3:45 - 5:15 p.m.

Session II

DOING BUSINESS IN KOREA

Whenever opportunities arise for entering a new foreign market, cultural and political differences can create misunderstandings. To succeed in doing business in Korea, the U.S. exporter must understand the culture and politics of that country and the people with whom he is dealing. This workshop will focus on how to work within the cultural and political framework of Korea and successfully expand your export market.

THE CHILEAN DEAL: POINTS OF VIEW

Chile is expected to export 32 million boxes of fruit to the United States this season. With the dramatic increase of Chilean imports over the past few years, U.S. producers are experiencing problems with competition. A dialogue is needed between U.S. and Chilean growers about when and how Chile should market its fruit in the United States. This session will provide an opportunity for U.S. and Chilean growers, importers, retailers — everyone involved in the Chilean Fruit Deal —to identify the problems and start working toward a solution.

PACKING FOR THE EUROPEAN COMMUNITY

Since U.S. production costs are higher, U.S. shippers to Europe must offer a superior product. Just as important, however, is meeting the packaging needs of the European markets. Packaging must coincide with what the Europeans want, not necessarily what the U.S. exporters have. This session on how to package for Europe will give you a leading edge in the European market.

SELLING TO THE U.S. INSTITUTIONAL MARKET

Hospitals, schools, prisons and other institutions offer tremendous market opportunities for U.S. importers. U.S. institutions have specialized needs when it comes to grades, packaging, quantity and quality. Learn what the demands of institutions are and how to take advantage of this potential market.

5:30-6:30 p.m.

International Reception

SUNDAY, FEBRUARY 15, 1987

8:00-9:00 a.m.

Breakfast: The Realities of Free Trade with Canada

9:00-9:30 a.m.

General Session: U.S. Prospects for Expanding Export Markets

9:45-11:15 a.m.

Session III

MEETING JAPANESE QUARANTINE REQUIREMENTS

What should a U.S. exporter do if Japanese quarantine inspectors find a new pest or disease in a shipment of produce? How can the U.S. Department of Agriculture help the U.S. industry overcome some of these restrictions. Whether the problem is aphids in lettuce, coddling moth on apples or a new and unknown problem, action can be taken at the scientific level to open up closed markets.

CBI: FINDING A MARKET NICHE

If Caribbean Basin growers are going to succeed in the U.S. market, they must make sure they do not compete with U.S. producers. Shipping during the U.S. off-season and exporting items not grown in the U.S. are two keys to successful marketing to American consumers. Examine how to accomplish these objectives through cooperation, not competition.

OVERSEAS TRANSPORTATION

Are you interested in getting involved in international trade, but don't know where to find a transportation carrier? How can you find carriers with destinations to your markets? How can you obtain favorable rates? Learn how to start and where to go for your transportation needs.

DOING BUSINESS IN THE MIDDLE EAST

There is growing interest on the part of U.S. exporters in shipping to the Middle East. Cultural and political differences, however, can make doing business in this part of the world difficult. How can you develop positive working relationships?

11:30 a.m.-1:00 p.m.

Lunch: Closing General Session

1:00-5:00 p.m.

Expo 87 - The Produce Show

INTERNATIONAL TRADE FORUM

The trade program as shown on the previous page highlights the range of subjects covered in the 12 roundtable discussions (excerpts have been repeated in the summaries below). The sessions I attended featured presentations by panelists and stimulating discussions. Although these were not taped, summaries were given at the conclusion of the forum and are included in this report as well. Registrants, speaker bios, and handouts are included as attachments to the report.

"Free Trade With Mexico," moderated by George Uribe

"With Mexico shipping 80 times more produce to the U.S. than it receives, any free trade negotiations between these two neighboring countries will have a tremendous impact on the U.S. produce industry. This session will focus on the implications a free trade agreement with Mexico will have on all segments of the industry from the growers to the retailers. What will be the major issues affecting the produce industry should free trade negotiations begin? Is a free trade agreement even feasible between the U.S. and Mexico?" (Refer to attached handout.)

George Uribe, Executive Vice President, West Mexico Vegetable Distributors Association, Nogales, Arizona

"For twelve years, George Uribe has headed up the West Mexico Vegetable Distributors Association representing the distributors of Mexican vegetables. Previously, Uribe worked for the Laredo Chamber of Commerce, the U.S. Small Business Administration, and the Santa Cruz County and Anaheim Chambers of Commerce.

A past president of the Arizona Chamber of Commerce Managers Association, Uribe has been very involved in the U.S. Junior Chamber of Commerce, American Legion, and the Veterans of Foreign Wars. Uribe currently serves on the International Trade Committee and Tomato Division Advisory Board of the United Fresh Fruit and Vegetable Association."

An interesting choice for moderator, Uribe is obviously partial in his affiliation. As he opened the session, Uribe commented that Mexico pays duties on fruit and vegetable imports entering the U.S., (except when exempt under the G.S.P.), and must compete with the imports from the Caribbean Basin.

Robert Meyer, Owner, Meyer Tomatoes, King City, California

"Bob Meyer is the owner of Meyer Tomatoes, now in its 32nd year of operation. Meyer Tomatoes is one of the largest fresh market tomato shippers in California and the largest volume shipper of fresh market green tomatoes from Mexico.

Meyer has been involved the Mexican tomato market for 20 years. Presently he is a bank director, vice chairman of the advisory board of a state university and chairman of the board of the California Fresh Market Tomato Marketing Order."

Meyer began with an explanation that Mexico's big attraction had been oil, resulting in its being deluged by bankers. Combined with actions by the Mexican government, this situation has led to today's economic problems. The northern producing states of Sonora and Sinaloa are poverty-stricken--drugs and robbery are commonplace. Meyer feels that the U.S. owes Mexico a "fair shake." Free trade is imperative, the CBI countries have a bigger "ride" and if Mexican duties were removed, business would still not be taken away from Florida.

Mexican tomatoes can reach the U.S. market in 16 hours to two days of being picked, some 600 miles south of the border. Prices are approximately $2.00 below the FOB Florida price. Post-harvest and handling problems include inferior cartons and irregular pallets. Moreover, in contrast to Chile, Mexicans lack knowledge regarding the marketplace. Although wage rates equate five Mexican workers to one U.S., all other factors are higher in Mexico compared to California. Duties are approximately $.35-.50, less than 10% of the landed cost. The duties are in effect year-round, but vary according to season.

Fred Williamson, Andrew and Williamson Sales Co., Chula Vista, California

"After twenty years in the produce business, Fred Williamson started Andrew and Williamson Sales Company with Fred Andrew. The company represents Mexican growers from Baja, California on a year-round basis specializing in tomatoes, Italian squash, bell peppers and strawberries.

Williamson is a former director of the United Fresh Fruit and Vegetable Association and currently serves as vice chairman of the California Fresh Market Tomato Advisory Board."

Williams commented that the California board puts a small amount of money into research and development. The producer/handler pays about .075/cwt that goes into the state's general treasury. He agreed with most statements made by R. Meyer, but said that Mexicans are opposed to contributing via taxes to California's research and development.

Charles Weisinger, Vice President, Sales, Six L's Packing, Inc., Immokalee, Florida

"Chuck Weisinger has been employed with Six L's Packing Co. since 1964, and currently is vice president of the sales division. He also is involved in the management of Paragon Produce Corporation.

Weisinger has been in sales for 15 years, handling both domestic and foreign produce from Jamaica, Nassau, Honduras, Mexico, Haiti, the Dominican Republic and other Central and South American countries. Weisinger currently serves as chairman of the United Fresh Fruit and Vegetable Association Tomato Division Advisory Board."

Weisinger stated that the U.S. now imports more agricultural products than it exports. During the 1984-1986 period, it was the largest grower of green tomatoes. He said that if free trade is to exist, based on supply and demand, it has to work both ways. Mexico's current permit system, making it difficult for U.S. producers to sell in Mexico, would have to be abolished. Mexico would have to meet USDA quality standards.

B. Timothy Bennett, Deputy Assistant United States Trade Representative for Mexico, Executive Office of the President, Washington, D.C.

"As deputy assistant U.S. trade representative, Tim Bennett is responsible for the formulation, coordination and implementation of U.S. bilateral trade and investment policy with Mexico. In the twelve years Bennett has been involved in international trade matters, he has served in the U.S. Departments of State and Labor and for the consulting firm of Theodore R. Gates Associates.

Bennett received his M.A. in International Affairs from John Hopkins University, and his B.A. from DePauw University. He also studied at The Bologna Center of the School of Advanced International Studies, Bologna, Italy, and the Universite d'Aix-Marseille, Aix-en-Provence, France."

In support of adminstration policy, Bennett said that fair trade is here to stay, and that reciprocity has to be part of the equation. Regarding ethylene dibromide (EDB), the EPA has until 2/17/87 to provide a justification for a waiver; otherwise, imports may have to be banned. The request regarding sale of Mexican avocados in the U.S. is under review and a decision will be out in six weeks. The GSP is undergoing a general review at President Reagan's request, and five items equate to $16 million in Mexican exports. Products under review include cabbage, peas (fresh or frozen), vegetables (not specified), melons, and fruits (not specified).

Mexico represents a $1 billion export surplus and is the sixth largest U.S. export market. Under the GATT agreement, Mexico may have to implement four staged tariff reductions, roll-backs to 30%, which would make the U.S. more competitive in its exports to Mexico. There has been increased enforcement in the area of patent/trademark protection. Bennett cited a case of stolen vines and new plant varieties. The U.S. is trying to get the required SGS inspection lifted on grain exports to Mexico.

Since Mexico became a member of GATT in November 1985, bi-lateral agreements between the U.S. and Mexico have moved ahead. A framework agreement exists which creates a mechanism to establish communication on problems that arise, and prior notification of each other's governments before actions are taken. The agreement may not include tariffs initially, but these could be a later spin-off. It is doubtful that a free trade agreement would be sector-specific due to efforts already underway on a multilateral level begun in Uruguay (CBI was passed with the approval of the GATT waiver). Orange juice and the European trade issue will make the tariff situation more difficult. Bennett suggests a private sector advisory process before pursuing a free trade agreement. Two years ago, Mexico's Minister Hernandez stated opposition to free trade with the U.S. Mexico has signed a technical standards agreement that would be the avenue to pursue regarding pesticide issues/abuses.

Carlos Vidali Carbajal, Director of International Affairs, Secretariat of Agriculture & Water Resources, Mexico City, Mexico

"Carlos Vidali C. is general director for international affairs for the Mexican Secretariat of Agriculture and Water Resources. An economist, Vidali has specialized in the management of private business and government, fiscal policy, foreign trade, specifically agriculture, and business consulting. He acts in high official positions in international conferences on agriculture, international finance, internal revenue and regional development.

Vidali is the permanent alternate representative of Mexico to international food organizations based in Rome including the Food and Agriculture Organization of the United Nations."

Vidali cited quality and sanitary problems in Mexico. Over 70% of its agricultural trade is with the U.S.(see attachment on Marketing Mexico Fruits and Vegetables) Mexico feels discriminated against in the GSP. Free trade may prove to be injurious to Mexican farmers.

"The Chilean Deal: Points of View," moderated by Pat Estrada

"Chile is expected to export 32 million boxes of fruit to the United States this season. With the dramatic increase of Chilean imports over the past few years, U.S. producers are experiencing problems with competition. A dialogue is needed between U.S. and Chilean growers about when and how Chile should market its fruit in the United States. This session will provide an opportunity for U.S. and Chilean growers, importers, retailers--everyone involved in the Chilean fruit deal--to identify problems and start working toward a solution." (Refer to attached handout.)

Patricio Estrada, United Marketing and Sales International Corporation, Ft. Lee, NJ

"After receiving his bachelor's and master's degrees in business administration from the City University of New York, Estrada began work in the early sixties for United Fruit Company. He then worked for a South American company, Compania Frutera Sudamericana S.A., a firm involved in shipping to the United States from Ecuador and Chile. In the late seventies, Estrada began work with the D'Arrigo Brothers Company of New York as manager of the international division.

Currently Estrada is president of United Marketing and Sales International Corp., a firm involved mainly in the importation of fruit from Chile, Spain and other countries, and in exporting fresh fruit to different parts of the world. Born in Santiago, Chile, Estrada is now an American citizen. He currently serves on the International Trade Committee of the United Fresh Fruit and Vegetable Association."

Since this meeting, Pat Estrada has started his own company, TradePath International. The principal U.S. port of entry for the Chilean fruit is Philadelphia, where some 25% of labor's man-hours can be attributed to fruit imports. Chile's fruit exports amount to a net return of about $250 million--its third largest export--with the U.S. importing roughly half.

William Helms, Deputy Administrator, Animal and Plant Health Inspection Service, USDA, Washington, D.C.

"As deputy administrator of APHIS, Bill Helms is responsible for the plant protection and quarantine division. PPQ programs involve management of ports of entry, international programs including imports and exports of plant products, and domestic program activities on the detection and management of pests on agricultural products.

Helms joined APHIS in 1956 after receiving his B.S. degree in Wildlife Management from Auburn University. Since then, Helms has held various positions in PPQ as an inspector, agriculturalist, district director, state supervisor, area director, and chief staff officer of the pest program development staff in Hyattsville, Maryland."

Chile has been pre-fumigating about 28% of its exports, and Helms says that Chile has the capability to do about 60-70%. APHIS would like to see this happen to cut staff costs. The net result would be to "nip any problems in the bud" prior to shipment. Regarding pest problems, APHIS is going to re-examine the situation and possibly reduce acceptable tolerance levels. There has been a notice published in the Federal Register to "allow countries to do their own pre-clearance." The current regulations require the use of USDA officers. If training of host-country personnel were to take place, it would be monitored by USDA. Helms was very complimentary concerning Chile's "APHIS" advances to date.

John Miceli, Compliance officer, U.S. Food and Drug Administration, Orlando, FL

"John Miceli has been employed by the U.S. Food and Drug Administration for almost 26 years serving in the FDA's Boston district office and a Hartford, Connecticut resident post as an investigator and supervisory investigator.

He was assigned to the Orlando district in 1972 and since 1980 has been the compliance officer. Miceli is also the Orlando district import programs manager."

Current GAO findings about the FDA and pesticides cite a low percentage of actual import checks, and this information is likely to stimulate increased checks. Recently, more grape samples have been tested for pesticides.

Bruce Obbink, President, California Table Grape Commission, Fresno, CA

"In 1968, Bruce Obbink joined the California Table Grape Commission, the marketing association for the California fresh grape industry. Previously he had been with the Council of California Growers and the Agricultural Education Foundation.

Obbink is a member of the Agricultural Policy Advisory Committee of the U.S. Department of Agriculture, an officer of the California Agricultural Council on International Trade and an officer member of the Executive Committee of the U.S. Agricultural Export Development Council. Currently Obbink serves as chairman of the board of the Produce Marketing Association and in 1981 was named Produce Marketer of the Year by The Packer. Obbink has travelled extensively in European and Asian markets on behalf of the California fresh grape industry."

Fruit is Chile's number three export, and table grapes represent about 70% of total agricultural exports to the U.S. Obbink is highly complimentary of Chilean production. He feels that problems do exist--for example, there are no maturity requirements in Chile--making the Chilean product inconsistent with California requirements. Obbink feels that minimum quality standards should be mandatory, not voluntary. There have been some pesticide residues on the Chilean product--but California has never had a violation of same. Regarding entry of Chilean product into U.S. (January to April is the window), Obbink is concerned that there should be reciprocity between the U.S. and Chile in terms of free trade. U.S. grapes are presently subject to a 20% tariff entering Chile. Grade standards are also a problem. By and large, Obbink's general argument was for "leveling the playing field."

Raimundo Correa Fabres, Secretary General, FEDEFRUTA, Santiago, Chile

Substituted for Florencio Lazo, of the Chilean Federation of Fruit Growers, tel: 722961. Chile exports today about 70 million boxes of fruit/year (each box is about 18 lbs.) to some 46 countries, of which about 54% goes to the U.S., 15% to Europe, 9% to the Middle East, 3% to the Far East, and the rest to Latin America. Exporters have no government subsidies; they have acted on their own. APHIS/PPQ has a joint program with Chile. (Refer to detailed contact report.)

Phil Smith, Chilean Winter Fruit Distributors, Irvine, CA

Smith highlighted that the Chilean deal is not new--it has taken some 30 years. By 1980, Chile exported some 4 million boxes of fruit. Today, it exports about 70 million. Improvements have been made over the years in quality, shipping/distribution, and packaging. Consumer acceptance is strengthening. U.S. per capita consumption is 7.5 lbs/year, of which approxmately 25% is Chilean product. He advocates strong voluntary, not mandatory regs for quality standards. They have contracted with the Catholic University in Chile to inspect for quality control.

Jack Pandol, President, Pandol Brothers Inc., Delano, CA

"Jack Pandol is a Delano-based farmer, involved in the production of various agricultural products, which included, but are not limited to the following: table grapes, citrus, almonds, kiwi, apples and grain. Additionally he operates a sales agency for several local grape and tree fruit growers, selling on a direct basis to approximately 29 nations. Pandol also operates in a sales capacity for growers in Chile exporting products to such areas as North America, the Orient and Europe.

Pandol has served on many committees and boards including director, California Pacific Corporation; director, Produce Marketing Association; past president, California Grape and Tree Fruit League; advisory boards of the Foreign Agricultural Service, USDA and U.S. Maritime Commission; and past member of the California State Board of Food and Agriculture."

As a major importer of Chilean fruit, Pandol has worked closely with the Chileans on packaging. Quality control issues and the pesticide issue have been raised at Chilean ministerial levels. There was paranoia regarding government intervention due to previous administrations. He recommends that Chilean exports be regulated so they don't flood the market (ex. December prices hurt California).

John Sozio, Diretor of Produce, Southeast Coast Division, Publix Super Markets, Miami, FL

"John Sozio began working for Publix Super Markets in 1967 as bag boy and worked his way up to produce manager at the store level in six years. In 1973 he was promoted to central prepack supervisor at the warehouse level until he was promoted again to produce buyer in 1975. In 1981 he obtained his current position as director of produce."

Sozio stated that the criteria for sales are high quality, and affordable and consistent supply. If there is overproduction, the quality is poor.

Dr. Anthony Wylie, Fundacion Chile, Santiago, Chile

The Fundacion Chile is working on quality control. An awareness exists as to the importance of pesticide information and quality control. The Fundacion offers the exporter technical assistance in all aspects of production, post-harvest handling, packaging, shipping, quality certification, and certification of standards (mutually agreed upon). Some 25% of all Chilean fruit exports are certified for quality control by the foundation. Labs are available to check pesticides, and they have an ongoing program with the FDA. It is a voluntary program for the growers. The message Wylie communicated is that the awareness is there in Chile to maintain and improve quality.

"The Realities of Free Trade with Canada," breakfast keynote speaker Eugene Whelan, President, Agricultural International Development Associates of Canada and Geneagrex International Corp, Ottawa, Canada

"Eugene Whelan, raised on a farm in Ontario, Canada, entered public life at the age of 21. He was first elected to the House of Commons as a member of the Liberal party in 1962 and was re-elected until 1984 when he did not seek another term. In November 1979 Whelan became minister of agriculture until 1984. Whelan introduced a wide range of legislation designed to improve the quality and efficiency of food production and marketing in Canada.

Over the years, Whelan represented the Canadian government on numerous bilateral missions to Europe, Asia, the Far East, North and Latin America, Australia and New Zealand. Guided by the strong belief that we should share our knowledge and farming methods with our less fortunate neighbors in the developing world, upon leaving politics, Whelan established his own business. This organization offers professional consulting services for agricultural development and related activities."

Canada imports more from the U.S. than from Europe. Whelan is opposed to subsidies but skeptical about free trade. He examined the definition and difficulty of "free market access," giving examples including the weather, irrigation dams, and toll roads. The world has changed, he said: the third world now has exporters; people's tastes have changed--e.g., salad bars; and Canada has adhered to GATT. The U.S. and Canadian trade representatives are conducting closed-door negotiations. The U.S. has shown protectionist tendencies, including cedar shingles and potatoes. Canada imports 90% of its fresh fruits, some 60% of which come from the U.S. Whelan advocates stronger support of GATT, and bilaterals between the U.S. and Canada.

"General Session: U.S. Prospects for Expanding Export Markets" keynote speaker, Sam Gibbons, Chairman, Subcommitte on Trade Committee on Ways and Means, U.S. House of Representatives, Washington, D.C.

"Rep. Sam Gibbons (D-FL) is now serving his twelfth term in the U.S. House of Representatives, where he is second to the chairman of the powerful Ways and Means Committee. Elected to the Ways and Means Committee in 1969, Gibbons is now chairman of the Trade Subcommittee, which has jurisdiction over approximately $500 billion in international trade. In the area of trade expansion, Gibbons is credited as the driving force behind the Caribbean Basin Initiative and the Trade Remedies Reform Act.

Gibbons also served on the Budget Committee and Education and Labor Committees in the House. Prior to his election to Congress, he served ten years in the Florida State Legislature. Gibbons represents the Seventh Congressional District of Florida which encompasses the Tampa area."

It is interesting that Gibbons--from a strong fruit and vegetable producing state, Florida--should be a strong backer of CBI. He is a free-trade advocate and favors "a leveling of the playing field." He urged the audience to contact him if they have difficulty contacting the trade negotiators. He would not push Canada into a free trade agreement. The current U.S. trade deficit is attributable to domestic banking chaos, and the expansion of the American economy at a greater rate than elsewhere. It is not due to America's lack of competitiveness.

"CBI: Finding a Market Niche," Moderated by Ralph Crevoshay

"If Caribbean Basin growers are going to succeed in the U.S. market, they must make sure they do not compete with U.S. producers. Shipping during the U.S. off-season and exporting items not grown in the U.S. are two keys to successful marketing to American consumers. Examine how to accomplish these objectives through cooperation, not competition."

Ralph Crevoshay, President, Pacific Rim Produce Marketers, Lemon Grove, CA

"Ralph Crevoshay recently founded Pacific Rim Produce Marketers after spending four years as director of marketing for Calavo Growers of California. He also is a founder of the North American Mango Importers Association. From 1977 to 1981 he was a grower and marketer of fresh mushrooms with Castle and Cooke Foods.

Crevoshay has served on committees of the California Avocado Commission, California Kiwifruit Commission, and the Papaya Administrative Committee. He has been a moderator and panelist for several USDA agricultural workshops for the Caribbean Basin. He currently serves as chairman of the International Trade Committee of the United Fresh Fruit and Vegetable Association."

The speaker introduced the session with an economic overview of third world countries and their need to export to generate foreign exchange.

George Truitt, President, Truitt Enterprises Inc., New York, NY

"For the past 26 years, George Truitt has specialized in agricultural produce marketing in Latin Amrica and the Caribbean. As president of his own company, Truitt works with major U.S. importers of fresh fruit and vegetables, and processors of frozen produce to develop counter-cylical, off-shore sourcing."

Mr. Truitt has worked with the Fund for Multinational Management Education. He unfortunately chose a Peruvian case study for discussion instead of one from the Caribbean Basin--some late arrivals thought they were in the wrong room. The objectives were to establish production of white asparagus and overcome a reputation in the U.S. for poor quality control in particular production areas. Steps included: 1) a decision to move to another area; 2) provision of seeds; 3) examination of U.S. consumption levels, approximately $.05 lb. per capita per year; 4) determination that major production areas/windows were CA, AZ, MI, and NJ.; 5) a look at supply/demand during off-season, e.g. Mexico; 6)a look at niche markets, NE, timing and price; 7)a look at duties relative to windows; 8) a look at grades--Hunt's Point; 9) exploration of market connections through retail chains and brokers; 10) a look at transport, both charters to niche markets as well as existing services; and 11) a look at fresh versus frozen costs, which were about equal.

Luis Rodriguez, "Corky" Foods, Boynton Beach, Florida

Mr. Rodriguez was also an interesting selection as speaker since he is with the Florida growers association and as an importer is not too enthusiastic about recent CBI experiences.

Has had five years of experience as a U.S. importer of Guatemalan and Dominican products, mainly non-traditionals such as eggplant and cauliflower. Did test trials twice in the Dominican and Guatemala, which were a disaster. If done right, he felt that melons, principally cantaloupes, honeydews, tropicals, and specialties, could find a window in the U.S. market at the desired quality levels. His message was that it is difficult to compete with U.S. technology. The response time for fertilizer acquisition in the U.S., for example, is the next day, compared to 27 days in the Dominican Republic. He has experienced problems in finding ideal growing conditions and growing tracks. He mentioned Azua in the Dominican, parcel growers, and agrarian reform. Chemicals are not readily available in the Caribbean Basin. Bureaucracies are also a problem. The mentality of local technicians must be changed to do it right the first time. Packaging needs more attention, and transport was the biggest nightmare of all. (PDM has understood that Rodriguez is suing CCT for $250,000.) He said that it represents 50% of delivered cost. There needs to be an alternative market, so as to move product quickly. Product may need to be airfreighted. He suggested getting the local producer involved financially. Corky Foods would not invest more than 5%. He said to document everything in writing.

The FEPROEXAAH representative suggested that a list of guidelines be prepared for joint ventures (works both ways). Another participant complained of difficulties in clearing Jamaican product which had been pre-cleared prior to departure from Jamaica. Pandol Brothers suggested that UFFVA work as an organization with USDA in expediting the process. The representative from the Chicago Association of Industry and Commerce, under contract to USAID in the Dominican Republic and Costa Rica, said that confusion exists as to who's who in the U.S. produce industry--jobber, broker, etc.

Breakout sessions not attended by the author are summarized below from notes taken during the moderators' comments at the general session.

"Trade With China"

China has tremendous export potential. Today it is the world's third largest producer of apples, and seventh largest producer of citrus. It has problems in cold storage, packing, packaging, transport, and market support. China is bound to grow; watch for it in the Pacific Rim marketplace.

"Doing Business With Korea"

The Western style of doing business has been adopted. U.S. opportunities for export are restricted. The U.S. government will have to initiate dialogue for "rules," which currently don't exist. There was a recommendation that 1) UFFVA request USTR and United members to contact Congress soon about market access due to

trade imbalance; 2) UFFVA work with USDA and APHIS to remove the 16-day cold treatment requirement (there is hard evidence supporting the removal of this requirement); and 3) the summer Olympics be used for marketing U.S. fruits and vegetables.

"Packing for the European Market"

European standards and quality were discussed, and differences from the U.S. It was suggested that fair trade be implemented--recognizing problems with the Common Market. It was also suggested that USDA pre-inspection be expanded to Europe.

"Selling to the U.S. Institutional Market"

It was recommended that information packets be developed on existing markets and latest trends, as well as a databank to broker U.S. and international concerns. Also suggested: that UFFVA work with PMA and others on regulations for same.

"Meeting Japanese Quarantine Requirements"

The Japanese are generally more rigorous than the U.S. on entry requirements. Channels to approach a new product should be through USDA/ERS. Another group is Japan Marketing Development Group in Washington. It was suggested that FAS staff in Japan be contacted first.

"Overseas Transportation"

There is a need for more awareness of carrier and shipper needs. Recommended: that UFFVA become more aware of the costs associated with transportation. Air cargo is utilized more frequently on the inbound leg to the U.S. than the outbound. Recommended: that more awareness be given to air cargo, handling and packaging.

"Doing Business in the Middle East"

Very little is known on this subject. Letters of credit are important: know who you are dealing with.

"Meeting U.S. Quarantine Requirements"

Recommended: increased funding for USDA about release. UFFVA to contact new member services, importers/exporters, step-by-step formats in quarantine. Recommended: that UFFVA have more input into use of irradiation as acceptable treatment (see handout).

"Countertrade and Barter"

More information needs to be provided to members. Suggested: sharing of information with other industries where this has been successful.

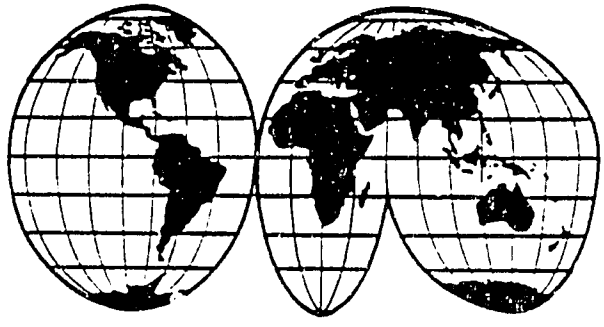
INTERNATIONAL TRADE FORUM

(Attachments)

United Fresh Fruit and
Vegetable Association

International Trade Forum

February 14-15, 1987
Orlando, Florida



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DOUGLAS P. BARKER
Executive Vice President
Sun World International Inc.
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DOING BUSINESS IN THE MIDDLE EAST

Doug Barker is currently executive vice president for Sun World, a California based agricultural organization. Barker's responsibilities include all the general operations in the areas of marketing and production for the company's nine California offices.

Barker has 30 years experience in the produce industry including key roles at Sunkist, where he began his career in 1961 rising through the ranks from district sales manager to the position of director of domestic marketing. He also has served as president of Blue Anchor, Inc., and has been on the board of directors for the Western Growers Association. He currently serves on the Government Relations Committee of the United Fresh Fruit and Vegetable Association.

B. TIMOTHY BENNETT
Deputy Assistant United States
Trade Representative for Mexico
Executive Office of the President
Washington, D.C.

FREE TRADE WITH MEXICO

As deputy assistant U.S. trade representative, Tim Bennett is responsible for the formulation, coordination and implementation of U.S. bilateral trade and investment policy with Mexico. In the twelve years Bennett has been involved in international trade matters, he has served in the U.S. Departments of State and Labor and for the consulting firm of Theodore R. Gates Associates.

Bennett received his M.A. in International Affairs from Johns Hopkins University, and his B.A. from DePauw University. He also studied at The Bologna Center of the School of Advanced International Studies, Bologna, Italy, and the Universite d'Aix-Marseille, Aix-en-Provence, France.

CHRISTINA BJORKROTH
Partner
Prevor Marketing AB
Helsinki, Finland

PACKING FOR THE EUROPEAN COMMUNITY

As a partner in Prevor Marketing AB - Scandinavia, Christina Bjorkroth is responsible for marketing U.S. produce in Finland on an exclusive basis. Prior to joining Prevor, she was part of the sales staff of Produce International AB Stockholm, a majority owned company of Castle and Cooke.

Bjorkroth started her career in the produce business in 1978 by accepting a position of sales representative for American Foods Oy, the Helsinki based sales subsidiary of American Foods AB - Stockholm.

WILLIAM L. BRYANT, II
Vice President
Northwest Horticultural Council
Yakima, Washington

MEETING JAPANESE QUARANTINE REQUIREMENTS

With primary responsibility for international trade issues, Bill Bryant represents the deciduous tree fruit industry of Washington and Oregon. Efforts focus on export access for Washington and Oregon fruit. Prior to joining the Northwest Horticultural Council, Bryant served on the Washington State Governor's Advisory Council on International Trade and Development.

Bryant received his B.S.F.S. from the Georgetown University School of Foreign Service, focusing on Asian and Latin American studies. He has studied in Brazil and spent three months in 1985 traveling through China and Tibet.

JAMES CHOI
Sales Promotion Manager
Sunkist Growers, Inc.
Seoul, Korea

DOING BUSINESS IN KOREA

James Choi currently serves as the sales promotion manager for Sunkist Growers in Korea. For seven years prior to joining Sunkist in August 1986, Choi worked for Haitai International, Inc. as merchandiser and sales promotion manager. He was also the export manager for fresh fruits and foodstuffs. In Nigeria, Choi represented Haitai for two years.

Choi received his B.A. in foreign trading and business administration from the Commerce College of The Chun-nam, National University, in Korea.

JAMES L. CLARK, JR.
Director, Marketing
Special Commodities
Sea-Land Service, Inc.
Iselin, New Jersey

OVERSEAS TRANSPORTATION

Jim Clark, with over 30 years experience in the transportation of special commodities and terminal operations, has held a variety of positions with Sea-Land Service, Inc. since 1963. He started at Sea-Land as caribbean manager for the perishable commodities service. Other positions included corporate manager, general manager and director.

Involved in numerous governmental/industrial activities, Clark has served for two years on the Agribusiness and Rural Affairs Committee of the U.S. Chamber of Commerce, was a delegate to the U.S./E.C. Agricultural Trade Conferences (1973-1977), and has been a member for the past 16 years on the U.S. delegation to the ECE Convention on the transport of perishable commodities in Geneva. From 1974 to 1979, Clark served as chairman of the National Maritime Council Committee on carrier/shipper dialogues regarding the export of Florida perishable commodities.

RALPH CREVOSHAY
President
Pacific Rim Produce Marketers
Lemon Grove, California

CBI: FINDING A MARKET NICHE

Ralph Crevoshay recently founded Pacific Rim Produce Marketers after spending four years as director of marketing for Calavo Growers of California. He also is a founder of the North American Mango Importers Association. From 1977 to 1981 he was a grower and marketer of fresh mushrooms with Castle and Cooke Foods.

Crevoshay has served on committees of the California Avocado Commission, California Kiwifruit Commission, and the Papaya Administrative Committee. He has been a moderator and panelist for several USDA agricultural workshops for the Caribbean Basin. He currently serves as Chairman of the International Trade Committee of the United Fresh Fruit and Vegetable Association

TONY ELLIOTT
Griffin and Brand European Ltd.
London, England

PACKING FOR THE EUROPEAN COMMUNITY

JAMES E. (JIM) EMERSON
Director, Government Relations
Seald-Sweet Growers, Inc.
Tampa, Florida

MEETING U.S. QUARANTINE REQUIREMENTS

As director of government relations, Jim Emerson is responsible for the company's government relations and regulatory compliance. Prior to joining Seald-Sweet, Emerson served five years as executive vice president of the Florida Citrus Packers, the fresh citrus industry trade association in Florida.

After receiving his B.S. degree in Agricultural Business Management from the University of Florida, Emerson worked for the Florida Power Corporation and Florida Farm Bureau. He also served as staff director for the Florida state house agriculture and general legislation committee. Emerson is a member of the board of directors of the United Fresh Fruit and Vegetable Association and serves on United's International Trade Committee.

PATRICIO ESTRADA
United Marketing and Sales
International Corporation
Fort Lee, New Jersey

THE CHILEAN DEAL: POINTS OF VIEW

After receiving his Bachelors and Masters degrees in Business Administration from the City University of New York, Estrada began work in the early sixties for United Fruit Company. He then worked for a South American company, Compania Frutera Sudamericana S.A., a firm involved in shipping to the United States from Ecuador and Chile. In the late seventies, Estrada began work with the D'Arrigo Brothers Company of New York as manager of the international division.

Currently Estrada is president of United Marketing and Sales International Corp., a firm involved mainly in the importation of fruit from Chile, Spain and other countries, and in exporting fresh fruit to different parts of the world. Born in Santiago, Chile, Estrada is now an American citizen. He currently serves on the International Trade Committee of the United Fresh Fruit and Vegetable Association.

SAM A. GIBBONS
Chairman, Subcommittee on Trade
Committee on Ways and Means
U.S. House of Representatives
Washington, D.C.

KEYNOTE SPEAKER

Rep. Sam Gibbons (D-FL) is now serving his twelfth term in the U.S. House of Representatives, where he is second to the Chairman of the powerful Ways and Means Committee. Elected to the Ways and Means Committee in 1969, Gibbons is now Chairman of the Trade Subcommittee which has jurisdiction over approximately $500 billion in international trade. In the area of trade expansion, Gibbons is credited as the driving force behind the Caribbean Basin Initiative and the Trade Remedies Reform Act.

Gibbons also served on the Budget Committee and Education and Labor Committee in the House. Prior to his election to Congress, he served ten years in the Florida State Legislature. Gibbons represents the Seventh Congressional District of Florida which encompasses the Tampa area.

JONATHAN P. GRESSEL
Foreign Agricultural Service
U.S. Department of Agriculture
Washington, D.C.

TRADE WITH CHINA

Jonathan Gressel joined the U.S. Department of Agriculture's Foreign Agricultural Service in 1984. He is an agricultural marketing specialist with the horticultural and tropical products division. He currently works with export market development programs.

In the Spring of 1985, Gressel spent five weeks traveling throughout the Peoples Republic of China to estimate China's potential as a competitor in the U.S. horticultural product markets in the Far East. He will be posted to Beijing as an Agricultural Attache in the Summer of 1988. He has an M.S. in Agricultural Economics from the University of Florida.

WILLIAM P. HARGRAVES
Corporate Manager,
Special Commodities Services
American President Lines
Oakland, California

DOING BUSINESS IN KOREA

As corporate manager in the special commodities services group of American President Lines, Bill Hargraves is responsible for developing new refrigerated commodities business for APL and in implementing quality assurance programs. He has been involved with pioneering work in the development of several products moving safely by sea such as lettuce, asparagus, broccoli and other specialty products which formerly had been exported only by air freight.

Hargraves has worked in the areas of sales management, market research and technical marketing in the U.S. and Canada for American President Lines, and previously for Sea-Land Service and the Foreign Trade Zone in San Jose. Hargraves is a member of the Distribution Council of the United Fresh Fruit and Vegetable Association.

WILSON L. HARRELL
Chairman and President
Harrell International Inc.
Jacksonville, Florida

COUNTERTRADE AND BARTER

Wilson Harrell is a consultant to consumer products companies regarding the marketing of products to the American grocery and mass merchandise outlets with special interest in marketing through food brokers and manufacturing representatives. Chairman of the Board and President of Harrell International, Inc. since 1961, Harrell has been involved in a number of intriguing marketing ventures.

Harrell's involvement in the worldwide marketing of foods and packaged goods to the vast U.S. Military Commissary and Exchange Market culminated with the establishment of marketing and sales offices in 76 cities around the world. Harrell has been CEO of fifteen large food brokerage companies throughout the west coast and southwest USA.

WILLIAM F. HELMS
Deputy Administrator
Animal and Plant Health
Inspection Service
U.S. Department of Agriculture
Washington, D.C.

MEETING U.S. QUARANTINE REQUIREMENTS
THE CHILEAN DEAL: POINTS OF VIEW
MEETING JAPANESE QUARANTINE REQUIREMENTS

As deputy administrator of APHIS, Bill Helms is responsible for the plant protection and quarantine division. PPQ programs involve management of ports of entry, international programs including imports and exports of plant products, and domestic program activities on the detection and management of pests on agricultural products.

Helms joined APHIS in 1956 after receiving his B.S. degree in Wildlife Management from Auburn University. Since then, Helms has held various positions in PPQ as an inspector, agriculturalist, district director, state supervisor, area director, and chief staff officer of the pest program development staff in Hyattsville, Maryland.

RICHARD L. KIMES
Assistant Vice President/
Manager, Import/Export
Seald-Sweet International, Inc.
Tampa, Florida

OVERSEAS TRANSPORTATION

Rick Kimes is in charge of handling shipments of citrus related commodities to Japan, Europe, Taiwan, Hong Kong and Korea for Seald-Sweet International Inc. Before joining Seald-Sweet he spent five years in a produce brokerage firm in Florida and California handling imports and exports for the Far East and Europe, and ten years in the shipping industry to include labor, agency, ship brokering, stevedoring and traffic operations.

Kimes spent the majority of his primary and secondary schooling in overseas locations including Japan, France and Korea.

FERNANDO LAZO
President
Federation of Chilean Fruit Growers
Rosario, Chile

THE CHILEAN DEAL: POINTS OF VIEW

DONALD M. LINS
President
Seald-Sweet Sales
Seald-Sweet International
Tampa, Florida

DOING BUSINESS IN KOREA

As President of Seald-Sweet Sales and Seald-Sweet International, Don Lins is in charge of marketing fresh citrus, peaches, apples, melons, vegetables, Chilean fruit and processed citrus products.

Lins has served as a director of the United Fresh Fruit and Vegetable Association, and Produce Marketing Association. He previously served as president of the Florida Citrus Packers Association and chairman of the Citrus Advisory Committee. Lins is the only person from agriculture to receive the Governor's Florida Businessman Man of the Year award.

BRIAN MESSENT
Export Sales Manager
B.C. Tree Fruits, Ltd.
Kelowna, British Columbia

TRADE WITH CHINA

Brian Messent is the export sales manager for B.C. Tree Fruits Ltd., a grower-owned cooperative. He is responsible for selling his company's products to some 27 countries around the world including the Peoples Republic of China.

Messent currently sits on the Canadian Expert Committee on Agriculture Marketing and Trade. He is well traveled and has first hand marketing experience in the highly prized Pacific Rim markets.

ROBERT L. MEYER
Owner
Meyer Tomatoes
King City, California

FREE TRADE WITH MEXICO

Bob Meyer is the owner of Meyer Tomatoes, now in its 32nd year of operation. Meyer Tomatoes is one of the largest fresh market tomato shippers in California and the largest volume shipper of fresh market green tomatoes from Mexico.

Meyer has been involved in the Mexican tomato market for 20 years. Presently he is a bank director, vice chairman of the advisory board of a state university and chairman of the board of the California Fresh Market Tomato Marketing Order.

JOHN J. MICELI
Compliance Officer
U.S. Food and Drug Administration
Orlando, Florida

MEETING U.S. QUARANTINE REQUIREMENTS
THE CHILEAN DEAL: POINTS OF VIEW

John Miceli has been employed by the U.S. Food and Drug Administration for almost 26 years serving in the FDA's Boston district office and Hartford, Connecticut resident post as an investigator and supervisory investigator.

He was assigned to the Orlando district in 1972 and since 1980 has been the compliance officer. Miceli is also the Orlando district import programs manager.

BRUCE J. OBBINK
President
California Table Grape Commission
Fresno, California

THE CHILEAN DEAL: POINTS OF VIEW

In 1968, Bruce Obbink joined the California Table Grape Commission, the marketing association for the California fresh grape industry. Previously he had been with the Council of California Growers and the Agricultural Education Foundation.

Obbink is a member of the Agricultural Policy Advisory Committee of the U.S. Department of Agriculture, an officer of the California Agricultural Council on International Trade, and officer member of the Executive Committee of the U.S. Agricultural Export Development Council. Currently Obbink serves as chairman of the board of the Produce Marketing Association and in 1981 was named Produce Marketer of the Year by The Packer. Obbink has travel extensively in European and Asian markets on behalf of the California fresh grape industry.

MILTON T. OUYE, PH.D.
National Program Leader,
Product Losses
Agricultural Research Service
U.S. Department of Agriculture
Beltsville, Maryland

MEETING U.S. QUARANTINE REQUIREMENTS
MEETING JAPANESE QUARANTINE REQUIREMENTS

Dr. Milton Ouye received a B.S. degree in Biology and Chemistry from Allegheny College, and M.S. and Ph.D. degrees in Entomology from Kansas State University. He began work with the Agricultural Research Service in 1959 doing research involving insect nutrition and rearing, pheromones, radiation and the sterile insect technique. Between 1969 and 1972, Ouye was employed by the International Atomic Energy Agency, Food and Agriculture Organization of the United Nations. His work concerned peaceful uses of atomic energy in agriculture.

Since 1972, Ouye has been at the Beltsville, Maryland, ARS facility dealing with program evaluation, analysis and coordination related to policy analysis, priority setting, budget development and program implementation for crop production and protection. In 1981 he joined the National Program Staff of ARS assuming his current position of national program leader for product losses dealing with ways to reduce losses due to insects, diseases, and degradation including quarantine treatment research.

JACK V. PANDOL
President
Pandol Brothers Inc.
Delano, California

COUNTERTRADE AND BARTER
THE CHILEAN DEAL: POINTS OF VIEW

Jack Pandol is a Delano based farmer, involved in the production of various agricultural products which include, but are not limited to the following: table grapes, citrus, almonds, kiwi, apples and grain. Additionally he operates a sales agency for several local grape and tree fruit growers, selling on a direct basis to approximately 29 nations. Pandol also operates in a sales capacity for growers in Chile exporting products to such areas as North America, the Orient and Europe.

Pandol has served on many committees and boards including director, California Pacific Corporation; director, Produce Marketing Association; past president, California Grape and Tree Fruit League; advisory boards of the Foreign Agricultural Service, USDA and U.S. Maritime Commission; and past member of the California State Board of Food and Agriculture.

ALBERT J. PLANAGAN
Director
Office of the Near East
U.S. Department of Commerce
Washington, D.C.

DOING BUSINESS IN THE MIDDLE EAST

As director of the Office of the Near East, Bert Planagan directs the Department's economic, trade and investment programs aimed at expanding U.S. commercial ties with the Middle East. Prior to assuming his current duties, Planagan served with the Department of Commerce's Bureau of East West Trade. He has also served as the Commerce desk officer for Saudi Arabia, Egypt and Turkey.

From 1968-69, Planagan was the legislative assitant to Rep. Sherman Lloyd of Utah. He began his career with the Department of State as a Foreign Service officer in 1965.

THOMAS M. POERSTEL
Assistant to the Director
International Division
Office of Transportation
U.S. Department of Agriculture
Washington, D.C.

OVERSEAS TRANSPORTATION

Tom Poerstel has worked in the international transportation arena of USDA since 1964. He has served as senior traffic manager in the ocean transportation division and transportation coordinator of the Foreign Agricultural Service and foreign marketing specialist of the Office of Transportation.

Poerstel has devoted most of his career to working on behalf of agricultural shippers to increase U.S. exports. He has published several directories dealing with transportation, and the monthly newsletter, World Agri-Transport.

JAMES E. PREVOR
Chairman of the Board/
Multipress International, Inc.
Director/
Prevor Marketing International
New York, New York

PACKING FOR THE EUROPEAN COMMUNITY

Jim Prevor serves as Chairman of the Board of Multipress International Inc., publishers of Produce Business, a trade magazine serving the international fruit, vegetable and floral industries. He also serves as director of Prevor Marketing International, a substantial importer, exporter and wholesaler marketing produce throughout the world.

Prevor also runs a consulting firm focused on agricultural marketing and specializing in the problems of international trade. He writes and lectures frequently on subjects related to fruit and vegetable distribution.

J. LUIS RODRIGUEZ
"Corky" Foods
Boynton Beach, Florida

CBI: FINDING A MARKET NICHE

JERRY SCHORR
Vice President-Cargo Sales
Eastern Air Lines, Inc.
Miami, Florida

OVERSEAS TRANSPORTATION

Jerry Schorr joined Eastern Airlines in 1964 as manager of distribution analysis. In 1977 he was appointed to his current position and is responsible for Eastern's systemwide cargo sales. Prior to his present affiliation with Eastern, Schoor held the position of market research

analyst with ASR Corporation during 1959. He joined REA Express in 1960 in the market research department and later became a distribution consultant.

Schorr has written several articles on distribution and transportation and has co-authored two books. He taught at Pratt Institute lecturing on physical distribution management as well as the University of Miami, Nova University and the New York Institute of Technology. Schorr currently teaches at Florida International University.

RICHARD B. SCHROETER
Deputy Director of Marketing
Horticultural and Tropical Products Division
Foreign Agricultural Service
U.S. Department of Agriculture
Washington, D.C.

DOING BUSINESS IN THE MIDDLE EAST

Richard Schroeter joined the Foreign Agricultural Service in 1966 after receiving his B.A. and M.A. degrees in economics from UCLA. He joined as an agricultural economist and from 1970-75 he was the assistant agricultural attache in the U.S. Mission to the European Community in Brussels, Belgium. From 1975-79 he served as division director in FAS International Trade Policy, primarily involved in trade negotiations with Japan.

Since 1979 Schroeter has served in his current position and is responsible for the oversight and administration of the USDA export market development programs for horticultural products, including targeted export assistance and cooperator programs.

DAN SCOTT
General Manager
International Division
Golden Valley Distributors
McAllen, Texas

SELLING TO THE U.S. INSTITUTIONAL MARKET

Dan Scott has been involved in the marketing of foodstuffs since 1979. Prior to joining Golden Valley Distributors in 1985 he was the export sales manager for the Texas Citrus Exchange.

He received his B.S. from Indiana University and conducted post graduate study at Illinois State University. He has travelled extensively around the world to Japan, Honduras, Jamaica, the United Kingdom, Denmark, Norway, Sweden, Holland, Germany, Belgium, Switzerland and France.

PHIL SMITH
Chilean Winter Fruit Distributors
Irvine, California

THE CHILEAN DEAL: POINTS OF VIEW

ROBERT A. SOUZA
Manager
Papaya Administrative Committee
Honolulu, Hawaii

MEETING JAPANESE QUARANTINE REQUIREMENTS

As Manager of the Papaya Adminstrative Committee, Bob Souza is responsible for managing and directing all administrative, research and promotional activities for the papaya industry. Prior to joining the Committee, he served as the chief of the marketing division for the Hawaiian Department of Agriculture and as director of economic development for the County of Hawaii.

Souza received his B.A. in economics and M.B.A. in marketing and management from the University of Hawaii. He has worked for the Bank of Hawaii as an economist, the Honolulu Star-Bulletin, Lewers and Cooke, Inc. and the Department of Planning and Economic Development for the State of Hawaii.

JOHN SOZIO
Director of Produce
Southeast Coast Division
Publix Super Markets
Miami, Florida

THE CHILEAN DEAL: POINTS OF VIEW

John Sozio began working for Publix Super Markets in 1967 as bag boy and worked his up to Produce Manager at the store level in six years. In 1973 he was promoted to Central Prepack Supervisor at the warehouse level until he was promoted again to Produce Buyer in 1975. In 1981 he obtained his current position as Director of Produce.

JERRY ST. LAURENT
Chefs Produce
Houston, Texas

SELLING TO THE U.S. INSTITUTIONAL MARKET

JOE STUBBS
Foodservice Sales Manager
Sunkist Growers, Inc.
Sherman Oaks, California

SELLING TO THE U.S. INSTITUTIONAL MARKET

Joe Stubbs has been in the foodservice sales field for 28 years. He joined Sunkist Growers in 1973 to establish the fresh fruit Foodservice Sales Department. He holds a B.S. degree in marketing from California State University.

In addition to serving on the board of directors for the Produce Marketing Association, Stubbs is active in the International Foodservice Manufacturers Association, the American School Food Service Association, and the National Association of College and University Food Service.

GEORGE A. TRUITT
President
Truitt Enterprises Inc.
New York, New York

CBI: FINDINC A MARKET NICHE

For the past 26 years, George Truitt has specialized in agricultural produce marketing in Latin America and the Caribbean. As President of his own company, Truitt works with major U.S. importers of fresh fruit and vegetables, and processors of frozen produce to develop counter-cylical off-shore sourcing.

GEORGE URIBE
Executive Vice President
West Mexico Vegetable
Distributors Association
Nogales, Arizona

FREE TRADE WITH MEXICO

For twelve years, George Uribe has headed up the West Mexico Vegetable Distributors Association representing the distributors of Mexican vegetables. Previously, Uribe worked for the Laredo Chamber of Commerce, the U.S.. Small Business Administration, and the Santa Cruz County and Anaheim Chambers of Commerce.

A past president of the Arizona Chamber of Commerce Managers Association, Uribe has been very involved in the U.S. Junior Chamber of Commerce, American Legion, and the Veterans of Foreign Wars. Uribe currently serves on the International Trade Committee and Tomato Division Advisory Board of the United Fresh Fruit and Vegetable Association.

CARLOS VIDALI CARBAJAL
Director of International Affairs
Secretariat of Agriculture & Water Resources
Mexico City, Mexico

FREE TRADE WITH MEXICO

Carlos Vidali C. is general director for international affairs for the Mexican Secretariat of Agriculture and Water Resources. An economist, Vidali has specialized in the management of private business and government, fiscal policy, foreign trade, specifically agriculture, and business consulting. He acts in high official positions in international conferences on agriculture, international finance, internal revenues and regional development.

Vidali is the permanent alternate representative of Mexico to international food organizations based in Rome including the Food and Agriculture Organization of the United Nations.

PERRY WALKER TRADE WITH CHINA
Vice President
Riverbend Farms
Sanger, California

Perry Walker has been part of the produce industry for over 20 years. During this time he has held many different jobs ranging from field work, export marketing to his present position as vice president in charge of corporate affairs at Riverbend. In this capacity Walker directs the corporation's communications, government and public affairs programs in addition to business development activities. His work has taken him to the world's major markets and production areas including an extensive tour in the Peoples Republic of China.

Walker serves on several industry, local, state and USDA committees including the Agricultural Technical Advisory Committee, USDA, the California Chamber of Commerce agriculture and international trade committees, and the administrative committees for the California/Arizona navel orange, valencia orange and lemon marketing orders. Walker also serves on the International Trade Committee of the United Fresh Fruit and Vegetable Association.

DAVID WEBSTER COUNTERTRADE AND BARTER
Key Account Manager
National Accounts Division
Orval Kent Food Company
King of Prussia, Pennsylvania

David Webster is the key account manager, national accounts division of the Orval Kent Food Company. He has been with the company for over six years during which time he has held the position of Director of retail sales/salad singles and national sales maanger, Kent Farms.

Before joining Orval Kent, Webster worked six years for Castle and Cooke in their Dole Fresh Marketing and Bud of California divisions. Webster currently serves on the board of directors and the International Trade Committee of the United Fresh Fruit and Vegetable Association.

W.E. WEEKS FREE TRADE WITH MEXICO
Executive Vice President
Texas Citrus and Vegetable Association
Harlingen, Texas

Bill Weeks joined the staff of the Texas Citrus and Vegetable Association in 1974 as traffic manager. In 1977 he was promoted to the position of executive vice president of the statewide trade association. Under Week's leadership, the Association has formed two insurance companies, a Webb-Pomerene Export Association, a Computer Service Company, the Texas Fresh Promotional Board, and most recently the Texas Citrus and Vegetable Import Association.

Approximately 37 percent of the Association's membership which grows and markets Texas produce, also import fruit and vegetables from Mexico. Weeks is a graduate of the University of Houston.

CHARLES WEISINGER — FREE TRADE WITH MEXICO
Vice President, Sales
Six L's Packing, Inc.
Immokalee, Florida

Chuck Weisinger has been employed with Six L's Packing Co. since 1964, and currently is vice president of the sales division. He also is involved in the management of Paragon Produce Corporation.

Weisinger has been in sales for 15 years, handling both domestic and foreign produce from Jamaica, Nassau, Honduras, Mexico, Haiti, the Dominican Republic and other Central and South American countries. Weisinger currently serves as chairman of the United Fresh Fruit and Vegetable Association Tomato Division Advisory Board.

EUGENE F. WHELAN — KEYNOTE SPEAKER
President
Agricultural International Development
Associates of Canada and
Geneagrex International Corporation
Ottawa, Ontario

Eugene Whelan, raised on a farm in Ontario Canada, entered public life at the age of 21. He was first elected to the House of Commons as a member of the Liberal party in 1962 and was re-elected until 1984 when he did not seek another term. In November 1979 Whelan became Minister of Agriculture until 1984. Whelan introduced a wide range of legislation designed to improve the quality and efficiency of food production and marketing in Canada.

Over the years, Whelan represented the Canadian government on numerous bilateral missions to Europe, Asia, the Far East, North and Latin America, Australia and New Zealand. Guided by the strong belief that we should share our knowledge and farming methods with our less fortunate neighbors in the developing world, upon leaving politics, Whelan established his own business. This organization offers professional consulting services for agricultural development and related activities.

WILLIAM O. WHITAKER
Vice President and Manager
International Banking
First Interstate Bank of Washington, N.A.
Seattle, Washington

DOING BUSINESS IN KOREA

Bill Whitaker became an international banker in 1960 soon after his graduation from Brigham Young University. Banking assignments included 4 1/2 years with Bank of America on Okinawa, 4 years in Seoul as well as assignments in the U.S. in international credit administration and marketing.

Whitaker joined the First Interstate organization in San Francisco in 1974 and transfered to Seattle in 1977. For the past several years, in his current assignment, Whitaker is responsible for the bank's international lending and marketing programs. He has traveled extensively in the Asia-Pacific area. Currently the president of the America-Korea Trade Club of the State of Washington, Whitaker also serves as treasurer of the Washington State International Trade Fair and as board member of the World Affairs Council.

FRED WILLIAMSON
Andrew and Williamson Sales Co.
Chula Vista, California

FREE TRADE WITH MEXICO

After twenty years in the produce business, Fred Williamson started Andrew and Williamson Sales Company with Fred Andrew. The company represents Mexican growers from Baja, California on a year round basis, specializing in tomatoes, italian squash, bell peppers and strawberries.

Williamson is a former director of the United Fresh Fruit and Vegetable Association and currently serves as vice chairman of the California Fresh Market Tomato Advisory Board.

ANTHONY WYLIE
Fundacion Chile
Santiago, Chile

THE CHILEAN DEAL: POINTS OF VIEW

ROBERT ZWARTKRUIS
Managing Director
Prevor Marketing AB - Scandinavia
Stockholm, Sweden

PACKING FOR THE EUROPEAN COMMUNITY

Robert Zwartkruis started work in the produce industry as a broker in 1955. He joined the staff of Stockholms Fruktimport AB, now a member of the Saba Group, in 1956 and became responsible for the purchase of fruits and vegetables as well as pioneering imports from Poland and Romania.

Zwartkruis founded American Foods AB in 1966, a subsidiary of American Foods Inc. - Florida, and specialized in the import of produce from the U.S. and Mexico as well as agricultural ventures in developing countries like Ethopia, Senegal and Egypt. He accepted a position with Castle and Cooke European headquarters as manager of produce operations. He returned to Sweden in 1985 to start Prevor Marketing AB, a wholy owned subsidiary of Prevor Marketing International. Zwartkruis is the European Bureau Chief for Produce Business.

Marketing Mexico

Fruits & Vegetables

1985 - 1986 Season

Fruit & Vegetable

Market News Service

United States Department of Agriculture
Agricultural Marketing Service
Fruit and Vegetable Division
Market News Branch

UNITED STATES IMPORT DUTIES

COMMODITIES	IMPORTS ENTERED DURING THE PERIOD OF:	RATE OF DUTY
ASPARAGUS	----------	25% AD VALOREM
BEANS, GREEN (OTHER THAN LIMA BEANS)	----------	3.5* PER POUND
BRUSSEL SPROUTS	----------	25% AD VALOREM
CAULIFLOWER	OCTOBER 16 THRU JUNE 4----------	12.5% AD VALOREM
	JUNE 5 THRU OCTOBER 15----------	5.5% AD VALOREM
CORN, SWEET	----------	25% AD VALOREM
CUCUMBERS	DECEMBER 1ST THRU FEBRUARY 29TH----------	2.2* PER POUND
	MARCH 1ST THRU JUNE 30TH----------	3* PER POUND
	JULY 1ST THRU AUGUST 31ST----------	1.5* PER POUND
	SEPTEMBER 1ST THRU NOVEMBER 30TH----------	3* PER POUND
EGGPLANT	DECEMBER 1ST THRU MARCH 31ST----------	1.1* PER POUND
	APRIL 1ST THRU NOVEMBER 30TH----------	1.5* PER POUND
GARLIC	----------	.75* PER POUND
GRAPES, TABLE (OTHER THAN HOTHOUSE)	FEBRUARY 15TH THRU MARCH 31ST----------	5.25* PER CUBIC FOOT
	APRIL 1ST THRU JUNE 30TH----------	FREE OF DUTY
	JULY 1ST THRU FEBRUARY 14TH----------	6* PER CUBIC FOOT
LIMES	----------	1* PER POUND
MANGOES	----------	3.75* PER POUND
MELONS, CANTALOUPS	SEPTEMBER 16TH THRU JULY 31ST----------	35% AD VALOREM
OTHER MELONS (PERSIAN, HONEYDEWS, ETC.)	JUNE 1ST THRU NOVEMBER 30TH----------	35% AD VALOREM
	DECEMBER 1ST THRU MAY 31ST----------	8.5% AD VALOREM
ONIONS, DRY OR GREEN (EXCEPT ONIONS SETS)	----------	1.75* PER POUND
PAPAYAS, FRESH	----------	8.5% AD VALOREM
PEAS, GREEN (FRESH)	OCTOBER 1ST THRU JUNE 30TH----------	2* PER POUND
	JULY 1ST THRU SEPTEMBER 30TH----------	5* PER POUND
PEPPERS, GREEN	(CALIFORNIA WONDERS, ANAHEIM, ETC.)----------	2.5* PER POUND
SQUASH	(ACORN, ITALIAN, SUMMER, YELLOW ETC.)----------	1.1* PER POUND
STRAWBERRIES	JUNE 15TH TO SEPTEMBER 15TH----------	.2* PER POUND
	SEPTEMBER 16TH TO JUNE 14TH----------	.75* PER POUND
TOMATOES	JULY 15TH THRU AUGUST 31ST AND NOVEMBER 15TH THRU FEBRUARY 29TH----------	1.5* PER POUND
	MARCH 1ST THRU JULY 14TH AND SEPTEMBER 1ST THRU NOVEMBER 14TH----------	2.1* PER POUND
WATERMELONS	----------	20% AD VALOREM

* CENTS

MEXICO RAIL AND TRUCK IMPORTS THROUGH NOGALES, ARIZONA PORT OF ENTRY IN POUNDS

ACCORDING TO PLANT QUARANTINE

PERIOD COVERED JULY 1ST THROUGH JUNE 30

COMMODITIES	1981-82	1982-83	1983-84	1984-85	1985-
ASPARAGUS	24,281	236,140	26,216	100,120	304,9
BEANS, GREEN	15,737,455	19,266,452	21,061,906	22,760,246	29,795,6
BROCCOLI		137,347	822,002	396,749	151,4
CANTALOUPS	44,379,804	76,732,297	123,067,431	31,051,904	73,532,4
CAULIFLOWER	1,007,857	1,604,510	1,200,167	1,579,175	78,4
CELERY					4,457,1
CHAYOTE					1,181,5
CORN	163,624	1,807,622	7,466,036	7,833,046	7,102,3
CUCUMBERS	247,526,523	254,904,269	263,733,549	276,102,682	316,836,76
EGGPLANT	33,621,544	38,198,980	40,54.,878	33,267,604	35,585,42
GARLIC	788,499	1,865,320	2,950,182	1,661,263	771,06
GRAPES, TABLE	35,627,748*	33,293,676*	22,555,423*	41,763,207*	57,317,28
LIMES,PERSIAN	70,772	162,964	--	--	373,27
MANGOES	33,939,054	26,022,008	35,986,474	30,186,619	46,544,93
MELONS,					
HONEYDEW					20,193,41
MIXED TYPES	4,199,696	3,305,803	6,851,092	3,866,138	1,813,18
ONIONS,					
DRY & GREEN	1,479,861	492,382	903,494	1,461,750	1,767,51
ORANGES	--	--	1,242,867	--	1,014,26
PEACHES					986,96
PEAS, GREEN	6,374,246	7,287,181	8,489,674	7,601,012	9,052,78
PEPPERS,					
CALWNDR TYPE	128,064,597	93,127,593	138,013,832	161,424,174	154,640,50
OTHER TYPE	18,237,514	15,683,943	23,677,633	21,805,648	25,388,30
COMBINED TOTAL	146,302,111	108,811,536	161,691,465	183,229,822	179,978,80
SQUASH	85,416,887	91,580,303	94,447,434	104,328,431	120,543,12
STRAWBERRIES	--	11,635	124,704	31,069	40,85
TOMATOES,					
(GREEN, BREAKERS					
& RIPER)	472,013,502	545,810,546	568,756,341	591,743,781	609,092,786
CHERRY TYPE	46,881,038	53,901,324	57,038,471	53,243,737	56,556,656
TOTAL	518,894,540	599,711,870	625,794,812	644,987,518	665,649,442
WATERMELONS	109,483,672	130,834,855	152,637,150	111,817,801	115,354,707

* MAY THROUGH JULY

MEXICO TRUCK IMPORTS THORUGH SOUTH TEXAS PORTS OF ENTRY IN POUNDS

(Includes In Bond Fruits and Vegetables for Export to Canada)

ACCORDING TO THE ANIMAL AND PLANT HEALTH INSPEPCTION SERVICE, PPQ

PERIOD COVERED SEPTEMBER 1, 1985 THROUGH AUGUST 31, 1986

COMMODITIES	1981-82	1982-83	1983-84	1984-85	1985-86
ASPARAGUS	1,920,000	2,300,000	1,446,458	3,322,885	7,056,089
BANANAS	10,440,000	40,500,000	60,480,052	62,006,699	104,753,196
BEANS, GREEN	-	40,000	400,000	1,040,000	41,884
BROCCOLI	-	80,000	1,360,000	3,328,745	5,584,523
BRUSSEL SPROUTS	475,000	80,000	920,000	1,510,000	467,365
CABBAGE	13,300,000	5,240,000	97,280,000	19,910,000	5,809,875
CANTALOUPS	145,480,000	78,080,000	128,360,000	130,051,200	174,342,440
CARROTS	3,312,000	240,000	7,881,197	6,670,000	8,656,758
CAULIFLOWER	966,000	600,000	600,000	1,551,971	1,250,000
CELERY	-	-	-	120,000	-
COCONUTS	4,450,000	2,830,000	3,560,000	2,798,860	2,919,820
CUCUMBERS	15,915,000	31,280,000	42,160,000	24,550,150	12,284,431
EGGPLANT	-	240,000	320,000	30,000	40,000
GARLIC	6,974,000	11,020,000	20,923,000	19,572,803	18,860,143
HONEYDEWS	20,100,000	22,320,000	35,680,000	39,020,000	33,542,525
MANGOES*	11,130,000	57,960,000	32,121,852	32,582,278	39,231,717
MISC.MELONS	1,650,000	1,380,000	1,640,000	5,380,000	1,999,093
OKRA	26,640,000	39,840,000	42,204,550	30,462,845	31,793,937
ONIONS,DRY	113,550,000	107,000,000	139,480,062	116,971,103	100,300,349
PAPAYAS	-	1,170,000	440,194	1,370,044	1,572,477
PARSLEY	-	-	160,000	340,399	-
PEAS, GREEN	-	-	-	170,000	-
PEAS, OTHER	1,586,000	4,120,000	6,040,000	5,110,000	5,390,220
PECANS	-	-	-	-	16,390,000
PEPPERS					
CALIFORNIA WONDER	1,920,000	4,800,000	10,762,617	12,022,448	6,797,282
OTHER TYPES	6,740,000	18,360,000	36,865,730	21,297,093	27,875,350
PINEAPPLES	51,120,000	58,060,000	38,805,550	24,645,789	40,247,062
PUMPKIN	-	-	160,000	150,000	174,346
SQUASH	5,712,000	9,160,000	12,000,480	9,436,617	15,802,452
STRAWBERRIES	636,000	3,040,000	3,920,000	6,340,000	4,540,000
TOMATOES	2,850,000	16,640,000	18,560,000	16,578,324	15,494,559
CHERRY TYPE	6,615,000	17,960,000	20,080,000	18,212,282	17,455,084
WATERMELONS	134,055,000	67,770,000	127,465,000	128,906,455	104,988,048
TOTAL	585,538,000	583,110,000	926,112,769	738,508,990	803,636,985
CITRUS					
GRAPEFRUIT	9,360,000	5,760,000	6,800,000	3,283,141	2,440,000
LIMES	55,240,000	19,280,000	34,922,511	62,597,544	77,418,618
ORANGES	29,799,000	11,400,000	15,840,000	6,317,214	20,100,000
TANGERINES	56,352,000	21,630,000	36,400,000	12,113,500	12,422,666
TOTAL CITRUS:	130,951,000	58,070,000	93,962,511	84,311,399	112,381,284
OVERALL TOTAL:	716,489,000	641,180,000	1,020,075,280	822,820,389	916,018,269

*MANGOES PERIOD EXTENDED TO END OF SEASON (AROUND MID-SEPTEMBER).

ADMINISTRATIVE DIVISIONS

1. Baja California Norte
2. Baja California Sur
3. Sonora
4. Chihuahua
5. Coahuila
6. Nuevo Leon
7. Sinaloa
8. Durango
9. Zacatecas
10. San Luis Potosi
11. Aguascallentes
12. Nayarit
13. Jalisco
14. Colima
15. Michoacan
16. Guerrero
17. Oaxaca
18. Chiapas
19. Guanajuato
20. Queretaro
21. Hidalgo
22. Mexico
23. Distrito Federal
24. Tlaxcala
25. Pueblo
26. Morelos
27. Tamaulipas
28. Veracruz
29. Tabasco
30. Campeche
31. Yucatan
32. Quintana Roo

6

CHILE

Attachment C

AN EXPORTING COUNTRY FOR FRUIT AND VEGETABLES

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Non-deciduous trees fruit	69	Canning products	135

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10/

INTRODUCTION

"All the climates known to man exist together in a narrow strip of land more than 4,000 kms in length."
This single phrase is sufficient to define a privileged South American country which produces a great variety of fruit and vegetables of outstanding colour and flavour during a season which coincides with winter in the northern hemisphere.
I.F.W., which is always keen to do everything possible to improve the position of the world markets, has made a special effort to take this opportunity of presenting importers with what is probably a favourable alternative concerning their supplies of fruit and vegetables.
As far back as 1961, the second issue of our journal published some figures on exports from Chile. These figures, compared with those of 1983, have increased more than 20 times on the average. This is due mainly to a continuous rise in the areas under cultivation during the past few years at an annual rate of 20%.

INTRODUCTION

"Une étroite bande de terre de plus de 4 000 km de longueur qui connaît tous les climats existant sur cette Terre."
Cette phrase définit à elle seule un pays privilégié d'Amérique du Sud qui produit une grande variété de fruits et légumes d'une couleur et d'un parfum remarquables lorsque sévit l'hiver dans l'hémisphère nord.
Bien informé de l'évolution des marchés, International Fruit World a décidé d'écrire cet article spécial pour présenter aux importateurs le Chili. Ce pays constitue probablement une alternative très prometteuse pour l'approvisionnement de fruits et légumes.
Dans son numéro 2 de 1961, IFW a publié quelques chiffres sur les exportations chiliennes. Voici, par comparaison, les données de l'année 1983. Comme on s'y attendait, le volume des exportations est 20 fois plus important. Au cours de ces dernières années, l'agriculture a été intensifiée d'environ 20%.

EINLEITUNG

"Auf einem schmalen Streifen Land von mehr als 4'000 Kilometer Länge finden sich alle Klimazonen der Erde."
In diesem Satz liegt bereits die ganze Erklärung dafür, warum Chile diese grosse Fülle von Früchten und Gemüse auserlesener Farbe und von vollendetem Geschmack hervorbringen kann, wenn in der nördlichen Hemisphäre der Winter herrscht.
International Fruit World, wohlunterrichtet über die Entwicklung der Märkte, hat es mit diesem Sonderheft unternommen, den Importeuren mit Chile eine vielversprechende Alternative in der Versorgung mit Früchten und Gemüse vorzustellen.
In der Ausgabe 2/61 der IFW wurden einige chilenische Exportzahlen veröffentlicht. Hier zeigt sich im Vergleich mit den entsprechenden Angaben des Jahres 1983, dass, wie erwartet, das Exportvolumen um zwanzig Mal grösser geworden ist. Der Anbau wurde in den letzten Jahren jährlich um 20% verstärkt.

Table 1

Exports of Chilean fruit (in metric tons)

Fruit	1960	1973	1983	Percentage of increase from 1960 to 1983
Apples	10,163	24,545	179,296	1,764
Table grapes	4,776	13,575	149,930	3,139
Peaches and nectarines	1,299	1,382	16,319	1,256
Pears	668	4,051	20,149	3,016
Plums	792	590	5,560	702
Total all fruit in this table	17,698	44,143	371,254	2,098

Source: – 1960: International Fruit World, 2/1961
– 1973/1983: PROCHILE, based on figures supplied by the Banco Central de Chile

This impressive advance which has been achieved in the development of Chilean exports is worthy of attention, as the prospects of continuous growth are very favourable, as can be gathered from a study of the figures relating to the areas under cultivation devoted to fruit.

As far as vegetables are concerned, we can say without any fear of being mistaken that the prospects are similar to those relating to fruit.

One example of this is represented by the trend which may be seen in respect of the cultivation and export of asparagus, which is a typical product in this sector.

Table 2

Development of the area of fruit orchards (figures in hectares)

Fruit	1960	1973	1983
Apple trees	7,090	11,295	17,797
Table grapes	4,030	4,080	18,824
Peaches and nectarines	7,830	14,756	12,774
Pear trees	2,050	2,578	4,190
Plum trees	2,300	1,685	4,849
Total area under cultivation	23,300	34,394	58,434

Source – 1960: CORFO National Fruit Development Plan, 1968.
– 1973: CORFO Official National Land Register, 1974
– 1983: ODEPA, based on CORFO Official Land Registers and regional data.

Table 3

Development of the area of asparagus (figures in hectares)

1960	1973	1983
230	180	1,200

Source - 1960/1973 Chile Foundation based on national agricultural censuses
- 1983 Chile Foundation.

Table 4

Exports of Chilean asparagus (figures in metric tons)

1960	1973	1983
--	--	749

Source: 1960/1973: Information provided by exporters.
1983: ODEPA, Agricultural Planning Office.

Likewise impressive is the progress achieved by the fruit and vegetable packing industry as well as the advances made in all those activities concerned with processing and the subsequent marketing of these products.
With regard to cold-storage plants, for example, Chile's present capacity, calculated in the number of 20 kilo cases, exceeds 18,000,000 units. The packing plants have at their disposal suitably trained personnel and technical equipment. The technological innovations at these plants are of a standard equal to that of the most exacting of the world's markets.
With 400,000 metric tons of fruit and vegetables exported during the 1983/1984 season, there was an average of three charter shipments per week, each vessel carrying over 250,000 cases of products.
In the peak period there were up to two charter shipments daily, with various destinations, without taking into account the intensive flow of shipments by the regular lines.
Among those we mention the "Compañia Sudamericana de Vapores de Chile" equipped with the most modern refrigerated vessels serving the U.S. and European Markets. A proof for the high level of their efficiency is the fact that "Cia. Sudamericana de Vapores de Chile" has recently been incorporated into the EUROSAL Service with their containership "Maipo" with a capacity of 1,900 containers. This type of container ship has a remarkable capacity for transporting products.

Cette évolution des exportations est impressionnante et les perspectives d'avenir sont encourageantes. Il suffit pour s'en convaincre de jeter un coup d'oeil aux chiffres ci-apres relatifs aux surfaces consacrées à la culture des fruits.
L'évolution de la production des légumes est identique a celle des fruits. Le cas des asperges en est un exemple typique.

Tableau N.° 3

Évolution des surfaces consacrées à la culture des asperges (en hectares)

1960	1973	1983
230	180	1 200

Sources: 1960/73 - Fundación Chile, selon les revelés de l'agriculture.
1983 - Fundación Chile.

Tableau N.° 4

Les exportations des asperges du Chili (en tonnes)

1960	1973	1983
--	--	749

Sources: 1960/73 - calculées selon le pourcentage des exportateurs.
1983 - Oficina de Planificación Agricola, ODEPA.

Les progrès effectués par les industries en aval de l'agriculture sont également impressionnats. Il s'agit des industries qui s'occupent de la manipulation, de l'emballage et de la commercialisation des fruits et légumes. Les chambres froides du pays ont par exemple une capacité de plus de 18 millions de cartons de 20 kg. L'emballage des fruits et légumes, effectué par un personnel bien formé et avec des machines tres performantes du point de vue technique, répond aux exigences les plus élevées des marches mondiaux. Au cours de la saison 1983/1984, 400 000 t de fruits et légumes ont éte exportées par bateau charté à raison de trois par semaine, chacun d'entre eux pouvant contenir 250 000 cartons. Autrement dit, durant la haute saison, deux bateaux sont partis chaque jour dans des directions les plus variées, sans parler des liaisons réguliers.

Diese Entwicklung der Exporte ist beachtlich, und die Zukunftsaussichten sind ermutigend. Dies lasst sich aus der Entwicklung der anbauflachen fur obst leicht ablesen.
Bei Gemüse ist eine ähnliche Entwicklung wie bei Früchten zu beobachten. Als Beispiel hierfur dienen die Anbau- und Exporttendenzen bei Spargel.

Tabelle 3

Entwicklung der Anbaufläche von Spargel (in Hektar)

1960	1973	1983
230	180	1'200

Quellen: 1960/73 - Fundación Chile nach Erhebungen der Landwirtschaft
1983 - Fundación Chile

Tabelle 4

Export von Spargel aus Chile (in t)

1960	1973	1983
-	-	749

Quellen: 1960/73 - nach Anteilen der Exporteure errechnet
1983 - Oficina de Planificación Agricola, ODEPA.

Entscheidend gestiegen sind auch die Leistungen der verarbeitenden Industrien für die Branche, die sich mit der Behandlung, Verpackung und Vermarktung von Früchten und Gemüse befassen.
Die Kühlhäuser des Landes zum Beispiel haben eine Kapazität von mehr als 18 Millionen Kartons von 20 Kilogramm Inhalt.
Die Früchte- und Gemüsepackungen, hergestellt durch sorgfältig geschultes Personal und mit Maschinen neuesten technischen Standes, genügen den Anforderungen der anspruchsvollsten Markte der Welt. Der Export an Früchten und Gemüse in der Saison 1983/84 lag bei 400'000 t, aufgeteilt in drei wöchentliche Schiffscharter mit 250'000 Kartons je Produkt. Das heisst, dass einschliesslich der Hochsaison täglich zwei Charterschiffe mit unterschiedlichen Bestimmungshäfen abgefertigt wurden, nicht zu sprechen von den zahlreichen Liniendiensten.
Von dieser Gruppe mochten wir die "Compañia Sudamericana de Vapores de Chile" herausstellen, welche mit ihren modernen Schiffe, den amerikanischen und europäischen Markt beliefert.
Dies beweist das erreichte Leistungsniveau dieser Schiffahrtslinie, welche mit dem Eurosal Service kooperiert.

under refrigeration allowing a higher flexibility in cargo. This Service takes twelve days operating during the whole of the year and offers more than 250,000 cubic feet of cooling capacity to and from northern Europe.
Furthermore terminals with refrigeration facilities are at the disposal for their exclusive use in Rotterdam (Netherlands) and in Philadelphia (USA).
On the subject of transportation, at the present time Chile's capacity of air space is rather low, bearing in mind the export possibilities of a large number of perishable products, such as raspberries, strawberries, persimmons (kakis), cherries, kiwifruit, apricots, custard apples (cherimoya), pear melons, avocados, asparagus, artichokes, tomatoes, bell pepper, endive and other articles. For this reason, the country is following with great interest the efforts which are being made by some private Chilean entrepreneurs to go into the chartering business in the months approaching Christmas. This will enable the markets in the northern hemisphere to obtain large quantities of perishable products in the best possible condition as regards quality in respect of size, flavour and colour, and at a time when such goods are not obtainable in fresh condition on our own markets.
I.F.W. approached various Chilean shippers as to the reasons for the dynamic developments which took place in this sector during the past few years and the enthusiastic reception given to Chilean fruit and vegetable products. In this connection, specific factors were repeatedly pointed out which appeared to justify this success. We are therefore describing these factors in the following pages, as we feel they would be of great interest to the import trade.

1. Timely arrivals at the markets

Owing to its geographical position and its particular conformation, Chile, with its vast length of 4,300 kms, is able to ship fresh out-of-season products which can reach the principal markets in the northern hemisphere earlier than any other country in the southern half of the world.

2. Intrinsic quality of the products.

For climatic reasons Chilean fruit possesses certain colours and flavours which are more pronounced than those in any other part of the world.
As regards their outstanding colour, this is probably due to the differences in temperature between day and night and the fact that during the day the fruit is twice exposed to temperatures which are the most suitable for the formation of pigment.
The special characteristics of flavour are attributable to the high concentration of sugars and aromas arising from the following factors:
- Chile, throughout its principal fruit-growing area, has a dry and semi-de-

Parmi elles, nous citerons la "Compañia Sudamericana de Vapores de Chile" qui est equipée des navires frigorifiques les plus modernes pour l'approvisionnement des marches des Etats Unis et d'Europe.
Une preuve du niveau d'efficacité atteint par la "Cia. Sudamericana de Vapores" est donnée par la recente incorporation au Service EUROSAL de son porte-conteneurs "Maipo", d'une capacité de 1900 conteneurs.
Ce type de navire porte-conteneurs dispose d'une importante capacité pour le transport de produits réfrigeres. Cet atout lui donne une plus grande flexibilité pour les cargaisons puisqu'il peut transporter tous les douze jours l'année durante plus de 250.000 pieds cubes sous froid d'Amerique du Sud au Nord de l'Europe et viceversa. De plus, la Compagnie dispose de ses propres terminaux frigorifiques a Rotterdam (Pays-Bas) et a Philadelphie (Etats Unis).
Il existe actuellement une disproportion entre les capacités de transport par voie aérienne et les énormes possibilités d'exportation de ce pays en matière de denrées périssables. Parmi celles-ci nous citerons les framboises, les fraises, les kakis, les cerises, les kiwis, les abricots, les pommes cannelles, les concombres, les avocats, les asperges, les artichauts, les tomates, les piments, les endives, etc. Voilà pourquoi les efforts de plusieurs entreprises privées pour organiser à la fin de cette année des transports par avion sont suivis avec un grand intérêt. Ceci permettrait aux marchés de l'hémisphère nord de recevoir de grandes quantités de produits d'une excellente qualité du point de vue de la taille, de la couleur et du parfum. En outre, ils seront disponibles à une époque où on ne les trouve plus sur ces marchés.
International Fruit World a demandé aux exportateurs chiliens d'exposer leurs raisons de cette explosion du secteur chilien des fruits et légumes et l'accueil chaleureux qu'ils ont reçu sur les marchés. Voici leurs réponses:

1 Arrivée des produits sur le marché.

Etant donné sa situation géographique qui s'étend sur 4 300 km, le Chili peut exporter des produits plus tôt que d'autres pays exportateurs de l'hémisphère sud.

2. Qualités intrinsèques du produit

Pour des raisons climatiques, les nuances de goût sont plus marquées dans les produits chiliens que chez les autres. Les couleurs, particulièrement accentuées, sont dues aux différences de température entre le jour et la nuit. Après le froid de la nuit, les pigments des fruits peuvent se former de façon idéale durant la journée.
Les fruits chiliens doivent leur goût particulier à la forte concentration de fructose et de substances aromatiques. Ceci s'explique par les faits suivants:
- Dans plusieurs régions arboricoles du Chili règne un climat très sec presque semblable à celui du désert. En outre,

repräsentiert durch das Container Schiff "Maipo", mit einer kapazität von 1'900 Containern.
Da diese Container-Schiffe, speziell für Tiefkühlladung eingerichtet sind, erhöht sich die Aufnahmefähigkeit der Fracht bei verschiedenen Produkten. Alle 12 Tage, und während des ganzes Jahres kann man mit einer Tiefkühladefähigkeit von 250'000 kubikfuss nach und von Nordeuropa rechnen. Ausserdem verfügt die "Compañia Sudamericana de Vapores de Chile" über Kühlhäuser in Rotterdamm, Holland und Philadelphia in die Vereinigten Staaten.
Vergleicht man die grossen Exportmöglichkeiten für verderbliche Produkte wie Himbeeren, Erdbeeren, Kakis, Kirschen, kiwis, Aprikosen, Chirimovas, Gurken, Avokados, Spargel, Artischocken, Tomaten, Paprikaschoten und Endivien mit der vorhandenen Kapazität für Lufttransporte, so ist hier ein Exporthindernis zu sehen. Aus diesem Grunde verfolgt man mit grossem Interesse die Bemühungen verschiedener Privatunternehmen, gegen Ende des Jahres Charterflüge zu organisieren. Auf diese Weise würden den Märkten der nördlichen Hemisphäre bedeutende Mengen von Produkten in ausgezeichneter Qualität, das heisst, im Aussehen, Geschmack und Farbgebung zu einem Zeitpunkt zur Verfügung stehen, zu dem sie dort frisch normalerweise nicht erhältlich sind.
International Fruit World hat die chilenischen Exporteure nach den Gründen für die entscheidende Entwicklung der chilenischen Früchte- und Gemüsesektors und der geradezu begeisterten Aufnahme auf den Importmärkten befragt. Im Einzelnen wurden folgende Punkte genannt:

1. Ankunft der Produkte auf den Märkten

Die geographische Beschaffenheit des Landes und die Ausdehnung von 4'300 Kilometern bringt es mit sich, dass die verbrauchermärkte früher als von anderen Exportländern der südlichen Hemisphäre beliefert werden können.

2. Innerliche Qualität der Produkte

Die Geschmacksnuancen chilenischer Produkte sind aus klimatischen Gründen ausgeprägter als von anderen Provenienzen. Die besonders akzentuierte Farbgebung ist auf die Temperaturunterschiede zwischen Tag und Nacht zurückzuführen. Nach der Nachtkühle können die Früchte am Tage in idealer Weise Pigmente bilden.
Die besondere Geschmacksnote der chilenischen Früchte ist auf die hohe Konzentration von Fruchtzucker und Aromastoffen zurückzuführen. Die Gründe hierfür sind die folgenden:
- Samtliche Fruchtanbaugebiete Chiles verfügen über ein weitgehend trockenes, fast wüstenähnliches Klima. Dazu kommt eine ausreichende Wasserversorgung aus der Schnee-

sert climate but with ample irrigation possibilities when this is necessary as a result of the water which is available from the mountains when the snow and ice begin to melt. This phenomenon, linked with daytime temperatures which do not exceed 30° C in the spring and summer, and night temperatures which do not go below 8° C, was the most frequently given reason to explain this aspect

- Also, according to the views expressed by Chilean fruit-growers, another reason for explaining this feature is the range and intensity of the extraordinary luminosity or brightness which characterises the country.
- A third aspect pointed out is thought to be represented by the special microclimatic conditions which extend throughout the country, caused by two mountain ranges which run longitudinally together across a total average breadth of 180 kms, and which produces differences in altitude of more than 6.000 metres.

3. Constancy of supplies

The shape of the country permits a large variety of micro-climates to co-exist. They are warmer in the North and they gradually become colder as one moves to the South. Another reason for the different microclimates is given by the existance of two mountain ranges that stretch along the country from North to South. These mountain ranges determine early Mediterranean climates near the Andes Mountains and late temperate climates near the coast line

This makes it possible for a particular variety of fruit or vegetable to be harvested at exactly the right time with differences of up to four months. A clear example of this is what happens with the Thompson Seedless variety of grapes. These are harvested in the northern valley of Copiapó about the 10th of December while in Talca, 1,100 kms to the south, harvesting is carried out on or about the 10th of April, four months later.

With regard to asparagus, the harvesting period is from the middle of August up to the end of December.

From the foregoing details it is possible to deduce the capacity of Chilean shippers to supply our markets throughout the entire period when products are out of season, including a wide range of varieties and types of fresh produce for a very long time.

4. Cost factors

Concerning the costs of harvesting and packing, it was pointed out that Chile possesses an excellent labour force, comprising people of both sexes, of homogeneous race, who display a fine spirit of effort and sacrifice. Labour costs are comparatively cheap owing to the conditions of these workers in a developing country.

ces régions sont suffisamment irriguées lors de la fonte des neiges. Au printemps et en automne, les températures ne dépassent pas 30°C le jour et ne descendent jamais en-dessous de 8°C la nuit.

- Un autre facteur important est l'éclairage des plantes, particulier quant a son intensite et sa quantité.
- Enfin, les régions arboricoles du Chili connaissent un microclimat dû à la configuration géographique du pays qui possède au largeur deux chaines de montagnes qui coexist dans un avérage de 180 km de travers, où les différences d'altitude dépassent 6 000 m

3 Continuité des exportations.

Etant donné la longueur du pays, il existe de nombreux microclimats. Ainsi, la température diminue à mesure que l'on va vers le sud où s'étend une longue vallée bordée par la Cordillère des Andes et par la Cordillère de la Côte, créent des conditions climatiques particulières. Pour ces raisons, une même variété de fruits ou de légumes peut arriver à maturité sur une période s'échelonnant sur 4 mois. L'exemple du raisin Thompson-Seedless est très significatif Ce raisin est vendangé dans la vallée de Copiapó, dans le nord du pays, vers le 10 décembre, mais seulement vers le 10 avril, soit quatre mois plus tard, à Talca, 1100 km plus au sud.

Il en va de même pour les asperges dont la saison est comprise entre la mi-août et la fin décembre. Aussi, les exportateurs chiliens peuvent offrir durant toute la période hors saison de l'hémisphère nord une grande variété de produits.

4 Les coûts de production.

Pour la récolte et l'emballage, le Chili dispose d'une main-d'oeuvre composée aussi bien d'hommes que de femmes dont l'attitude au travail est excellente et dont les salaires sont très avantageux.

Les grandes étendues forestières et une industrie concurrentielle qui exporte du bois et des emballages fournissent les matières premières en quantité suffisante. En outre, le secteur de l'impression est très développé.

Comme le Chili exporte de grandes quantités de marchandises, il peut affréter des bateaux entiers, une façon de remédier aux désavantages de la distance séparant le Chili des pays consommateurs.

Par rapport à la moyenne internationale, les coûts de transports, de l'unité d'emballage jusqu' aux ports, sont moins élevés au Chili car le pays est étroit et la réseau routier en direction des ports est bien fourni.

En outre, dans les régions où se pratique la culture arboricole, c'est-à-dire sur plus de 1000 km de côtes, on compte sept grands ports dont trois revêtent actuellement une importance particulière.

5 Niveau technologique

La recherche et la formation dans le sec-

schmelze von den Bergen. Die Temperaturen überschreiten im Frühjahr und im Herbst am Tage niemals 30° C, in der Nacht liegen sie nicht unter 8° C.

- Ein anderer wichtiger Faktor ist die einzigartige Lichtstärke der Pflanzen, und zwar nach Intensität und Menge.
- Drittens herrscht in den Fruchtanbaugebieten Chiles ein Mikroklima, das auch wieder auf die geographische Gestalt des Landes mit zwei Bergketten von 180 km Breite mit Höhenunterschieden von mehr als 6'000 m zurückgeht.

3. Fortdauer der Exporte

Die grosse Ausdehnung des Landes erlaubt das Nebeneinander von einer grossen Anzahl von Mikroklimata. Es ergibt sich eine Abkühlung von Norden gegen den Süden, ebenso auch besondere klimatische Voraussetzungen durch die Gebirgszüge, die direkt an das Meer reichen. Auf diese Weise erreicht die gleiche Früchte- und Gemüsesorte den idealen Reifetermin gleich mehrfach innerhalb von vier Monaten. Ein gutes Beispiel hierfür sind die Tafeltrauben der Sorte Thompson-Seedless. Die Ernte erfolgt im nördlichen Valle de Copiapó um den 10. Dezember, während 1'100 km südlich, in Talca, am 10. April, also vier Monate später geerntet werden kann. Aehnlich sieht es für Spargel aus: die Erntesaison liegt zwischen Mitte August und Ende Dezember.

Aus dem Gesagten wird deutlich, dass die Exporteure während der gesamten off season –Periode die Möglichkeit haben, mit einer grossen Palette von Produkten die Märkte zu beliefern.

4. Produktions- und Vermarktungskosten

Für die Ernte und Verpackung stehen in Chile Arbeitskräfte, Frauen und Männer, mit ausgezeichneter arbeitsmoral und zu vergleichsweise günstigen Löhnen (da Chile Entwicklungsland ist) zur Verfügung.

Die grossen Waldbestände des Landes, verbunden mit einer leistungsfähigen Exportindustrie für Holz und Verpackungen, sorgen für ausreichendes Rohmaterial. Ausserdem ist die Druckindustrie hochentwickelt.

Wenn auch Chile immer noch weit von den Verbrauchsländern entfernt liegt, so wird diese Situation weitgehend wettgemacht durch den Umstand, dass man dank grosser Mengen die Fähigkeit hat, ganze Schiffsladungen zu versenden. Die Kosten für den Transport vom Packhaus bis zum Hafen, die international hoch angesetzt sind, befinden sich in Chile auf niedrigerem Niveau, da das Land so schmal und das Strassennetz in Richtung Häfen gut ausgebaut ist.

Zudem befinden sich in der Region des Fruchtanbaus, das heisst auf einer Küstenlange von 1'000 Kilometern, sieben

As for packing, the Chileans have the advantage of a powerful industry which exports timber, carton packaging and printed matter.
With regard to transportation although Chile is somewhat remote from the principal centres of consumption this situation has been overcome by the large volume of goods exported by the industry, enabling complete ships to be chartered.
In turn, the costs of transport from the farm to the port, which are normally rather high at the international level, are lower in Chile, owing to its territory being so narrow and the fact that the country is well equipped with road networks to the ports.
In this connection, it is necessary to point out that throughout the entire length of its most important fruit-growing region, extending over an approximate distance of 1,000 kms, Chile has seven major ports, three of which are of outstanding importance at the present time.

5. The level of technology

Chile has an adequate level of technological and professional training.
An average of 85 agricultural engineers graduate every year from Chilean universities, specialising in fruit growing and horticulture.
It is estimated that about 10% of all agricultural engineers who graduate annually have undertaken specific studies in these disciplines and obtained a degree in education or that of a Ph. D.
This makes it possible for producers to have available at a national level the necessary technological advisory facilities to enable them to run their orchards. Exporting companies, in their turn, have qualified personel at their disposal for harvesting and post-harvesting operational purposes.
The above arrangements have ensured Chile having an efficient health inspection service which is carried out by the state.

6. Vast experience of producers and shippers.

Chile has been a fruit exporting country since as far back as 1920 when fruit from there reached California, United States, in a completely satisfactory condition. This is sufficient proof of the considerable experience of Chilean producers and shippers.

7. Importers of repute

In conclusion, it is necessary to add that Chilean shippers have never failed to realise that a factor of paramount importance in the development of their export trade is the trustworthiness and standing of the importers and brokers with whom they deal and the high degree of mutual confidence and commitment established on the basis of traditional honesty in the

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teur des fruits et légumes ont atteint un haut niveau.
En moyenne, 85 ingénieurs agricoles sont formés chaque année dans les universités dans la branche des fruits et légumes et environ 10% d'entre eux ont un titre de "magistere" ou doctorat.
Les producteurs peuvent ainsi compter sur l'appui de spécialistes pour la culture des fruits et légumes. En outre, les maisons d'exportation ont un personnel bien formé pour diriger la récolte et les manipulations qui suivent. Les entreprises se chargent, elles-mêmes des tests de santé et qualité en plus des inspections phytosanitaires d'Etat.

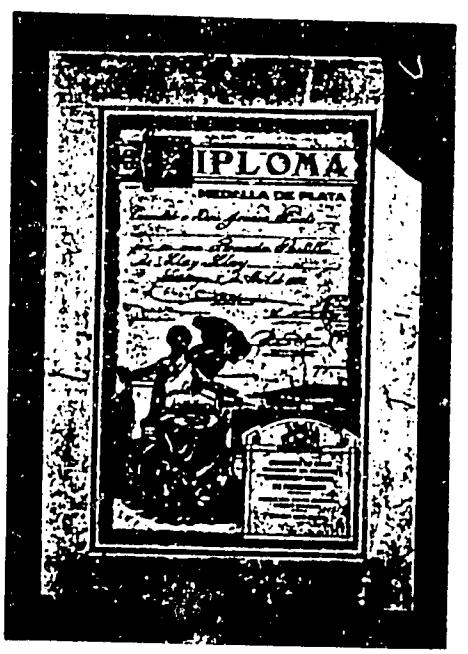
6 Expérience des producteurs et des exportateurs

Le début des exportations dans le secteur des fruits et légumes remonte aux années 1920 où les fruits étaient exportés en Californie. Depuis lors, les affaires n'ont cessé de se développer.

7 Relations avec les importateurs

Grâce à leurs connaissances techniques, les entreprises chiliennes d'exportation sont conscientes que les importateurs et les courtiers ont contribué dans une large mesure à créer des contacts continus de toutes sortes entre les pays consommateurs et le Chili, ce qui est bien entendu nécessaire pour la commercialisation des denrées périssables.
Dans les pages qui suivent, International Fruit World montre par des images et des graphiques l'évolution des différents groupes de produits tout en tenant compte des entreprises qui travaillent en collaboration avec PROCHILE, (l'organisme chargé de favoriser les exportations) Ces articles on pour but d'augmenter la participation des produits chilien dans l'approvisionnement des marchés internationaux.

1928 National Award for export quality grapes



wichtige Hafen, von denen zur Zeit drei von Bedeutung sind.

5. Anbautechnik

Chile verfügt über einen entsprechenden Stand der Forschung und Ausbildung in der obst und Gemüsebranche. Es werden in Lande durchschnittlich 85 Agraringenieure pro Jahr in der Fachrichtung obst und Gemüse an den Hochschulen ausgebildet. Rund 10% davon erlangen einen akademischen Grad.
So können die Produzenten auf die Unterstützung der Wissenschaft beim Anbau von Früchten und Gemüse rechnen. Auf der anderen Seite verfügen die Exportfirmen über einen gut ausgebildeten Stab von Mitarbeitern für die Durchführung der Ernte und der Nacherntebehandlung. Die Firmen selbst führen neben der staatlichen phytosanitären Inspektion eine Gesundheitsprüfung durch.

6. Erfahrung der Produzenten und Exporteure

Die Anfänge des Früchte- und Gemüse-Exports gehen auf das Jahr 1920 zurück, als Früchte nach Kalifornien (USA) exportiert wurden. Seitdem ist man ununterbrochen im "Geschäft".

7. Beziehungen zu den Importeuren

Die chilenischen Exportfirmen sind sich darüber im Klaren, dass die Importeure und Broker mit ihrem Fachwissen in hohem Masse dazu beigetragen haben, zwischen den Verbrauchsländern und Chile jene Art kontinuierlicher Kontakte hergestellt zu haben, wie sie für die Vermarktung der verderblichen Ware erforderlich ist.

International Fruit World wird auf den folgenden Seiten über jede Produktgruppe in illustrativer und graphisch ansprechender Form berichten, wobei die Firmen berücksichtigt sind, welche mit der Chilenischen Direktion für Exportförderung PROCHILE zusammenarbeiten. Dies erfolgt im Sinne der Erhöhung des Anteils der chilenischen Produktion an der Versorgung der internationalen Märkte.

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commercial relationship between both parties. In the following pages I.F.W. has considered it appropriate to publish illustrative material and technical reports on each group of products which those shippers who work together with PROCHILE (Chilean Export Promotion Bureau) wish to incorporate in this special review, their object being to increase the share of Chilean products on international markets.

Quality control of Chilean asparagus

Contrôle de qualité des asperges chiliennes

Quality control for Chilean fruit

Chile has always been a country with excellent fruit growing conditions. Fruit growing has without doubt been booming for some time now. Production is increasing at a steady rate so that exports are now higher than any other sector of the nation's fruit growing industry, and the market position of Chilean fruit is growing stronger internationally.

In 1985 the fruit growing area totalled 100.650 ha, of which 21.3% yielded dessert grapes, 17.9% apples. Stone fruit accounts for 21.3% (nectarines, peaches, plums, apricots, and cherries); pears, for 4%. Lemons account for 5.4% of the area under cultivation, almonds and walnuts, 8.5%, avocados, 7.6%, other fruit including berries, 13.9%.

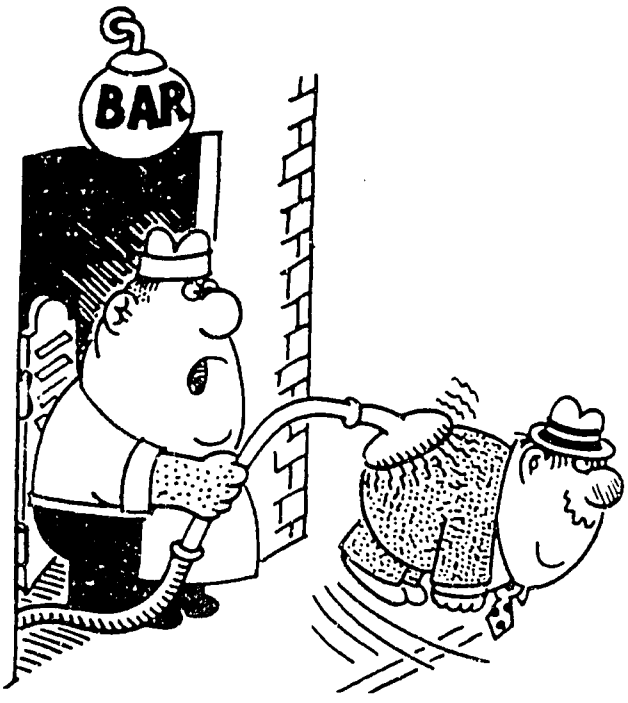
The breath-taking development of this sector over the last few years shows that the outlook for this industry is still very promising. This development may be attributed to Chile's excellent environmental conditions, but it is also due to a number of other components permitting the optimum utilization

Chili: contrôle de la qualité des fruits

Le Chili a toujours bénéficié de conditions optimales pour la culture fruitière. Mais on assiste depuis peu à un véritable «boom». La progression est constante, de sorte que les exportations constituent aujourd'hui la part la plus importante du secteur fruitier et que le Chili prend de plus en plus d'importance sur le marché international.

En 1984, la surface cultivée s'étendait sur 100 650 ha, dont 21,3% de plantations de raisin de table, 17,9% de pommes, 21,3% de fruits à noyau (nectarines, pêches, prunes, abricots et cerises), 4% de poires, 5,4% de citrons, 8,5% d'amandes et de noix, 7,6% d'avocats et 13,9% de baies et d'autres fruits.

Vu le développement extraordinaire de ce secteur ces dernières années, les perspectives sont réjouissantes. Cela tient en premier lieu aux conditions extérieures excellentes qui règnent au Chili, mais aussi à d'autres éléments indispensables pour mettre ces conditions naturelles pleinement à profit, comme le savoir-faire commercial et le haut niveau technique



of these natural conditions. These components comprise entrepreneurial skill and the employment of high-level technologies in the branch and they have contributed much towards boosting the development of the fruit sector. Steady growth in the international market-place is shown only when the fruit meets stringent quality requirements in respect of its internal quality. Consequently, special attention is given to harvesting, post-harvesting treatments, packing, and quality control. These points are the criteria for raising profit levels and standardizing high internal and external quality requirements. Consequently, Chile has introduced measures permitting her to compete with other countries with wider fruit growing experience behind them.

In Chile approx. 12 mio. boxes of fruit are inspected by specialized companies. Chile's exports total 52 mio. boxes. Final inspection is handled by specialized companies, although quality control is the responsibility of the fruit growing companies themselves, both in the field and at the packing station. Of the total number of export shipments that have been inspected, the quality control program established by the Chilean Foundation, a joint venture of the Chilean government and ITT Corporation accounts for. This joint venture is a non-profit making body.

The results of the program are self-evident: 4 mio. boxes were inspected in 1981 by many Chilean and non-Chilean companies; 7.5 mio. in 1982, 10 mio. in 1985. These quantities represent 20% of total exports and may be taken as recognition by producers and exporters of inspection standards and improved produce quality. Five years ago, when the Chilean Foundation initiated its quality control program, which – it should be mentioned – is not compulsory for all exporters, there was no talk at the time of procedures of this type covering inspection from plantation to port of shipment.

The program concentrates on fruit and vegetables for export and is aimed at providing the producer or exporter with a statement of produce quality, proposing that this statement accompany the produce to the international market. The Foundation employs 45 specialists, who have been trained specifically for the job, to perform these duties. They are employed in the regions III to VII (Copiapó to Talca). These

de tout le secteur. On constate également qu'une progression constante sur les marchés étrangers n'est possible que si les fruits répondent aux plus hautes exigences de qualité. On a donc particulièrement soigné la récolte, le traitement après récolte, l'emballage et le contrôle de qualité, qui sont les conditions de l'amélioration du rendement et de l'uniformisation d'une qualité intrinsèque et extérieure supérieure. La mise en vigueur de telles mesures a permis au Chili de concurrencer des pays plus expérimentés dans la culture fruitière.

Des 52 mio. de cartons de fruits chiliens exportés, 12 mio. sont contrôlés par des tiers, soit des entreprises spécialisées. Ce contrôle s'ajoute à celui que les producteurs effectuent eux-mêmes dans les plantations et les entrepôts. De tout le volume d'exportation contrôlé, 10 mio. entrent dans le programme de contrôle de qualité de Fundación Chile, une co-entreprise du gouvernement et de ITT Corporation sans but lucratif.

Les chiffres parlent d'eux-mêmes: en 1981, 4 mio. de cartons ont été contrôlés par des entreprises chiliennes et étrangères, en 1982, ce chiffre a passé à 7,5 mio. et en 1985 à 10 mio. Cela équivaut à 20% des exportations totales, preuve que producteurs et exportateurs ont reconnu la nécessité de contrôler et d'améliorer la qualité. Lorsqu'il y a cinq ans Fundación Chile a introduit son programme de contrôle de qualité, qui n'est d'ailleurs pas imposé à tous les exportateurs, cette procédure, comprenant le contrôle de la marchandise de la plantation jusqu'au port, était peu connue.

Le programme concerne essentiellement les fruits et légumes d'exportation et vise à donner aux producteurs et aux exportateurs un diagnostic sur la qualité de leurs produits, pour les encourager à les exporter. Fundación a formé 45 techniciens à cet effet, qui travaillent dans les régions III à VII (Copiapó à Talca). Ces collaborateurs examinent les fruits dans les entrepôts et les ports selon les normes qualitatives en vigueur dans la société ou dans le pays importateur. Chaque jour, les inspecteurs établissent un rapport par producteur et par variété de fruits contrôlés, de façon à pouvoir résoudre sans délai les problèmes éventuels. Les exportateurs peuvent déterminer à l'avance le pays destinataire; les fruits sont alors triés, emballés et contrôlés selon les exigences de l'acheteur.

Pour la troisième saison consécutive, Fundación Chile établit des certificats de qualité, qui attestent que les fruits exportés satisfont aux exigences ou aux normes déterminées auparavant par l'acheteur et l'exportateur. La marchandise est payée avant la livraison en échange de la garantie fournie par le certificat de qualité.

Dans le but d'améliorer encore ses prestations, Fundación Chile a effectué l'an dernier, pour la première fois, un sondage parmi les destinataires américains des produits, pour vérifier si le contrôle correspondait à leurs exigences. L'enquête montre que non seulement ils sont pleinement satisfaits, mais que la demande est en hausse depuis que ce procédé est en vigueur. Dès 1987, Fundación commencera à effectuer des analyses concernant les résidus des produits phytosanitaires.

L'une des mesures importantes prises pour améliorer la qualité a été la création de Comisión Nacional de la Fruta (commission nationale du secteur fruitier) par le ministère de l'Agriculture d'entente avec les universités, les producteurs, INIA (Instituto de Investigaciones Agropecuarias – institut d'analyses agricoles), Prochile (organisation encourageant les exportations), ODEPA (Oficina de Planificación Agrícola - bureau de planification agricole), SAG (Servicio Agrícola y Ganadero - service de contrôle de l'agriculture et du bétail), SNA (Sociedad Nacional de Agricultura - société nationale d'agriculture), et enfin Funda-

employees work in the packing stations and at the port; they inspect the fruit to the quality standards laid down by the individual companies or the importing countries. The inspectors issue their certificates daily according to producer and variety of fruit undergoing inspection. The aim is to solve any problems likely to arise following inspection of the fruit. The exporter determines in advance which countries will be taking his fruit shipments and the produce is graded, packed, and checked to the buyer's specifications.

Following the third season in succession, quality certificates are issued within the framework of the quality control program and certify that the exported fruit meets with specific requirements or standards that have been agreed upon between exporter and buyer. Consequently, advance payment is made against the guarantee that is provided by the quality certificate.

In an effort to improve services constantly, a market survey was initiated among U.S. buyers by the Chilean Foundation, the aim being to find out whether these inspection procedures satisfied customer requirement. The result of the survey shows that not only were buyers completely satisfied, but there was even an increased demand for this service. As of the 1987 season the Chilean Foundation will carry out routine checks for traces of insecticides in the plantations.

A quality boosting measure of singular importance has been the establishment of a national committee for the fruit sector by the Chilean Ministry of Agriculture in close collaboration with the following bodies: universities, producers, INIA (Institute for Agricultural Investigations), Prochile (Export Promotion Council), ODEPA (Agricultural Planning Office), SAG (Agricultural and Cattle-raising Service), and SNA (National Agricultural Association), and the Chilean Foundation. The advantages of the quality control program benefit not only the producer and the exporter, but also the importer of the produce.

A number of processed-fruit lines, especially canned produce, are being exported in increasing quantities over the last few years. The same applies to a number of varieties of fresh fruit where the introduction of inspection procedures according to the requirements of the importing country was felt to be necessary as in the processed-produce area. Consequently, the organizations and enterprises specializing in quality control have expanded their services accordingly to include canned produce and frozen and dried fruit. Thus, the quality inspectors work hand in hand with exporters to raise price levels in the market-place and to afford free, permanent access to Chilean produce.

New fruit inspection program at the port of Valparaiso

The Servicio de Agricultura y Ganaderia (SAG – Agricultural and Livestock Service) has implemented an intense large fruit inspection program in Valparaiso in a massive effort to relieve congestion at that major export outlet for fruit and vegetables. Simultaneously, SAG has made available to producers and exporters the services of its professional and technical staff, and it is fully supporting their efforts to accelerate fumigation and sanitization of fruit export shipments. Favorable results have already become apparent in that rejection rates have decreased substantially in export markets. In the USA, for example, the rejection rate has dropped to well below 10%. SAG's point of origin, port facility and shipboard inspections are certain to continue to accelerate fruit shipments as well as to improve their acceptance in worldwide export markets.

ción Chile. Il n'y a pas que les producteurs et les exportateurs qui bénéficient du programme de contrôle de qualité, mais aussi les importateurs.

Ces dernières années, les exportations de certains produits transformés, en particulier de conserves, ont également augmenté. Comme pour la plupart des produits frais, il s'est avéré nécessaire de contrôler leur qualité selon les normes du pays importateur. Les organisations et entreprises s'occupant du contrôle ont donc étendu leurs prestations aux conserves, aux produits surgelés et séchés. Les contrôleurs de qualité collaborent ainsi avec les exportateurs, en vue d'obtenir de meilleurs prix et de garantir leur accès sur les marchés.

Nouveau programme d'inspection des fruits au port de Valparaíso

Le Servicio de Agricultura y Ganadería (SAG – Service de l'agriculture et du bétail) a mis sur pied un programme intensif de contrôle de la qualité et des mesures phytosanitaires pour les fruits et légumes transbordés à Valparaíso. Il est destiné à soulager le goulet d'étranglement du plus grand port d'exportation de fruits du Chili. En même temps, SAG propose aux producteurs et aux exportateurs l'assistance technique de ses spécialistes pour accélérer la désinfection par fumigation et le contrôle sanitaire des cargaisons. Cette action a déjà eu des résultats positifs, puisque les taux de renvoi des produits sur les marchés d'exportation ont très nettement diminué. Aux Etats-Unis, par exemple, le taux de renvoi est maintenant inférieur à 10%. La surveillance des entrepôts, des installations portuaires et des navires exercée par SAG va certainement continuer à augmenter les parts de marché des produits chiliens par l'amélioration de leur qualité.

The port of Valparaiso, Chile

Le port de Valparaiso au Chili

Attachment D

United States Department of Agriculture

Office of the Secretary

Development of Alternative Technologies for Quarantine Treatment of Fruits and Vegetables

Prepared by the U.S. Department of Agricultu as requested by the Congress of the United States of America

February 15, 1984

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Issued February 15, 1984

PURPOSE

The Secretary of Agriculture was directed to establish and lead a task force on the development of new post-harvest insect infestation treatments of fruits and vegetables by the U.S. Congress (House Report No. 98-450 of October 27, 1983, and House Report No. 98-231 of June 3, 1983). This request was made because the Environmental Protection Agency published in September 1983, a notice of intent to cancel the use of EDB for the fumigation treatment of fruit and vegetables to be effective September 1, 1984, if not contested. The Congress requested that the Secretary report the findings of the task force to the appropriate committees of Congress by February 15, 1984.

Assistant Secretary for Science and Education, Orville G. Bentley, assembled a task force comprised of 7 Department agencies: Agricultural Marketing Service, Agricultural Research Service, Animal and Plant Health Inspection Service, Cooperative State Research Service, Economics Research Service, Foreign Agricultural Service, and Office of Transportation. Also, information was requested from the Department of Health and Human Services, and the Environmental Protection Agency. The following text and reference material fulfill the request.

REFERENCES

1. EPA Position Document 1 on Ethylene Dibromide, December 1977

2. USDA, EPA, State Universities, Assessment Report on Ethylene Dibromide, June 1980

3. EPA Position Document 2/3 on Ethylene Dibromide, December 1980

4. USDA Report of Research on the Effect of Ethylene Dibromide Citrus Fumigation on Fruit Fly Control and Residue Levels, September 1983

5. Risk Assessment/Risk Management Report on Consumption of Treated Citrus, September 1983

6. EPA Position Document 4, September 1983

7. USDA Plant Pest Act and Plant Quarantine Act

8. Regional Project on Post-Harvest Insect Control

9. Protocol for Control of Mexican Fruit Fly in Texas

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I. BACKGROUND

A. Ethylene Dibromide Registration History

ETHYLENE DIBROMIDE (EDB) has been produced in the United States since the 1920's and is used primarily as a lead scavenger in leaded gasoline additives. It has been registered as a pesticide since 1948. Of the estimated 300 million pounds produced each year, only 5 to 7% was used in the agricultural pesticide market until September 1983.

The largest agricultural use of EDB has been the soil fumigation use (soybeans, cotton, peanuts, tobacco and pineapples, as well as a number of other fruit and vegetable crops). This use for nematode control accounted for more than 80% of all the U.S. EDB pesticide product until banned in 1983. The Administrator of the Environmental Protection Agency (EPA) announced on February 3, 1984, emergency suspension of EDB use for stored grain fumigation and spot fumigation of grain milling machinery. The only remaining registered uses of EDB are for quarantine fumigation of fruits and vegetables (less than 100,000 pounds/year) and smaller amounts are used for fumigation of beehives, storage vaults, and termite control.

U.S. quarantine fumigations are treatments authorized by the Federal Plant Quarantine Act of August 20, 1912, and the Federal Plant Pest Act of May 23, 1957. These treatments are carried out to prevent the introduction or interstate dissemination of new insect pests or diseases. Foreign insects invading a new location frequently become more destructive than in their native habitat because of the absence of natural predators and diseases and lack of competition for food sources. Other countries, Japan for example, require treatment of certain U.S. fruit and vegetables for precisely the same reason: to prevent insects and diseases from becoming established in their country.

The first indication of a potential problem with EDB was contained in a September 4, 1973, letter to EPA from Dr. Weisburger of the National Cancer Institute (NCI), stating that EDB produces "a high incidence of squamous cell carcinoma of the stomach" when administered at high doses during chronic feeding studies conducted with rats and mice. On October 16, 1974, NCI issued a "Memorandum of Alert" regarding the preliminary finding of carcinogenic activity.

The (EPA) placed the chemical under review in November of 1975. Based upon the NCI cancer study, information on mutagenicity, possible adverse reproductive effects, and a review of available literature, EPA issued a notice of Rebuttable Presumption Against Registration along with a Position Document Number One in the December 14, 1977, Federal Register (Reference 1).

The USDA, in cooperation with EPA, pursuant to a memorandum of understanding, established a pesticide impact assessment team (composed of USDA, State and EPA personnel) to assess the benefits and potential exposure resulting from registered uses of EDB as an agricultural pesticide. Their June 1980 report was made a part of the EPA rebuttable presumption file (Reference 2). The overall impact resulting from a cancellation of EDB at that time was estimated to be between $57.8 million and $62.7 million. This included increased cost of treatment as well as decreased value of production.

EPA issued a preliminary notice of regulatory decision in December 1980, Position Document 2/3 (Reference 3). At that time the Agency proposed to ban the use of EDB as a fumigant of stored grain, grain milling machinery, and felled logs and to phase out by July 1983 the quarantine use on citrus, tropical fruits and vegetables. The preplant soil fumigation use was to be retained. This preliminary notice was forwarded to the Secretary of Agriculture for comment as required by law.

On April 6, 1981, Secretary Block responded to EPA's December notice. In summary the Department concurred in EPA's decision to continue use of EDB for soil fumigation and the postponement of a decision on several other uses pending receipt of additional data. The Department did not agree that EDB use should be canceled for fumigation of felled logs or for quarantine purposes. There was insufficient information to adequately indicate that gamma irradiation was or would be a feasible substitute for EDB quarantine fumigation on a broad scale basis by the proposed July 1983 phase-out date. USDA suggested that more data on residue levels as well as information on the effectiveness of worker and applicator protection techniques.

On September 13, 1983, at the request of EPA, the Department provided residue data on citrus treated with reduced dosages of EDB (Reference 4). Also, at EPA's request on September 15, a draft risk assessment with more recent data on the distribution of risk to the California population from consumption of treated citrus was provided. As promised, the completed risk assessment/risk management report was transmitted on September 30 (Reference 5).

It was also on September 30, 1983, that EPA published their Position Document Number 4, announcing their decision of September 23, to issue a notice of emergency suspension of EDB as a soil fumigant and notice of intent to cancel uses on stored grain, spot fumigation of grain milling machinery, and felled log fumigation, with a phase-out by September 1, 1984, of the quarantine use (Reference 6). The termite, beehive supers, and vault fumigation uses would remain registered if certain label changes were made. Objections to the notice of intent to cancel and requests for a hearing were filed by registrants and users of EDB within the 30-day period allowed by law. The Department also filed as an intervenor to assist in the development of a complete record of scientific information and market impact.

B. The Quarantine Pest Problem

1. Domestic Considerations

The risk of introducing or spreading potential insect pests with movements of plants, plant products, and articles capable of harboring plant pests varies greatly depending upon the commodity involved and the origin of the commidity. The detection, control, eradication, suppression, and prevention or retardation of the spread of plant pests are necessary to protect the agriculture and economy of the United States and the health and welfare of the people of the United States.

The Secretary of Agriculture is authorized to take the measures he deems necessary to prevent the introduction and interstate dissemination of plant pests new to or not widely prevalent or distributed within and throughout the United States (Reference 7).

The Department's Animal and Plant Health Inspection Service (APHIS), has the responsibility to prevent the introduction and dissemination of plant pests. State plant health regulatory agencies have the responsibility to prevent intrastate spread of pests. Further, in the absence of a Federal quarantine, States are free to impose whatever quarantine restrictions they deem necessary to prevent the introduction of plant pests. When Federal quarantines are in force, there are normally parallel State quarantines to support a cooperative exclusion effort.

The Plant Protection and Quarantine (PPQ) Division of APHIS uses a variety of resources in determining the occurrence of plant pests in foreign countries. Once it has been determined that a plant pest not present in the United States, does in fact occur in a country wanting to ship products to the United States, then procedures are developed that render a host product safe to enter the United States. In most cases, this action requires chemical treatment. The same procedures apply within the United States for movements of host commodities between States for pests with limited distribution. Likewise, many foreign countries require treatment of U.S. grown commodities to provide protection from pests occurring in the United States but not occurring in the receiving foreign country.

Tropical fruit flies are insects of quarantine significance which occur at various places throughout the world as shown in Table 1. Three of the most economically important fruit flies to citrus, tropical fruit, and cucurbits (e.g., squash) that do not occur in the continental United States are the Mediterranean fruit fly (Medfly), the oriental fruit fly, and the melon fly. All three occur in the Hawaiian Islands. The first two occasionally establish themselves in the continental United States but are quickly eradicated. As an example, Medfly has been introduced into the United States four times since 1975, and with the exception of the recent California situation, all were eradicated in less than 6 months. When a fruit fly does become established, such as the recent California outbreak, cost to eradicate the pest can run into the millions of dollars. The cost for the 1982 California Medfly outbreak was $100 million. Therefore, as a condition of entry into the United States, any host commodity from a foreign country where flies are known to occur, must be quarantine treated to rid the insect from the product.

Within the continental United States, the Caribbean fruit fly (Caribfly) exists only in Florida, and the Mexican fruit fly (Mexfly) is established in Texas and was recently found in some areas of California. While there is no Federal quarantine on Caribfly, the other citrus-producing States require treatment of Florida citrus to rid the fruit of the pest as a condition of entry into their States. There is a Federal quarantine on host commodities in Texas and the regulated areas of California because of the Mexfly. In the international arena, all citrus, with the exception of limes and lemons, and tropical fruits from the Caribbean area including Mexico, must be treated as a condition of entry into the United States because of the occurrence of fruit flies that are pests of agriculture products in this geographical area.

Insects of Quarantine Significance

Species	Distribution	Major Hosts*
Anastrepha ludens (Mexican Fruit Fly)	Central America, Mexico, and southern Texas	Grapefruit, orange, tangerine, citron and other citrus, mango, plum, papaya, peach, apricot, nectarine, avocado, apple, pear
Anastrepha fraterculus (South American Fruit Fly)	Mexico, Central America, Argentina, Bolivia, Brazil, Colombia, Ecuador, Guyana, Peru, Uruguay, Venezuela,	Grapefruit, orange, tangerine, citron and other citrus, mango, plum, papaya, avocada, peach, apple, pear
Anastrtepha suspensa (Caribbean Fruit Fly)	West Indies: Cuba, Jamaica, Hispaniola, Puerto Rico. Found in southern and central Florida	Grapefruit, orange, and other citrus, mango, and peach
Ceratitis capitata (Mediterranean Fruit Fly)	Reported from 81 countries and political territories. Occurs in Africa, Europe, Middle East, western Australia, South and Central America, Mexico and Hawaii	Orange, grapefruit, tangerine, citron and other citrus, mango, plum, peach, apricot, nectarine, fig, persimmon, apple, pear, avocado
Dacus dorsalis (Oriental Fruit Fly)	Occurs in Asia and Pacific Islands: Bangladesh, Burma, Bonin Islands, China, Cambodia, Hawaiian Islands, India, Indonesia, Laos, Malaysia, Nepal, Okinawa, Pakistan, Philippines, Ryukyu Islands, Sri Lanka, Taiwan, Thailand, and Viet Nam	Orange, grapefruit, tangerine, and other citrus, papaya, mango, banana, pineapple (other than smooth cayenne), peach, fig, avocado, apple, pear
Dacus cucurbitae (Melon Fruit Fly)	Occurs in Asia: Afghanistan, Bangladesh, Brunei, Burma, China (including Taiwan), Hong Kong, India, Indonesia, Jammu and Kashmir, Japan (only Ryukyu Islands), Kampuchea, Malaysia, Nepal, Pakistan, Philippines, Singapore, Sri Lanka, Thailand, and Viet Nam; in Africa: Egypt, Kenya, Mauritius, Reunion, and Tanzania; and in Pacific Islands: Hawaiian Islands, Guam, and Papua, New Guinea	Cucumber, cantaloupe, squash, grapefruit, orange, papaya, mango, string bean, peach, peppers, fig, tomato, avocado, apple, pear

USDA, in late 1983, met with the United Fresh Fruit and Vegetable Association (United) to discuss development of alternatives to EDB. This organization represents a broad spectrum of citrus and papaya interests, both on the mainland and in Hawaii. United and its membership accepted the responsibility providing oversight to the development of alternative technology. Two technical work groups were established, one to address issues relative to citrus, the other relative to papayas.

In mid-October 1983, USDA scientists met with the citrus work group to identify candidate alternatives to EDB, set priorities on research and development efforts, and establish timetables for implementation of new technology. A followup meeting was held on January 16, 1984, to review progress. The citrus work group has representatives from the State Governments of Florida and Texas. A description of the progress to date is given in Section II. A., with target dates given in Table 4.

In mid-November 1983, the same USDA scientists met with the Hawaiian Papaya Administration Commission and papaya producers in Hawaii. The same approach outlined above was followed at this meeting. A meeting will be held in mid-February 1984 to assess progress on development of EDB alternatives for papaya treatment.

2. International Considerations

The focal point of U.S. concern for the use of EDB in the export sector has been the movement of fresh produce to Japan. Japan is one of the largest offshore markets for fresh produce and is the largest single market for fresh U.S. citrus. In fiscal year 1983, the value of U.S. exports of fresh citrus totaled $185 million. According to Japanese Government requirements, all citrus shipped from the State of Florida must be quarantine treated since fruit produced in that State is host to the Caribfly. It is estimated that at least 85% of the fresh grapefruit shipped to Japan originates in Florida.

The citrus producing areas of California and Arizona are prominent in the shipment of fresh lemons and oranges to Japan (imports of oranges into Japan operate under a limited quota). However, quarantine treatment is not presently required by the Government of Japan on California or Arizona citrus.

EDB is very widely used in Japanese agriculture for shipments to the Japanese mainland from the Ryukyu Islands as well as in shipments into Japan of fresh produce grown in Southeast Asia. Thus far, Japan has not taken any action against the use of EDB. It is well known that other countries in the Far East, especially Taiwan, are monitoring the Japanese situation closely. Should Japan rule against the further use of EDB these other countries are expected to follow without hesitation. The only feasible alternative to EDB for the Japanese market is considered to be cold treatment (See also Section II. B. 1. a. for a detailed description), which received Government of Japan approval in late 1983. The first test commercial shipment of cold-treated fresh Florida

grapefruit of the 1983-84 season arrived in Japan on November 24, 1983. A question has developed however, regarding the ability of the cold treatment process to maintain an acceptable quality level. Despite indications that the other shipments of cold-treated grapefruit arrived in generally good condition, the Japanese trade has reported some concern about early season fruit. Further details are discussed on Page 14, II B 1 a.

The use of gamma irradiation is a longer-term possibility as an alternative technology to EDB fumigation on products shipped to Japan. Its use to inhibit sprouting of potatoes was approved by the Japanese Government in 1972 and has been in use since that time. A wide range of irradiation research on various food items (including rice, wheat, onions and oranges) was conducted in Japan from 1967 to 1981. Despite results showing safety for human consumption, to date the use of irradiation on foodstuffs other than potatoes has not been approved by the Government of Japan, apparently in deference to the deep-rooted public sensitivity to irradiation.

The U.S. Agricultural Counselor's office has contacted officials of Japan's Ministry of Agriculture, Forestry and Fisheries, and Ministry of Health and Welfare, concerning Japan's possible acceptance of irradiated papayas from Hawaii. However, officials in both Ministries were very reluctant to discuss the subject and refrained from making any specific comments on the possibility of Japan's approval for irradiated food imports. Failure to provide some alternative for the papaya shippers and growers could have considerable impact upon the Hawaiian industry. In both fiscal years 1982 and 1983, U.S. exports of fresh papayas to Japan approximated $3.6 million.

3. Imported Commodities

A decision to ban the use of EDB in quarantine fumigation will have a negative economic impact upon many countries exporting tropical fruit to the United States. At the present time, concern is most acute in those countries which will participate in the President's Caribbean Basin Initiative (CBI), which is to become effective in 1984. This program is designed to promote and develop economic incentives, especially the export potential of countries in the Caribbean region. The centerpiece of the CBI is a 12-year period of duty-free access to the U.S. markets for almost all products from the beneficiary countries. Thus, should no viable alternative be found to replace EDB fumigation for quarantine insect control, entry of commodities that carry fruit flies from Caribbean countries would be denied.

The American Embassy in Costa Rica recently sent a message to the U.S. Department of State urging that EPA take immediate action to extend the deadline on the ban of EDB for quarantine fumigation in order to allow more time to develop or change fumigation procedures that would be acceptable to USDA's Plant Protection and Quarantine, U.S. Food and Drug Administration, and U.S. EPA. The message recognized the considerable time and effort already devoted to develop the CBI incentives only to be faced suddenly with a decision that "slaps hard at potential export activity from CBI countries." Many of the 12 U.S. Embassies in the Caribbean have expressed full support for the Costa Rican message.

A preliminary survey was made of the U.S. imports subject to EDB treatment from those countries eligible for benefits under the Caribbean Basin Recovery Act for the two most recent fiscal years, 1982 and 1983. This review indicated that the commodities most affected would be, by far, mangoes and various types of fresh citrus, as well as papayas. In fiscal year 1983, the total value of such imports was $4.3 million, of which $3.9 million represented mangoes alone. Countries most affected were Haiti, Belize, Jamaica, and the Dominican Republic. Table 2 gives a list of countries and products from which EDB-treated fruit was received in FY 1982.

Though these import levels are only a reflection of the recent past, it is expected that with duty-free treatment, the production and marketing of tropical fruits will increase both in the region of the Caribbean Islands and Central America. There has already been some imports of vegetables from certain countries of Central America, the most prominent of which is Guatemala. Now, with access to a duty-free market under the CBI program, this practice is expected to spread to other nearby countries where the production of processing type vegetables such as broccoli, cauliflower is feasible.

Because of the EDB issue, a number of Latin American countries who are not participants in the CBI have voiced their concerns over the future of their tropical fruit exports to the United States. Brazil and Ecuador are among these. Brazil indicated that a ban on EDB may require that country to modify or even abandon its single newly constructed fumigation chamber installed only this past year in Sao Paulo. Lately, Brazil has been showing considerable interest in the U.S. market for papayas and mangoes.

II. ALTERNATIVES

A. The Research, Development, and Implementation Process

The development of a commercially viable quarantine treatment schedule is of necessity a lengthy process requiring effective communication and cooperation between scientists, regulatory officials, and industry. The illustration on Page 9 shows how this process evolves during the various stages of development from idea to commercial practice with three organizations: ARS, APHIS, and industry. Two keys to rapid regulatory approval of a given technology are (1) planning the experimental protocol to meet the demanding quarantine requirements and, (2) having ARS scientists work with APHIS inspectors and industrial workers during scale-up of the technology to commercial practice. If these three groups were to work in isolation, the approval time for an alternate technology would increase. The time frame for this process could take anywhere from 3 to 40 years.

TABLE 2

IMPORTED PRODUCTS FUMIGATED WITH EDB---FY 1982

Grapefruit	1,256,665 kg
Mangoes	34,280,135 kg
Oranges	11,374,022 kg
Papaya	240,647 kg
Tangerines	23,529,128 kg

Country of Origin

Grapefruit--
Mexico, Honduras, Dominican Republic

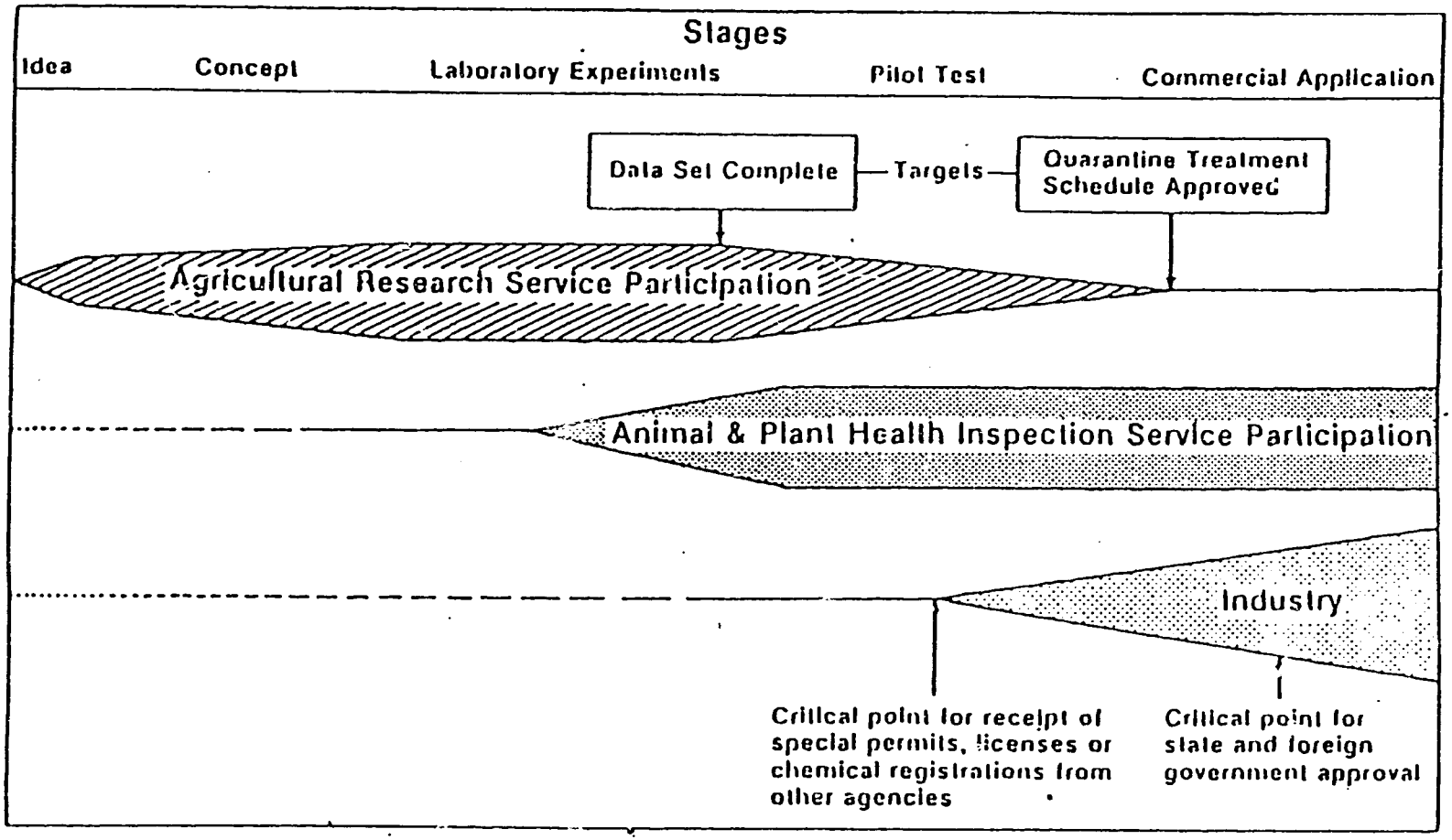
Mangoes--
Mexico, Jamaica, Haiti, Dominican Republic, Chile, Brazi

Oranges--
Mexico, Costa Rica, Spain

Papaya--
Guatemala, Bahamas, Dominican Republic, Colombia, Brazil

Tangerines,
Mexico, Spain, Morocco

The Process for Implementing a Quarantine Control Program



EDB is a broad spectrum fumigant for fruits and vegetables. The chemical can kill the five major fruit fly quarantine pests with little or no damage to commodities (phytotoxic effects), and the method of application fits within the marketing system currently used (truck, rail, air, and sea). No single method of quarantine treatment is known that can directly replace EDB fumigation for all its uses.

The Agricultural Research Service has conducted research for more than 40 years on control of fruit flies in the field, and in commodities after harvest. The expenditure of approximately $20 million in 1983 dollars has yielded developments such as sterile male fruit fly eradication methods, identification of insect lures, development of traps, evaluation of 3,000 chemicals for fruit fly control, and many basic studies on the biology of the pests and host commodities. The ARS 1984 fiscal year budget for fruit and vegetable quarantine treatments is $4,746,000 of which $1,589,000 is spent solely on EDB alternative technologies. The principal ARS research laboratories are located in Miami, Gainesville and Orlando, FL; Weslaco, TX; Fresno, CA; Yakima, WA; Hilo and Honolulu, HI. Basic research to develop new approaches to this problem and others is also conducted at a number of other ARS locations.

An active research program of post-harvest control of fruit flies is also conducted by the State universities and the Florida Department of Citrus. Research is coordinated through a Regional Project. The participating institutions and areas of work are shown in Reference 8.

The APHIS Plant Protection and Quarantine technical staff work closely with the research scientists during the later stages of technical development. Research protocols are jointly planned to assure that required data on insect mortality and fruit quality are obtained to develop a quarantine treatment schedule. APHIS takes into consideration special information needs of State and foreign governments during this planning so that approval as a quarantine treatment can be quickly obtained.

In all activities where Federal involvement occurs, the activity is a cooperative effort between the U.S. Department of Agriculture and the affected States. Quarantine boundaries, treatments, and certification procedures are mutually developed and implemented. Where foreign governments are involved, USDA serves as the liaison for the U.S. industry. At the request of the industry, USDA has discussed successfully with foreign countries, such as Japan, the use of possible alternative treatment procedures. Periodic program reviews and critiques are conducted involving all cooperators. When EPA initiated regulatory review of EDB, numerous meetings were held with the industry to explore alternatives and develop action plans that would result in alternative treatment procedures to EDB.

As mentioned in Section I. B. 2., two technical work groups involving Federal, State, and industry organizations have been established to develop and implement EDB alternatives for grapefruit and papayas. The action plan giving an overview of alternatives, priorities, and target dates is given in Table 3.

TABLE 3

Projected Milestones and Decision Points for Alternative Quarantine Treatment Schedules

Commodity/ Pest	Method	Responsible Agency	Milestone	Completion date (decision point)
Grapefruit/ Caribbean fruit fly	MB fumigation	ARS	Lab data [a]/	4/1/84
		ARS	Confirming test [a]/[b]/	5/1/84
		APHIS	Test on commercial load	6/15/84
		APHIS	Determine regulatory acceptability of schedule	6/15/84
	Phosphine fumigation	ARS	Lab data [a]/	4/1/84
		ARS	Confirming test [a]/[b]/	5/15/84
		APHIS	Test on commercial load	6/15/84
			Determine regulatory acceptability of schedule	6/15/84
Papaya/ trifly[c]/	Stage of ripeness, + hot water immersion + cold temp.	ARS	Lab data[a]/	complete
		ARS	Confirming test[a]/[b]/	complete
		ARS/APHIS	test on commercial load	4/1/84
		APHIS	Determine regulatory acceptability of schedule	4/15/84
	Stage of ripeness, + two separate hot water immersion	ARS	Lab data [a]/	3/15/84
		ARS/APHIS	Confirmatory test [a]/[b]/	5/1/84
		APHIS	Determine regulatory acceptability of schedule	5/15/84
	Phosphine fumigation	ARS	Lab data [a]/	4/1/84
		ARS/APHIS	Confirmatory test [a]/[b]/	4/15/84
		APHIS	Determine regulatory acceptability of schedule	5/1/84

Note: For each method, the milestone will be evaluated at the completion date to determine if the next milestone should be pursued.

The following approaches have been or are being considered as alternatives for EDB:

a. Other chemical fumigation treatment including:
   - o Methyl Bromide (MB)
   - o Phosphine
   - o Others

b. Non-chemical treatment including:
   - o Temperature manipulation
   - o Modified atmosphere
   - o Gamma irradiation
   - o Biological control of fruit flies
   - o Host resistance to pests
   - o Combinations of the above
   - o Microwave irradiation (phytotoxic effects unacceptable)
   - o Ultrasound (only kills organisms in outer 2mm of fruit)

c. Combinations of a. and b. above, such as:
   - o MB with modified atmosphere
   - o MB with temperature manipulation
   - o Preconditioning fruit to reduce phytotoxic effects of MB

d. Non-conventional treatment including:
   - o Eliminating need for quarantine treatment by eliminating the quarantine pest
     - oo Fly-free period
     - oo Biological and physical barriers prevent pest invasion
   - o Mechanical removal of infested fruits
   - o Selecting fruit at the time of harvest that repel pests because of naturally occurring chemicals
   - o Combining in-field pest control, post-harvest storage, processing, and packaging that will eliminate infestation and provide security

Table 4 gives a summary of the most promising alternatives to EDB fumigation of grapefruit and papayas.

B. Near-Term Alternatives Available by January 1985

1. Grapefruit

Grapefruit from Florida is under quarantine restrictions imposed by Arizona, Texas, California, and Japan because of the Caribbean fruit fly. Texas grapefruit is under Federal quarantine restrictions because of the Mexican fruit fly.

Florida is a major exporter of grapefruit to Japan. About 18 percent of Florida's fresh grapefruit production is shipped to that country annually. For the 1982-83 season, this totaled 293.5 million pounds. About 26 million pounds of fresh grapefruit are shipped annually from Florida to California. Up to 1983, EDB was the only acceptable quarantine treatment method available.

TABLE 4

Summary of Most Promising Alternatives to EDB Fumigation
(Ready for Adaptation by Industry by Jan. 1985)

Quarantine Restriction by Indicated Categories				Destination/Transportation System
Insect	State	Commodity	Alternative	
Caribbean fruit fly (all citrus)	Florida	Grapefruit (all citrus)	Cold treatment	Japan/Sea
			Methyl Bromide	CA, TX/Truck
			Phosphine	CA, TX/Truck
Mexican fruit fly	Texas	Grapefruit	Fly-free zones	All
Mediterranean fruit fly	Hawaii	Papaya	Fruit selection plus hot and cold treatments	CA/Sea
			Fruit selection plus 2 hot treatments	Japan, U.S./Air
			Phosphine	Japan, U.S./Air
Oriental fruit fly	Hawaii	Papaya	Fruit selection plus hot and cold treatments	CA/Sea
			Fruit selection plus 2 hot treatments	Japan, U.S./Air
			Phosphine	Japan, U.S./Air
Melon fly	Hawaii	Papaya	Fruit selection plus hot and cold treatments	CA/Sea
			Fruit selection plus 2 hot treatments	Japan,U.S./Air
			Phosphine	Japan, U.S./Air

Unless an alternative to EDB is found, about 18 percent of the fresh grapefruit shipped from Florida to Japan would have to be diverted to an alternative use. Normal grapefruit market conditions indicate this fruit would probably be diverted to processing with a decrease in on-tree price of about 3.4 cents per pound of fruit or loss of about 1.9 million dollars for the fruit diverted to other products. Table 5 gives a summary of the estimated cost comparison of EDB to various alternative scenarios.

a. Cold Treatment of the Caribbean Fruit Fly in Grapefruit

Grapefruit, a temperature sensitive fruit, can be preconditioned to withstand near freezing conditions by holding fruit at 60°F for 7 days. Caribbean fruit flies are killed if they are exposed to 34°F for 19 days. Therefore, the total time for quarantine cold treatment is at least 26 days. With temperatures, slightly higher than 34°F, fruit must be exposed to cold temperatures for slightly longer periods to provide quarantine security. The Japanese have accepted intransit cold treatment as a quarantine treatment method. This grapefruit marketing system fits with this alternative since sea shipping transit time is approximately 22 days. Industry is currently evaluating the commercial viability of this technique. Cold-treated fruit shipped last year arrived in good condition and quality was not impaired. The first shipment of the 1983-84 season showed significant fruit damage. It appears the damage may have been due to an unusually late-maturing crop, the effect of degreening, storage temperature after treatment and/or dehydration of fruit when storage humidity drops below 85%. Japanese warehouses are not equipped to maintain grapefruit at cold temperatures to avoid dehydration. Early season fruit picked at a later date arrived in Japan with no significant damage when compared with EDB treated fruit. If the technical problem encountered with the first shipment can be solved, use of cold treatment compared to EDB fumigation would result in treatment cost increases estimated at 25 to 40 cents per box. This represents a 1.7 to 2.72 million dollar increase in treatment costs which is 6 to almost 10 percent of the F.O.B. value of grapefruit shipped to Japan during the 1982-83 citrus season.

It is unlikely that a substantial quantity of cold-treated grapefruit would be shipped to California since the storage facilities for 26 days (7 days of preconditioning plus 19 days of treatment) at temperatures to meet quarantine requirements are not available at this time. Some shippers may be able to obtain cold treatment facilities. However, treatment costs for the California market are likely to increase by about $1.20 to $1.26 per box or 2.8 cents per pound assuming the increased demand for cold treatment facilities does not increase the price of storage.

b. Phosphine Fumigation for Caribbean Fruit Flies in Grapefruit

Phosphine, generated from aluminum or magnesium phosphide, is a slow-acting fumigant and requires considerably longer treatment time than the two-hour EDB fumigation. A treatment schedule using 33 grams of magnesium phosphide per 1,000 cu. ft., for three days at ambient temperature will provide quarantine security. Recent

studies show no phytotoxic effects; however, some of the earlier studies did show some fruit damage. Preconditioning fruit and appropriate storage temperatures after treatment may be a means to consistently prevent potential injury due to phosphine. Recent data show damage to treated fruit held at 50°F and no damage when held at 60°F.

EDB treatment costs about 10 cents per box with 6 cents being the cost of treatment and 4 cents for extra handling. The current EDB fumigation chambers could be used with phosphine provided some modification is made to reduce the corrosive effects of the chemical. Phosphine treatment would cost 34 cents to 64 cents per box depending on the number of treatments per week. This would result in an increase of 24 to 54 cents per box above EDB costs. There could be a short-term shortage of treatment chamber space with the longer treatment time. Construction of substantial additional fumigation chamber space could result in increased costs beyond those estimated here.

c. Methyl Bromide (MB) Fumigation for Caribbean Fruit Flies in Grapefruit

MB may be a preferable fumigant as compared to phosphine because treatment time is in hours rather than days and current fumigation facilities can be used with minimal modification. Published data by the ARS, USDA Miami laboratory show that 2 1/2 lbs. per 1,000 cu. ft., at ambient temperatures for 2 hours, with 20% of the chamber volume occupied will provide quarantine security (current criteria is 99.9968% insect mortality or probit 9). In these recent experiments, no fruit injury or decay due to MB was noted. However, some injury/decay was recorded in earlier studies. Experiments are in progress to determine why injury was obtained in the past and to determine how to avoid MB injury. Promising results are being obtained. Commercial-scale evaluation will be implemented soon. Based on published ARS, USDA data, California has "temporarily" approved use of MB at the 2 1/2 lb./1,000 cu. ft. rate.

The estimated treatment cost of MB fumigation when compared to EDB would be 3 to 6 cents more per box due to the higher cost of MB. Toxicological evaluation on MB is continuing and this chemical can not be considered a permanent replacement for EDB.

d. Methyl Bromide for Mexican Fruit Flies in Grapefruit

The Texas citrus industry relies heavily on the fly-free zones concept discussed below. When the Mexfly is detected at a field population level that requires quarantine treatment, untreated fruit cannot be shipped citrus growing areas. The only USDA approved quarantine treatment schedule is with EDB fumigation. Based on results to date with the Florida Caribbean fruit flies, MB may be the best alternative fumigation method if treatment is necessary. Research will be started at the ARS Mission, Texas laboratory within a few months to test this concept.

e. Quarantine Certification Based on Freedom From Infestation

In 1981, the citrus industry formed a technical advisory group that included USDA representation to review the available data on the dynamics of the Mexfly in the Rio Grande Valley of Texas. As a result of this evaluation, a protocol (see Reference 9) was developed that included increments of detection in conjunction with the release of sterile flies. Since the Mexfly population is at low levels during winter months in the Rio Grande Valley, it was proposed that if the early population could be detected and measured as it increases, and if the population could be managed by the release of sterile male insects, then perhaps it could be demonstrated that there is a period during which fruit could be moved with only a certification of freedom from infestation and no post-harvest quarantine treatment. This approach was studied during the 1981-82 citrus season wherein Mexfly traps correctly indicated populations and fruit infestation. Further refinements were made in the program for the 1982-83 season and fruit was shipped with only fly-free certification from October 15, 1982, until the first week in March 1983, when EDB fumigation was again required because of Mexfly population increases.

Further refinement of the protocol occurred during the 1983-84 season which allowed an increase in the number of trapped Mexflies in citrus groves before fumigation of grapefruit was started. Also, spraying pesticide on host vegetation was used in lieu of fumigation. Field treatments or fumigation was required in one-half the Rio Grande Valley by mid-November due to the large residual Mexfly populations from the preceding season.

Even though USDA has taken no regulatory action on the Caribbean fruit fly occurring in Florida, we are cooperating with the State and industry to develop a protocol in Florida similar to the one in Texas. Technology is not as advanced nor is much information available on the population dynamics of this fruit fly as compared to the Mexfly in Texas.

The December 1983 cold wave severly damaged citrus orchards in Texas and Northern Mexico and it is not known how soon full grapefruit production can again reach levels of previous years. The freeze has also reduced Mexfly populations to very low levels making it feasible to consider eradication of the insect from the Rio Grande Valley and Northern Mexico to a natural ecological barrier where Mexfly host vegetation is sparse. APHIS will complete construction of a fruit fly rearing and male sterilization facility in Mission, Texas in 1984. When further information is collected on the number of Mexflies now remaining in this geographical area, a decision will be made on the feasibility of

eradication of the insect. The extent of the area to be covered will be based on cost and the cooperation of the Mexican Government.

Until fruit flies can be eradicated from an area, it is necessary to maintain a backup post-harvest fruit quarantine treatment. The costs of eradication and prevention of pest reentry are extremely high though technically feasible. Recent scientific discoveries show promise in quickly identifying infested fruit (current inspection employs cutting open a representative sample of fruit) discussed on Page 22.

f. Emergency Response Needs

EDB fumigation is needed for emergency control of tropical fruit fly pests in the event of accidental introductions. The ability to use the fumigant on short notice provides a way to keep supplies of food available while protecting agriculture from further spread of pests. Without such an emergency procedure it would be necessary to embargo and destroy host products, an act that may cause significant disruptions to our nation's food supply. It was estimated that preharvest and post-harvest costs for 20 selected crops for the first year of a total California quarantine would range from $817 million to $1,256 million in 1981 dollars.

2. Papaya

The papaya industry in Hawaii shipped about 34 million pounds of fresh papaya to Japan and the 48 contiguous States during the 1982-83 season. These shipments represented about 87 percent of papaya production in Hawaii, which had a farm value of $11 million. About 17 percent of these shipments went to Japan. All papaya shipped to Japan or the 48 contiguous States were treated with EDB under quarantine restrictions to prevent spread of 3 species of fruit flies.

TABLE 5

Cost of EDB and potential alternative scenarios for use on Florida grapefruit

Treatment	Percent of fruit treated a/	Market Destination	Treatment cost per box b/	Total treatment cost	Increased treatment cost
			Dollars	Million dollars	
EDB	100	All	0.10	31.98	
Alternative scenarios c/					
1. Cold Treatment	75	Japan	0.35 to 0.50	83.94 to 119.91	
	25	CA, TX, AZ	1.30 to 1.36	103.92 to 108.72	
Scenario Total	100		--	187.86 to 228.63	155.88 to 196.65
2. Cold Treatment	75	Japan	0.35 to 0.50	83.94 to 119.91	
Methyl Bromide	25	CA, TX, AZ	0.13 to 0.16	10.39 to 12.79	
Scenario Total	100		--	94.33 to 132.70	62.35 to 100.72
3. Cold Treatment	75	Japan	0.35 to 0.50	83.94 to 119.91	
Phosphine	25	CA, TX, AZ	0.34 to 0.64	27.18 to 51.16	
Scenario Total	100		--	111.12 to 171.02	79.14 to 139.09
4. Irradiation	100	All	0.29 to 0.526	92.73 to 160.20	60.75 to 136.22

a/ Assumes a 42.5 pound box.

b/ Percent treated with scenarios 1, 2, and 3; based on expected problems with cold treatment.

c/ Scenarios 1, 2, and 3, were developed assuming the alternative chemicals would be used only where cold treatment was not practical. Methyl bromide could become a widespread replacement for EDB if its use becomes practical with increased treatment costs of 9.6 to 19.2 million dollars.

NOTE: Costs are estimates only. For some treatments estimates may be less reliable since no comparative

a. Combination of Hot Water Dip, Cold Treatment, and Degree of Ripeness

Three species of fruit flies attack payapas in Hawaii; the oriental fruit fly, Mediterranean fruit fly, and melon fly. The predominant species is the oriental fruit fly. It is known that the three species cannot survive if the fruit is less than a quarter of full ripeness. The presence of benzyl isothiocyanate (BITC) in the latex and tissues (1) repels egg-laying females significantly, and (2) kills eggs and hatched larvae if the concentration remains above 52.6 ppm. The concentration of BITC when papaya is mature green or "color turning" is well above the 52.6 ppm level. If quarter ripe papaya were held at 73.4°F, the fruit will rapidly mature and the BITC concentration will rapidly drop to below the insect control level, e.g., at 24 hours after harvest, BITC concentration drops to 26 ppm.

Until a rapid, accurate mechanical system to determine ripeness is available, a visual, subjective selection by workers must be used. However, to achieve quarantine security, heat treatment (120°F for 20 minutes) plus cold (47°F for 10 days) of visually selected papayas will maintain quality. This cold treatment period is a viable alternative for intransit sea shipments to California. Usual commercial processing of papaya employs a 120°F, 20 minute heat-treatment to prevent spread of decay causing organisms. Commercial scale evaluation of the hot/cold treatment is in progress to determine if the results will be similar to laboratory and simulated shipment tests. Estimated treatment costs indicate this process will be less expensive than current EDB fumigation. There is some question regarding possible additional cost of harvesting fruit at less than quarter ripe. Actual experience is needed to determine whether increased harvest costs would be incurred.

b. Combination of Two Hot Treatments and Degree of Ripeness

Exposing less than quarter ripe papayas to two separate hot water treatments may be another method to insure insect quarantine security. Research indicates that exposing these fruit to water temperatures of 108°F for 40 minutes followed by an exposure to 120°F for 20 minutes gives adequate quarantine protection for all three fruit flies. This procedure shows promise for the air freight markets of Japan and the eastern U.S. However, large scale commercial tests should be conducted and regulatory approval must be received before it is accepted.

c. Phosphine Fumigation

Laboratory data show that theoretically a one-day treatment with phosphine from magnesium phosphide should provide quarantine security and not injure the fruit. Tests are planned in ARS's

Hilo, Hawaii laboratory in 2 months to evaluate its commercial feasibility. Phosphine may become the viable alternative until a reliable method of harvesting fruit quarter ripe or less is developed. If the one-day fumigation works, it may be more practical for industry to utilize one reliable treatment method than the combinations mentioned in a. and b. above.

Table 6 presents cost comparison scenarios between EDB quarantine fumigation, the alternative treatments and shipment methods.

C. Long Term Alternatives

1. Gamma Irradiation

Use of radiation techniques such as microwaves and ultra high frequencies have been investigated. Of these, gamma irradiation shows the most promise. All insects can be killed with gamma irradiation. However, in many instances, the killing dosage will injure the commodity. For those commodities currently dependent on EDB, research shows that use of gamma irradiation is technologically feasible especially for fruit flies in papaya and grapefruit. To permit use of low dosage of irradiation, research is in progress to show that it is not necessary to kill all insects present for quarantine security purposes. At very low dosages (less than 10 kilorads) few insects would survive, and of those survivors, none will be able to produce progeny. Many commodities currently injured at dosages necessary to kill fruit flies will not be injured if the criterium for quarantine security is changed from "mortality" to the "inability to produce progeny". Such a change in definition will require prior consultation and approval by USDA, States and foreign countries.

At the present time gamma irradiation has been approved by the U.S. Government for disinfestation of grain, antisprouting of potatoes and disinfestation of spices; however, only disinfestation treatment of spices is used commercially. A special review by three United Nation organizations (World Health Organization, Food and Agricultural Organization, and International Atomic Energy Agency) found no toxic risk to humans for food exposed up to 1,000 kilorads irradiation. The U.S. Department of Health and Human Services is currently developing regulatory guidelines for processing all foods with up to 100 kilorads dosage. It is hoped that a proposed rule will soon be published in the Federal Register; however, considering the time period needed to receive public comment, to make further modification and to publish a final rule, it is not expected that approval for food treatment can be available until later this year. There are some questions regarding consumer acceptance of irradiated food products. Assuming these questions can be resolved, firms experienced with irradiating medical equipment have expressed interest in irradiating food. Assuming FDA approval were granted for food irradiation, irradiators could be operational about 18 months after all necessary local permits and licenses are obtained. Therefore, irradiation cannot be available as an alternative to EDB fumigation by the proposed cancellation date of September 1, 1984. A more realistic date for its full scale commercial use as a quarantine treatment of fruits and vegetables may be 1986.

TABLE 6

Cost of EDB quarantine fumigation and potential alternative scenario for use on papaya

Treatment	Total fruit treated	Shipment Method	Treatment cost per pound	Total treatment cost	Increased treatment cost
			Cents		Million dollars
EDB d/	100	All	0.15	5.1	--
Alternative Scenarios					
1. Heat/Heat b/	70 a/	Air	0.15 to 0.20	3.57 to 4.76	
Heat/Cold b/	30	Sea	(0.15)c/	(1.53)	
Scenario Total					(3.06) to (1.87)b/
2. Phosphine	100	All	0.375 to 0.75	12.75 to 25.5	7.69 to 20.4
3. Irradiation	100	All	0.435 to 0.789	14.79 to 26.83	9.69 to 21.73

a/ Distribution based on portion which is surface shipped and could be heat/cold treated.

b/ The feasibility of this option is based on the assumption that fruit can be harvested at 1/4 ripe to meet quarantine standards. APHIS, USDA has not approved any detection method.

c/ This represents a cost decrease since the fruit is surface shipped under refrigeration with EDB treatment and current practice is not to impose an additional charge for shipment under controlled temperatures.

d/ Current practices to heat dip all papaya for 20 minutes at 49°C which would be utilized with all alternatives. In addition, this heat dip is the first heat dip of scenario 1.

NOTE: Costs are estimates only. For some treatments estimates may be less reliable since no comparative experience base exists to develop estimates.

Various cost projections have been developed which indicate gamma irradiation would cost about 0.18 to 0.24 cents per pound (7.8 to 10.1 cents per box of grapefruit) plus the cost of transporting fruit to the plant and unloading and loading the conveyance carrying the fruit. If irradiation plants could be located adjoining the ship loading facilities for grapefruit exports to Japan, much of the extra handling cost could be avoided. This would require altering either the scale of irradiation plants or the location of shipping facilities which would significantly increase the unit cost of processing fruit. Assuming irradiation plants were at locations near the current EDB fumigation chambers, handling costs would range from 21.2 to 42.5 cents per box. This would give a total cost for grapefruit treatment of 29 to 52.6 cents per box as compared to 10 cents per box for EDB (see Table 5)

Fruit being exported from Hawaii would face additional logistical problems of moving all fruit produced on several islands to a control irradiator for treatment. It is estimated that irradiation plus handling would cost 0.479 to 0.789 cents per pound compared to 0.15 cents per pound with EDB (see Table 6). There remain numerous questions regarding the costs of handling fruit to be irradiated and the size of the processing plants which are yet to be constructed. Therefore, realistic cost estimates are not possible until an actual facility is operational which can handle the volume ands value of fruit and vegetables produced.

2. Detection of Fruit Fly Infested Fruit

A device has been discovered that will detect all stages of fruit fly larvae in the host commodity. It is based on the use of an accelerometer, which is a transducer that will detect vibrations in solids. Currently all stages of the Caribbean fruit fly larvae can be detected, except early and mid-first instar larvae. The research effort currently is to improve the sensitivity of the accelerometer so that newly hatched larvae can be detected. This will then be used to detect fruit infested with larvae so that they may be removed. An effective quarantine treatment schedule can then be developed by combining larval removal with a method that will kill or eliminate insect eggs.

III. Establishment of Priorities

The Agricultural Research Service and the Animal Plant and Health Inspection Service have established immediate priorities in view of the Environmental Protection Agency's indication on February 3, 1984, to make a decision in a few weeks on EDB fumigation of fruits and vegetables. An accelerated research program and quarantine review schedule was discussed for papaya, citrus, and mango alternatives in view of EPA's decision to take action earlier than September 1, 1984, as previously announced. Four areas were assigned highest priority based upon industry and foreign government indications of potential disruption of fruit and vegetable markets. These are: 1) acceleration of work on papaya alternatives to have an approved treatment ahead of the timeframes indicated on Page 11, Table 3; 2) speed up work on methyl bromide fumigation of grapefruit; 3) concurrent with the grapefruit activities, test methyl bromide fumigation on oranges and tangerines, which has not proven acceptable in the past; 4) initiate research on temperature treatment on mangoes for fruit fly control.

USDA in cooperation with other Federal Departments, and the private sector, will continue its accelerated research program in order to alleviate undue economic harm to the American farmer and to maintain our vital international agricultural trade relations.

CONFERENCE EDUCATIONAL SESSIONS

EDUCATIONAL SESSION CAPSULE

Monday, February 16, 10:15 a.m. - 11:45 a.m.
Family Communication
Distribution: Teamwork Counts
Merger Mania: Effects on the Produce Industry
Finding Your Way in the Software Maze
Read any Good Labels Lately?
Marketing, Merchandising & Agrichemicals:
Managing Situations in the Apple Industry
The Produce Broker: The Vital Link in Distribution
Breaking Foodservice Sales Barriers
New Products and Beyond

Tuesday, February 17, 8:15 a.m. - 9:45 a.m.
Family Business—Beyond Survival
Intermodal: A Transportation Network
The Future of Branded Produce
Foodservice Packaging: Where Do We Go From Here?
Perfect Produce: The Food Revolution Ahead
What's New in Onions
A Produce Success Story: The Independent Retailer
Immigration Reform: The Changes Ahead

Tuesday, February 17, 10:00 a.m. - 11:45 a.m.
Crisis Management: Taking Control
Saving Money Under '86 Tax Reform
Shippers and Retailers: Keep Talking
Coping with the Insurance Liability Crisis
Upscaling Your Merchandising Programs
Fresh Profit Trends in Restaurants
Potatoes: Can A Good Year Bring on a Better One?
The Dynamic Tomato Industry—Changes are Coming
Reprogramming Yourself for Success

Wednesday, February 18, 10:45 a.m. - 12:15 p.m.
The PACA and Inspection Services: Tools for the Industry
Diet Crazes: Cutting Calories and Increasing Profits
The Supermarket of the Future
Getting into the Business of Floral

DIVISION AND COMMITTEE MEETINGS

Saturday, February 14
Distribution Division Council ..... 9 a.m. - 3 p.m.
Government Relations Committee .... 10 a.m. - 12:30 p.m.
Fresh Approach Committee ..... 10 a.m. - 12 noon
Foodservice Division Advisory Board ... 1:30 p.m. - 3:30 p.m.
Retail Division Advisory Board ..... 2 p.m. - 5 p.m.

Sunday, February 15
Terminal Market Division Advisory Board ... 9 a.m. - 11 a.m.
Potato Division Advisory Board ..... 10 a.m. - 12 noon
Brokers Division Advisory Board ..... 2 p.m. - 4 p.m.
Tomato Division Advisory Board ..... 2 p.m. - 5 p.m.

Monday, February 16
Onion Division Advisory Board ..... 2 p.m. - 4 p.m.

Tuesday, February 17
International Trade Committee ..... 2 p.m. - 5 p.m.

EDUCATIONAL SESSIONS

During the conference, educational sessions were featured in the mornings on a range of subjects (see previous page). Summarized below are topics covered in the sessions I attended. Tapes on other relevant sessions were purchased and sent to the PROEXAG field office.

"The Produce Broker: The Vital Link in Distribution", moderated by Derrelle Pridgen, Sr.

"Anyone in the shipping and retailing sectors of the industry is aware of the many problems inherent in the complex business of fresh produce production and marketing. Frequently, a good produce broker can be the key element in resolving difficult situations, solving delivery problems and locating the right suppliers for a particular product. In many cases, the intermediary relationship the broker enjoys can be crucial in facilitating solutions to difficult problems. Shippers and receivers as well as brokers will want to discover how brokers can truly be the vital link in the produce distribution chain."

Peter C. Ballotta, The Tobi Company, Tampa, FL

Peter recommended that there should be some ability to regulate who does and doesn't get into the business. He also provided his definition of characteristics of a good broker.

Don Smith, Turlock Fruit Company, Turlock, CA

Don's definition of a good broker are that he/she: 1) be informed--map, weather, crops at origin, condition, and rapport with customer--and should visit production and distribution points to understand the industry; 2) be available; 3) use efficient mechanics and procedures, including billing system; 4) use diplomacy--know the timing of putting both sides together or apart; 5) monitor credit and let parties know; 6) provide assistance in promotional sales; 7) if trucking is involved, track and monitor same, and know about product temperature compatibilities; and 8) be aggressive. Last, in terms of quality/maturity emphasis on fruits and vegetables, the broker should help insist on desired grades.

Robert Strube, Strube Celery and Vegetable Company, Chicago, Illinois

Strube stated that the broker should be used for 1) transport; 2) communication regarding market condition and supplies; and 3) sales, both full trailer-loads and LTL. He feels there should be marketing orders on production to limit quantitites in terminal markets to create price stability. Artificial protection of production doesn't work.

"The Future of Branded Produce," moderated by Myron Wolfe, The Ontario Produce Company, Toronto, Ontario

"Today's produce consumers want taste, texture and beautiful produce--and that requires optimum freshness. Many companies have developed superior products through years of research and advanced technology. Does this produce have an added value to the consumer? Does the power of brand names make a difference? What are the risks involved? Does the retailer control the quality in the end? Where does branded produce fit into the future of the produce department and on the bottom line."

Kirk Leighton, Campbell Soup Company, Camden, NJ

The speaker had interesting stats, describing the evolution of Campbell's as a company once known for its tomato soup. They are now capitalizing on that brand identification to launch their fresh program, which features high-end quality produce in pre-packs.

Allen Vangelos, Calavo Growers of California, Los Angeles, CA

Representing #1 in avocados, Vangelos discussed quality in brand identification, purchasing from others and labeling under their name.

Ray Klocke, The Kroger Company, Cincinnati, Ohio

Branded produce is here to stay, but economics/generic produce play an important role as well.

Dennis Werner, Chiquita Brands, Inc., Montvale, NJ

Chiquita opened with an excellent film on how they selected Costa Rica as an overseas location, the importance of looking for long-term commitment and association with a name brand. Bananas paved the way in brand identification, and in this case, pineapples followed in similar fashion.

"Upscaling Your Merchandising Program," moderated by Bill Vastine

"With today's better educated and affluent consumers demanding that their produce departments be more sophisticated in appearance and appeal, many relailers are faced with the need for upscaling their merchandising programs--sampling, nutrition awareness, expanded salad bars, tie-in items and new lighting fixtures."

I had planned to attend this session, but met with Bill Crum instead. He is very upbeat about this subject and retail marketing's connection to the PROEXAG project. Dole, for example, has moved to the pineapple pre-pack. New products, including some of those from Central America, may sell better in clear-plastic pre-packed containers.

"The PACA and Inspection Service: Tools for the Industry," moderated by Tom Kovacevich, Jr.

"The administration of the Perishable Agricultural Commodities Act and the inspection service are some of the most important government programs assisting the orderly marketing of fresh produce. This session will detail the benefits and obligations of all parties licensed under the PACA as well as methods to better utilize this program. Learn the importance of inspections at both origin and destination and what your company can do to protect its interests."

Eric Forman, U.S. Department of Agriculture, Washington, D.C.

John Flanagan, U.S. Department of Agriculture, Washington, D.C.

Karl Torline, U.S. Department of Agriculture, Washington, D.C.

Leonard Kreinces, Attorney at Law, Harrison, New York

This lively discussion featured presentations from those from USDA who administer the program, deal with the many requests, filing procedures, background investigations, and legal proceedings and perspectives. Kreinces, having represented clients in PACA cases, was most impressive in highlighting some of the successes of the program, the ins and outs, and areas for improvement. It is clear that as PACA has grown in popularity in terms of "keeping the industry clean," USDA staff has not grown in keeping with the demand. This situation has resulted in delays in processing filings. There were many questions from the audience, dealing in specifics to gain interpretations from the panelists as to fault, how to proceed, and whether the regulations and PACA trust were applicable. All in all, very interesting and well worth making this avenue available to Central American and Panamanian shippers in protecting their rights as exporters.

CONTACT REPORTS

CONTACT REPORTS

Summarized below are reports outlining discussions held with individuals during the conference and exhibition, as requested by the PROEXAG team and otherwise. Both Ed Hurlston and John Guy Smith, PROEXAG chief-of-party and post-harvest handling specialist respectively, suggested persons to be contacted, using the advance registration lists. In representing their interests, every effort was made to contact the individuals, and to meet with them between scheduled sessions. Under the circumstances, and with more than 6500 persons in attendance at the conference and trade show, it was not possible to contact every individual. In some cases, the suggested contact person indicated another individual for further followup.

AEROLINEAS ARGENTINAS CARGO

Carlos Alberto Abad, Direct of Sales

Luis Schvartzer, Director, Buenos Aires Central Market

Results/Next Steps:

PDM met these two Argentines during the trade forum; their English was weak and upon discovering that I spoke Spanish, they asked me to do some informal interpreting. Carlos Abad is very interested in increasing two-way cargoes for Argentina. Although the country currently exports refrigerated cargo to Europe, they have not as yet capitalized on the export potential for their grapes, apples and stone fruit, as has neighboring Chile (see attached article). This was their first time to UFFVA; Schvartzer said that President Alfonsin had sent him as personal emissary; USIS had sponsored the trip. The session on "Chile as Role Model" was a learning experience for both of them, as they were not aware that Chile's exports had reached such substantial levels. Argentina, as many of its Latin counterparts, produces many quality fruits and vegetables for the domestic market. Its next challenge will be the export market.

Luis Schvartzer
Director
Corporacion del Mercado Central de Buenos Aires
Autopista Riccheri
y Boulogne Sur Mer
Pcia de Bs As
Tel 622-0011
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AEROLINEAS ARGENTINAS
CARGO

CARLOS ALBERTO ABAD
JEFE DEPARTAMENTO VENTAS

RIVADAVIA 578, P.5º OF. 515 - 1002 Bs. As. - TEL 33-6223/30-3551/9 INT. 160 - 4..

BANFRUIT COMPANY, affiliated with Turbana Company

John Addison-Smith, Executive Vice President

Results/Next Steps:

Since Turbana has had experience in doing charter "go-bys" we should re-contact same as we get closer to looking at this type of alternate transport.

Banfruit Company
AFFILIATED WITH TURBANA CORPORATION

JOHN H. ADDISON-SMITH
EXECUTIVE VICE PRESIDENT

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BONUS PRODUCE DISTRIBUTORS INC.

2/87-JGS *** Jim Nahos, Bob Maxwell

Background/Request:

They are receiving cantaloupe from Honduras (Choluteca area) from ASENSA, that is managed by an Israeli firm, Shemesh. William Flynn reported that they were receiving approx. 5 containers per week at Port New Orleans and breaking the loads for re-shipment at New Orleans Cold Storage, NOCS. They reportly keep their own man at NOCS. Excellent opportunity to inform ourselves about the first (known to us) commercial scale movement of C.A. fresh produce through New Orleans (excluding bananas). A second reported receiver at New Orleans Double "B" Produce Co., (receiving cantaloupes from the cooperative CREHSUL) will not be represented at the convention. Might be able to find out more about their operation from BONUS

Results/Next Steps:

Although contact not made with individuals mentioned above, PRONET printout below gives further indication as to business. Maxwell Trading served as part of marketing arm for Bonus product. Some questions regarding Israeli connection to Bonus. Refer to contact report with S.Smith of Turlock, original joint venture for substantial volumes and "clout" with ocean carriers did not work out.

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->ShipBroImpt
GrpsPchPlmNecMel
Area Code: 805
Tel 849-2675 (ss) Jim Nahas
Tel 849-2676 (ss) Bob Maxwell
Maxwell residence 328-1387
Brands: BONUS PAK, SAVOR PAK, ROYAL ANNE

BONUS PRODUCE DISTRIBUTORS INC
3460 N Delaware Ave, Suite 101
(HDQ EARLIMART CA)
PHILADELPHIA
Pennsylvania 19134
->ShipBroImpt
GrpsPchPlmNecMel
Area Code: 215
Tel 425-0860
Specialize in Chilean fruits & vegetables

BOSS FRUIT & Vegetable Co.

MARKETING SERVICES & INFORMATION SYSTEMS

BRUCE E. NICHOLES
Assistant Manager
L.D. (208) 454-1987

FULL-LINE AGENTS

MARKETING DIVISION

BOSS FRUIT AND VEGETABLE CO.

Bruce Nichols, Assistant Manager

Results/Next Steps

PDM met during the exhibition. Importing Chilean fruit; some interest in Central America. Computerized info system worth looking into. (see attachment)

BROCK PRODUCE

Jim Brock

Results/Next Steps:

Now in El Centro, Honduras, used to be agricultural attache in San Salvador. Does not like Sea-Land. Products of interest: bananas(exotics), pineapples(were burnt in C.Rica), mangoes, and possible strawberries, blueberries, blackberries, asparagus. Can provide technical advice and advances on shipments. No investments in foreign country.

J.R. BROOKS & SONS, INC.

2/87-JGS *

Background/Request:

What are they doing with exotics? Are they interested in Central American joint ventures? Re: Exotics, limes, mangoes, papayas, etc...?

Results/Next Steps:

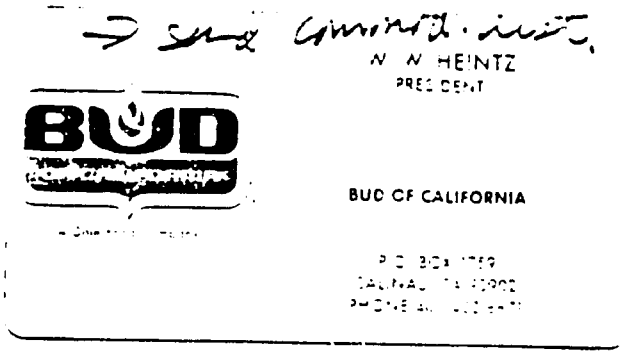
Interested in pursuing additional deals in Central America. Currently bringing in Costa Rican chayote. See card below for product interest.

J.R. BROOKS & SON, INC.

Bill Schaefer
Director of Marketing

P.O. Drawer 9 16400 S.W. 256 St.
Homestead, FL 33090 (305) 247-3544

• Alemoya • Avocado • Black Sapote • Boniato • Breadfruit •
• Brooks Big 'Uns Avocados • Calabaza • Canistel •
• Carambola • Chayote • Cilantro • Coconut • Eddos •
• Guava • Hardee Red Avocados • Jaboticaba •
• Keitt Kolossal Mangos • Kumquat • Lime • Longans •
• Lychee • Malanga • Mamey Sapote • Mango • Monstera •
• Papaya • Passion Fruit • Pummelo • Sapodilla •
• Star Fruit • Sugar Apple • Sugar Cane • Tamarind •
• Water Coconuts • Water Cress • White Sapote •
• Yucca Cassava •



BUD OF CALIFORNIA

2/87-EFH * Bart Good, Bill Heintz

Background/Request:

Both are acquaintances of mine as is Minor Athanassiadis and Mike Cavallero. Bill is the president of Bud of California. Bart Good is in charge of processed (salad-bar type) food items and the other two are salesmen. Bart is a good friend - you may want to inquire if any interest in processing fresh vegetables in CA (specifically Guatemala and to a lesser extent Panama) since they are labor intensive products and could be produced much cheaper here.

Results/Next Steps:

Met all of EFH's suggested contacts. Bill Heintz, President, requested commodity list for followup. Interested.

CALAVO GROWERS OF CALIFORNIA:

2/87-EFH * Al Vangelos, Danny Lopez

Background/Request:

Al Vangelos is the president of Calavo and an acquaintance of mine. You may wish to tell him that I had several conversations with Danny Lopez (also a friend) before coming to Guatemala and that Danny thought that Calavos might have some interest in some of the products in C.A. particularly in Guatemala. Danny Lopez is Calavo's sales manager.

Results/Next Steps:

Attended session for which Al was panelist; unable to actually speak with same. Should followup with brochure and phone call.

CAMPBELL SOUP COMPANY

2/87-JGS *** Steve Blum, Jack Rittenauer, Kirk Leighton

Background/Request:

Campbell's buys frozen vegetables in Guatemala. Why are they represented at the convention? Probably because of their move into a fresh vegetable market, convenience pack for microwave cooking. Could they possibly be interested in contracting C.A. of selected vegetables? In either Costa Rica or Guatemala we can source them on a year-round basis. If Campbell's is happy with the fancy broccoli they are securing in Guatemala, they might be pursuaded to do one of their new fresh packs here?

Results/Next Steps:

Approached following panel on branded produce. Interested in PROEXAG project. Have team leaving soon for Chile; would be interested in doing same to Central America.

Campbell Soup Company
Campbell Place
Camden, New Jersey 08101-0391

KIRK W. LEIGHTON
Group General Manager - Fresh Foods

609-342-4893

CASTELLINI COMPANY

2/87-JGS * Bob Castellini

They source a lot of stuff in Pompano. Might be interesting to talk to them to get a terminal market operator's view of the Pompano deal.

Results/ Next Steps:

Unable to contact. Should followup with phone call.

CHIQUITA BRANDS, INC.

2/87-JGS *** John-Campbell Barmmers

Background/Request:

Whatever happened to Chiquita Brands enormous interest in our project?

Results/Next Steps:

Stopped by booth but did not meet John-Campbell Barmmers. RF to followup with his contacts.

COLLIER ENTERPRISES

David Land, President

Results/Next Steps:

Large land-owners, grower-shippers of produce, mainly tomatoes squash, peppers and other product in Collier County, Florida. Interested in PROEXAG project, potential collaboration, also potential short-term technical assistance. Very familiar with political players in Florida produce scene.

COOPERATIVA HORTICOLA DE MERCADEO, BOQUETE, PANAMA

2/87-JGS *** Rodrigo Marcaicq

Background/Requests:

He expects to meet PDM at the convention. Will have up to 15 hectares of asparagus ready for export starting in Oct. of this year. He is shopping for a connection. We have informed Bob Ross.

Results/Next Steps:

Looked for same at trade program and conference but did not connect. Plenty of interest in asparagus.

CORKY FOODS CORP.

J. Luis Rodriguez, Chairman, also President of Florida Fruit & Vegetable Association

Results/Next Steps:

PDM approached following CBI panel; very negative. Problems in dealing with Caribbean Basin countries extremely difficult. Refer to trade forum notes.

Florida Fruit & Vegetable Association
4401 E COLONIAL DRIVE
P O BOX 20155, ORLANDO, FLORIDA 32814

J. LUIS RODRIGUEZ
PRESIDENT

CORKY FOODS CORP.
A Diversified Agribusiness Company

J. LUIS RODRIGUEZ
Chairman of the Board

Boynton Beach, Florida 33436
(305) 736-0685

Dole Citrus

L. Patrick Hanemann
Vice President
Sales and Marketing

P. O. Box 9269
Ontario, CA 91762-9269
(714) 983-0203

Telex 1561165
Answer Back Dole A Castle & Cooke Company

DOLE CITRUS

2/87-EFH * Pat Hanemann

Background/Requests:

Pat Hanemann is an old friend - if you run across him say hello for me and inquire if there is any type of citrus or citrus product they might be interested in from C.A.

Results/Next Steps:

Some interest, might be worth pursuing regarding Honduran processed product.

Dole Fresh Fruit Company

Paul J. Yoder
Manager, Industry Relations

P.O. Box 3080 East Tower
2300 Glades Road
Boca Raton, FL 33431

(305) 368-1671 A Castle & Cooke Company

Fresh Fruit Company

Charles W. Palmer
Vice President Sales and Marketing
Fresh Fruit Products

2300 Glades Road, P.O. Box 3080
Boca Raton, FL 33431-0980

(305) 368-DOLE A Castle & Cooke Company

DOLE FOOD COMPANY

2/87-EFH Bill Crum, Dave Delorenzo, Bob Fisher, Selby Gillis Charlie Palmer, Ben Paz, Rick Utchell, Paul Yoder, Jim Sousane, Jim Mills, Bob Post, Bill McKinley, Larry Metcalfe

Background/Request:

My old buddies will be there, Bill Crum, Dave Delorenzo, president of Dole Fresh Fruits and Bob Fisher, president of Dole Foods are good friends as are Selby Gillis, Bill McKinley Larry Metcalfe, Jim Mills, and Charlie Palmer (all salesmen) -, Charlie Palmer is their boss. So is Bob Post (salesman that is). Say hello to Ben Paz if you run across him as well as Ed Turdiar, Rich Utchell, and Paul Yoder (the last three are also salesmen - Ben is in charge of banana and pineapple operations). But the person you really want to see from this group is probably Jim Sousane - New Product Development(also the papaya and avocados man). Since Dole is hosting the Hospitality center - you'll probably find all these guys there

Results/Next Steps:

Great group from Dole. Met most of EFH's contacts either at booth or during program. Bill Crum is very enthusiastic about working with us and as retired v.p. sales, he is a real gold mine and wonderful person as well. Jim Sousanne interested in project. Worth following up as project progresses.

DRISCOLL STRAWBERRY ASSOCIATION

2/87-EFH-and-JGS Ken Morena

Background/Request:

EFH - Don't know anyone there but from what I've heard about them there "numero uno" and the type of company we'd love to have the project associated with.
JGS - Numero uno for quality product in the USA. We are told in Nov. by Bob Ross of LAAD that Driscoll was interested in entering Guatemala, but we have not been able to confirm this.

Results/Next Steps:

Visited booth. Some interest and appears contacts made with Costa Rica. Definitely worth linking up with same. Bill Crum volunteered to go visit them in California.

A. DUDA AND SONS, INC.

2/87-EFH * Joe Obucina, Jim Moore

Background/Request:

Bill Crum can introduce you to representatives from this company. Small (relatively) lettuce and California type vegetables based in Florida (very small Salinas Valley operation) may be interested in this type of product from C.A. (Guatemala, Costa Rica, and Panama).

Results/Next Steps:

Visited booth briefly, individuals above not present. Worth following up with info on project as they have a good name in the industry.

EASTERN AIRLINES

2/87-EFH

Background/Request:

Shipping of air containers from Guatemala?

Results/Next Steps:

Registered according to list, but no booth and was unable to make contact in crowds.

FEPROEXAAH

2/87-EFH

Background/Requests:

No special request although know that several individuals plan to attend.

Results/Next Steps:

Refer to Central American contact report.

FRUITCO CORPORATION

2/87-JGS **

Background/Request:

One of the two Chilean sales firms based in the US who dipped their toes into the Salvador melon deal this season at ASPENT'S invitation (My own opinion was that this was inadvisable).

Results/Next Steps:

Did not make contact. Believe that no one came afterall to conference.

FRUPAC INTERNATIONAL CORPORATION

2/87-JGS

Background/Request:

Same as Fruitco, above. It would be very interesting for us to get feedback from these two companies. (JGS FruPac contact report was sent to PDM under separate cover)

Results/Next Steps:

Met with Celia Cussen, in charge of business diversification and development. FRUPAC is targetting pre-packing for retailers- willing to send their own packaging technician to source countries. They had a problem with some Salvadoran melons, cargo arrived in south Florida and there was a temperature problem in transporting same to cold storage in Tampa(15 trailers with ASPENT). Mixed experience with CCT. Fasarelli's name mentioned in connection with strawberries and cantaloupes.

Celia L. Cussen
Business Diversification and Development

Philadelphia, Pa. 19110 Tel: (215) 225-1490

FUSADES

2/87-JGS

Background/Request:

FUSADES and their offshoot ASPENT, PROEXAG's designated export federation in El Salvador, sometimes operate as rival organizations. I have not been impressed with the FUSADES/FUNDACION CHILE operation. However we would like to know if FUSADES is at the convention "fishing" for U.S partners.

Results/Next Steps:

Refer to Central American contact report attached.

GRIFFIN AND BRAND OF McALLEN, INC.

2/87-JGS ** Mike Gower

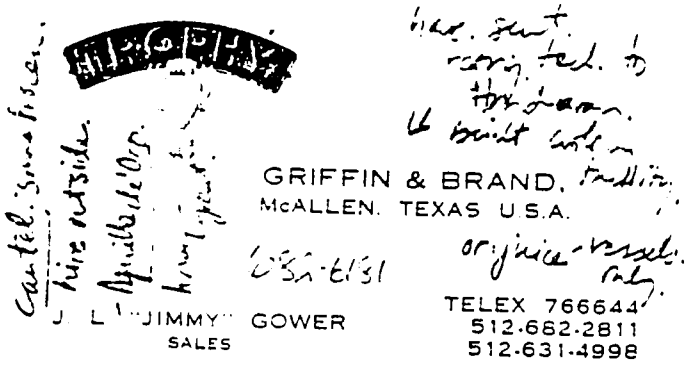
Background/Request

Griffin and Brand have a big presence here: Grapefruit in Honduras; Strawberries and watermelons in Guatemala; and melons in El Salvador. Yet we have had no contact with them to date. We note that Othal Brand is not listed in their delegation. Maybe one of their delegates will tell you exactly how they are moving melons form Salvador and Guatemala up through Mexico to McAllen. This would be vital information to pass on to our partners ASPENT in El Salvador. Our joint activities to date indicate that:
1) They are not having their own trailers pulled through as they did in their trial runs last year.
2) They are pulling their own reefers or nose-reefers to the Mexican/Guatemala borders and effecting back-to-back transfer there. Some of the honeydews are hauled right of the packing line in dry trailers to the transfer point.
3) They have contracted with a Mexican trucking firm for full service from the border to McAllen. Any more details you might entice or obtain from their delegation would be very useful.

Results/Next Steps:

PDM met with Jimmy Gower whose are is onion sales. He was somewhat familiar with the Central American operations and willing to talk about it. G & B has sent a refrigerated technician to Honduras; built a cooling facility there. Importing fresh and frozen canteloupes; good honeydews through Aguilla de'Oro. Orange juice shipped only by vessel, through Tampa/Manatee. Importing Guatemalan and Salvadoran cantaloupes and honeydews. J.Brands is one of melon contacts. Using own trucks for overland route through Mexico to Texas, 4-5 day transit with 40' reefers, as high as 27,000 boxes in one day.

Red tape exists between Guatemala and Mexico, since honeydews moving out of both countries. For details on overland transport, contact Othal Brand, Jr. or Wayne Showers, president.



R.GUERCIO AND SONS, INC.

2/87-JGS

Background/Request:

Largest independent house in New Orleans. May be able to shed light on why none of the New Orleans-based commission houses are interested in moving imports (Pompano style).

Results/Next Steps:

Did not see same during conference. PROEXAG can followup through John Hyatt of Irwin Brown in New Orleans.

INTERNATIONAL BANANA ASSOCIATION

2/87-EFH Bob Moore

Background/Next Steps:

Bob Moore, president of International Banana Association. Als a friend - (ex C&C counsel) does he think there is any market for "exotic" bananas (lady finger, apple banana, etc...) varieties. Know market (by industry standards) is extremely small if it exists at all - but container load volumes could be sufficient to sustain a local farms of significant size (i.e. so much as the avg. melon grower ships). Please say hello to Bob for me and give him the latest news on us.

Results/Next Steps:

Unsuccessful in tracking down. Worth following up with regarding specialty bananas.

JACC/RD(JOINT AGRIBUSINESS FOR CONSULTING AND COINVESTMENT BOARD

J. Robert Velado, Agribusiness Advisor

Knowledgeable about current investment/export projects in the the Dominican Republic. Worth staying in touch with to examine comparative advantages of Caribbean Basin countries vs. competition.

J. Robert Velado
Agribusiness Adviser

Alberto Larancuent 16, Ens. Naco
Apartado Postal 3468
Santo Domingo, República Domunicana
Tels (809) 567-7207 7208 7209 7200

KELLY HARRISON ASSOCIATES

2/87-JGS

Background/Request:

Curious about what is Kelly's latest angle?

Results/Next Steps:

PDM did not see him at conference. Home office has had contact with same regarding PROEXAG. He may be selling some of operation's assets, pending outcome of Dominican Republic bid.

LINDEMANN PRODUCE INC.

2/87-JGS *** and EFH * George Lindemann President, Roger Houck, Sales Mgr.

Background/Request:

JGS - Just visited us. They may have out a trial deal with Ricardo Alfaro this morning prior to their departure for San Francisco. Have strong long term interest in off-shore procurement of melons about are not in any big hurry. They want to talk to you about New Orleans and other transport related matters.
EFH - Roger Houck (Sales), George Lindemann (President), acquaintances of JG Smith. Super nice people we've already had contact with them but you may enjoy their company if you run across them.

Results/Next Steps:

(see attached contact report)

GEORGE LINDEMANN
President

Lindemann Produce, Inc.
GROWER — PACKER — SHIPPER

... East Pacheco Blvd
Los Banos, California 93635

Office 209/826-...
Home 209/826-3198

LOI INDUSTRIES, INC.

2/87-EFH * Ed Del Beccaro

Background/Requests:

Ed Del Beccaro set up the Chilean grape deal. Bronx Terminal Market and ex-C&C employee - I think they're brokers. Ask him in my name what he's up to and if he has any interest in C.A. produce.

Results/Next Steps:

PDM was familiar with Loi from her time working with Sea-Land. Ed was very willing to meet. Currently handling Jamaican and Dominican product (tuber root family and ground provisions for ethnic market), also buying from Brazil and Colombia. Mentioned Frank Kranick's name. Carrying some 18 items, discussed Pathmark's involvement as well. Interested in getting together with PROEXAG team.

LOI INDUSTRIES, INC.
EDWARD L. DEL BECCARO
Executive Vice Pres. C.E.O
201 567-0800
205 JACKSON STREET
ENGLEWOOD N.J. 07631

OCEAN SPRAY CRANBERRIES, INC.

2/87-EFH * Bruce Pascal

Background/Request:

Say hello to Bruce Pascal for me - any interest in anything we might grow here - Guatemala can produce anything California grows. Pascal probably knows as many people of importance in the industry as Bill Crum.

Results/Next Steps:

Bill Crum introduce PDM to Bruce Pascal, currently working as consultant to Ocean Spray. Some interest in pursuing sourcing possibilities through PROEXAG. At Ocean Spray's booth, Dana G. Monska, Sales Representative, said we should contact Steve Densmire, New Products Manager, send project summary, and mention juice concentrate, passion fruit, and tropical fruit line.

Dana G. Monska
Sales Representative
Ocean Spray Cranberries, Inc.
225 Water Street, Plymouth, MA 02360
(617) 747-1600 TWX 7103910598

OSHITA INC.

2/87-JGS ** Jack Oshita

Background/Request:

One of the biggest shippers of green bunching onions and leeks out of California. Would be interesting to hear their opinion about the prospects for sales of these two products out of Guatemala. We believe M and S here is shipping 3,000 packages of green bunching onions per week for distribution out of Pompano.

Results/Next Steps:

Unable to contact same. If present at conference, likely he attended onion session held concurrently to other programs.

THE PACKER

Bill Coon, Publisher
Bill O'Neill, Editor
Maribeth Samenus, Managing Editor

Results/Next Steps:

Lots of interest by Packer staff in project-- interested in maintaining contact and doing periodic pieces on what's happening in Central America and Panama. Bill Coon participated in some of discussions with Bill Crum, PDM and others, and also helpful in pointing out individuals requested for contact by PROEXAG team.

W. E. (BILL) COON
Vice President and Publishing Director

7950 COLLEGE BLVD., SHAWNEE MISSION, KS. 66210 • 913-341-6310

PANDOL BROTHERS

2/87-JGS Daryl Fulmer, Jack Pandol

Background/Request:

Run a big import operation from Chile. Reported to be interested in Central America. They were the linch pin firm in Robert Nathan's Inc's ROCAP proposal.

SELECT QUALITY PRODUCE
Growers • Shippers
Importers • Exporters

Darrel Fulmer
Vice President Marketing

Route 2, Box 388
Delano, California 93215
(805) 725-3755
TELEX 68-2459

Results/Next Steps:

Very dynamic individuals; PDM met with same following one of the trade forum sessions. Interested in PROEXAG project as PANDOL handles product from around the world. Once marketing specialist on board, should re-contact.

PILLSBURY COMPANY

2/87-JGS

Background/Request:

Same possibilities as indicated for Campbell's Soup Company.

Results/Next Steps:

Pulled out of Chile last month. Getting into fresh, pre-packs marketing to upscale market. Worth re-contacting once marketing specialist is onboard.

PRONET

Jan Kessinger
David Leek

Chemonics subscribes to fruit and vegetable on-line database for PROEXAG project. Demonstration set up to look at same. Also discussed addition of some tropical products-- will be on a demand basis. Both individuals very helpful to PDM in pointing out individuals/introductions that PROEXAG team had requested.

C.H. ROBINSON COMPANY

2/87-JGS ** Sid Verdoorn, Lou Baker

Background/Request:

Nation-wide brokeage firm reported to be the designated marketer for the FEPROEXAAH/FHIA/Luis Berger commercial scale export trails in Comayagua, Honduras. It would be interesting to get this U.S. broker's view of that "experiment."

Results/Next Steps:

Although unable to get together with this Minneapolis-based firm during program, contact should be made as followup. Known in marketplace as shippers, brokers, commissions merchants, etc

SALYER AMERICAN FRESH FOODS

2/87-EFH * Bob Ighearst

Background/Request:

Bob is the president of Salyer's fresh fruit vegetables venture and an old C&C buddy. Emanuel Lazopoulos (sales) an old C&C acquaintance. I talked to Bob recently about possible help (technical) for local lettuce growers. No interest as of now in marketing C.A. products, but feel him out anyways.

Results/Next Steps:

Interest still not great, but worth staying in contact with as commodity lists are better defined as well as marketing strategy.

SHAMROCK INDUSTRIES

Bernie Leon, Distributor
Jack Miller, Distributor
Patrick Miller, President

Bernie Leon also works with Sea-Land Agencies International. Shamrock is headquartered in Canada with distributorships in south Florida. Currently sourcing cane and palms from Costa Rica. Worth followup call regarding expanded sourcing.

SEA-LAND AGENCIES INTERNATIONAL INC.

Bernie J. Leon
Operations Manager
(305) 477-6820

IMPOXMAR CORP., AS REPRESENTATIVES OF
SEA-LAND SERVICE, INC.
8600 N.W. 53rd Terrace, Suite 221
Miami, Florida 33166
Telex: ITT 425137

SHAMROCK INDUSTRIES

Patrick Murray
President

SPEEDEL® Specialized Growing Mixes

P.O. Box 730
Norwich, Ontario
Canada N0J 1P0

Tel: 519-863-3024
Telex: 064-74162
SHAMROCK NWCH

SHAMROCK INDUSTRIES

Bernie Leon
DISTRIBUTOR

SPEEDEL • Specialized Growing Mixes

IMPOXMAR CORP DIST
600 Three Island Blvd Suite 422
Hallandale, Florida 33009

(305) 454-1432 Broward

SHAMROCK INDUSTRIES

Jack Miller
DISTRIBUTOR

SPEEDEL • Specialized Growing Mixes

IMPOXMAR CORP DIST
600 Three Island Blvd Suite 422
Hallandale, Florida 33009

(305) 245-2966 Dade
(305) 454-1432 Broward

SOUTHERN PACIFIC TRANSPORT COMPANY

2/87 * Bob Burassa

Background/Request:

Do they have fresh produce in reefer containers from NOLA to the West coast?

Results/Next Steps

May not have shown up at conference. Southern may be under consideration for potential buy-out.

SUN WORLD INTERNATIONAL, INC.

2/87-EGH * Jim Rinella

Jim Rinella is the president of Sun World and is also an old C&C buddy. He apparently is looking at something in Panama. (Robert P. Maloney who we met in Panama was apparently doing some work for him). Remind him we're here to help in anything he might be interested in.

Results/Next Steps:

Jim recounted to Bill Crum and PDM their Panama experience. Had wanted to start small, do it right, then grow. Panamanians wanted to start larger. Jim purchased some used reefers at about $12,000 and approached Turbana to do a "go-by" in Panama. Unfortunately, Murphy's Law came into play, some 200 of the season's projected 400 loads became ripe during a two-week hiatus when for some reason the Turbana ship was unable to call Panama afterall. The disaster of the situation is self-evident. Two points mentioned by both Rinella and Bill Crum-- consistent supply of quality product.

SUN WORLD
INTERNATIONAL INC

JAMES R. RINELLA
PRESIDENT

P. O. Box 1028
COACHELLA, CA 92236-1026

(619) 398-6181

TALLEY FARMS
Growers•Packers•Shippers

TALLEY FARMS

Rosemary Talley, Vice President

Rosemary Talley Vice President

Results/Next Steps:

PHONE (805) 489-2508 • (805) 489-4874
DRAWER Q • ARROYO GRANDE, CALIFORNIA 93420

Good company to contact regarding the pros of palletization.

TANIMURA AND ANTLE

2/87-EFH

Background/Request:

Salinas-based lettuce grower/packer/shipper similiar to Bud of California. In fact, Bob Antle used to be president of Bud. Doubt there's any interest but if you need someone from T&A you may make some overtures. I know Bob Antle.

Results/Next Steps:

Unable to make contact; potential lettuce linkage is doubtful.

P.TAVILLA COMPANY & TAVILLA SALES COMPANY

2/87-JGS *** John Williams

Background/Request:

Williams sells product originating in Salvador (where he got burned this year), Honduras and Guatemala. He along with Dave Warren and Richard Frohmader is one of the best informed people about the C.A. and Caribbean deals especially about U.S. market reaction and movement. I believe Tavilla Sales Co. was on the original Chemonics list for their Market Technology Access Group. He has a port of New Orleans horror story from two years ago, and did not want to have anything to do with our "New Orleans Connection" initiative.

Results/Next Steps:

Appreciative of contact and interested in PROEXAG continued involvement. Might be receptive to softening of position on New Orleans.

TRANSFRESH CORP

Richard Macleod

Results/Next Steps:

PDM familiar with TransFresh organization from her days with Sea-Land. TransFresh provides controlled/modified atmosphere and is the real expert in the business. Had wanted to do a joint venture at one time in Jamaica for non-traditional exports; did not pan out. Cost is important consideration in weighing advantages of extended shelf-life provided through modified atmosphere. Need to also take a look at other carriers serving Central America, and whether they offer equipment suitable for this.

TransFRESH CORPORATION

RICHARD F. MACLEOD
Director

607 Brunken Avenue
P.O. Box 1788
Salinas, CA 93902

(408) 424-2911
TELEX 351424 TF SLI

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TURLOCK FRUIT COMPANY:

2/87-JGS *** Don Smith

Background/Request:

Delicate situation since Turlock (the Smiths) and Lindemann have both pursued the Alfaro connection through our intervention. However by the time the convention convenes, Alfaro will have made his choice and the Smiths and Lindemanns are good friends.

We would like to know if Turlock in addition to Bonus and Double "B" has moved Honduran canteloupes through New Orleans.

Results/Next Steps:

PDM met with Steve Smith. Bonus backed out of their planned joint venture deal--was to have been 200 tls(Bonus) and 100 tls between Doublebee/Turlock all from Choluteca in Honduras. This combined total would have provided some additional clout in rate negotiations with the ocean carriers. Very interested in moving product ex Central Ameria via New Orleans. Project for '87 season some 5 tls/week for 8 weeks, totalling about 40 trailers. Using John Hyatt of Irwin Brown in New Orleans as freight forwarder and customs broker, TCI Trucking does drayage from port to King Cold Storage. Working very well. Steve said Turlock originally got involved in Central America when he was asked to do some short-term work in Honduras. Met Carlos Rodriguez of CREHSUL and eventually business took off. His brother has also played local role. Steve curious about Alfaro's choice. PDM unsure about same and urged Steve to contact Alfaro. Steve also interested in maintaining contact with PDM on transport issues.

STEPHEN H. SMITH

KING O' THE WEST
SYCAMORE
OAK FLAT

TURLOCK FRUIT CO.

MAIN OFFICE:
P.O. Box 7
Turlock, CA 95381
Ph. (209) 634-7207

SEASONAL OFFICE:
June-July
Bakersfield, CA
Ph. (805) 831-7754

UNITED FRESH FRUIT AND VEGETABLE ASSOCIATION(UFFVA)

Claudia Fuquay
Sharon Bomer

United has a very qualified staff and is increasing services to its members, including having established an ag chemical info center with hotline, to diffuse info before crisis occurs. Sponsoring seminars on range of subjects from immigration to retail. Developing tapes/training sessions, Fresh Facts series.

U.S. DEPARTMENT OF AGRICULTURE

John Toth
Eric Forman

Have spoken with both by phone before--good contacts to keep in mind for PROEXAG.

PHONE 813-299-4770

JOHN R. TOTH
OFFICER-IN-CHARGE
SOUTHEAST MARKETING FIELD OFFICE

U.S. DEPARTMENT OF AGRICULTURE
AGRICULTURAL MARKETING SERVICE
FRUIT AND VEGETABLE DIVISION

500 3RD STREET NW
P O BOX 2276
WINTER HAVEN FL 33883

ERIC M. FORMAN
Deputy Director
FRUIT AND VEGETABLE DIVISION

Agricultural Marketing Service
U.S. Dept. of Agriculture

Washington, DC 20250
(202) 475-5262

UNIVERSITY OF CALIFORNIA AT DAVIS

2/87-EFH

Background/Request:

Personal favor if you see Lynette Cunha (whom I don't know), ask her for Bill Liebhardt's address - Bill is a newly appointed professor of agriculture. We may someday need him for the project but he's a very good old friend.

Results/Next Steps:

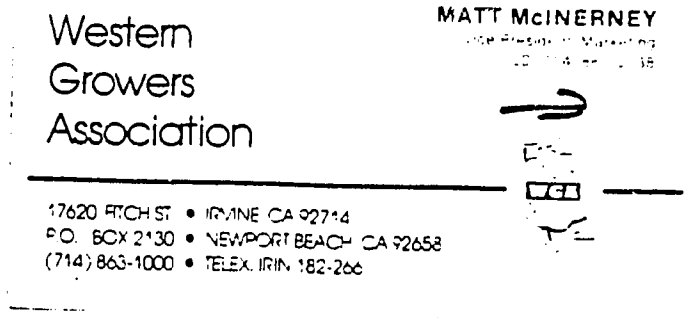
PDM made contact with Lynette who followed up with Bill's address: Dept. of Pomology, Wickson Hall, University of California, Davis, CA 95616

WESTERN GROWERS ASSOCIATION

Matt McInerney

Results/Next Steps:

Recommends palletization using throw-away pallets, costing about $4 each. Results in less shrinkage and loss.



OTHER REQUESTS:

2/87-JGS ***

Background/Requests:

Baby Vegetables (Miniature vegetables)

We don't have any leads for you at this time but this is a very fast growing segment of the purveyors market. Miniature vegetables we are told are "muy de moda" in the upscale restaurants in the US and Europe. In the Guatemala and Costa Rican highlands, we can produce baby anything all year round -- carrots, zucchini, yellow squash, turnips, pearl potatoes, beets, pumpkins squash, etc... There are people here exporting baby squash by air. Any information leads, contacts, etc... that you can pick up on this class of product will be very helpful to us.

Results/Next Steps:

Definitely interested in the baby vegetables, however market is small, upscale. Refer to contact reports where interested parties have requested product list.

CONTROLLED ATMOSPHERE SYSTEMS FOR CONTAINERS AND TRAILERS

2/87-JGS

Background/Requests:

I am woefully ignorant in this area. Any information, brochures, literature, sales plugs, etc....; comment from users of systems such as TECHTROL will be gratefully received.

Results/Next Steps:

Refer to TransFresh contact report.

CARIBBEAN PAVILLION

The countries of Jamaica(JNIP), El Salvador(FUSADES), Haiti (PROMINEX), Belize(BABCO), and Honduras(FIDE/FEPROEXXAH) were represented at the Caribbean Pavillion. This promotional effort was coordinated through Caribbean/Central American Action that sponsors the annual Miami Conference on the Caribbean. During the initial years of the conference, the Caribbean Basin countries each had their own exhibits which were staffed by investment promotion teams, some of which included the non-traditional fruit and vegetable exports.

More recently, it has become clear that it was no longer necessary to bring potential U.S. investors and buyers to a central location, but rather to encourage the respective CBI countries to promote themselves at the major trade shows, such as the PMA convention, the UFFVA conference, the bobbin show, etc. Some countries have the financing and are better equipped to do this on their own; for others the learning curve requires that they first promote themselves as part of a regional effort.

PDM visited the Caribbean Pavillion to meet with individuals from the countries. Some observations:

1) the booth's location was excellent, thus they got a good traffic flow;

2) the displays were attractive and presented the variety and potential of non-traditionals--flowers, fruits, vegetables;

3) the exhibits were staffed principally by federation staff, who although well-qualified to describe their potential, were not generally the grower/exporters themselves.

4) all country representatives were extremely pleased with their results with the exception of Jamaica. Evidently, they came looking more for investors, not just buyers.

CONTACT REPORT: FERNANDO VALEY, INAPSA, GUATEMALA
RICARDO SANTA CRUZ RUBI, GREMIAL DE EXPORTADORES DE PRODUCTOS NO TRADICIONALES, GUATEMALA
FERNANDO GARCIA-SALAS, CONSULTORES AGROINDUSTRIALES, GUATEMALA
FRANCISCO ROHRMANN CASTILLO, CONSULTORES AGROINDUSTRIALES, GUATEMALA
MARIO MOLINA BATLLE, FUSADES, EL SALVADOR
PEDRO A. URQUILLA, ASPENT, SALVADOR
ROSS WHERRY, USAID, COSTA RICA

Prepared by Pamela Michel, 2/20/87

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tel: 23-97-78
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ROSS WHERRY
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APO Miami 34020
Apartado Postal 10053
1000 San Jose, Costa Rica
tel: 506-23-8046

Background

While at the UFFVA conference, a number of representatives from Central American export federations or their projects decided to get together and have an informal Central American roundtable discussion on common interests and problems. Two common areas of concern leading up to the meeting seemed to be current losses experienced by melon growers in a crowded market, and transportation. This seemed to be a good opportunity as well to gain a broader perspective of how the ROCAP project could be of assistance. Although present at the international trade forum, Elias Lizardo Zelaya of FEPROEXAAH was not present at the roundtable, as he had already departed for Honduras.

Summary

Needless to say, the Chilean success story and the somewhat negative CBI trade forum session, had left Central American reps with a real sense that something really needs to be done in Central America. The discussion began with transport and PDM provided at the request of some participants a summary of the impressive Chilean operation including how growers first organized themselves to warrant sufficient volumes for a charter vessel, their distribution systems from growing area to the port, and cargo tracking systems. This information was gleaned from discussions with the executive director of the Chilean fruit producers' federation, Raimundo Correa Fabres. (refer to contact report). Several individuals commented on the lack of refrigerated containers in Central America and if they were to look at some type of charter situation in the future, that they first needed more information on who is growing what, where, and when they are shipping to the States.

The participants expressed need for information was not confined to historical data (available through USDA, PIERS, or U.S. Census statistics) or PRONET'S on-line information-- they wanted to know in addition if the ROCAP project could also provide who is currently shipping from other competitor countries. The apparent frustration of the export federations and their membership is that they lack information of what others are planting and shipping-- hence as we are currently experiencing in the marketplace, the melon prices have fallen due to many of the shipments arriving at the same time.

PDM asked whether the federation representatives felt that their membership would be receptive to sharing information with their competitors in their own country as well as with their foreign competitors. Surprisingly, the response was very positive. PDM said that she would report this information to the ROCAP team for their potential follow-up with the federations. It may be worth exploring the possibility of bringing together the respective federation representatives to discuss this idea. The issue of confidentiality vis-a-vis ROCAP project development could be surfaced as well. Using the Chilean example once again, the producers' federation works with the government in publishing an annual report of what is produced where in Chile. Evidently the first one was quite a task, surveying producers from farm to farm; however, once the method was in place, and the market for the report was established, they have simply updated the report from year to year.

Our session lasting a little less than an hour was brought to an end because the convention center security guards needed to lock the doors. An informal attempt was made to bring the group together again the following day at breakfast but did not work out. PDM suggests that in addition to the followup previously stated, that some consideration be given to organizing a round-table of this kind at future UFFVA or PMA meetings.

FEPROEXAAH

Lic. Elías Lizardo Zelaya
Unidad de Exportación y Transporte

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Centro América

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GUATEMALA, GUATEMALA, C.A.
TELS. # 64456 320042 321042
TELEX 3180 NINSA GU

FARMING AVAILABILITY (LAND)

A) Warm Climate: altitude 1,200'; harvest 2 crops per year. ZACAPA - Teculután
70 hectares per crop. (168 acres)

CROP	YIELD PER HECTAREA	HARVESTING TIME
Honeydew	1,400 boxes of 28 lbs. ea.	November, December March, April
Cantaloupe	1,000 boxes of 40 lbs. ea.	November, December March, April
Dried Onion	57,000 lbs.	January, February & March
Jalapeño Pepper	1,750 boxes of 20 lbs. ea.	January, February April, May.
Cucumber	2,500 boxes of 20 lbs. ea.	November, December March, April
Okra	1,200 boxes of 20 lbs. ea.	February, May

B) Temperate Climate: altitude 4,500'; all year around.
35 Hectares per crop. (84 acres). Guatemala - near Guat City.

Brócoli	1,050 boxes of 20 lbs. ea.	All year around

C) Cold Climate: altitude 6,000'; 35 hectares per crop (84 acres). (near Guat. city).

Strawberries	3,500 boxes of 12 lbs. ea.	November, December January

) equipment -- pre-cooling.

CONTACT REPORT: GEORGE LINDEMANN
ROGER HOUCK

Prepared 2/20/87 by Pam D. Michel

GEORGE LINDEMANN
President
Lindemann Produce, Inc.
923 East Pacheco Blvd.
Los Banos, California 93635
tel:(209)826-2442(wk)
(209)826-3198(res)

ROGER HOUCK
Sales Manager
Lindemann Produce, Inc.
923 East Pacheco Blvd.
Los Banos, California 93635
tel: (209)826-1139

Background

Lindemann Produce is a grower, packer, and shipper of cantaloupes, honeydews, and lettuce under the "Lindy's Delight" label (mainly cantaloupes, some apricots as well). Season is from May 10-December 10. Lindemann exports to Japan and Hong Kong and ships to the 48 states in the U.S. They have a customer base of some 2000, including some of the retail chains, but don't deal with the terminal markets. JGS knew of Lindemann, and had urged David Mendel's followup to ascertain potential interest in sourcing from Central America. Based on these discussions and followup by the field team, Houck and Lindemann travelled to Central America in January to meet with melon producer and shipper(from Guatemala and El Salvador), Mr. R. Alfaro Castillo. The ROCAP team requested PDM to followup with Lindemann at UFFVA to discuss next steps.

Summary

The Lindemann representatives summarized their trip to Central America and commented on how impressed they were with Alfaro's operation. Having never imported before, Lindemann Produce, Inc. is looking for additional supplies of honeydews during the market window when product is not available in the U.S. They are particularly interested in the mid-west and western markets, as exploring as well exports directly from Central America to Japan. They have made an arrangement with Alfaro to sell his melons on consignment and will reimburse him for the freight(built into price), and would like to begin bringing in product between March 5-10 and continue until around May 10. Although honeydew prices are low right now, they seem to think that the market is subject to change. Estimated volumes are for between 30,000 to 50,000 cases. Depending on the equipment and loadability factors, this represents some 30 to 50 ocean containers.

PDM was requested to explain about her background and role with respect to the project, as well to describe Chemonics. The representatives then went on to state what were their perceived needs in terms of assistance from PDM to assist on the U.S. side of the transport issue:

1. Shipping schedules from Guatemala and El Salvador to all U.S. ports.

2. Ocean rates for item #1 on honeydews.

3. Contact names and addresses for ocean carriers.

4. Contact names and addresses for receivers and handlers, (freight forwarders, custom brokers, expediters, and cold storage facilities) at ports of entry.

5. Shipping services available between west coast Central America and Long Beach, and between Central America and Japan.

Lindemann Produce is enthusiastic about New Orleans but cautious, and would like to be aware of other ports of entry through Florida. Since this is their first experience in importing product, they have requested PDM to accompany them to New Orleans and south Florida for 2-day meetings with relevant parties to assure smooth handling of their first shipments.

Next Steps:

1. As requested by Lindemann, PDM will send followup letter acknowledging points, summarizing what the ROCAP will provide to Lindemann.

2. PDM will send info as described above. Preparation of will be done in consultation with the field office.

3. PDM will set up appointments and accompany Lindemann to New Orleans and South Florida, tentatively scheduled for March 3-4.

4. PDM will return to port of entry to be available during trial shipment arrivals if Lindemann requests same.

CONTACT REPORT: RAIMUNDO CORREA FABRES
SECRETARIO GENERAL
FEDEFRUTA

Prepared by Pamela D. Michel

RAIMUNDO CORREA FABRES
Secretario General

Fedefruta
FEDERACION DE PRODUCTORES DE FRUTAS DE CHILE
Nueva York 53, Of. 101, 10° Piso Fono 722961, Santiago-Chile

Background

Following the trade forum session on Chile, PDM approached Raimundo Correa Fabres to learn more about the Chilean experience and its relevance to PROEXAG. Issues discussed included potential 1)linkages/similarities; 2)transportation; 3)organizing growers; 4)cold storage facilities; 5)El Mercurio Sunday Section, "Revista del Campo;" 6)computerization/inventory. These subjects and others are summarized below.

Summary

FEDEFRUTA, the Chilean fruit growers association, is about a year old. Staffed by a general manager, Raimundo Correa Fabres, and two secretaries, the organization has about 700 members, which represents roughly 8-9% of the total fruit growers. Services for its members include: 1)an annual census on production(originally financed by government with additional association funding, it today is more sophisticated utilizing satellite photography; 2) price info, national and international, including USDA market news(info is faxed to Catholic University by PROCHILE, Chile's national investment promotion group, then info is published in local newspaper El Mercurio, not just in special Sunday section); Chilean producers may write some articles, federation others; 3)provides pesticide info; FDA sends PROCHILE an addendum and the local agricultural attache does as well(APHIS updates); 4)packaging info; and 5)transport info, e.g. prices by box.

APHIS has some 500 inspectors; Chile has about 10. More and more pre-inspection is being done which helps avert any problems prior to shipment. Promotional effort is handled between three groups-- FEDEFRUTA, as described above; Fundacion Chile provides technical assistance and re-sells services; and PROCHILE, as the investment promotion group provides external promotion through its contats in Washington, Miami, New York, and Los Angeles, sending back relevant information to the fruit industry.

When initially organizing for transport, exporters started with existing services, and once they had sufficient volumes, began with a small group of interested companies and took bids for charters. Today, Chilean Line provides containerized service for fruit exports, but 95% of Chile's exports are sold on consignment and last year most of it moved on pallets in some 214 charters.

Today there are some 10,000 producers, selling to some 400 exporters, who in turn sell to about 84 receivers. Since the producers are taking more of the transport risk, selling on an FOB delivered U.S. port basis, good communication between all parties is critical. The system of using facsimile machines, telexes and computers is very common. At the time of loading, for example, the producers/exporters declare volumes and grades to receivers on a floppy disc. The receivers then quote back to same expected market price based on what has been declared. Since transit time is about 11 days, this factor is important for financing purposes. Once cargo arrives in U.S. port, it is examined and reconciled against what was originally declared; floppy disc is sent once again. All in all, solid communication that instills confidence. Since tree crops and stone fruit involved years of production and not 60 or 90-day growing cycles, this is key.

Cold storage is somewhat limited. Fruit is transported by truck from orchards to central cold rooms, and then transported by dedicated trucks with tarpaulins to insulate fruit from elements to the port of exit. Chile has three main ports. Santo Antonio is used for most European-bound cargoes; Coquimbo, in the north for product going to East Coast of the U.S.; and Valparaiso, which is the biggest, for exports destined to U.S. east or west coast and Latin America. All three ports are unionized and productivity is encouraged since labor is selected according to those which scored highest in training courses. Ports may operate on a 24-hour basis, with 8-hour labor shifts. Principal U.S. ports of entry are Philadephia, Tampa, Long Beach and Galveston, with recent competition and interest from other ports such as New Orleans.

It is interesting to note that AID has not played a role in Chile's development of its fruit exports. Some financing has been provided by ITT funds which could not be repatriated. Although it has taken some 30 years to develop, its fruit industry today represents Chile's third largest export and translates into some 70 million boxes of fruit, the greater percentage of which is table grapes, but also includes apples, peaches, nectarines, plums, pears, cherries, and more recently cherimoya, raspberries, blackberries, and asparagus. The next season's volumes are expected to increase to 84 million boxes, and exports are expanding to Japan. (refer to attached projections and articles)

PRONOSTICOS DE EXPORTACIONES 1987 (miles de cajas)

		Diciembre	Enero	Febrero	Marzo	Abril	Mayo	Junio	Julio	Otros	Total
Uvas	86	494	4.481	8.307	11.083	5.685	260	42			30.369
Uvas	87	750	5.000	9.600	12.520	6.000	300	20			34.170
Ciruela	86	368	1.582	545	103	67					2.668
	87	420	1.850	720	150	70					3.210
Durazno	86	305	297	317	124	19					1.063
	87	350	350	350	200	20					1.270
Nectari.	86	818	1.557	1.367	83						3.827
	87	1.160	1.850	1.500	100						4.550
Manzan.	86	14	1,2	708	5.410	5.771	1.878	865	509	1.000	16.172
	87	10	---	750	6.000	6.200	2.000	1.000	600	500	17.060
Peras	86	50	90	709	1.210	272	50	21	39	76	2.476
	87	60	100	1.000	1.500	350	50	25	40	80	3.205
Sub Tot.	86	2.049	8.008	11.953	18.013	11.814	2.188	928	548	1.076	56.577
	87	2.750	9.150	13.920	20.470	12.640	2.350	1.045	640	580	63.545
Otras	86	1.054	307	381	584	664	284	366	566	953	5.151
	87	1.264	368	457	700	796	340	439	679	1.143	6.185
Total	86	3.103	8.315	12.334	18.597	12.478	2.472	1.294	1.114	2.029	61.753
	87	4.014	9.518	14.377	21.170	13.436	2.690	1.484	1.319	1.723	69.731

Nota : Cifras 86 Reales

Estimación en Ton 1987 : 802.960,14

+ 13%

PRINCIPALES EXPORTACIONES DE FRUTA FRESCA (Tons Netas)

ESPECIE	1981	1982	1983	1984	1985	1986
Uva de Mesa	79.802	109.231	149.930	178.419	227.623	225.397
Manzanas	187.171	181.626	179.296	208.370	201.361	311.838
Ciruelas	3.077	3.047	5.560	8.790	16.033	19.129
Nectarines	6.023	8.556	13.440	18.295	27.086	29.349
Duraznos	3.171	2.696	2.879	5.025	6.262	8.222
Peras	21.667	25.647	20.149	27.947	30.380	44.890
Limones	4.428	2.861	3.092	1.111	8.062	5.088
TOTAL	305.339	333.664	374.346	447.958	516.807	643.913
Indice	100,0	109,3	122,6	146,7	169,2	210,8

PRINCIPALES EXPORTACIONES POR MESES 84-85-86 (miles de Cajas)

ESPECIE	AÑO	NOV.	DIC.	ENERO	FEBRERO	MARZO	ABRIL	MAYO	JUN.	JUL.	AGOS.	SEPT.	OCT.
Uvas	83/84	-	135	1.930	5.674	10.022	4.972	869	31	4	-	-	-
	84/85	1	257	2.794	6.313	12.901	7.692	1.066	39	-	-	-	-
	85/86	-	494	4.481	8.307	11.083	5.684	260	42	4	9	-	-
Manzanas	84	10	2	1	466	4.726	3.043	1.458	589	178	112	76	9
	85	9	11	2	603	3.848	3.551	1.188	663	372	97	174	41
	86	14	14	1	708	5.410	5.771	1.878	865	508	587	412	148
Ciruelas	84	2	139	673	326	9	6	-	-	-	-	-	-
	85	18	309	1.619	250	25	15	-	-	-	-	-	-
	86	49	318	1.582	545	103	67	1	-	-	-	-	-
Nectarines	84	11	465	764	854	42	-	-	-	-	-	-	-
	85	34	795	1.680	962	49	-	-	-	-	-	-	-
	86	60	757	1.557	1.367	83	-	-	-	-	-	-	-
Duraznos	84	3	117	128	229	102	7	-	-	-	-	-	-
	85	19	216	299	205	54	7	-	-	-	-	-	-
	86	25	280	296	317	124	19	-	-	-	-	-	-
Peras	84	5	-	92	295	890	165	50	18	11	10	13	12
	85	8	-	133	419	840	201	35	4	8	9	8	7
	86	2	-	90	709	1.210	272	50	21	39	43	33	26

EMBARQUES POR BUQUES Y ESPECIE (Nº de Cajas)

Fecha Zarpe	Nombre	Destino	Uvas	Nectarin.	Ciruela	Durazno	Damasco	Cerezas	TOTAL	
06.12.85	Neerlandic	USA Phil	10.772	50.018	12.089	16.171	31.766	21.174	141.990	
06.12.85	Chillan	USA Phil	12.494	63.698	40.177	19.334	12.494	8.721	156.918	
15.12.85	Pacific Star	USA Phil	41.376	94.968	19.897	78.207	39.796	22.217	296.461	
19.12.85	Nordic	USA	-	33.225	15.504	19.925	21.270	35.113	125.037	
21.12.85	Sun Daimond	USA	-	-	-	-	-	-	5.985	Ajos
22.12.85	Cholguan	USA Phil	15.225	90.974	41.475	33.988	14.623	2.419	198.704	
22.12.85	Fra Maru	USA	218	20.026	3.803	26.785	5.677	-	56.509	
29.12.85	Reefer Dolphin	USA	1.992	81.774	33.587	3.437	22.948	-	143.738	
01.01.86	Ditoku Maru	USA	1.040	54.289	20.065	-	-	-	75.394	
04.01.86	Neerlandic	USA	22.536	73.425	39.569	-	-	-	135.530	
05.01 86	Orient Rex	USA	25.343	39.200	24.856	-	-	-	89.399	
07.01.86	Ocean Pride	USA	115.142	120.459	51.994	-	-	-	287.595	
09.01.86	Bungo Reefer	USA	35.760	39.780	14.489	-	-	-	90.029	

SERVICIO AGRICOLA Y GANADERO
PROCESAMIENTO DE DATOS

EXPORTACIONES ENTRE EL 1.11.85 AL 31.05.86

EXPRESADO EN CANTIDAD DE ENVASES

ESPECIE	U.S.A.	CANADA	CENTRO AMERICA	AMERICA LATINA	EUROPA	PAISES ARABES	EXTREMO ORIENTE	TOTAL EXPORTADO
SECTOR: AGRICOLA								
CLASIFICACION: HORTAL-CHACRA								
SUB-CLASIFICACION: PROD.PRIMARIO								
AJI	0	0	0	10	0	0	0	10
AJO	85.450	0	3.424	9.756	40.446	0	0	139.076
APIO	0	0	0	600	0	0	0	600
ALCACHOFAS	25	0	0	0	0	0	0	25
ARVEJA VERDE	0	0	0	0	139	0	0	139
BETARRAGA	0	0	0	46	0	0	0	46
CEBOLLAS	17.146	19.796	0	11.268	358.978	0	1.921	409.109
COLIFLOR	0	0	0	807	0	0	0	807
ESPARRAGOS	94.036	7.512	0	0	13.853	0	0	115.401
LECHUGAS	0	0	0	1.996	0	0	0	1.996
MELONES	362.597	0	0	0	206.754	0	0	569.351
OREGANO	556	0	440	35.197	14.291	0	0	50.484
PAPAS	0	0	0	1.038	0	0	0	1.038
PIMIENTO	0	2.943	0	541	0	0	0	3.484
POROTOS	0	1	0	0	0	0	0	1
REPOLLOS	0	0	0	618	0	0	0	618
TOMATE	0	402	0	2.598	2.653	0	0	5.653
ZANAHORIA	0	0	0	2.054	0	0	0	2.054
ZAPALLO	2.626	0	0	461	0	0	0	3.087
PEPINO ENSALADA	0	0	0	952	0	0	0	952
SUB-TOTAL	562.436	33.576	3.864	66.942	637.024	[illegible]	[illegible]	1.315.752
CLASIFICACION: FRUTAS								
SUB-CLASIFICACION: PROD.PRIMARIO								
ALMENDRAS C/CASCARA	0	0	0	0	0	0	0	0
CEREZAS	11.125.027	1.467	1.100	1.500	0	0	0	1.500
CIRUELAS	2.176.516	960	4.626	59.678	34.954	2.516	0	284.742
DAMASCOS	197.765	165	788	133.280	147.065	[illegible]	[illegible]	[illegible]
DURAZNOS	853.042	805	680	2.608	19.170	[illegible]	[illegible]	[illegible]
FRUTILLAS	4.771	0	0	125.833	64.876	18.303	0	1.066.560
LIMONES	2	0	0	3.955	8.810	0	0	13.504
MANZANAS	1.618.674	0	0	3.467	1	0	0	7.470
NECTARINES	3.161.996	0	60.588	402.843	628.583.310	[illegible]	[illegible]	[illegible]
NUECES C/CASCARAS	0	775	3.564	231.619	155.948	273.217	0	3.827.049
PERAS	617.859	0	0	20.016	1	0	0	20.017
UVAS	21.603.691	89.032	19.609	20.782	1.486.586	111.403	[illegible]	[illegible]
MEMBRILLOS	5.184	0	44.138	314.530	[illegible]	[illegible]	[illegible]	[illegible]
CAQUIS	7.808	0	0	0	288	0	0	1.568
CASTAÑAS	0	0	0	0	3	0	0	1.811
AVELLANAS	0	0	0	3.197	0	0	0	3.197
PEPINOS FRUTA	0	0	0	0	0	0	0	1
TUNAS	15.255	0	0	1.200	312	0	0	1.512
PALTAS	134.589	0	0	1.118	465	968	0	17.742
POMELOS	0	0	0	4.238	114	0	0	130.942
CHIRIMOYAS	0	0	0	8	0	0	0	8
FRAMBUESAS	137.109	251	0	200	1	0	0	201
MORAS	1.631	0	0	687	23.370	0	0	161.417
KIWIS	47.409	0	0	0	1.196	0	0	2.827
ZARZAPARRILLA	283	0	0	0	201.435	0	0	[illegible]
BOYSONBERRIES	4.263	0	0	0	371	0	0	614
NISPEROS	1.755	0	0	0	0	0	0	4.221
SUB-TOTAL	30.724.629	99.411	134.093	1.320.628	16.162.187	5.336.715	1.349.429	55.108.142
TOTALES	31.287.065	122.987	137.957	1.387.570	16.799.211	5.346.359	1.351.749	[illegible]
	55 %	0,2 %	0,25 %	2,4 %	29,8 %	9,4 %	2,4 %	

MANZANAS : EXPORTACION 80 - 86

AÑO	TONS	Valor FOB Nom. (Millones Dolares)	Valor FOB Real (Millones Dolares)	
1980	163.013	74,7	82,6	
1981	187.171	81,5	85,3	
1982	181.626	62,9	63,7	
1983	179.296	62,9	63,7	
1984	108.370	74,5	74,5	
1985	183.278	77,1	68,1	
1986	311.838	118,5	105,3	(est.)

FUENTE : Banco Central de Chile

PRECIOS MEDIOS FOB U$ POR KG.

	1983	1984	1985	1986
Manzanas	0,35	0,36	0,38	0,39
Peras	0,46	0,40	0,45	0,47
Ciruelas	0,80	1,03	0,73	0,86
Duraznos	0,62	0,94	0,96	0,97
Nectarines	0,50	0,77	0,54	0,68

EXPORTACIONES UVA DE MESA

Año	Tons.	Valor Fob (millones dólares)	Dólar por Kilo
81	79.802	76,0	0,95
82	109.231	107,7	0,98
83	149.930	125,8	0,84
84	178.119	164,7	0,92
85	231.527	215,5	0,93
86	223.208	183,7	0,82

FUENTE : Banco Central de Chile.

EXPORTACIONES DE UVA POR VARIEDAD (miles de cajas)

Variedad	1984	1985	1986
Thompson Sdl.	11.717	17.524	16.132
Flame Sdl.	383	1.453	3.371
Ribier	5.667	6.059	5.620
Emperor	2.426	2.427	1.252
Almería	1.418	1.168	632
Perlette	504	601	657
Ruby Sdl.	316	441	504
Red Sdl.	253	376	410
Black Sdl.	24	131	250
Otras	927	880	859
	23.638	31.063	30.052

EXPORTACIONES DE UVA POR DESTINO %

Mercado	1984	1985	1986
EE.UU.	79,3	78,7	79,8
Europa	6,4	10,3	12,0
Medio Oriente	10,2	8,2	5,3
Lejano Oriente	0,9	1,8	1,6
Otros	3,2	1,1	1,3

FUENTE : Ministerio de Agricultura - Chile

UVA DE MESA

PRECIOS PROMEDIOS PONDERADOS EN PHILADELPHIA U.S.A.
(U$ por Caja)

VARIEDAD	1984	1985	1986	Variación %
Thompson Sdl.	9.31	8.55	9.41	1.1
Ribier	5.77	8.13	6.75	17.0
Emperor	5.51	6.85	7.18	30.3
Flame Sdl.	12.88	10.73	8.22	- 36.2
Perlette	13.85	13.71	13.58	- 2.0
Almeria	6.49	8.57	6.76	4.2
Ruby Sdl.	9.77	10.52	8.87	- 9.2
Black Sdl.	11.16	9.59	9.34	- 16.4
Red Sdl.	11.75	13.23	13.26	12.9
Cardinal	9.15	9.69	4.88	- 46.7

FUENTE : Panorama Económico de la Fruticultura - U. Católica 1986

- 813.90 Tech/transport/Charter Transport (Chilean Deal) - [return to PDM]
F+V Mktg: Competition - Chile - (Albany)

From Chile to America: Getting there's half the job

Helen Hughes/Special

A truck bringing in the morning's asparagus harvest is weighed on its arrival at a Calera de Tango packing plant. A study by the state found that the supply of adequate vehicles in Chile is limited. Equipping and maintaining trucks means substantial initial costs that discourage many small operators.

New study pinpoints transit problems

By Imogen Mark
Special to The Packer

SANTIAGO, CHILE — Chilean fruit producers can expect to see [illegible] freight charges rise, according to a new study from the state holding and development company Corfo

In a major review of the industry's existing infrastructure, the authors concluded that the supply of adequate vehicles is limited. Equipping and maintaining trucks for carrying fresh fruit means substantial initial costs that discourage many smaller operators.

That gives the bigger companies an advantage and a degree of control that is bound to push rates up, particularly because the fruit industry is competing for transport with other activities.

United Trading so far is the only company to make a major investment in buying its own refrigerated trucks. This season, it has 23 of them operating, enough to carry about half the volume of fruit it expects to ship.

These highly adaptable refrigerated vehicles, says Hani El-Nasfy, shipping manager at United Trading, have allowed the company to make the most of conditions at the ports.

Rising productivity

Productivity has risen in all the ports since the beginning of the decade when a series of restrictive labor practices were ended. That allowed the port authorities to reorganize shifts with varying numbers of stevedores

Now, El Nasfy said, the main bottleneck is the routine inspection by USDA officials. At present, regulations say this can be done only by daylight. But United Trading would like that made more flexible so that they could work round the clock in the peak months to get fruit loaded and off

New technology has been the other big factor in speeding up movement in the ports. In 1982-83, a charter vessel would take an average of 4,300 boxes an hour, according to the Corfo study. By 1985-86, the figure was up to 9,500. That allows an average turnaround of 40 hours per vessel.

New machinery allows multiple loading of some types of pallets direct from the truck. (Each pallet carries 100 boxes.)

Valparaiso has one "super crane," the Hitachi, which can load 22 pallets at a time on a 40-foot platform.

Port rundown

Valparaiso, Chile's oldest port, accounts for more than one-half the shipments from the main fruit-growing regions of the central valley.

Though the facilities are adequate for the moment the congestion caused by trucks lining up to unload during the peak period is serious. The authorities should consider building a temporary storage facility, the study said.

San Antonio, 62 miles south of Santiago takes only a relatively small amount of the fruit traffic. It has fewer facilities, poor link roads and its wharves were badly affected by the 1985 earthquake and have been repaired only temporarily

Coquimbo, in the north, has been operating for only three seasons, but it provides a useful outlet for the northern growers. It offers lower rates, between 77 cents and $1.79 per ton

The Corfo team suggested that the southern growers could well be served by rehabilitating the small ports at Talcahuano and at Chanaral or Caldera even further south to provide them with closer alternative outlets to trucking their produce up to Valparaiso

But Coquimbo was opened for fruit business largely as a result of initiatives by some of the big companies. It will take a similar impulse from the private sector to get new installations in place for the south. And that will depend on how fast the deal grows

Another note of warning from the Corfo team: Roads are often in poor condition because of bad maintenance.

This causes unnecessary losses when the cargo gets jolted and bruised. It also causes delays and contributes to deterioration in the quality of the produce, the study warned

Write it down!
Send a letter to the editor of The *Packer*, 7950 College Blvd., Overland Park, Kansas 66210.

Ampro expectations: focus on regulations, port liaison, promos

US. Support Office Concept
F+V Mktg: Competition (library)

PHILADELPHIA — Still in its infancy, the American Produce Association is figuring out how to crawl, but its president is sure the group will be on its feet soon.

Ampro president George Carstens had few details of the group's activities, but he has high hopes. He expects this year's advertising and promotion budget to equal or surpass last year's $1.1-million budget.

Any increase in volume automatically will increase the budget if the assessment remains 3 cents per case. However, if the proposed increase to 4 cents per case is approved, the budget would jump 33 percent on volume equal to last year and more if volume is up as projected.

Ampro was formed this fall to increase the scope of importers' activities and to give them one voice as an industry, Carstens said. Ampro is working on many things, including port liaison, regulatory affairs and advertising and promotion. Various committees met at the Produce Marketing Association convention in October.

Ampro acts as an advisory association for Chilean exporters and as a representative of importers and allied industries. Carstens said membership figures will not be nailed down until the first membership fees are collected. But a spokesman for Ampro said importer membership is expected to total 35 to 40, with allied industry membership about the same.

The proposed membership fees, which must be approved, are $500 a year for importers and $250 for allied industry (fumigators, retailers, stevedores, etc.). At the expected membership levels, that would give Ampro a budget of $26,250 to $30,000.

The assessment monies go almost exclusively to advertising and promotion. Ampro wants to double the public relations budget this year and to consider television advertising.

Carstens said membership fees may or may not be the only source of income for Ampro. The group will need more than that to carry out some of the projects it envisions, he said.

David Holzworth of Alvin, Gump, Strauss, Hauer & Feld, Washington, D.C., said Pro-Chile, the Chilean government promotion group, will not be involved in Ampro or Ampro funding. Holzworth is general counsel for Ampro and for the Chilean exporters association.

The involvement of Chilean fruit exporters in Ampro continues to evolve, Holzworth said. The factors in the trade are working out which decisions will be made in the United States and which will be made in Chile. In the past, he said, most decisions were made in Chile, but the deal has grown so large that the grower-shippers and exporters need a presence in the United States.

More is happening at Ampro, but its leaders cannot disclose details. Carstens said the deal will proceed as always. The promotion and advertising programs will be put in place, although they had not been firmed up as of early November. Membership will be determined; fees will be collected; Ampro will move ahead with its plans.

Ampro may be just crawling, but Carstens has his eyes firmly set on walking shoes.

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① F+V Mktg: Competition (Chile) -- (library)

Foundation drums in inspection importance

SANTIAGO, CHILE — Fundacion Chile is a private nonprofit foundation set up in 1976 by an agreement between the government of Chile and the ITT Corporation. Its task is to introduce technologies that can be adapted to meet Chile's needs and help develop new areas of economic activity.

That aim has taken it into a wide range of activities, from quality control in the fruit industry to salmon-farming, software for managing industrial processes, and designing energy-conserving wood homes.

It has grown from a $7-million operation with 17 full-time staff, to a $31.7-million outfit with 250 staff.

Its agro-industrial activities take up nearly half its time and resources, though as its director Anthony Wylie freely admits: "The fruit industry here is moving as fast or faster than we are. They don't need us, except for very specific services."

But one of the missions which the foundation has set itself, Wylie said, is to drum in the message about the need for quality control. The slogan: Better quality means better prices.

So the foundation gives a lot of importance to its work of inspecting produce, anything up to four times if the exporter chooses.

Another important service the foundation offers is its laboratory facility. During the hectic peak months of the fruit export season the lab provides round-the-clock analyses of pesticide residues — where a grower or an exporter wants to check or double-check the brand used, or how much still remains in the fruit.

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F+V Mktg: Competition (Library)

More importers pick fruit ripened on trees

Eating quality helps offset high cost

By Kathy Means
Eastern editor

PHILADELPHIA — The experiment is over; tree-ripened fruit is now a regular item for Frupac International Corp. Based on the success of existing tree-ripened deals, other importers are considering offering their customers the same product.

Tree-ripened fruit is just that — fruit ripened on the trees in Chile. It requires special grading, packing and transportation to ensure that the mature fruit arrives in U.S. stores without bruises.

Frupac calls the last two years — its first in the program — a qualifying period, a time to find out what worked and what didn't. Selection, procurement, harvesting, packing and palletizing all have been upgraded to maintain peak quality, said sales vice president Chris Gardella.

The Frupac tree-ripened fruit arrives by air freight in January and February. At that time of year, air freight probably costs four times as much as surface shipments, Gardella said.

High-ticket item

That makes tree-ripened fruit a high-ticket item suitable mainly for upscale stores with consumers willing to pay. The fruit retails for $2.49 to $3.49 a pound on average, Gardella said. It is an excellent item that has been well-received by retailers.

But it is not a profit-oriented program, Gardella said. Frupac offers the product almost at cost as a variety item for its regular customers. The emphasis is on eating quality. Tree-ripened fruit is not always the most beautiful fruit, Gardella said, but it has exceptional taste.

Wm. H. Kopke Jr. Co., Inc., Lake Success, N.Y., has had its own version of tree-ripened fruit in place since the 1980-81 season.

The firm uses it as a good pre-Christmas item; once vessels begin to arrive, the air shipments cease because of the extreme price difference, said George Carstens of the firm. Kopke's shippers pack tree-ripened fruit, usually large sizes with high color, and air-ship it to the United States within 24 to 36 hours of harvest.

Watchful eye

Other importers have been watching Frupac and Kopke in recent years, evaluating the program on their own. Some are ready to try it; some are considering it; some won't touch it.

Profits to both the retailer, importer and grower are a concern for some. Jac. Vandenberg Inc., New York, N.Y., has not decided about trying tree-ripened fruit. David Schiro of the firm said the question is first whether it is profitable for his retail customers, and second, is it profitable for the Chilean exporters and growers.

Demand from the trade is another question. Andy Economou of Unifrutti of America Inc., Philadelphia, said he is ready to do it anytime demand warrants it. He does not currently have a tree-ripened fruit program.

A couple of importers said they might offer tree-ripened fruit as a custom program — on request only. Ed Guzi of Coexport International Inc., Chicago, believes there is a niche for the product.

Peter Warren of Winter Fruit Distributors Inc., Philadelphia, said his firm also may offer tree-ripened fruit on a request-only basis. He has done a little of it in previous years, but he has not seen much growth in the field.

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The Packer Nov. 14, 1987

Use by retailers varies

F+V Mktg: Competition (Library)

PHILADELPHIA — Some importers offer tree-ripened fruit to retailers on a request-only basis. Others have programs in place.

The importers recognize what retailers already know: A tree-ripened fruit program is not for everyone. Because the fruit comes in by plane and has already had special handling, grading and packing, the price can be too steep for many consumers.

At least two retailers in the Northeast have had success with tree-ripened fruit in their upscale stores. Those consumers are willing to pay more for fruit that is ready to eat when they buy it.

Other retailers do not see potential for such a program in their markets. Chuck Hubbell markets produce in a blue-collar area of northeastern Pennsylvania. Stores that Affiliated Food Distributors Inc., Scranton, serves, do not have the sort of customers who can afford tree-ripened fruit.

Hubbell would not rule out the possibility for the future, but he said he has to keep his customers' needs foremost in developing produce programs.

The idea is good, but risky, said Grady Gresham, director of produce for Harris-Teeter Super Markets Inc., Charlotte, N.C., a chain of more than 115 stores.

The chain has gone back and forth for years about ripened fruit — not just from Chile. Gresham said it is a good item to carry for customers, but it is very hard to handle. It means getting the fruit successfully through the chain distribution system and strict discipline at the store level.

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F&V Mktg: Competition (Library)

Exporters, USDA spar in court

Grape marketing orders disputed

By Tom Karst
Markets editor

KANSAS CITY — Chile's winter fruit deal has been anything but static. From lowly levels in the early 1970s, Chile's fruit volume has surged to close to 30-million packages in the late 1980s.

One unchanging characteristic of Chilean trade with the United States in recent years, however, has been the long-running dispute with the USDA concerning marketing order dates and inspection procedures for Chilean grapes.

The issue has been in court this year in the case of Cal-Fruit Suma International vs. the United States Department of Agriculture. The plaintiffs, representing exporters and handlers of Chilean grapes, contend the USDA has discriminated against imported grapes regarding marketing order provisions and inspection requirements.

Through early November, the courts had not ruled in favor of the Chileans. A motion for summary judgement had been filed by Chilean interests on Aug. 28, and oral arguments were expected by the end of the year, according to David Holzworth of Akin Gump, Strauss, Hauer & Feld, legal counsel for the plaintiffs.

Holzworth said an appeal is likely, regardless of whether the USDA or Chilean interests win the decision. Despite the protracted nature of the battle, he said there is "without question" a firm commitment from the Chilean exporters and importers to continue in the legal arena. Although declining to reveal how much the court maneuvers have cost the plaintiffs, he said the outlays have been more than money.

"I can tell you that an awful lot of time by many companies has been committed in support of court papers and comments before the agency to protect the market," he said. Holzworth said the Chilean importers take the issues at stake very seriously because the decisions could affect their business

Holzworth said the seemingly perpetual litagation could be ended with a compromise.

"There is a clear area where compromise is possible," he said, noting that if the USDA permits grading inspection in Chile under shipping point standards, "the marketing order could be in place 365 days a year."

That arrangement, he said, would result in the same degree of quality for both domestic and imported grapes.

In addition, he said, the Chilean Exporters Association has gone on record with the USDA that it would pay 100 percent of the inspection costs in Chile — an important consideration, he said, in days of concern about budget and trade deficits.

Players keep fingers crossed on trade bill

KANSAS CITY - Omnibus trade legislation in the U.S. Congress likely will not reach the president's desk this year, according to Sharon Bomer, legislative affairs specialist for the United Fresh Fruit and Vegetable Association.

When it does, Chilean exporters and importers hope it will not contain provisions that would make it easier for the USDA to move up effective dates of marketing orders, according to David Holzworth of Akin Gump, Strauss, Hauer & Feld, legal counsel for the Chilean Exporters Association.

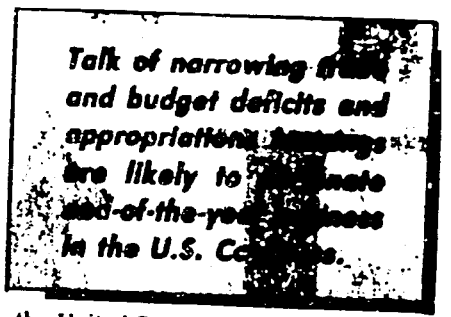
Earlier this fall, sources expected the compromise trade bill to perhaps by hammered out between the House and Senate by Thanksgiving. but Bomer said most people in Washington don't believe there will be a trade bill until early next year. Talk of narrowing trade and budget deficits and appropriations hearings are likely to dominate end-of-the-year business, she said.

Bomer said the USDA likely will be a prime target for budget cuts, including such areas as agricultural research, plant production and quarantine and the cooperative extension service.

Meanwhile, she said, the United's position on the trade bill is neutral so far, noting there is no final bill to pass judgment on. Moreover, although the United has come out for or against various aspects of the trade legislation, the association has no position on the marketing order amendments.

Holzworth said the House version of the trade bill would give the secretary of agriculture "unfettered discretion to move the date as far into the year as he deems necessary."

"This legislation affects 18 commodities, not just grapes, and would have a



the United States," Holzworth said.

On the other hand, Holzworth said, the Senate version of the same issue would permit the date to advance, provided there was a reason for it. That would be less objectionable than the House version, he added.

Overall, though, exporters and handlers of Chilean produce were wary of the trade bill and concerned about the implication such legislation would

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F+V Mktg: Competition (Chile)

Berger International moves into fruit

SANTIAGO, CHILE — It is natural that when your business in Chile is to trade beans, lentils and other commodities related to agriculture, sooner or later you wind up involved in the fresh fruit deal. This is the case of Berger International, a subsidiary of Con Agra, which owns a large number of companies operating across the food chain.

"This will be our second season as exporters of fresh fruits," said Pedro Mendive, managing director of Berger in Santiago, "We are new in the fruit deal, but we learn fast, and the nature of our original business is such that we can offer added advantages to the producers that operate with us."

Berger is presenting an image marked by flexibility. Do you want to export while keeping your own identity? Fine — Berger will export your produce under your own trade name. Do you want financing, technical assistance, the more traditional approach offered by the exporting companies? O.K. — Gerger will do it. Do you want payments in advance? Berger is ready to negotiate the amount. A minimum guaranteed payment? For grapes, apples and pears, Berger offers you a percentage of the expected f.o.b. returns.

The result of this approach has been success. Last season, the company exported 150,000 boxes, acting as a traditional exporting company and another 50,000 using the non-traditional approach, which Mendive equates to that of a field receiver.

"The advantage for us is that we can capture Chilean fruit faster," Mendive said. "And by paying a fruit condition insurance, we can count on the quality of the fruit shipped to the international markets."

Insurance needs

The insurance policy offered to Berger by Property Marine, Mendive said, replaces the need for a large technical team supervising the fruit operations. "It is not cheap," he said, "but it is worthwhile, mostly considering the alternative cost of managing a large technical force of our own." He believes the use of the fruit condition insurance permits the company to expand, in the short-term, at a faster pace than it would be possible through investments in infrastructure and manpower.

Berger is growing fast. Mendive projects exports to reach a total of 1-million boxes during the 1987-88 season, of which about 800,000 will be exports using a non-traditional approach. The strength of the company is grapes and apples, but some other produce, such as endive, also is being shipped to the United States by air freight.

The growth of Berger may receive a tremendous boost in the forthcoming weeks if a deal to purchase the Chilean exporting company Frutanex is concluded.

"This could be the first purchase of a non-American company by Conagra," Mendive said, adding that the deal probably will be concluded through a debt-for-equity swap or a discounted debt operation, as it is sometimes called. By this mechanism, the foreign company buys Chilean debt at a discount that could be as high as 50 percent. The debt instrument then is brought to the Central Bank of Chile, which pays the document in pesos at a price that is 79 percent of its face value.

The foreign company can then use the pesos to purchase equity in a domestic firm. However, the Central Bank approves these operations on a case-by-case basis, and the interested parties must wait for the red tape to clear before materializing the deal. Once the Frutanex takover is made, Berger will rise immediately to the privileged group of the large exporting companies.

MENDIVE

Expansion plans

"It is a question of elemental arithmetics," Mendive said. "Frutanex exported 2.7-million boxes during the past season and will reach 3 million this season or next. By that time our own operations will be handling levels of 2-million boxes. That puts up in the range of 5-million boxes per year."

The need to grow is not only fostered by the desire to be big, but also by strategic considerations." The trend in Chile is to have fewer and more efficient companies," Mendive said. "The moment will come when prices will stabilize at lower levels than those found today. Lower prices mean lower margins. At this stage, increased profits will only be possible through larger export volumes."

There also is the possibility of increasing returns by adding value to the produce. Faithful to its food-chain tradition, Conagra already is thinking of producing concentrates and exporting berries. But these projects will only come true in time, when the success of its first entry into Chile is assured.

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O F+V Mktg: Competition Library

Frutexport executives bring expertise to firm

By John M. O'Brien
Special to The Packer

SANTIAGO, CHILE — What happens when a group of producers reach maturity and believe they can handle their business better than the exporting company that has sheltered them for many years? A split, of course.

This is even more true when the producers belong to a self-contained, perfectly identifiable and profitable region, such as the booming valleys in the north of Chile that produce early grapes for eager markets in the United States and elsewhere. The new company has everything needed for success: the soil, the know-how, the contacts and, most important, the will to take a risk and aim for grandeur in the intricate and competitive business of fruit exports.

The origins of Frutexport, as this new company is called, is simple: Jaime Ferrer, partner of David del Curto SA, along with Eugenio Silva, a top marketing executive of del Curto, plus Isaac Bon of Frupac, recently divorced themselves from their respective companies, bringing along a dozen large growers from the valleys of Copiapo, Vicuna in the Elqui River Valley, and El Palqui in Ovalle.

"We wanted to have our own identity, and as members of a large company this was hard to achieve," said Silva, now vice president of Frutexport.

Silva said Frutexport members have an average production capacity of 80,000 to 100,000-boxes, that each owns his own packinghouse and that all the vineyards operate with drip irrigation.

"Our standards," he said "are definitely above average."

Grape exports

The new company will export 1.1-million boxes during the 1987-88 season. Most of the grapes, a healthy 80 percent, come from the northern valleys, and the remainder area from the central region.

"We will begin our business with a tonnage that will put us immediately among the 12 largest grape exporters of Chile," he said, adding that the idea is to increase output at an annual rate of 50 percent during the next three years.

"We are looking forward to reaching this goal by incorporating a very special type of grower," Silva said, explaining that in Chile it is common to find lawyers, medical doctors, bankers and other professionals in the fruit business, attracted by its profit potential.

"They are O.K., I suppose," he said, "but they are not specialized producers. Our type of grower is the one 100-percent dedicated to fruits. That's the type of guy we want aboard."

But what about investments in cold storage, transportation and distribution in overseas markets?

Storage

"Frutexport began last August as a full fledged company, and there is not enough time to invest in infrastructure before the season begins," Silva said. "Meantime, we are renting cold storage capacity."

As a result of the continuing boost in production for Chilean export fruit, the main line exporting companies have constructed enough cold storage to sustain the boom when the new output comes on. Meanwile, they rent their excess capacity to companies such as Frutexport that can negotiate a good bargain.

"Last season, cold storage rental was in the range of 27-20 cents per box, but this year it should be even lower," Silva said, pointing out that most Frutexport shipments will leave from the port of Coquimbo, the exact place where capacity construction is topping national averages. Shipping will be done through the recently formed shipping group of Profrut, composed of mid-sized and some large companies that will charter weekly deliveries to both coasts in the United States throughout the season.

CHILE EXPORTS

LEADING FRUIT EXPORTERS — 1986
(in millions/U.S. dollars)

David del Curto S.A.	$78
Standard Trading Co. S.A.	$52
United Trading Co. S.A.	$39
Frupac	$29
Unifrutti	$27
Coopefrut	$23
Frutanex	$19
Exp. Aconcagua	$16
Agro-Frio	$13
Rio Blanco	$12
Coexport	$10
Chile total	$476

Source: Saludos Chile

① Fr V Mktg: Competition (Library)
② Ag Counsel: Berries (library)
③ Loadability factors (return to POM)

- Transportation presents challenge, 4C
- Exporters, USDA tangle, 5C
- Companies seek edge, 9-13C
- New growing areas emerge, 14-15C

Production continues steady climb

84-million boxes expected this season

By John M. O'Brien
Special to The Packer

SANTIAGO, CHILE — Chile will produce close to 84 million boxes of fruits and vegetables during the 1987-88 season compared to 71-million boxes in 1986-87. This is the usual annual jump of about 20 percent that characterizes Chilean produce output since the early 1980s. The reason for this impressive growth is simple: Chile is planting fruits and vegetables and will continue planting them because it has the land, the climate, the know-how, the manpower and the markets. Being a Latin American nation with a large foreign debt, it also has the urgent need to satisfy its dollar income requirements through exports.

Everybody in the produce business knows Chile intends to reach the 100-million box target by the end of the 1990s. Everybody also knows it probably won't be a difficult target to meet. Chile has 88,920 acres of table grapes, 42,400 acres of apples, 19,760 acres of plums, 16,056 acres of pears and 9,880 acres of kiwifruit, just to name the most important fruits. In 1974, Chile had a total of 162,279 acres planted. Today, the area planted exceeds 321,100 acres. A recent report from the United Nations' Food and Agricultural Organization stated Chile already has become the largest exporter of fruit from temperate climate countries in the Southern Hemisphere. Table grape exports account for the largest part of the feat, representing more than 50 percent of total boxes exported last season, while apples come second with about 25 percent.

Official forecasts concerning Chilean produce are not readily available. The exporters association, which groups the main exporting companies, is keeping its figures under tight wraps, convinced it would be a strategic mistake to disclose them before the season begins. Exporters fear the impact that the signs of growing output and exports could have on worldwide markets. California growers already have started their worry, demanding protection against Chilean produce during overlapping months, while Europeans have talked of quotas for apple shipments to that continent.

Export estimates

However, it is not easy to keep a secret in the world of Chilean Fruteros — the "fruit people," as those involved in the business call themselves — and, based on their anonymous contributions, the following estimates for the most important Chilean export crops have been compiled.

Table grapes probably will reach 42 million boxes, of which 28 to 30-million will go to the United States. The most important variety shipped to the U.S. market is Thompson Seedless, which accounts for roughly 50 percent of total Chilean grape shipments to the United States. But the variety that has increased most consistently and dramatically is Flame Seedless. Shipments to the United States during 1987-88 totaled 6-million boxes, a 72 percent increase from the previous season.

However, this variety faces serious marketing problems due to importers' complaints over size deficiency of grapes, shattering and spoilage. Sources claim much of the Flame crop had to be sold at cost last season because the small fruit size, and this situation could turn into a deep crisis if not controlled.

(See Climb, page 2C)


Helen Hughes/special

Growers cashing in on burgeoning berry deal

By Imogen Mark
Special to The Packer

SANTIAGO, CHILE — Berries: raspberries, blueberries, Boysenberries, red currants, black currants, gooseberries — this is the new deal that everyone is talking about in Chile this year.

The figures still are modest. The official figures for the 1985-86 season showed plantings of only around 358 acres, with an estimated average production of around seven tons of export-quality fruit per acre.

But Andres Bizeta, the berries expert at Fundacion Chile, a private research and development center, reckons the real total is around 1,235 acres among southern growers.

Raspberries are the clear favorites. They have a well-defined market, and shipments reached 263,365 boxes last season.

Chilean growers are planting double-cropping varieties such as Heritage and Glen Clova. Others, such as Willamette and Meeker, are doing well, too.

Varied deal

The harvest season runs from December to late April or early May, with a peak in December and January. A variety of early and late varieties and climatic differences in the growing zones, from the temperate central zone compete with hotter temperatures and faster-maturing fruit, which puts the pressure on during the harvesting season.

The health and pest-control checks are tough, Bizeta said. SAG, the government agency responsible for carrying out inspections as part of an agreement with the USDA, will turn down any shipment that shows up with even one bug.

Most growers are careful to carry out the spraying program, and at the packing stage, some even have the packers inspect every individual berry to make sure each is perfect.

Potential problems

methyl bromide, but the fruit often is affected by discoloration and spotting, so most rely on rigorous inspection and then the cooling process.

Insulated and sealed minicontainers, which will take around 40 trays, are used by many growers for the trip from packing plants to the airport to the end market.

The fruit may have to wait for inspection by SAG officials at the airport before loading. Bizeta worries that bottlenecks at that point, and perhaps a shortage of air carriers, are some of the potential problems the berry exporters will have to solve.

There is a tricky [illegible]

Climb

(Continued from page 1C)

Of the [illegible] acres planted with grapes in Chile, the V Region and the metropolitan area of Santiago account for a total of [illegible] acres, of which 19,019 are Thompson Seedless and [illegible] are Flame. But while most Thompson vineyards are in full production, only 30 percent to 40 percent of the Flame vineyards have reached maturity. A report from the Chilean Embassy in Washington suggests because the Catholic University/Exporters Association Quality Control Program extends over a higher percentage of this variety (only 1-million-boxes were controlled last season), Flame Seedless could suffer more problems and further price drops. Enrique Brunsone, general manager of the exporting cooperative Coopefrut, goes further to say this variety could be produced only by growers who can assure exceptional quality. Those who cannot meet exceptional quality standard, Brunsone said, should ingraft other varieties.

The most rapidly growing market for Chilean table grapes is Europe, with an average annual growth of 24 percent during the past five seasons. In 1982-83, exports to Europe were 3.3-million boxes compared to 7.8-million during 1986-87.

Apple prospects

The second most important item is apples, with exports expected to reach 20-million boxes during the forthcoming season, compared to 17.7-million in 1986-87. Here, Europe accounts for 55 percent of exports, followed by the Middle East with about 20 percent and the United States with 14 percent.

Although the world markets prefer red apples, the United States essentially is a client for the Chilean Granny Smith. About 1.5-million-boxes were shipped to the United States last season, and exporters now are aiming for a substantial leap that will add another 1-million boxes of Granny Smith shipments. Given the large increase in domestic U.S. red apple production, one exporter said, it would be folly to try to place Chilean red apples in the United States during 1987/88.

Exports of plums will boom to 4.2-million boxes from 3.6-million last season. Again, the main market is the United States, with 75 percent of total exports. However, symptoms of oversupply are perceived in the United States, especially during the weeks extending from mid-January to mid-February. Chileans now are conscious that the U.S. market easily will be saturated and are thinking of increasing shipments to Europe in competition with South African production.

Chilean exports of other fruits, such as nectarines, will grow slightly to 4.2-million from 4-million last season and peaches to 1.7-million from 1.3-million, while pears will increase to 3-million from 2.5-million.

F+V Mktg: Competition (library)

① F+V Mktg: (library)
② Ag Comm'd: Berries (library)
③ Vol Mobility Factors / Competition Comparative Transport (return to PDM)

Berry

(Continued from page 1C)

til the volume of exports reaches the point where expansion of refrigerated warehousing, for example, can be justified.

Shipping alternatives

Last year, Fundacion Chile looked at the possibility of shipping from southern airports, in Valdivia and Puerto Montt as an alternative to Santiago. But the cost of bringing down a SAG official to inspect the shipments could not be justified, so that plan will have to wait until the volume of shipments makes it worthwhile, in another year or two, Buzeta believes.

Chile's other main berry deals are strawberries, which totaled 17,443 boxes last year, blackberries and the hybrid Boysenberries, which accounted for another 14,350 boxes.

Fundacion Chile is among the growers experimenting with blueberries. That means introducing a new species into Chile and meeting some tough regulations to make sure the new plants meet strict pest-control regulations.

The process is just beginning, so it could take two or three years before they are cleared for distribution and planting and production can begin.

Red and black currants already are in production, although this still is very small. (Exports were just more than 1,000 boxes last season.)

Specialized deal

The berry deal is highly specialized, and there are relatively few companies in the market. The biggest single producer is Hortifrut, which has been growing and exporting berries for seven years. It produced almost 50 percent of last season's deal.

Few other Chilean producers have ventured into this market, says Hortifrut's president, Victor Moller. The distribution is too different from apples or stonefruit or table grapes, too complex and too low-volume for the big companies such as Dole or David del Curto.

His company produces and exports directly, which allows it to control all aspects of the process from quality and volume control on the farm to processing, then road freight to the airport and off to the supermarket shelves.

Berries are a highly perishable, low-volume deal; that means a lot of sales outlets. So Hortifrut formed its own distribution company in the United States, Southern Sun Inc., Miami, to handle a complex marketing set-up.

Joint efforts

Producers from the Northwest United States have joined the network; growers in Oregon and Washington have bought a share in Southern Sun. American and Chilean growers have established common standards of quality and varieties, and together they are keeping the consumer supplied year-round with fresh berries.

In this deal, there is no overlap between Northern and Southern Hemisphere growing seasons, Moller explained.

Hortifrut has plantations in Chile's central valley around Santiago, in Los Angeles, to the south; and in Ovalle, still further south. That gives it the harvesting spread from mid-November to May, he said, and then leaves the market clear for its American associates.

Moller expects berry sales of around $3 million this season, and his U.S. partners will make another $3.7 billion, he expects.

For the moment, the main market for Chilean raspberries and blackberries is the United States which took nearly 180,000 boxes of raspberries and 12,000 of boysenberries last season. Europe and Latin America are important purchasers of strawberries.

With expensive air freight and no other transport alternative for such a perishable product, growers and exporters must start looking now for the new markets of the future.

Deal's pluses outweigh its minuses

PHILADELPHIA — Any deal can have its disadvantages, but retailers believe the advantages of the Chilean fruit deal far outweigh any problems.

The main advantage is having good produ[illegible]uring the offseason, said Chuck Hubbell, produce director for Affiliated Food Distributors Inc., Scranton, Pa.

The main disadvantage is when shippers get involved in the deal too soon. Then consumers buy sour grapes and don't come back for more.

The shelf life of some items is shortened because of the distance involved, said Rick Giese, produce director for Affiliated Foods Co-op Inc., Norfolk, Neb.

As far as Malone & Hyde Inc., Memphis, Tenn., is concerned, there are no disadvantages to the Chilean deal, said Phil Campagna, director of produce op-

Low-volume items make presence felt

PHILADELPHIA — The Chilean fruit deal is best known for its grapes, plums, peaches and nectarines. But some of the smaller-volume commodities are important, especially at the beginning of the deal.

Cherries and apricots have been on Rick Giese's order list for the last two years, and he considered carrying asparagus this year. Giese, produce director for Affiliated Foods Co-op Inc., Norfolk, Neb., did not carry any of those items three years ago.

Affilated is a cooperative serving 378 stores in six states, and demand varies from area to area, Giese said.

The same is true for Malone & Hyde Inc., Memphis, Tenn., said Phil Campagna, director of produce operations. His Miami division does a big volume of asparagus, larger than any other division. Cherries are a big item at Malone & Hyde, depending on the crop and price, he said.

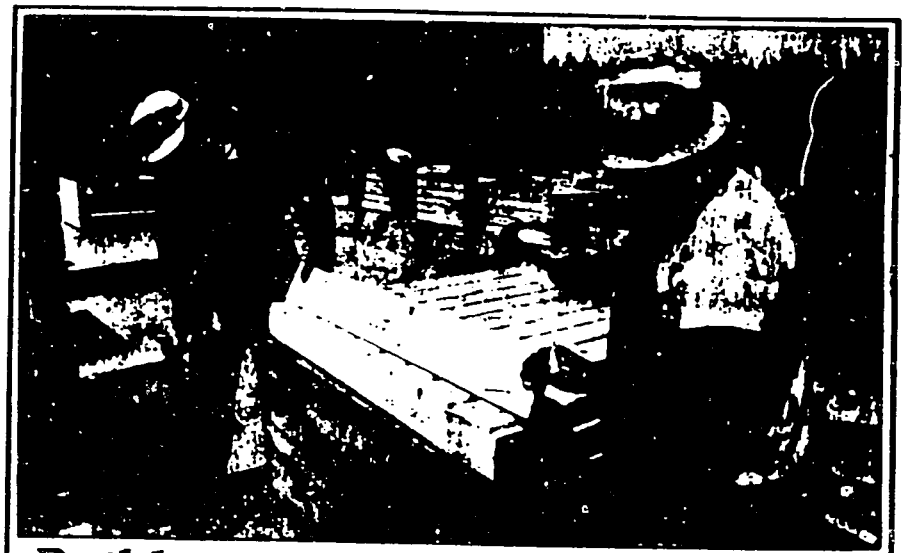
It is the high price of cherries that makes Anthony Terrone steer away from them. Terrone is director of produce operations for King Kullen Grocery Co., Inc., Westbury, N.Y., a chain of more than 50 stores. He has used Chilean artichokes when California supplies are scarce.

The main small-volume commodity Terrone uses from Chile is asparagus, and that deal has picked up in recent years.

Promotion is the key to increasing the volume on the early items, said Chuck Hubbell, produce director for Affiliated Food Distributors Inc., Scranton, Pa., a co-op serving more than 275 stores. And advertising need not be limited to high-volume, low-priced items. The more-expensive early items, such as cherries and asparagus, can be promoted as well.

"We will advertise. You can't create demand unless you put it in front of the customer," Hubbell said. "I'm not embarrassed about putting something in with a ridiculously high price."

Retailers need to promote the early items more, said Grady Gresham, director of produce for Harris Teeter Super Markets Inc., Charlotte, N.C. Cherries have been high in price recent-



Helen Hughes/special

Building success

Storage bins are a hot commodity in the fast-growing production region of Linares. Harvest in the region will begin with cherries in mid-November. (Story, page 14C)

3-year promo plan faces approval

By Lisa Shidler
Assistant Western editor

SAN FRANCISCO — This season will be a test bed for Chilean produce advertising and promotions, designed to establish a base for the long-range goal of developing a three-year communications plan.

Promotional plans and tests have been approved by AMPRO, the U.S. importers association, but still face approval when they are presented Nov. 19 to the Asocion de Exportadores de Chile in Santiago.

If approved, the new ad agency which handles the Chilean fruit account, Saatchi & Saatchi DFS, San Francisco, will test advertising as it is aired in a still-undetermined number of markets. The tests have two purposes:

- to compare radio to television advertising in effectiveness, and
- to determine at what levels advertising is most effective.

Before the commercials are aired at the season's peak, they will go through concepts will be tried on consumers to determine the hot buttons — the most sensitive topics.

Pabst believes the hot button is fresh, playing up the fact that the Chilean fruit is not from storage. Even if this is validated by the tests, other factors could come into play. For example, last year the consumer advertising theme was changed from "Coming up from Chile, a taste of summer now," to "Summer fruit in winter, a taste of sunshine now."

The switch was made because of the focus on Chile's political situation, Pabst said. Through consumer tests, Pabst hopes to find out if this is a problem for consumers and, even more so, their other concerns.

The 1988 promotional budget, if approved, will be slightly higher than the $1-million budget of 1987, Pabst said. This was generated by a grower assessment of 3 cents per box; the Chilean government agency ProChile no longer contributes funds for the U.S. program.

more than 6,000 radio commercials aired in 36 markets. The promotions is a joint effort, under the name of the California Winter Fruit Association, between the importers and the exporters.

Five field merchandisers once again will call on the trade, this year possibly with a higher budget. By late November, they will offer new point of purchase material that has been developed and is ready for printing if approved by the Chileans, Pabst said.

The public relations program also may have an increased budget. Cary Saunders & Associates, San Francisco, again will handle these duties, focusing on local broadcast, business page and food page coverage of when ships arrive, when the crop begins harvest and other aspects of the deal.

Saatchi & Saatchi took over the Chilean account from Evans-Lynch Rockey Inc., which had merged with McClure & Associates, the first advertising agency in charge of Nor[illegible]

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Almost like early U.S. settlers who ventured into new frontiers in search of opportunities and growth, Chilean growers see a land of plenty when they look

South to Linares

By John M. O'Brien
Special to The Packer

SANTIAGO, CHILE — Growers and exporters here are looking to the south to develop plantations of apples, pears, kiwifruit, asparagus and new varieties, such as Red Chief apples. Many of these products are in demand in the People's Republic of China, where already Chile has a growing market.

One new growing area is the province of Linares, some 300 kilometers south of Santiago.

"The advantages of Linares for the serious grower, is that the region was not well known as a fruit producing region, but as a producer of rice and sugar beets, according to Mario Gaete, Coopefrut's chief agronomist for Linares. Now that the word is out, land prices have soared by 100 percent since mid-1986."

Regardless of the impressive price jump, a high-quality hectare still sells for about $3,000 — considered a bargain compared to international standards.

Currently, Linares has only 7,804 acres in production, but its potential is great — 113,030 acres of apples, 150,000 acres of pears and 18,700 acres of kiwifruit, according to the latest agricultural census.

That potential has spurred some of the major exporting companies to prepare new investments in packing and cold storage. Coopefrut, Unifrutti, David Del Curto [illegible], Bellfrut and Fruta- [illegible] there, while Coopefrut [illegible] are constructing con- [illegible] atmosphere units for startup this season.

According to the latest agricultural census in Chile, the growing potential for pears (above) in Linares is estimated at 150,000 acres. Pear production in Linares is reported up for 1987. In the kiwifruit fields of Las Brisas, which is owned by Juan Carlos Sotomayor, Coopefrut's chief agronomist Mario Gaete (right) explains the junction of the irrigation distribution system.

Photos by Helen Hughes/special

Unifrutti is working on a 600,000-box facility — expandable to 1.8-million — and Coopefrut on one of 200,000-boxes expandable to 800,000 or 1-million.

Benefits to Linares

Linares also is benefiting from irrigation works performed in association with the construction of a 500-megawatt hydroelectric plant on the Maule River. The generating center is located close to the Andes Mountains, some 50 kilometers east of Linares. The construction of a 20-kilometer deviation channel and other irrigation works will make it possible to water some 741,000 additional acres that will contribute to the fruit potential of the region.

Of course Linares holds a handicap vis-a-vis other rural areas in the Central Valley further north," Gaete said, "transport infrastructure is poor, telephones are scarce and cold weather sometimes affects early blooming varieties, but the problems, really, are nothing too hard to handle."

Coopefrut — a cooperative of growers that has been exporting Chilean fruits for the last 25 years — is the most active company in Linares, representing 33 percent of the apples, 60 percent of the pears and 70 percent of the kiwifruit.

Gabriel Artigues, a director of Coopefrut, said growers should have completed 5 years exporting through Coopefrut before becoming a member of the cooperative. He said the advantage of being a member is that it offers the right to perceive a share of the financial surplus generated by the cooperative.

"Last year our surplus totaled 96-million pesos ($430,400 in U.S. currency). This sum resulted from the 8 percent f.o.b. commission we charge our growers for exporting services minus costs."

The projected growth of Coopefrut activity in Linares includes: apple, output to 600,000 boxes compared to 500,000 last season. Of that, red apples represent 60 percent, while Granny Smiths make up 40 percent.

However, the estimated production for 1990-91 is 1.3-million boxes. These large volumes are repeated in pears, kiwifruit and asparagus. Coopefrut pear orchards — Packams and Boscs — are just

Linares

(Continued from page 14C)

beginning to enter production with an output of 30,000 boxes estimated for 1987-88. By 1991 the estimated output will be 200,000 boxes.

Asparagus production will be 12,000 boxes this season and is predicted to grow to 100,000 in 1990-91. Kiwifruit output will reach 55,000 boxes this season and 1-million in the early 1990s.

"The available infrastructure in Linares is o.k. to handle current volumes," Gaete said. "But it will be insufficient when the big boost occurs once the orchards reach maturity."

Las Brisas

One of the most successful Coopefrut growers is the Las Brisas orchard owned by the Sotomayor brothers.

Their 444 acres has been administered by Juan Carlos [illegible]

"Our idea is to complete the natural cycle in the farm," Sotomayor said. "We have cattle that produce milk, cheese and guano. The guano is mixed with sugar beet waste on our earthworm farm to produce humus."

The humus is used as fertilizer in the orchards and to improve the quality of the fertilizers for production of apples, pears and kiwifruit seedlings grown in the nurseries.

Sotomayor said Las Brisas also plants corn between the kiwifruit trees to serve as a windbreaker.

Las Brisas has 123.5 acres of pears and 74 acres of apples that will enter full production during the 1988-89 season. Las Brisas also has 37 acres of kiwifruit ready to begin production this season, while another 24.5 acres are being planted in a program to complete 197.5 acres within the next decade.

"This is a fantastic region for fruit production," Sotomayor

① Fr V Mkt: Competition (library)
② Ag Commod: Asparagus (library)

Standard Trading poised for run at number one

Financial investments boost export volume

By J.S. O'Brien
Special to The Packer

SANTIAGO, CHILE — Standard Trading Co. S.A. has invested $7.6 million since it began operations in Chile in 1981-82 and is preparing to invest another $6.2 million next year. The investments have been rewarded with state-of-the-art technology and a large output growth, from 1.6-million boxes in 1981-82 to 10 million in 1987-88. At present, it is ranked number two in export volume, second only to David del Curto S.A. But the company expects to fight a hard battle for the top place this season, depending on del Curto's results and its own output growth.

"We are the largest exporters of apples in Chile," Standard's production manager Dino Pruzzo Jr. said. "Standard exported 3.7-million boxes last season and is now preparing to ship a total of about 4 million to worldwide markets."

Of these 4-million boxes, 2.3 million are Granny Smiths, a variety that Standard considers one of its best products.

"Our Grannies from Doñihue are some of the best available in the country," said Pruzzo, adding that 400,000 boxes of Grannies are going to the United States, compared to 320,000 last season. As a result of the oversupply of red apples from Washington this year, he said, Chilean apple shipments to the United States will be restricted to Grannies only.

"Last season," Pruzzo said, "some 2.3-million boxes of apples were exported to the United States, of which 87 percent were Grannies. This season, the total estimated export shipments of 2.5- to 2.8-million will be solely composed of Grannies."

Other fruits

Standard also is strong in grapes, pears and kiwifruit. These three fruits are produced by Sociedad Genova, a Standard Trading grower, in three separate farms close to the capital of Santiago.

Sociedad Genova is owned by the Pruzzo family, including Dino Jr., his brother, sister and father, the legendary Dino Pruzzo, owner of one of the oldest Chilean fruit exporting companies, which went bankrupt in 1981.

"I didn't sit out on the action for too long," Pruzzo said, smiling. "Standard hired me as a marketing adviser barely a week after I lost my company."

Today he divides his time between his job with Standard and his vineyard and orchards in the fertile soils of Calera de Tango. "Sociedad Genova has 158 acres of Packham pears, 64 acres of Rubier and Red Globe vineyards and 69 acres of kiwis," he said.

Last season, Standard got its growers an average of $10 per box f.o.b. for Packhams, giving them a net return of $6.50. Standard and other exporting companies now are promoting plantations of Beurre Boscs and summer Bartletts to diversify production.

Kiwifruit future

But the future lies with the kiwifruit. Plantings of this fruit began less than 8 years ago with such a success that, at present, some 9,880 acres have been planted with kiwifruit.

"Chile exported 880,000 boxes of kiwis last season. Shipments will reach some 2.5-million boxes during 1987-88 and 5 million in 1988-89," said Eduardo Macaya, standard's chief agronomist for the region south of Santiago. He added that Standard is big in kiwifruit with export volume jumping from 50,000 boxes in 1985-86 to 190,000 in 1986-87 and 700,000 boxes this coming season.

"It is a difficult and expensive fruit to grow," Macaya said. "Investment costs range between $19,000 and $34,000 per acre, and the trees have to be very well protected from the wind to avoid breaking the fragile branches that grow one to two inches per day. It's a very labor-intensive crop."

But the profits from kiwifruit plantation warrant any risk, at least for the time being.

"Sociedad Genova will export its first shipment this season from the yields of the first 17 acres they planted three years ago.

European market

The growth of kiwifruit is destined for the European markets, where Chile holds comparative advantages over the largest producers in New Zealand, which have higher production and freight costs. The United States now takes barely 2 percent of Chilean kiwifruit production; nevertheless, the exporters believe the United States market offers a great potential for development. Meantime, confidence is high and the statistics reveal that by 1991, Chile will have planted between 17,000 and 20,000 with kiwifruit.

In the struggle to gain the quality producers who will support the growth of Chile's many varieties of fruits and vegetables, Standard offers a high-tech infrastructure, market knowledge and a policy of minimum guaranteed prices. Last season, Standard spent $35 million dollars to finance its Chilean growers, and the company closed its books showing returns of $60 million f.o.b.

The Packer 10/19 1987

FTV Mktg: Competition (Library)

United Trading Co. stays on fast track

Firm is number three and growing

SANTIAGO, CHILE – United Trading Co. will export about 8-million boxes of fruits and vegetables during 1987-88, a remarkable achievement for a company that opened shop in Chile during the 1983-84 season with exports totaling only 2.8-million boxes. Now entering its fourth season as a locally based exporter, UTC already is ranked among the three largest exporting companies, along with David del Curto SA and Standard Trading Co. SA.

With an average annual output increase of 25 percent, UTC is one of the fastest-growing operations here. "The big output jump was made possible by our investments in infrastructure, our financing capabilities, our first-hand knowledge of the different markets and our strong commitment to get the best manpower available," according to executive vice president Oussama Abougharsale. And he adds quickly: "But UTC does not want to be the largest company or break records of any sort unless they refer to quality."

Oussama, a well-mannered and soft-spoken Palestinian who is well-known in Chile for his fondness for horses and religious devotion, is linked to the produce business by family.

"I have talked fruit since I was a child because my father and his family have been involved in the trade for many years," he recalled, adding, "After getting my B.A. from the American University of Beirut, I went to work as sales manager for a Middle East trading and industrial company, Matico, which my father had formed in the late 1950s."

Oussama first came to Latin America in 1980 when he was commissioned to start fruit production and exports from Uruguay, the small Atlantic Coast nation that is best known for high-quality livestock production and now also known for its potential for citrus plantations.

"We bought a company called Altisol, and presently have 2,500 acres of citrus," Oussama said. "Our aim is to reach a production target of 3-million cases in the next 10 years by adding another 5,000 acres to production. The idea is to get full weekly shiploads throughout the complete Southern Hemisphere season."

Because of phytosanitary considerations, the U.S. market is closed to valencia oranges, mandarins, lemons and other citrus from Uruguay. That is why Oussama is eyeing the European and Canadian markets where, he believes, the sweet Uruguayan citrus is considered better quality than its South African counterparts.

Altisol, as well as Idehco and other produce companies, is majority-owned by the Abougharsale family.

"However," Oussama said, "each of our companies is a completely independent profit center that has to operate maximizing its position."

And he goes on to explain the nature of this relationship in detail: "In the U.S., for example, we participate in Cal-Fruit Sunset in association with the Glickenhaus family. But UTC and Calfrut Sunset are completely different companies with different partners.

Remember that UTC represents about 400 Chilean growers from the Copiapo Valley in the north to Osorno in the south, and we have to present them with the best results depending on their quality. If the prices at which our distributors sell the products are less than those obtained by competing companies, our distributors have to reach in their pockets and compensate for the difference."

Oussama is careful to insist that he is not speaking about minimum guaranteed prices: "Ours is a different concept. We don't negotiate with our growers on the basis of minimum prices, and they perfectly well understand our point: Companies that promise minimum prices not always stick to their word, while others, when facing depressed prices, overdo their quality-control zeal to reduce the volumes accepted for processing and export."

In Chile, UTC owns plants and land, mainly vineyards, in the northern valleys.

"It is not our policy to own land and compete with our grower," Oussama said, "but we were forced to buy land and produce early grapes in Copiapo because producers from that region were all boxed by companies that had arrived earlier.

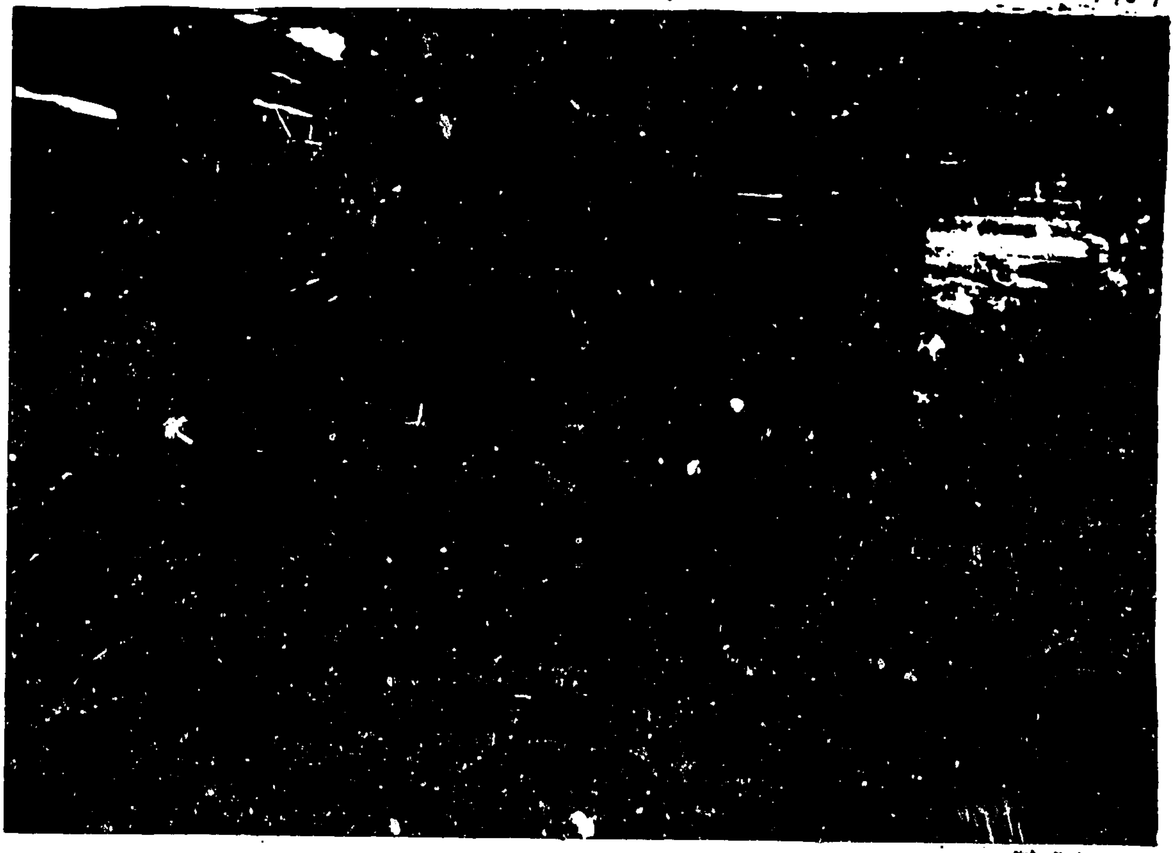
UTC's strength lies, as is the case for most of other large companies, in exports of grapes and apples. The program for 1987-88 contemplates 4.1-million boxes of grapes, compared to 3.2 million the previous season, and 2.5-million boxes of apples, compared to 1.6-million. Exports of apples, pears, and stone fruit will receive a boost with the construction of the first controlled-atmosphere UTC unit.

"Controlled atmosphere serves well the marketing strategy of those exporters, like us, who export to the Far-East and Arabia June through August," Oussama said, "but, in my opinion, more important than this technology is hydrocooling."

The complete production of UTC apples, pears and stone fruits goes through hydrocooling before entering cold storage in an effort to keep the cold chain going without disruptions. Another substantial investment made by UTC was the purchase of 23 refrigerated trucks equipped with Thermoking units.

"We also invited Thermoking technicians to teach maintenance and repairs," Oussama said, saying his company is a training ground for Chilean specialists in all aspects of fruit production and exports. And, he concludes proudly: "Despite being relatively new in the market, our company can easily compete with the best-known brands in the world."

The Packer Nov 14. 1987



[illegible]/special

A shipment of asparagus begins its long trek to [illegible] supermarkets on the Valdes family farm about 18 miles southwest of Santiago, Chile. The boxes are loaded onto a vintage truck for the first leg of [illegible], to the David Del Curto SA packinghouse. Chilean growers and exporters are looking even farther south to develop plantations of apples, pears, kiwifruit, asparagus and other commodities. (For more on the Chilean deal, see Chilean Produce, section C.)

Chilean growers aren't about to sit back and rest on their laurels, but instead are putting their best efforts forward to overcome obstacles and uncover

New deals

By [illegible] Mark
Special to The Packer

SANTIAGO, CHILE — Chilean fresh vegetables and exotic fruits are among new deals on the agenda in Santiago. And if companies can uncover export markets as accepting as those for traditional fruits from Chile, the potential could be phenomenal. But first come the obstacles.

Eduardo Armstrong, general manager of Armstrong S.A., is working with Pro-Chile, the government export promotion agency, to make experimental sea shipments of tomato, lettuce, beet root, carrot, pepper and celery.

They are testing each stage, from the varieties that best resist the journey, the packing products and the right containers, to the markets at the other end.

Armstrong is confident Chile can compete with Mexican tomatoes in both quality and cost. But first Chile has to meet USDA [illegible] requirements, which it is [illegible] it can do.

Currently, shipments are only going to Canada, which has less stringent controls.

Asparagus already is an established export — nearly [illegible] last season. Chile sends the easy-cook green variety to the United States and Europe. Only the German market prefers the white variety.

Diversifying

Hortifrut, a company specializing in berries, is experimenting with endive for U.S. and European markets. A winter crop, endive complements spring asparagus and summer-autumn berries as well as maximizing use of processing plants and the workforce.

Hortifrut also is starting to cultivate baby vegetables — squash, corn and carrots — mainly for the restaurant trade.

Now that better container systems are making ocean freight an option for the more perishable vegetables, which means avocados, tomatoes, and other salad stuffs make a more attractive deal for Chilean growers.

Higher volume production in turn makes more frequent and bigger shipments possible, and helps bring down freight charges.

That encourages growers and helps them break out of the vicious circle of an infrequent shipping service that creates higher charges, lower volume and fewer growers interested in producing for export, Hortifrut president Victor Moller said.

Armstrong also ships exotic fruits from Chile, such as cherimoyas, loquats

(See Deals, page [illegible])

① F+V Mktg: Competition (library)
② Ag Commod: Tomatoes. (library)
③ Ag Commod: Asparagus (library)
④ Ag Commod: Tree Crops (tropical) - library.
⑤ Ag. Commod: Oriental Veg/Exotics (library)
⑥ Tech/Transport/Charter (-return to PDM

① F+V Mktg: Concession (Library)
② by Commod: Tomatoes (Library)
③ " " : Asparagus (Library)
④ " " : Tropical Tree Crops (Library)
⑤ " " : Oriental Veg. (Library)
⑥ Tech / Transport / Charts = (return to PDA)

Market sensitivity: perspective on Chile

By Tom Karst
Markets editor

KANSAS CITY - Few things in life are certain, but it is highly likely the United States will receive as much, if not more, Chilean fruit this season as last season.

About 80 million boxes of fruit will be exported to world markets from Chile this season, and the United States figures to receive at least as much as last season's record of 35 million packages, according to Alfredo Woerner, commerical counselor at the New York City office of ProChile, an export promotion arm of the Chilean government. Total Chilean fruit exports during 1986-87 were 72 million packages.

Woerner, having just returned from a trip to Chile Nov. 6, said currency exchange rates are more favorable for Chilean exporters to sell to Europe but fruit volume to the United States likely will increase nonetheless.

Woerner equivocated on the extent of the increase and observed that grapes are the volatile item in the export mix.

"We have reached a certain level where it is getting sensitive; it's difficult to foresee how much more we are going to sell (in the United States)," he said. "The crop increase is there — the question is where to push and to sell."

Auto similarities

He likened the Chilean situation to the transformation in American attitudes about trade. "When the Japanese automakers were only exporting about 20,000 cars a year to the United States, nobody said a word," he observed. But now, when one in five cars is made in Japan, Woerner said many Americans object — a reality he sees today in some views about Chilean grape imports.

Part of the solution to the continued growth in worldwide Chilean grape exports would be the opening of the Japanese market.

"It's not official yet, but the possibility exists, and we are comfortable that we are going to have a positive response," he said, adding the decision may become official in December.

Provided the ruling is favorable, export potential this year to Japan for Chilean grapes may be somewhere between 500,000 and 1 million packages, Woerner said.

Looking to Europe

Regarding this season's 8-million package increase, he said Europe perhaps can absorb a greater proportion of fruit this season but the U.S. market almost surely will share in the increase.

Woerner said asparagus has experienced continued growth in the country, with production both in the Santiago area and 500 miles south of Santiago.

"There is also a huge development in the berries," he said, noting that raspberries, blueberries, blackberries and strawberries have been cultivated extensively.

Raspberry harvest is active from late November through January and starts again in March with the second crop. Blackberries are harvested most heavily during the January through March period, Woerner said.

Woerner said kiwifruit also is coming on strong in Chile, but said export potential for that crop rests in Europe, not the United States.

"Due to the currency situation, it's more favorable to the European markets where the per capita consumption is by far higher than the United States," he said.

Although tomatoes have not been approved by the USDA for export to the United States, he said it is conceivable that Chile may develop tomato varieties to sell to North America during the winter.

"We see the quality of the tomato marketed here is poor quality — the taste is not there," he noted. He said some exporters in Chile believe they can provide a vine-ripened tomato to North America — even by ship.

Deals

(Continued from page 1A)

and persimmons. Production of all three fruits is relatively small, and the markets, too, are limited by higher costs.

Persimmons, which have a defined market among the Jewish community in New York City, look the most promising. Plantings have begun to rise and production should increase within the next three to four years.

Cherimoyas are difficult to handle. Like loquats, cherimoyas dehydrate and spoil quickly, which makes producing and shipping a high-precision exercise. The fruit size — a kilo or more in export-quality fruit — places cherimoyas at the top end of the market at around $8 a unit, Armstrong said.

Pistachios and Asian pears

The Chileans are working to do things the other way around, too — experimenting with products that already have a market to see how they do in Chile.

The state University of Chile's agricultural science department under Professor Gaston Bruna has been experimenting with pistachios.

Pistachios grow well in Chilean soil and climate conditions. Now the question is whether the local growers can produce and ship them at a low enough cost to compete with Iran and the United States.

Asian pears are another product local producers are trying.

The university also is investigating the peach and plum markets to pinpoint changing consumer tastes.

Much of the current research in the industry worldwide, Bruna said, is concerned with the growing demand for tastier fruit and changing consumer tastes. The traditional Chilean fruit growers are inclined to be satisfied with producing top-quality fruit, without asking themselves whether it meets market demand, Bruna believes.

"I'd make them work for a month in a women's clothes shop," he chuckles, "just so they'd get the point that consumers have a point of view, and a strong one, and they can change their minds, fast.

"There are fashions in fruit just the same way. So even if the productive cycle of a fruit tree is around 15 years, we have to reckon that its product life cycle could be less, around eight to 10 years."

At Fundacion Chilena, a private research center, Mauricio Meyer said local plum growers have to gear up with the earlier and later varieties that provide a longer season.

Currently, 70 percent of Chile's plum exports hit the market within a three-week span — driving prices down sharply.

In the apple market, he said, the Europeans in particular are prepared to pay higher prices for more flavorful fruit. Greater acidity and a crisp texture are both important characteristics, while color and size, the big selling points in the United States, are less crucial.

Helen Hughes/special

Dino Ruzzo (right) and his youngest son, Mario, inspect their kiwifruit crop on their farm just outside Santiago, Chile. Kiwifruit, along with berries, is coming on strong with Chilean exporters. Experts say the primary export market for kiwifruit is Europe because of favorable currency exchange rates and high per-capita consumption. However, Victor Moller, president of Hortifrut, is concerned that the current craze for kiwifruit among producers will mean massive overproduction and a market that cannot keep pace.

Grape production in Chile follows U.S. patterns closely, with 75 percent of plantings producing seedless varieties. This year's crop will be much the same as last year, with Thompson Seedless accounting for around 50 percent of total exports.

Future challenges

The way forward for the Chilean fruit industry, according to Hortifrut's Moller, is to diversify its products to try to satisfy the small as well as the big markets. It should provide exotic fruits for a gourmet market, as well as table grapes and peaches for mass consumption.

That way, too, Chilean producers can avoid swamping the market with a single product. Moller voiced concern that for example, the current craze for kiwifruit among producers will mean massive overproduction and a market that cannot keep pace.

Enrique Bruzzone, general manager of Coopefrut agreed. The current phase of mass production is driving the producers to standardize with just a few varieties.

But attention to detail, to specialized products with a limited but identifiable market, will pay dividends over the long run for the industry as a whole, Bruzzone said.

813.46 Tech/Transport/Chilean Line (return to PDM)
813.7N " " /Ports/Philadelphia (")
813.7R " / " / " /Tampa (")

Importers won't have long wait for ships to come in

KANSAS CITY — If all goes according to plan, the first Chilean fruit vessel of the season will arrive Dec. 7 at Philadelphia's Tioga terminal, according to a spokesman for New York City-based Chilean Lines Inc.

The common carrier's first Chilean vessel was anticipated to start loading Nov. 23 in Valparaiso and also will take on fruit at a port farther north in Chile, according to Gerardo Guzman, officer of Chilean Lines Inc., a subsidiary of South American Steamship Co.

Guzman said Chilean Lines will make about 45 to 50 calls into Philadelphia, which will be the shipping line's only destination with Chilean fruit.

Chilean Lines Inc. is the only common carrier in the Chilean deal, he explained, although two other private carriers also transport fruit.

"We intend to carry 18-million cases of fruit, or about 180,000 tons; that is about a 15-percent increase from last year," he said.

The reason Chilean Lines will concentrate its calls in Philadelphia, Guzman said, is because it is leasing space in the Tioga Terminal through a subsidiary, Tioga Fruit Terminal Inc. That move, which represents a change from last year, will give Chilean Lines more efficiency and independence in the operation of the terminal.

Guzman said Chilean Lines has about 36 importer clients who keep the reefer vessels busy throughout the import season.

The cost of operating the vessels ranges from about $30,000 to $35,000 per day, Guzman said.

New Jersey port

Ike Taubman of Jac Vandenberg Inc., New York City, said Nov. 9 that the importer firm — the agent for Chilean fruit from David Del Curto S.A. in the Eastern United States — expects to receive fruit on the first few Chilean Lines vessels, and by late December rely on charter vessels.

In late December, Taubman said, Vandenberg will begin receiving fruit from charter vessels that will unload at the Holt Terminal in New Jersey.

Taubman said about 20 vessels are expected into the Holt Terminal this year, and he noted that every other one will offload some fruit at Cape Canaveral in Florida.

West Coast outlook

Barbara Mertz of David Oppenheimer California Inc., Visalia, Calif., said the first Chilean fruit ocean shipment to the West Coast is anticipated by Dec. 26 or 28.

Mertz said preliminary indications show that Oppenheimer, which is the West Coast agent for David Del Curto, may increase its volume from 2 million to 2.5 million packages.

Tom Murphy of Stevedoring Service of America, Los Angeles, said the Lauritzen Co. and the Trans Reefer line are two shipping lines that unload fruit in Los Angeles, with volume last year of about 15 and 10 vessels, respectively.

Mike Hubbard of Merit Steamship Agency Inc., agent for Lauritzen Lines, said a 15-percent to 20-percent increase in volume is forecast for the shipping concern on the West Coast. Hubbard said the first vessel tentatively is scheduled to arrive about Dec. 28.

Meanwhile, a spokesman for Merchants Refrigerating for Tampa, Fla., said the first vessel into Tampa is anticipated by the middle of January. Sources said about 10 vessels unloaded in Tampa last season.

The Register Nov 19 1987

Photos by Helen Hughes/special

A worker (left) at David Del Curto's asparagus packinghouse in Coriero de Tango puts sized product in its corresponding size box. Meanwhile at the same plant, a line of workers sort stalks as they move down the packing line. Low-cost labor is one of the advantages afforded Chilean producers. Asparagus exports from Chile are expected to total about 800,000 boxes this season, with predictions of 1-million boxes in 1988-89.

① Ag Commod.: Asparagus (library)
② FTV Mktg: Competition (library)

IV

ASPARAGUS YIELDS EXPORT ADVANTAGES

Commodity filling gap before Chilean fruit season's peak

By John M. O'Brien
Special to The Packer

SANTIAGO, CHILE — Asparagus production offers one major advantage to Chile growers and exporters: their harvest, processing and export runs from late August until November and December, a period in which little other activity takes place in the Chilean vegetable industry. Asparagus is a viable alternative to maintain the industry in anticipation of the grape and fruit season that begins to peak in December.

A mature asparagus field yields more than 1,810 [illegible] per acre. The vegetable is processed in the day and arrives three to four days later on international markets.

"Hotel chains in the United States, Canada and Europe are the main buyers of Chilean asparagus," said Aldo Guida, marketing manager of Standard Trading Co. "The boxes of 6 kilos (5.5 kilos net weight) are shipped air freight with average costs of $1.45-1.50 per kilo New York."

Guida said Standard Trading seriously considered shipping by sea in containers equipped with controlled atmosphere, but the cost was about $1 per kilo, hardly an improvement over current air freight rates when considering the cost of the new equipment. An effort also was made to export air freight to Japan, but the effort soon was discontinued because it turned out to be uneconomical.

Chile has some 3,400 acres planted to asparagus for shipment of 282,000 boxes during the 1986-87 season. Exports are expected to jump to about 300,000 boxes during the current season, and [illegible] expected to reach [illegible] in 1988-89. The main exporters are Standard Trading, Unimarc, United Trading Co. S.A., FruPac and David Del Curto S.A.

"At Standard, we are planning to double our output this season to 60,000 boxes," said Guida, adding the firm is constructing a 120,000-box asparagus plant at Chillan, some 300 kilometers south of Santiago for startup in 1988.

Guida said Standard Trading was the first company to begin exporting Chilean asparagus in 1980 after inviting Frank Takatori from the United States to teach growers production techniques. Takatori recommended specific seeds, and most growers now import their seeds from Takatori and Brian Benson.

Like Standard Trading, other producers and exporters are moving farther south to benefit from improved prices during the late season. A special case is United Trading, a company that shipped 22,000 boxes last season and now is planning to ship 40,000 boxes. United Trading constructed the southernmost asparagus plant in Chile in the region of Osorno, some 1,000 kilometers south of the capital. The Osorno plant has a processing capacity for 1,000 kilos per hour and cold storage for 3,000 boxes.

"We harvest, pack and bring the asparagus in refrigerated trucks to the airport in Santiago where the product is sent to our foreign markets," said Ricardo Corssen, production manager at United Trading. "The higher land transportation costs, from Osorno to Santiago, is easily compensated for the good prices we get in the United States during December."

Corssen also said several agro-industrial companies, such as Liquid Carbonic and Agrofoods, now are buying asparagus and other vegetables from local growers and exporters to process and sell as frozen vegetables in U.S. and other markets.

A typical Chilean asparagus field is harvested in two shifts: from 7 a.m. to 10 a.m. and from 4 p.m. to 7 p.m. The asparagus is cut and loaded in cases of 9.5 kilos. After quality control at the packinghouse, only 30 percent will be admitted for export.

Most exporting companies have hydrocooling facilities to reduce temperature before packing to 36 degrees from 57 to 62 degrees. At the packinghouse, the stem is cut about an inch reducing the average size to about 9 inches. Meanwhile, the produce is sprayed with [illegible] water containing 100 ppm chlorine. [illegible] operators classify the asparagus according to size and pack it in plastic or wood boxes for export. A wooden box costs about 55 cents compared to $[illegible] per plastic box. The boxes then are transported to the airport in refrigerated trucks or trucks covered with thermal blankets. Before entering the airfield, a team of USDA and Chilean inspectors perform a phyto sanitary control of the product.

The U.S. officials analyze a 2-percent sample of the export volume, while the Chileans analyze a sample that corresponds to the cubic root of the shipment.

Del Curto and Dole asparagus boxes are opened for inspection by Chilean and USDA personnel (above). Because Chilean exporters want to avoid overheating their product, trucks carrying the asparagus arrive at the inspection post only about a half hour before scheduled flight time. After having passed inspection, Del Curto product (right) is prepared for its immediate flight to the United States or other export destinations.

① Ag Commod: Asparagus (Kitzman)
② Comparative Adv. (return to PDH)
③ 811.4 Tech / PHH / Controlled Atmo.

① Fr V Mktg. (Library)

② 820 Tech/MTAG/ Prospective Members.

Importers

(Continued from page 12C)

Philadelphia: Frupac has instituted an aggressive air freight program, said sales vice president Chris Gardella. He began with asparagus, switched to raspberries and planned to follow with early season tree fruits and grapes.

The air-freight program also is essential to Frupac's tree-ripened fruit program. Frupac added Bill Hamill in the sales department this summer and hired more people for the research and development department, Gardella said. Frupac also is looking to new countries for diversification. And the firm is upgrading its computer system.

■ T.G.T. EAST, Philadelphia: Kevin Storey, formerly with Winter Fruit Distributors Inc., opened T.G.T. East Oct. 5. It is the East Coast arm of T.G.T. Inc., San Francisco, and will be a broker-shipper handling Chilean and some domestic deals. Storey said he will buy and broker from various importers, giving the customer better service because he is independent.

■ JOHNSON & SBROCCO INTERNATIONAL INC., Philadelphia: Johnson & Sbrocco are Bob Johnson in the Rockaway, N.J., office and Harold Sbrocco in the Philadelphia office, each with about 13 years of experience in the produce industry. They formed the company last July to be an importer and broker. Sbrocco said the firm handles offshore deals, the Chilean deal and other imports in addition to a few domestic deals. Jeffrey Young assists Johnson; Sbrocco also plans to hire an assistant.

■ SURVEYR UNLIMITED INC., Philadelphia: Since the death of its president, vice president of sales Steve Sumpson and vice president of operations Ben Alter are running the company. They have updated the computer system to provide more-detailed information for their clients.

They have added a year-end summary of growers' performance so growers can improve their operations. Last year the firm had three major clients, and Simpson wants to expand this year. He is looking into a training program for firms that want to keep inspection in-house.

■ SEALD-SWEET SALES INC., Tampa, Fla., is a sales agent for Frupac. Seald Sweet sells primarily grapes, apples, peaches and pears for Frupac and will market between 650,000 and 700,000 boxes of Frupac's fruit this season.

The Packer Nov 14 1987

Importers maneuver to stay competitive

Firms shuffle personnel, equipment

By Kathy Means
Eastern editor

PHILADELPHIA — As is always the case, the Chilean deal has seen some firm-hopping among salesmen and other changes on the importer side in the last year, including new entries into the deal. Among these changes are:

■ TRADE PATH INTERNATIONAL INC., Fort Lee, N.J.: Since joining Trade Path as president Sept. 1, Pat Estrada has made some big changes in light of anticipated larger volume. He is improving the existing computer program. He has computerized the pier and cold-storage locations to improve inventory control.

Trade Path will receive fruit in California, but all business will be handled from Fort Lee, Estrada said. His new sales force includes Mike Cora, Alan Elkin and Craig Padover, all of whom were with other firms involved in the Chilean deal.

Trade Path deals exclusively with two labels — C&D and Apricot. In Chile, the exporter Commercial y Desarollo has bought a huge facility and is building a controlled-atmosphere storage for 300,000 boxes of apples.

■ QUALITY SALES INTERNATIONAL INC., Philadelphia, and MENDELSON-ZELLER CO., INC., Fresno, Calif.: Mendelson-Zeller has entered the Chilean deal through Quality Sales. Mendelson-Zeller will be the importer of record and the marketer, said Mike Storey of Quality Sales.

Quality Sales will continue to sell fruit, but this year it will be as Mendelson-Zeller's representative. Quality Sales' role will be managing the deal for Mendelson-Zeller, handling procurement, receiving, distribution, management and liaison activities between the importer and exporters. Mendelson-Zeller will import from 10 to 15 independent suppliers — some small-to-medium shipper-exporters, some large exporters, Storey said.

■ HILLCREST SALES INC., Philadelphia: Hillcrest has handled fruit from Curumon in Chile for the last five years. Curumon has left the fruit business, said Hillcrest manager Irving Gates. This year, Hillcrest will represent five other independent fruit companies in the Chilean deal.

■ UNIFRUTTI OF AMERICA INC., Philadelphia: Jim Durkin, formerly in charge of operations and transportation, has moved to the sales desk. He has been with the firm since it opened four years ago. President Andy Economou said Unifrutti will handle cantaloupe from Chile this year after successful experiments last year. The cantaloupe deal starts in mid-December and lasts two months.

■ FINEST FRUITS INC., New York, N.Y.: Finest Fruits handled endive (Belgian-type) from Chile this year, according to import manager Robert Crespo. The firm had been looking at the deal for years, he said, and this year the quality, color and packaging were like the Belgian product. Crespo did not expect a lot of volume — about one container a day.

If the grower finds the results satisfactory, Finest will do more volume next year, Crespo said. The deal ran from early August until mid-October or late October.

■ WINTER FRUIT DISTRIBUTORS INC., Philadelphia: The rumor that Winter Fruit was to be acquired by a multinational firm is false, Peter Warren of Winter Fruit said. There were discussions with a multinational firm, but the deal did not go through. This year it will be business as usual for Winter Fruit and Frutanex, the exporter it deals with in Chile. Warren said Winter Fruit is becoming more aggressive in third-country (non-Chile) sourcing.

■ WM. H. KOPKE JR. CO., INC., Lake Success, N.Y.: John Mayback rejoined the Kopke sales force Oct. 1. He had been with Kopke for three years before leaving the firm a year ago.

■ GELCO INTERNACIONAL, S.A., Miami: Gelco, a cut flower importer, began diversifying two years ago. Last year, the firm imported 40,000 flats of raspberries from Chile. This year, controller and salesman Michael Parr expects volume to reach 60,000 flats.

He said the firm has considered importing asparagus, cherries and fresh herbs. Gelco has been offered a soft fruit and grape deal, but the company does not believe it is compatible with its current lines, Parr said.

■ MARGLO PRODUCTS CORP., New York, N.Y.: Dick Drummey joined the company Oct. 15 as sales manager.

■ UNITED MARKETING & SALES INTERNATIONAL CORP., Fort Lee, N.J.: New president Luis Carrasco expects fruit volume to double this year as Unimarc and other exporters increase their volume to UMS. Volume should double from 600,000 packages last year, to 1.2 million this year, he said, which means increasing the staff in all areas.

He and Unimarc are working on a quality production program that involves not only better-quality fruit but better quality in packaging, information and the whole operation. Agronomists and packaging specialists are adapting the operation in Chile to U.S. needs. And the company is continuing to computerize its information.

■ FRUPAC INTERNATIONAL CORP.,

(See Importers, page 13C)

Q F+V Mktg: Competition (Library)

Del Curto sets its sights higher

Firm eyes new production marks

By John M. O'Brien
Special to The Packer

SANTIAGO, CHILE — In mid-1987, David del Curto S.A. inaugurated its new headquarters in Santiago, fulfilling the dream nourished by the founder of the company, David del Curto, who died in a helicopter crash in 1965. The new white-and-blue building is home to the number-one Chilean fruit-exporting company. Despite a recent split of one of its main partners, del Curto is alive and kicking and ready to set new production records during the 1987-88 season.

"The output losses that result from the group of northern growers leaving our company will be recuperated with higher output from our own plantations and new growers coming to work with us," said Rodrigo Duran, del Curto's export manager for the United States and the Far East. "We will probably not grow this season at a tremendous rate, but we certainly will grow."

Duran said del Curto's 1987-88 program expands the output of 11- to 11.5-million [illegible] which grapes will represent [illegible] boxes. Last season, del Curto exported 9.8-million boxes, including 8.3-million boxes of grapes.

Improved facilities

Del Curto is preparing for production growth in the forthcoming seasons, improving its facilities, which include seven plants with precooling and cold storage, for a total capacity of 30-million boxes. The company is adding controlled-atmosphere chambers, hydrocooling, digital control systems, electronic sizing and color sorters to most of its plants and implementing the first climatized packing in Chile. With this technique, the conveyors take the pallets directly to cold storage.

"The Chilean supply of fruits with a high return, such as Ruby Seedless, red and black seedless, continue growing at a rate of 10 percent to 15 percent," Duran said, adding that the opposite is happening with the varieties which seem to have saturated the market, such as Emperor, Ribier and Almeria.

"The Chilean output growth will be absorbed by our traditional markets and by new emerging markets in the Far East. There, Japan appears as a very interesting possibility," he said.

Ongoing talks between the Chilean government and the Japanese are considering an agreement for initial table grape shipments of 500,000 to 1-million boxes, restricted to three varieties — Thompson Seedless, Flame Seedless and Ribier. But del Curto sees big growth possibilities in exporting vegetables to the Japanese, who are large consumers of green vegetables and kiwifruit.

Marketing manager Andres Orsini defends the quality of Chile's Flame Seedless grapes. "I believe the problems have been blown out of proportion," he says. "There have been some mistakes in handling given the fact that in Chile this variety is new compared, for example, to the Thompson Seedless."

Quality control

One of the main issues being debated among Chilean exporters is quality control. "Fortunately," Duran said, "Most of these exporters are aware that when they enter new markets they are not selling their own individual brand but rather Chile's produce. They know that a poor-quality product will harm all of us."

It remains to be seen, however, what the result will be when the Chileans arrive on the Japanese market, where the national consumer has traditionally been considered a tough and difficult customer.

But at this moment, the most pressing problem for Chilean exporters, especially table grape exporters, is the Flame Seedless, a variety that has been planted at an increasing rate during the past three years. Flame has been criticized for poor quality in size and color by broad industry sectors, including U.S. distributors, the Ministry of Agriculture, Fundacion-Chile and even the Chilean Embassy in Washington.

"I believe the problems have been blown out of proportion," marketing director Andres Orsini said. "There have been some mistakes in handling given the fact that, in Chile, this variety is new compared, for example, to the Thompson Seedless with which we have been working for the past 20 years."

Marketing problem

Orsini sees it essentially as a marketing problem: "The future of table grapes in the United States is seedless," he said, "and Flame consumption is not yet close to consumption of the Thompson variety. I think those consumption levels can be matched with adequate marketing."

Duran attributes part of the problems suffered by Flames in the U.S. markets to the program restricting the use of SO2 pads.

"When the program was launched," he said, "it coincided with a rainy spring and the beginning of massive Flame exports to the United States. At that point, the exporters tried to reduce to a minimum the use of pads, bringing additional risks of botrytis to the product. It should be noticed that this problem did not only affect Flame but also all other Chilean varieties."

Meanwhile, del Curto is preparing to face the forthcoming season with a determined stand: To continue as the industry's leader, a position their executives attribute to hard work and quality production in more than two decades dedicated to the fruit-exporting business.

MARKETING

FOOD

New Rx: Try an Atemoya a Day

Tropical fruits take off

Plant avocados, everyone urged Marc Ellenby. It was 1980, and Ellenby had just purchased eight and a half acres in subtropical Dade County, Fla.—prime land for what was then a thriving avocado industry. But it wasn't avocados that had lured Ellenby from the Midwest to Florida. Instead he took a chance with sweetsop, or sugar apples, a fruit beloved in much of the world but not a commercial crop here until Ellenby and his wife, Kiki, harvested their first 4,000 pounds in 1982. Today the Florida avocado industry is flat; and the Ellenbys, working some 70 acres, run one of the largest independent tropical-fruit businesses in the state.

Tropical fruit is such a new enterprise that many Americans have never even heard of some of the Ellenbys' crops. Along with sugar apples they grow atemoyas, carambolas, lychees, longans, passion fruit, mangoes and three kinds of sapote, as well as other fruits for experimental purposes. Much of their fruit is shipped to ethnic- and specialty-food markets, but a few items have begun to show up in grocery stores; and for the second straight year Harry and David, the Oregon fancy-fruit mail-order company, will be offering carambolas along with the usual pears and grapefruits. Production throughout the industry is still low and prices are high: carambolas, for example, can run from 79 cents each to $5.99 a pound. But J.R. Brooks & Son, one of Florida's largest tropical-fruit shippers, marketed 32,000 pounds of atemoya this year—double the amount sold two years ago—and expects to ship a million pounds of carambolas, up from less than half a million pounds in 1986. "To say that we love tropical fruits is an understatement," says Marc with a grin. "This is really an exciting time for all of us in the industry. The rare-fruiters are out of the closet."

Both Marc, 37, and Kiki, 36, were raised in Chicago and never even turned over a shovelful of dirt until they graduated from college and moved to the shores of Lake Michigan, where they taught Transcendental Meditation and planted a garden. "We were hauling all this soil, we didn't know what we were doing, but Marc loved it," says Kiki. "He decided he had found his niche." Going on to study horticulture at the University of Florida, Marc became entranced with tropical fruits, especially the exotic backyard trees that Floridians had never bothered to cultivate commercially. The success of those first sugar apples—"We took them to Miami, opened a box, and all the Cuban grandfathers went absolutely wild"—convinced him there was a market for fruits that had long been ignored by local growers.

THOMAS PUREN

On beyond kiwis: *The Ellenbys with fruit*

Slurpy flesh: Florida's tropical fruits look weird and taste sensational. The sugar apple is the creepiest: gray-green and bumpy, it looks like a thousand-year-old pine cone; but cut it open and you'll find thick, slurpy white flesh so sweet you'll have to brush your teeth after eating it. The sugar apple is too fragile to be transported very far—the Ellenbys sell their entire crop to Miami's Cuban and Southeast Asian populations—but it has a more decorous and commercially viable offspring called the atemoya, a hybrid raised to be firmer, less sweet and not quite so dazzlingly tropical in character. Lychees, the small, reddish fruits with the rough jackets that can be slipped off easily to reveal loose, translucent flesh, taste like melon that's been dipped in a sweet white wine; their cousin the longan is said to be similar in looks and flavor. Passion fruit is about the size of an egg but light as a Ping-Pong ball. When it's ripe the skin wrinkles unpleasantly, but that's the time to cut it in half and spoon out what's inside: a slippery and brightly flavored pulp clinging to little seeds you can crunch. All these fruits are remarkable not only for their novelty but for the intensity of their flavors. At a time when more and more of our mass-produced fruits taste like white bread, the tropicals remind us how extraordinary a fruit can be before agribusiness reaches it.

Alas, agribusiness has already reached the best known of Florida's tropical fruits: the mango. More than a hundred varieties are grown in the state but only two—the Tommy Atkins and the Keitt—are likely to show up in your neighborhood market. Neither is the best Florida has to offer, but what has happened to the mango is exactly what happened to the apple: commerce has settled on a few hardy varieties to the virtual exclusion of others. "The Tommy Atkins comes in early, in June, and gets a beautiful red color on it," says Kiki. "That's what the American housewife wants to see; that's why the Red Delicious apple has become the apple-a-day." The Ellenbys have decided to try planting a yellowish-green variety from Thailand, to see if Americans can be wooed to better mangoes. "We'll go to the Thai and Vietnamese markets first, because they know the fruit, and then we'll see if we can get into the gourmet market," says Marc. "It's taking a big chance—these mangoes won't be as attractive as the red ones—but they'll taste great."

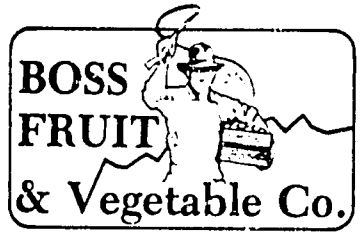
Right now the hopes of the tropical-fruit industry are fixed on the carambola, or star fruit. A firm, yellow oblong with five fins—it can be cut in slices that look like little stars—the carambola is as juicy and zesty as a citrus fruit. It needs no peeling; the seeds are inconsequential. It's a high-yielding fruit that will ripen fully on the shelf, and the tart variety that has been on the market for a couple of years is giving way to a new, sweet variety. "The plans for the carambola are that it's going to be another kiwi," says Kiki. "Everybody's jumping on the bandwagon and growing it." The Ellenbys will pick some 80,000 pounds by the end of the season and, over the next five years, Marc predicts, the Florida crop will increase more than fivefold to some 7 million pounds annually.

Sweat and ambition: The Ellenbys still meditate every day—in fact they attribute a lot of their success to the practice—but they work their farm with a great deal of very un-'60s sweat and ambition. Constantly on the lookout for the exotic fruits of the future, they experiment with whatever they see growing around them. And once in a while they come up with a fruit plainly destined for greatness. Almost offhandedly, for instance, they offer a taste of the muntingia—no big deal in a Florida backyard, perhaps, but for the rest of us one of the most wonderful fruits in the world. About the size and color of a cranberry, the muntingia has a delicate, edible skin around a wispy bit of pulp that gives a burst of startling, nutlike flavor. "Doesn't it taste like Froot Loops?" says Kiki. Well, maybe the kind they make in heaven. If the Ellenbys decide to go ahead and cultivate the muntingia, it will be packaged like raspberries: a few pricey morsels to a box. Watch for them.

LAURA SHAPIRO

Newsweek, 1987

Attachment H



L.D. 208-459-2000

February 9, 1987

FOR THE FRESHEST ENCOUNTER -
Visit our Booth at United, Orlando!

I wish to extend my thanks for the support given by the individuals and the companies with whom we traded during the 1986 season. Also, on behalf of our member growers and shippers whose fruit we distribute, thank you for "making the deal".

Our member shippers: **Payette Valley Fruit, Payette, ID; West Wind Orchards, Ontario, OR; J. C. Watson Co., Homedale, ID; Evans Orchards, Emmett, ID; McMullin Orchards, Payson, UT; Delta Packing, Lodi, CA; and K & K Farms, Wapato, WA;** with their confidence and cooperation, I initiated a new marketing company which has innovated many new ideas for our present and future customers.

We look forward to the new crop and, Lord willing, successful markets for both your company and ours. It is our intention to be the best Western source for retailers and wholesalers who participate.

Trading with **Boss Fruit** will enhance for you many opportunities in 1987. Our product line includes stone-fruit as well as apples from ID, OR, UT, CA, and WA districts.

Our "plum" varieties consist of early Italian, late Italian, Friars, Empress, and Presidents. We have significant supplies of Cherries, Peaches, Nectarines, Grapes, Onions and Potatoes. Our famous **"Idaho Crunchers"** include Jonathans, Red Delicious, Double Red Romes, and Golden Delicious. See our Blue Book listing on page 320 for specific start dates on all merchandise.

Boss Fruit is a major source for plums in August-September. To those attending the **United** convention in **Orlando**, do stop by our exhibit and get specific about your plum requirements. Daniele Nicholes, traffic manager, can arrange drop shipments to your location. Bruce Nicholes, assistant manager, is capable of securing for you the items you require. **We got you covered!**

Come enter our **daily prize drawing!**

My marketing strategy is Based On Service and Satisfaction!

Thanks,

P. N. Nicholes

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* Autodial for shippers and truckers with history access.
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& Bruce E. Nicholes, asst. mgr.
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POCantRe ..... 100M XXX

EXPOSITION

EXPOSITION

In addition to the trade forum and educational sessions was the trade show or exposition itself, featuring several hundred booths where one could sample foods, view the latest in packaging or state-of- the art wrapping materials, and generally rub elbows with the shippers and service representatives of the industry.

A great deal of brochures and materials were gathered and sent to the PROEXAG office, some titles of which are listed below:

Stone Container Corporation, "Packaging Products"

Package Research Laboratory, "Wirebound Boxes and Crates"
"Wirebound Du-alls"
"Cutting Costs by Pallet Crate Handling Fruits and Vegetables"

U.S. Dept. of Agriculture, "N.Y. City Wholesale F & V Report"
"Fruit and Veg. Truck Rate Report"
"Fruit and Veg. Grading"
"Facts About:The F & V Grower & PACA"
"PACA Trust and Guidelines"
"How PACA Can Help Your Food Service Firm"
"The Food Retailer and PACA"
"U.S. Standards and Inspection Instructions for Fresh Fruits and Veg.and Other Special Products"
"Ornamental Crops Nat'l Mkt Trends"
"Nat'l Shipping Point Trends"

PRONET Hotline Reports

Ryan Instruments, "Ryan Model K"
"Ryan Tripmentor"
"Ryan UTI"

Tel-Tru Manufacturing Co., Inc., "Thermometers" and "Recorders"

Owens-Illinois, "The Guide to Powerful Packaging"

Clarksville Machine Works, "Hydrocoolers"

Palm Beach Refrigeration, "The Hydrocooling and Preservation of Fresh Fruits and Vegetables"

Ready-Pac Produce

CONWED, "Tensionet Pallet Wrap"

AMETEK, "Microfoam Protective Packaging"

Tama Plastics Industries, "Tamanet"

The Packer,"Produce Packaging and Materials Handling Digest '87

"

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RECOMMENDATIONS

RECOMMENDATIONS

The UFFVA annual convention and exhibition is undoubtedly one of the best forums for meeting potentially interested companies and acquainting them with the PROEXAG project as well as to nurture those relationships with companies who may already be involved. It is recommended that PROEXAG:

1) plan to attend the UFFVA and PMA conventions each year; and preferably to have two representatives in attendance, as both events attract between 6500 and 8000 participants and this is more easily managed and greater outreach can be achieved with more than one person.

2) utilize the registration list, prior to the event and during the convention to target specific individuals and companies for further follow-up;

3) tap, where possible, the resources of individuals such as Bill Crum, who is well-known in the industry, and others from PMA, UFFVA, and The PACKER to make new acquaintances;

4) encourage Central American export federations to be represented at the convention, either with their own country's booth or in shared regional umbrella; prepare handouts, displays, and produce in an attractive fashion; organize for conducting outreach, handling inquiries, and followup. Bring both federation staff representatives and growers/shippers.

5) followup on contacts generated during the conference; send project brochures, grower/shipper lists, commodity information, etc.

6) make suggestions to the UFFVA organizers in response to their requests for program ideas and speakers for subsequent annual conferences; this is a good way to promote the project.

CHEMONICS

INTERNATIONAL
CONSULTING
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March 1,1988

Agency for International Development
Aquisitions, Room 209, SA-18
Washington, D.C. 20523

Dear Sirs:

Enclosed please find copy(s) of the following documents:

Contract Number: 596-0108-c-00-6060

From: Chemonics International
2000 M Street, N.W. Suite 200
Washington, D.C. 20036

Subject(s): United Fruit and Vegetable Association

Title(s): 1. Report on the United Fresh Fruit and Vegetable Association International Trade Forum and 83rd Annual Convention and Exposition.

Author(s):
1. Pamela D. Michel

Sincerely,

Diane Bejarano

Diane Bejarano
Project Assistant

2000 M St., N.W.
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Washington, D.C. 20036

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Fax: (202) 331-8202
ITT Telex: 440361 CHNC UI