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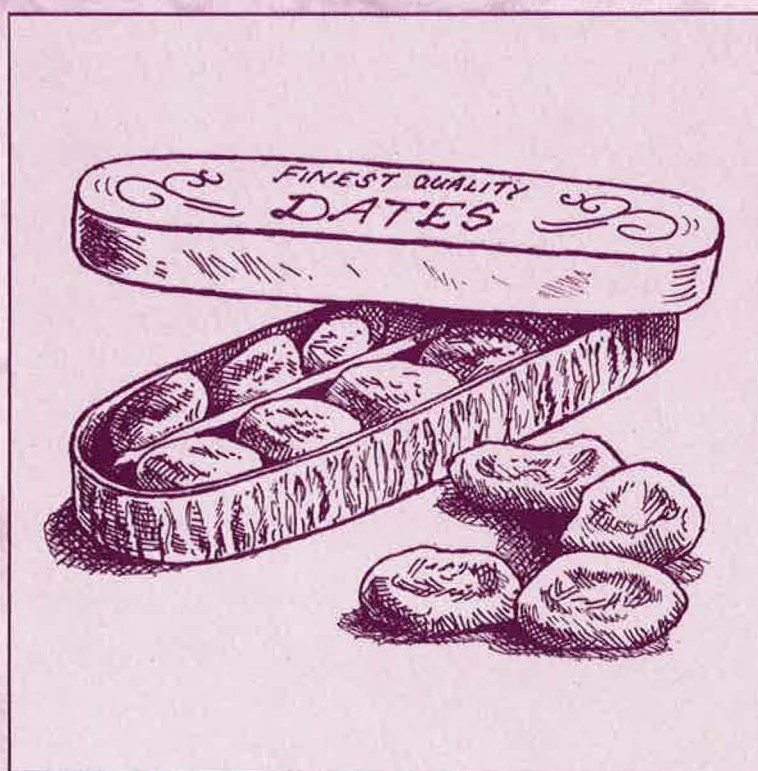


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**THE MARKET FOR DRIED
FRUIT IN THE UNITED
KINGDOM, THE FEDERAL
REPUBLIC OF GERMANY
AND FRANCE**



**OVERSEAS DEVELOPMENT
NATURAL RESOURCES INSTITUTE
BULLETIN**

**OVERSEAS DEVELOPMENT
NATURAL RESOURCES
INSTITUTE**

Bulletin No. 34

**THE MARKET FOR DRIED FRUIT IN THE
UNITED KINGDOM, THE FEDERAL
REPUBLIC OF GERMANY AND FRANCE**

G. HARMAN AND N. ANAND

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ABBREVIATIONS

ACP	African, Caribbean and Pacific States
CALRAB	California Raisin Advisory Board
c. & f.	Cost and freight included
c.i.f.	Cost, insurance and freight included
EC	European Community
ECU	European Currency Unit
FAO	Food and Agriculture Organization of the United Nations
f.a.q.	Fair average quality
f.a.s.	Free along side
f.o.b.	Free on board
GSP	Generalized System of Preferences
ISO	International Standards Organization
LDDC	Least Developed Developing Countries
MIP	Minimum Import Price
OCT	Overseas Countries and Territories
TARIS	Union of Agricultural Cooperatives, Turkey
USDA	United States Department of Agriculture
WHO	World Health Organization

NOTES

All values unless otherwise stated are given in £ sterling.

All weights unless otherwise stated are metric.

The Federal Republic of Germany will be referred to as West Germany.

Maghreb region includes Algeria, Morocco and Tunisia.

CONVENTIONS USED IN TABLES

.. not available

– nil or negligible

Summaries

SUMMARY

This study forms part of a series examining the prospects for selected commodities including those of developing countries in major world markets. The immediate objectives of this report are to assess the present and longer term prospects in the United Kingdom, France and West Germany for selected tropical and temperate fruits in their dried form and to provide existing and potential suppliers with information on various aspects of marketing including product forms, their uses and quality, external trade, trade and distribution structure, prices, tariffs and consumption levels. The three countries were selected because of their importance in the trade.

The trade statistics used cover the period 1982 to 1987. Initial fieldwork was carried out between 1983 and 1985; further trade views were subsequently obtained for the United Kingdom.

The tariff rates quoted in the report apply specifically to products imported into the United Kingdom, but are similar in other EC countries including France and West Germany.

Selected dried tropical fruits

Among the tropical dried fruits, bananas, pineapples and papaya are the most popular. Their main uses are in snack foods, and as ingredients in breakfast cereals or in ready-to-eat meals and desserts. They are sold both separately and in mixes. The main supplier of banana chips is the Philippines whilst Ecuador is the main supplier of dried bananas. Dried papaya and pineapple are supplied mainly by Thailand, the Philippines and Taiwan.

The main retail outlets in the United Kingdom for tropical dried fruits are the health food shops where low sugar content is important and sales reach the peak at Christmas time. This sector is not as important in France and West Germany. Other retail outlets include supermarkets, chain stores, groceries and even open markets which cater more for the sweetened products.

While the volume purchased in the United Kingdom at present is showing signs of stabilizing, in France and West Germany the rate of growth is much higher. In all the three markets, future expansion is largely dependent on the requirements of the breakfast cereal manufacturers.

There is no specialization in the trading functions or in products among the tropical dried fruit traders. They import in bulk generally and only small quantities are imported in retail packs. EC processors generally obtain supplies from domestic stockists rather than direct from overseas. Customs duty can be as high as 25% and is largely dependent on added sugar which also attracts a special sugar levy.

Banana chips, of which about 3100 t were imported from the Philippines into the three markets in 1987, are more popular than dried bananas, imports of which were just over 1000 t in 1987. Pineapple and papaya imports are much lower but cannot be satisfactorily quantified due to statistical problems; they are preferred in the diced form. In addition, cleanliness, taste, colour, texture, additives, sugar content, prices and packaging influence consumers' purchases.

Prices are not usually published but the trade is very competitive. For example, Thai dried bananas fetch significantly lower prices than Ecuadorean, but Philippines papaya and pineapple products are marketed at much lower prices than those from Thailand. Products without added sugar, from most sources tend to be more expensive. Prices quoted in the text are only guidelines obtained from traders.

For the three markets taken as a whole, particularly for banana chips, there are reasonable opportunities for new suppliers who are able to meet the buyers' requirements but within the context of growing price competition.

Dried vine fruits

Of the three vine products, currants, raisins and sultanas, Greece is the main supplier of currants to the United Kingdom, France and West Germany. Greece, Turkey and Australia, in that order,

are the main suppliers of sultanas while the United States, and to a lesser extent, South Africa and Afghanistan, supply the three with raisins.

The total imports per annum for the three countries in vine fruits have ranged between 160,000 and 200,000 t within a gradual upward trend. The trade in currants and other dried grapes is greater in containers of 15 kg and less, than in containers of greater than 15 kg, in the three markets; in the study period the latter was usually 1000 ± 400 t in any single year, except for 1984 when about 7500 t and 1987 when about 51,000 t, respectively, were imported. The main uses are in baking, confectionery, snack foods and breakfast cereals and as a result of the interchangeability, their relative prices often determine their use, although one of the three might often be preferred for certain applications. As a result of the EC support and storage programme there are annually large quantities of these products which are only suitable for pickles, sauces and animal feeds.

The trade in vine fruits is highly regulated and supported by the various producing and exporting countries and, in the European market, Greece is at an advantage compared with non-European suppliers owing to the EC support and the operation of the minimum import price (MIP) which is set annually.

In the United Kingdom, the health food sector in which darker sun-dried products are preferred is an important outlet; in contrast, in France and West Germany the artificially dried and chemically treated, light coloured products are preferred. Overall there is increased consumption of vine fruits in the three markets.

The trade and distribution structure is similar to that for other dried fruits. Companies involved in the vine fruits trade also do not tend to specialize in particular products or in trade functions, although there are still a few specialized brokers in the United Kingdom. The retail trade is undertaken, as in other dried fruits, through the normal marketing channels for food and groceries. Forward purchasing which is a feature of the vine fruit trade is often hindered by regulatory and support practices. Tariffs into the three markets range from zero to 3%.

With the rising imports in recent years into the three markets, it would appear that there are opportunities for new suppliers who can satisfy the buyers' requirements, but the MIP reduces these opportunities.

Dried temperate fruits

The dried fruits in this section include apples, peaches, nectarines, pears and mixed fruits. The fruits are dissected into various popular shapes before drying. The trade statistics group together apples and pears, and peaches and nectarines. The United Kingdom is the largest importer of fruit mixtures while West Germany majors in the others. France and West Germany are producers of some of the dried fruits as well and often are net exporters for mixtures.

For the three markets, Italy is the major source of dried soft apples, the harder variety being obtained from China. Dried pears are supplied by South Africa, the United States and Australia, among others, while dried peaches and fruit mixtures are obtained mainly from South Africa. Aggregate imports of temperate dried fruits for the three markets rose from about 5500 t in 1982 to about 7300 t in 1987, but almost wholly through increases in West German imports of apples and pears; all other items stagnated or declined.

One reason given for the decline in imports of most items was the level of sulphur in dried fruit. Health food outlets in particular are keen on excluding sulphur-treated dried fruit among their retail outlets, much keener than the catering sector and other retail outlets. The main use of dried fruits dealt with in this section is in the preparation of dried fruit salads.

The trade and distribution structure is similar to that for other dried fruits.

Prices are not usually published and quotations are not easy to obtain unless serious trading intentions are disclosed. Those prices quoted in the text are only guides but it is clear that United States products are generally more expensive than those from other sources. Chinese products are usually at the lower end of the price range. The tariff-free trade within the EC, tends to place imports from other countries at a disadvantage; however, Turkey, ACP/OCT and LDDC countries with free entry and GSP countries with concessionary rates for pears only, enjoy privileges.

There are United States as well as international standards for dried apples, pears and peaches but individual buyers only use these as guidelines. There appears to be some potential for new supplies of the above dried fruits, particularly in the United Kingdom and West Germany, provided buyers' requirements are satisfied. There is little potential for fruit mixtures, imports of which are declining, as the traders prefer to do their own mixing from imported ingredients. There is some reported opportunity in the French market for additive-free, organically grown products.

Dried apricots

Dried apricots entering the three markets are usually pitted wholes from Turkey and Afghanistan, or halves from Iran, or halves and wholes from South Africa.

There is a preference for Turkish apricots owing to their flavour, but health food shops show greater preference for apricots from Afghanistan, the only source which does not treat its product with sulphur dioxide.

Imports are in bulk as well as in retail packs, and grading is by 'counts', e.g. 140–150 to the kilogram. Total imports into the three markets have generally been between 6500 and 9700 t per year with West Germany being the biggest importer, followed by the United Kingdom and France, in that order.

Dried apricots have both household as well as industrial uses and include baking, jam making, desserts, mixed fruit salads, snack food and cereals. The last three uses are related mainly to the industrial sector.

In all three markets, apricots are sold loose or in packets of 200 and 500 g. Sales are higher in the winter months but consumption tends to vary with availability. There is, however, a tendency for consumption to increase. Buyers tend to respond to the consumers' preference and flavour, appearance, cleanliness, absence of infestation, additives, absence of fermentation and method of pitting are taken into account in trading. There are specifications for trading in dried apricots by the USDA and by the FAO/WHO Codex Alimentarius Commission.

The trade and distribution structure is similar to that for other dried fruits.

Dried apricot prices are subject to considerable fluctuations largely based on the size or anticipated size of the Turkish annual crop. Price range differential during a year is often in excess of US\$500 per tonne. Prices are published regularly in the United Kingdom *Public Ledger* and the French newspaper *L'Antenne*. Turkish prices tend to be higher than those from other sources. The tariff rates range from zero to 7%; Turkey, ACP/OCT and LDDC countries enjoy duty-free entry.

While there are prospects for increased imports in the three markets, the potential new suppliers should avoid over-optimism as exports from present suppliers are likely to rise.

Dried figs

The major proportion of dried figs entering the three markets is from Turkey whilst about 25% of West German supplies are from Greece. Dried figs are classified as natural (dried and packed) or manipulated (dried and then further prepared). The Turkish Smyrna variety receives particular preference.

Imports into the three markets have ranged between 19,000 and 26,000 t annually, but with no trend. The French and West German markets are about the same size, approximately 9000 t, while the United Kingdom's is a little more than half that size. A common pack is a 12 kg case containing 48 × 250 g retail packages. Loose dried figs are also imported in 10–14 kg cases. Cases are usually made of wood, fibreboard or cardboard.

The great proportion of figs enters the retail sector of the three markets. Although consumption is mainly out-of-hand eating, certain quantities are used for household culinary purposes and the industrial sector uses a certain quantity in food processing, alcohol and snack food manufacturing. The preference is for Turkish figs in the retail sector and Greek figs for the industrial sector. Consumption tends to increase during the Christmas and Easter seasons and retail packs ranging from 200 to 500 g are very popular.

Organization of trade and distribution is similar to that for other dried fruits.

Overall, the biggest single influence on price, as in the apricot market, is the size or expected size of the Turkish annual crop. Other influences include the minimum export prices set by exporters, exchange rates and stock manipulation. Prices are published regularly in the United Kingdom *Public Ledger* and the French newspaper *L'Antenne*.

Tariffs range from zero to 10%. Greece and Turkey both enjoy duty-free entry and also state support for their fig industries. Thus exporters from other countries are at a disadvantage.

Standards for grading are published by the USDA but European buyers have their own requirements relating to flavour, skin texture and blemishes, cleanliness, infestation, contaminants, size and presentation. Generally, the potential for new producers is poor as little growth is anticipated and the existing main suppliers, Turkey and Greece, have marked advantages.

Dates

Dates entering the three markets are classified variously, and the major primary sources include Iraq, Iran, Tunisia, Algeria, Morocco, the United States and Pakistan. However, through re-export, supplies are also received from some major trading points such as Marseilles in France.

Annual imports for the three markets averaged around 26,000 t per year, but with no trend, of which over half was imported by France and over one-third by the United Kingdom. West Germany is the smallest market of the three. The United Kingdom and particularly, France, are

large re-exporters. Consumption in all three markets seems to be stagnating. Outlet patterns differ significantly. In the United Kingdom a large proportion of net imports is used for industrial purposes such as the manufacture of pickles, brown sauce, confectionery and cakes. The remainder enters the retail trade for direct consumption, household cooking and baking. In France dates are not normally used in household cooking and little is used in the industrial sector. The bulk enters the retail trade for direct consumption. In West Germany dates are used for household cooking, direct consumption and a substantial proportion is used by food manufacturers but dates are not used by pickle and sauce manufacturers.

The trade and distribution structure of dates differs from the pattern for the other items studied. Fresh dates, with some exceptions in West Germany, including frozen dates from Israel, tend to enter the three markets through the fresh fruit and vegetable trade. The trade in processed (heated, hydrated and dehydrated) dates and natural (processed but not glazed) dates is centred in Marseilles; there are two main importers in the United Kingdom. West Germany obtains supplies from Marseilles or from its specialized agencies in West Germany. Dry (unprocessed for cooking and pickle/sauce manufacture) dates tend to be purchased by the unspecialized dried fruit dealers. In the retail sector all three markets make use of the established food and groceries distribution system.

Several factors affect prices, but the role of government bodies in many supplying countries in setting export prices is important. Rejections and re-exportation of imports by the United States can lead to significant price changes during any year. Quotations for dry dates sometimes appear in the United Kingdom publications *Food News* and *Public Ledger* but these must be treated with caution. Some of these prices are quoted in the text.

Tariff rates range from zero to 12%. The zero rate applies to most developing countries and to Maghreb countries, it gives them an advantage over other exporters to the EC, such as the United States.

There are United States and international standards for dates but a number of exporting and importing countries have their own criteria which may vary with the kinds of dates, the uses intended and the particular country from which the purchases are made. Some of these criteria are cleanliness, levels of infestation and moisture, variety, colour, size and packaging.

With the cessation of the Iran—Iraq hostilities any opportunity which might have existed for new producers must have diminished significantly. The production in these two countries is likely to increase and there is little hope for increased intake in any of the three markets reviewed. However, producers of organically grown dates may find interested buyers in all three markets if the prices are suitable.

Prunes

The main supplier of prunes to the three markets is the United States. Other suppliers include Yugoslavia, Romania, Chile and Argentina. The United States high quality product is best suited for the requirements of the West German market. The other suppliers export smaller, poorer quality prunes used for canning and industrial processing, particularly in the United Kingdom and France. France also produces prunes commercially and supplies the West German and United Kingdom markets. There is no commercial production of prunes in the United Kingdom or West Germany.

Consumption of prunes in West Germany appears to have been increasing recently, is stagnating in the United Kingdom and is believed to be rising in France, although this is not revealed in the import statistics which show a decline. Together the three countries imported an average of just over 19,000 t annually, half of which was accounted for by West Germany, one-third by the United Kingdom and the remainder by France. Re-exports from the United Kingdom and West Germany are negligible but French exports far exceed its imports. In all three markets prunes are consumed direct as a snack food, are used in cooking and also in the industrial sector for canning. It is believed that 50% of United Kingdom imports are canned for subsequent consumption.

The trading and distribution pattern for prunes is similar to that for other dried fruit.

The main factor influencing the price of prunes is the size or expected size of the crop. Other factors include the shortage or abundance of particular sizes and currency conversion rates, particularly the United States dollar and the French franc. Prices of prunes are published occasionally in the United Kingdom publication *Food News*. Those prices quoted in the text apply only to the particular period and should be used cautiously.

The full tariff rate is 12%. ACP/OCT and LDDC are zero-rated.

There are USDA standards for dried prunes. With prunes, mould is a particular problem, but treatment with sorbic acid eliminates this problem. However, different buyers have their own requirements. Competition offered by the United States, France and Eastern European suppliers will inhibit any new supplier to the three markets. Moreover, there is no marked upward trend in consumption in the French and United Kingdom markets.

RESUME

Cette étude fait partie d'une série qui examine les possibilités d'importations dans les principaux marchés des pays développés de produits sélectionnés y compris ceux des pays en développement. Les objectifs immédiats de ce rapport consistent à évaluer les possibilités actuelles et à plus long terme d'importations au Royaume-Uni, en France et en Allemagne occidentale de fruits tropicaux et tempérés sélectionnés sous forme sèche, ainsi que de donner aux fournisseurs existants et potentiels des informations sur divers aspects de la commercialisation, y compris les formes des produits, leurs usages et qualités, le commerce extérieur, la structure du commerce et de la distribution, les prix, les tarifs et les niveaux de consommation. Les trois pays ont été sélectionnés en raison de leur importance dans ce domaine.

Les statistiques commerciales utilisées couvrent la période de 1982 à 1987. Des recherches initiales ont été entreprises entre 1983 et 1985. Des opinions plus à jour du négoce ont ensuite été recueillies pour le Royaume-Uni.

Les barèmes de tarifs cités dans ce rapport s'appliquent spécifiquement aux produits importés dans le Royaume-Uni, mais ils sont analogues dans d'autres pays de la CE, y compris la France et l'Allemagne occidentale.

Fruits tropicaux secs sélectionnés

Parmi les fruits tropicaux secs, les plus populaires sont la banane, l'ananas et la papaye. Leurs principaux usages sont le casse-croûte ou snack et des ingrédients des céréales de petits-déjeuners ou des repas ou desserts 'prêts à manger'. Ils sont vendus tant séparément qu'en mélanges. Les 'chips' de bananes proviennent surtout des Philippines, tandis que l'Equateur est le principal fournisseur de bananes sèches. La papaye sèche et l'ananas sec sont surtout fournis par la Thaïlande, les Philippines et Taïwan.

Les principaux débouchés au détail au Royaume-Uni pour les fruits tropicaux secs sont les magasins dits 'de santé', où il faut une faible teneur en sucre et où la vente atteint sa crête à l'époque de Noël. Ce secteur n'est pas important en France ni en Allemagne occidentale. D'autres débouchés de détail comprennent les supers-marchés, les magasins à succursales multiples, les épiceries et même les éventails, qui préfèrent les produits sucrés.

Si le volume acheté au Royaume-Uni tend aujourd'hui à se stabiliser, en France et en Allemagne de l'ouest, le taux de croissance est bien plus rapide. Sur les trois marchés, l'expansion ultérieure dépend surtout des besoins des fabricants de céréales pour le petit-déjeuner.

Les fonctions commerciales et les produits ne sont pas spécialisés parmi les négociants en fruits tropicaux secs. Ils importent généralement en gros et seule une petite quantité est importée préemballée pour le détail. Les transformateurs de la communauté s'approvisionnent surtout chez les détenteurs de stocks, plutôt qu'auprès des exportateurs à l'étranger. Les droits de douane peuvent atteindre 25% et ils dépendent largement de l'addition du sucre, qui est frappé d'un prélèvement spécial.

Les chips de bananes, dont environ 3100 t ont été importées en provenance des Philippines sur les trois marchés en 1987, sont plus populaires que les bananes sèches, dont l'importation dépassait juste 1000 t en 1987. Les importations d'ananas et de papayes sont bien plus faibles mais ne peuvent pas être quantifiées de manière satisfaisante, par suite de difficultés statistiques. On les préfère sous forme de dés. En outre, les achats sont surtout influencés par la propreté, le goût, la couleur, la texture, les additifs, la teneur en sucre, les prix et le conditionnement.

Les prix sont rarement publiés mais le négoce est très concurrentiel. Par exemple, les bananes sèches de Thaïlande sont vendues nettement moins cher que celles d'Equateur, mais la papaye et l'ananas des Philippines sont vendus bien moins cher que ceux de Thaïlande. Les produits sans addition de sucre, quelle qu'en soit l'origine, tendent à être plus coûteux. Les prix cités dans le texte ne sont que des orientations fournies par le négoce.

Pour les trois marchés pris dans leur ensemble, particulièrement pour les chips de bananes, de nouveaux fournisseurs pourront probablement trouver des débouchés raisonnables, s'ils peuvent répondre aux besoins des acheteurs, mais en tenant compte de la concurrence des prix, qui est plus marquée.

Fruits secs de la vigne

Des trois produits de la vigne: raisins de Corinthe, du type Malaga ou de Smyrne, c'est la Grèce qui fournit le plus de corinthes au Royaume-Uni, à la France et à l'Allemagne de l'ouest. La Grèce, la Turquie et l'Australie, dans cet ordre, sont les plus gros fournisseurs de smyrnes, tandis que les Etats-Unis et, dans une moindre mesure, l'Afrique du sud et l'Afghanistan, fournissent aux trois marchés des raisins du type Malaga.

Le total annuel d'importations pour les trois pays de fruits provenant de la vigne a varié entre 160,000 et 200,000 t, avec une tendance graduelle à la hausse. Le commerce des corinthes

et d'autres raisins secs est plus fort en emballages de 15 kg et moins, qu'en conditionnement de 15 kg et davantage, sur les trois marchés. Pendant la période de l'étude, ce dernier représentait généralement 1000 ± 400 t pendant une année quelconque, sauf en 1984, avec 7500 t et en 1987, avec environ 51,000 t d'importations. Les principaux usages sont dans la pâtisserie, la confiserie, les produits pour casse-croûte et les céréales de petits-déjeuners et, en raison de leur facilité de se remplacer mutuellement, les prix relatifs déterminent souvent l'usage, bien que l'un des trois puisse souvent être préféré pour certains usages particuliers. En raison du support des prix de la communauté et du programme de stockage, il y a chaque année de fortes quantités de ces produits qui ne conviennent qu'au traitement au vinaigre, en sauces et pour l'affouragement du bétail.

Le commerce des fruits fournis par la vigne est très réglementé et appuyé par les différents pays producteurs et exportateurs; sur le marché européen, la Grèce est privilégiée par rapport à des fournisseurs non européens, en raison du support de la communauté et de l'opération du prix d'importation minimum (PIM) qui est fixé tous les ans.

Au Royaume-Uni, le secteur des produits de santé ou organiques représente un très important marché. Dans ce cas, les produits séchés au soleil et plus foncés sont préférés, contrairement à ce qui se passe en France et en Allemagne de l'ouest, où on préfère les produits séchés artificiellement et traités chimiquement, qui ont une couleur plus pâle. Dans l'ensemble, les fruits qui proviennent de la vigne sont de plus en plus consommés sur les trois marchés.

La structure du commerce et de la distribution est analogue à celle des autres fruits secs. Les sociétés qui se livrent au commerce des fruits de la vigne ne se spécialisent généralement pas sur des produits particuliers et des rôles commerciaux spéciaux, bien que le Royaume-Uni ait encore quelques courtiers spécialisés. Le commerce de détail est entrepris, comme pour les autres fruits secs, par les filières de commercialisation normale des produits alimentaires de l'épicerie. Les achats à terme, qui caractérisent le commerce des fruits de la vigne, sont souvent contrecarrés par des pratiques réglementaires et de support. Les tarifs sur les trois marchés entre zéro et 3%.

Les importations ayant augmenté depuis quelques années sur les trois marchés, il semble bien que de nouveaux fournisseurs auront de bons débouchés, s'ils peuvent satisfaire les besoins des acheteurs, mais le PIM réduit ces débouchés.

Fruits tempérés secs

Les fruits secs de cette section comprennent les pommes, les pêches, les nectarines, les poires et les fruits mélangés. Les fruits sont disséqués selon diverses formes populaires avant le séchage. Les statistiques commerciales regroupent les pommes et les poires, et les pêches et les nectarines. Le Royaume-Uni est le plus gros importateur de mélanges de fruits, tandis que l'Allemagne de l'ouest domine pour les autres. La France et l'Allemagne de l'ouest produisent aussi certains des fruits secs et souvent sont des exportateurs nets de mélanges.

Pour les trois marchés, l'Italie est la source principale de pommes sèches molles, la variété dure provenant de Chine. Les poires sèches sont fournies par l'Afrique du sud, les Etats-Unis et l'Australie, entre autres, tandis que les pêches sèches et les mélanges de fruits proviennent d'Afrique du sud. Au total, les importations de fruits tempérés secs sur les trois marchés ont passé d'environ 5500 t en 1982 à environ 7300 t en 1987, mais presque entièrement par suite des augmentations des importations de pommes et de poires en Allemagne de l'ouest; tous les autres fruits ont fait du surplace ou ont baissé.

Une raison fournie pour la baisse des importations de la plupart des articles était la quantité de soufre dans les fruits secs. Particulièrement dans les magasins de produits alimentaires de santé, on cherche à exclure les fruits secs traités au soufre, ce qui est moins manifeste dans le secteur de la restauration et d'autres débouchés de détail. L'usage principal des fruits secs, dans ce dernier secteur, est la préparation de salades de fruits sèches.

La structure du commerce et de la distribution est analogue à celle des autres fruits secs.

Les prix sont rarement publiés et il est difficile de se procurer des quotations, à moins de révéler des intentions sérieuses d'achat. Les prix cités dans le texte ne sont que des orientations mais il est clair que les produits des Etats-Unis sont généralement plus coûteux que ceux d'autres origines. Les produits chinois sont généralement au bas de l'échelle des prix. Les échanges exempts de tarifs au sein de la communauté européenne tendent à désavantager les importations en provenance d'autres pays; toutefois, la Turquie, les pays ACP/OCT et les pays LDDC à exemption de droits et les pays GSP à taux de faveur pour les pêches seulement bénéficient de privilèges.

Il y a des normes Etats-Unis et des normes internationales pour les fruits secs: pommes, poires et pêches mais les acheteurs individuels ne peuvent s'en servir que d'une façon générale. Il semble qu'il soit possible de fournir davantage des fruits secs ci-dessus, particulièrement au Royaume-Uni et en Allemagne de l'ouest, à condition de satisfaire les besoins des acheteurs. Il n'y a pas beaucoup de potentiel pour les mélanges de fruits, dont les importations diminuent, car les négociants préfèrent faire leurs propres mélanges au moyen d'ingrédients importés. On signale que le marché français ouvre davantage ses portes à des produits de croissance organique et exempts de succédanés.

Abricots secs

Les abricots secs qui pénètrent sur les trois marchés sont généralement des fruits entiers dénoyautés provenant de Turquie et d'Afghanistan, ou des moitiés provenant d'Iran ou des moitiés et des fruits entiers d'Afrique du sud.

On préfère les abricots turcs, en raison de leur flaveur, mais les magasins de produits de santé préfèrent surtout des abricots d'Afghanistan, qui est la seule origine qui ne traite pas ses produits au moyen de dioxyde de soufre.

Les importations se font en vrac aussi bien qu'en emballage détail et le classement se fait d'après le nombre, par exemple, 140-150 au kilogram. Le total des importations sur les trois marchés a généralement évolué entre 6500 et 9700 t par an, l'Allemagne étant le principal importateur, suivie par le Royaume-Uni et la France, dans cet ordre.

Les abricots secs ont des usages tant ménagers qu'industriels, qui comprennent la pâtisserie, la confiture, les desserts, les salades de fruits mélangés, les aliments snacks et les céréales. Ces trois derniers usages se rencontrent surtout dans le secteur industriel.

Sur les trois marchés, les abricots sont vendus en vrac ou en paquets de 200 et 500 g. Les ventes sont plus fortes pendant les mois d'hiver, mais la consommation tend à varier selon l'offre. Toutefois, la consommation tend à augmenter. Les acheteurs tendent à répondre à la préférence des consommateurs, pour la flaveur, l'aspect, la propreté, l'absence d'infestation, de produits additifs, l'absence de fermentation et la méthode de dénoyautage, qui entrent en considération dans la commerce. Il y a des spécifications de commerce des abricots secs publiées par le Ministère de l'agriculture des Etats-Unis, l'USDA, et par la Commission du Codex Alimentarius FAO/OMS.

La structure du commerce et de la distribution est analogue à celle des autres fruits secs.

Les prix des abricots secs fluctuent considérablement, surtout en raison de la dimension ou de l'ampleur prévue de la récolte annuelle de Turquie. Le différentiel des écarts de prix pendant une année donnée dépasse souvent US\$500 par tonne. Les prix sont publiés régulièrement au Royaume-Uni par le *Public Ledger* et en France par le journal *l'Antenne*. Les prix turcs tendent à être supérieurs à ceux d'autres sources. Les tarifs varient entre zéro et 7%; la Turquie, les pays ACT/OCT et LDDC bénéficient de l'exemption de droits.

Bien qu'il soit possible de prévoir une augmentation des importations sur les trois marchés, les nouveaux fournisseurs potentiels doivent se garder d'un suroptimisme, car les exportations des fournisseurs actuels ont des chances de s'accroître.

Figues sèches

La plus grande proportion de figues sèches qui pénètrent sur les trois marchés provient de Turquie, bien qu'environ 25% des approvisionnements d'Allemagne occidentale viennent de Grèce. Les figues sèches sont classées comme étant naturelles (sèches et emballées) ou manipulées (sèches et ensuite préparées davantage). La variété turque de Smyrne est de loin la préférée.

Les importations sur les trois marchés ont varié entre 19,000 et 26,000 t par an, mais sans suivre une tendance claire. Les marchés français et ouest-allemand sont à peu près de la même dimension, soit approximativement 9000 t, tandis que le marché du Royaume-Uni est un peu plus de la moitié de ce chiffre. Un emballage courant est la caisse de 12 kg, contenant 48 x paquets détail de 250 g. Les figues sèches en vrac sont également importées dans des caisses de 10 à 14 kg. Les caisses sont généralement en bois, en panneau de fibres ou en carton.

La plus forte proportion de figues qui pénètrent sur les trois marchés se dirige vers le secteur détail. Bien que la consommation se fasse surtout pour manger sans formalité, certaines quantités servent à des usages culinaires ménagers et le secteur industriel emploie une certaine quantité pour la transformation des produits alimentaires, la production d'alcool et de snacks. Les préférées sont les figues de Turquie sur le secteur de détail et les figues de Grèce dans le secteur industriel. La consommation tend à s'accroître pendant les périodes de Noël et de Pâques et les paquets au détail allant de 200 à 500 g sont très populaires.

L'organisation du commerce et de la distribution est très analogue à celle d'autres fruits secs.

D'une façon générale, la plus grande influence sur les prix, comme dans le cas des abricots, c'est la dimension ou l'ampleur prévue de la récolte turque annuelle. D'autres influences comprennent les prix minimum d'exportation établis par les exportateurs, les taux des changes et la manipulation des stocks. Les prix sont publiés régulièrement dans le Royaume-Uni par le *Public Ledger* et en France par *l'Antenne*.

Les tarifs varient entre zéro et 10%. La Grèce et la Turquie bénéficient tous les deux d'exemption de droits et également du support de l'Etat pour leurs industries de la figue. Les exportateurs d'autres produits sont donc désavantagés.

Des normes de classement sont publiées par l'USDA mais les acheteurs européens ont leurs propres exigences concernant la flaveur, la texture de la peau et ses flétrissures, la propreté, l'infestation, les contaminants, la dimension et le conditionnement. Généralement, le potentiel pour de nouveaux producteurs n'est pas souriant, car on ne prévoit guère de croissance et les principaux fournisseurs actuels, la Turquie et la Grèce, ont des avantages au départ.

Dates

Les dates qui pénètrent sur les trois marchés sont classées de façon variée et les principales sources sont l'Irak, l'Iran, la Tunisie, l'Algérie, le Maroc, les Etats-Unis et le Pakistan. Toutefois, des expéditions destinées directement à la réexportation sont également reçues par Marseille en France.

Les importations annuelles des trois marchés sont d'environ 26,000 t par an, mais sans suivre une tendance marquée; plus de la moitié a été importée par la France et plus d'un tiers par la Royaume-Uni. L'Allemagne occidentale est le plus petit des trois marchés. Le Royaume-Uni, et particulièrement la France, sont de grands réexportateurs. La consommation sur les trois marchés semble stagner. Les débouchés varient beaucoup. Au Royaume-Uni, une très forte proportion des importations nettes sert à des fins industrielles, comme la fabrication de pickles, de sauce brune, de produits de confiserie et de gâteaux. Le reste pénètre sur le commerce de détail, pour consommation directe, cuisine et pâtisserie ménagères. En France, les dates ne servent généralement pas à la pâtisserie ménagère et le secteur industriel n'en emploie guère. Le gros pénètre sur le marché au détail pour consommation directe. En Allemagne occidentale, les dates servent à la cuisine familiale, à la consommation directe et une proportion importante est employée par les fabricants de produits alimentaires mais les dates ne servent pas à la fabrication de pickles ni de sauces.

La structure du commerce et de la distribution des dates diffère de celle des autres articles étudiés. Les dates fraîches, avec quelques exceptions en Allemagne occidentale, y compris les dates congelées d'Israël, tendent à pénétrer sur les trois marchés par le truchement du commerce des fruits et légumes frais. Le commerce des dates transformées (chauffées, hydratées et déshydratées) et naturelles (transformées mais non glacées) se concentre à Marseille. Il ya a deux principaux importateurs dans le Royaume-Uni. L'Allemagne de l'ouest s'approvisionne à partir de Marseille ou dans ses agences spécialisées en Allemagne occidentale. Les dates sèches (non traitées pour la cuisine et la fabrication de pickles et de sauces) tendent à être achetées par des négociants en fruits sans spécialisation. Dans le secteur de détail, les trois marchés se servent du système établi de l'alimentation et de l'épicerie.

Plusieurs facteurs affectent les prix, mais le rôle des organismes gouvernementaux pour fixer les prix d'exportation dans bien des pays fournisseurs est très important. Des réjections ou des réexportations de la part des Etats-Unis de leurs importations peuvent provoquer des changements de prix significatifs pendant une année quelconque. Des quotatifs de dates sèches paraissent parfois dans des publications du Royaume-Uni *Food News* et *Public Ledger* mais il convient de les traiter avec prudence. Certains de ces prix sont cités dans le texte.

Les barèmes de tarifs varient entre zéro et 12%. Le barème zéro s'applique à la plupart des pays en développement et aux pays du Maghreb. Cela leur donne un avantage par rapport à d'autres exportateurs, comme les Etats-Unis, sur le marché communautaire.

Il existe des normes américaines et internationales pour les dates mais un certain nombre de pays exportateurs et importateurs appliquent leurs propres critères, qui peuvent varier selon le type de dates, les usages prévus et le pays où se font les achats. Certains de ces critères sont la propreté, les degrés d'infestation et d'humidité, la variété, la couleur, la dimension et le conditionnement.

La cessation des hostilités Iran/Irak a probablement réduit de manière significative les occasions qui auraient pu s'offrir à de nouveaux producteurs. La production de ces deux pays va probablement s'accroître et il ne semble guère possible de s'attendre à une importation accrue sur l'un quelconque des trois marchés étudiés. Toutefois, les producteurs de dates cultivées organiquement pourront trouver des acheteurs qui s'y intéresseront sur les trois marchés, si les prix conviennent.

Pruneaux

Les Etats-Unis sont le principal fournisseur de pruneaux sur les trois marchés. D'autres fournisseurs comprennent la Yougoslavie, la Roumanie, le Chili et l'Argentine. Le produit de haute qualité des Etats-Unis convient le mieux aux besoins du marché ouest-allemand. Les autres fournisseurs exportent des pruneaux plus petits, de moins bonne qualité, qui servent surtout à la conserverie et à la transformation industrielle, particulièrement au Royaume-Uni et en France. La France produit aussi des pruneaux commercialement et en fournit aux marchés ouest-allemand et du Royaume-Uni. Il n'y a pas de production commerciale de pruneaux au Royaume-Uni ou en Allemagne de l'ouest.

La consommation de pruneaux en Allemagne de l'ouest semble s'être accrue récemment; elle stagne au Royaume-Uni et l'on pense qu'elle augmente en France, bien que ceci ne soit pas manifesté par les statistiques d'importations, qui montrent une réduction. Au total, les trois

pays ont importé en moyenne juste un peu plus de 19,000 t par an, dont la moitié en Allemagne occidentale, un tiers au Royaume-Uni et le reste en France. Les réexportations du Royaume-Uni et d'Allemagne de l'ouest sont négligeables mais les exportations françaises dépassent de loin les importations. Sur les trois marchés, les pruneaux sont consommés directement comme snack, servent à la cuisine et aussi à la conserverie industrielle. On pense que 50% des importations du Royaume-Uni sont conservés pour consommation ultérieure.

Le système de commercialisation et de distribution des pruneaux est analogue à celui des autres fruits secs.

Le facteur principal qui influence les prix des pruneaux, c'est la dimension ou l'ampleur prévue de la récolte. D'autres facteurs comprennent la pénurie ou l'abondance de dimensions particulières, ainsi que les taux de conversion des changes, particulièrement du dollar US et du franc français. Les prix des pruneaux sont publiés parfois dans la publication du Royaume-Uni *Food News*. Ces prix cités dans le texte ne s'appliquent qu'à une période particulière et ils doivent donc être examinés avec prudence.

Le taux complet de tarifs est de 12%. Les pays ACP/OCT et les moins développés des pays en développement sont au tarif zéro.

Il y a des normes USDA pour les pruneaux secs. Dans le cas des pruneaux, la moisissure pose un problème particulier, mais le traitement à l'acide sorbique élimine ce problème. Toutefois, différents acheteurs ont leurs propres exigences. La concurrence des fournisseurs des Etats-Unis, de France et d'Europe de l'est, inhiberont tous nouveaux fournisseurs sur les trois marchés. En outre, il n'y a pas de tendance marquée à la hausse de la consommation ni en France, ni au Royaume-Uni.

RESUMEN

El presente estudio forma parte de una serie de trabajos, en los que se pasa revista a las oportunidades de productos seleccionados – incluyendo artículos procedentes de países en desarrollo – en importantes mercados del mundo desarrollado. Los objetivos inmediatos de este informe es evaluar las perspectivas actuales y a largo plazo de frutas selectas secas – tanto tropicales como de climas templados – en el Reino Unido, Francia y Alemania Occidental. Al mismo tiempo, se ha intentado proporcionar a proveedores actuales y futuros información sobre distintos aspectos de marketing, incluyendo formas del producto, sus usos y calidad, comercio exterior, estructura comercial y de distribución, precios, impuestos y niveles de consumo. La selección de los tres países en cuestión se debió a su importancia dentro de este sector.

Las estadísticas comerciales utilizadas abarcan el periodo de 1982 a 1987, habiéndose realizado los trabajos iniciales sobre el terreno entre 1983 y 1985. Subsiguientemente, se obtuvieron nuevos puntos de vista comerciales para el Reino Unido.

Se bien los índices de impuestos citados en este informe tienen específicamente aplicación a productos importados en el Reino Unido, son similares a los existentes en otros países de la CE, incluyendo Francia y Alemania Occidental.

Frutas tropicales secas selectas

Las bananas, piña y papaya son las frutas tropicales secas que gozan de mayor popularidad, siendo principalmente utilizadas en la elaboración de tentempiés, y como ingredientes de cereales para desayuno o de comidas y postres 'listos para comer'. Estos productos se venden por separado y en mezclas. Filipinas es el principal proveedor de banana troceada, mientras que Ecuador se encuentra a la cabeza entre los proveedores de banana seca. Los principales proveedores de papaya y piña seca son Tailandia, Filipinas y Taiwan.

En el Reino Unido, los principales mercados de venta al detalle para frutas tropicales secas son las tiendas de dietética, en cuyos productos es importante un bajo contenido de azúcar, siendo la época navideña el período de ventas máximas. Este sector no posee la misma importancia en Francia y Alemania. Valga citar asimismo, entre otros mercados detallistas, los supermercados, cadenas de grandes almacenes, ultramarinos, y aun mercados al exterior, que se hallan más interesados en productos edulcorados.

Si bien el volumen de ventas en el Reino Unido parece estar mostrando indicios de estabilización, el ritmo de crecimiento en Francia y Alemania es muy superior. Su expansión futura en los tres mercados dependerá, en gran parte, de los requisitos de los fabricantes de cereales para desayuno.

No existe especialización alguna en las funciones comerciales o en los productos entre los comerciantes de frutas tropicales secas, cuya importación se realiza, en general, a granel, con una reducida cantidad importada en paquetes para venta al detalle. Por regla general, las compañías de la CE dedicadas a la elaboración de productos obtienen sus provisiones de almacenistas domésticos, más bien que directamente del extranjero. Los impuestos de aduanas pueden alcanzar hasta el 25%, dependiendo, en gran parte, del azúcar añadido, que se halla sujeto a impuestos especiales.

La banana troceada – de la que, durante 1987, se importaron en los tres mercados que nos ocupan unas 3100 t procedentes de las Filipinas – es un producto más popular que la banana seca, cuyas importaciones ascendieron a algo más de 1000 t durante el mismo periodo. Las importaciones de papaya y piña son muy inferiores, si bien no pueden cuantificarse satisfactoriamente por razones estadísticas, prefiriéndose su importación en cubitos. Otros factores asimismo tomados en cuenta por el comprador son la limpieza, sabor, color, textura, aditivos, contenido de azúcar, precio y embalaje.

Si bien, por regla general, no se publican los precios, se trata de un sector altamente competitivo. Por ejemplo, las bananas secas de Tailandia se pagan a precios significativamente inferiores a los de la banana ecuatoriana, mientras que los productos de papaya y piña procedentes de Filipinas obtienen precios muy inferiores a los de Tailandia. Los productos más costosos de casi cualquier fuente tienden a ser aquéllos a los que no se ha añadido azúcar. Valga apuntar que los precios citados en el texto y obtenidos del sector, deberán ser únicamente considerados a manera de orientación.

Considerando el conjunto de los tres mercados y, en particular, por cuanto respecta a la banana troceada, existen oportunidades razonables para nuevos proveedores, capaces de dar satisfacción a las exigencias del comprador, aunque dentro de un contexto de precios cada vez más competitivos.

Frutos vitícolas secos

De los tres productos constitutivos de este sector – grosellas pasas, uvas pasas y pasas de Esmirna – Grecia es el principal proveedor de grosellas pasas del Reino Unido, Francia y Alemania. Grecia, Turquía y Australia, en dicho orden, son los principales proveedores de pasas de Esmirna, mientras que los Estados Unidos y, en menor grado, Suráfrica y Afganistán, son los principales proveedores de uvas pasas.

Las importaciones anuales totales para los países en esta sección han variado entre 160,000 y 200,000 t, dentro de cierta tónica ascendente. En los tres mercados, el comercio en grosellas pasas y demás frutos secos del sector es superior en recipientes de 15 kg como máximo que en recipientes de 15 kg en adelante. Durante el período de estudio, las importaciones de este último apartado ascendieron, por regla general, a 1000 ± 400 t en cada año, a excepción de 1984 (unas 7500 t) y 1987 (unas 51,000 t). Sus principales usos son en panadería, confitería, producción de tentempiés y cereales para desayuno. Como resultado de su intercambiabilidad, sus precios relativos determinan frecuentemente su uso, si bien, a veces, una de las tres se prefiere para determinadas aplicaciones. Como resultado del programa de almacenamiento y apoyo de la CE, hay grandes cantidades anuales de estos productos que solamente son apropiadas para encurtidos, salsas y piensos animales.

El comercio en frutos vitícolas se encuentra altamente regulado y apoyado por los distintos países productores y exportadores y, dentro del mercado europeo, Grecia cuenta con una indudable ventaja sobre otros proveedores no europeos, debido al apoyo de la CE y a la aplicación del precio mínimo de importación (PMI), anualmente establecido.

En el Reino Unido, el sector de la dietética – en el que se prefieren los productos más oscuros secados al sol – es un mercado de gran importancia. Por el contrario, en Francia y Alemania, se prefieren los productos de color claro químicamente tratados y artificialmente secados. En líneas generales, existe un creciente consumo de frutos vitícolas en los tres mercados.

La estructura comercial y de distribución es similar a la de otros productos secos. Una vez más, las compañías que forman parte de este sector no tienden a especializarse en productos o funciones comerciales específicos, si bien sigue existiendo un reducido número de corredores especializados en el Reino Unido. Al igual que con el resto de las otras frutas secas, el mercado detallista sigue los canales normales de marketing para productos alimenticios y ultramarinos. Las compras a plazo – característica del comercio en frutos vitícolas – se ven, a menudo, obstaculizadas por medidas de regulación y apoyo. Los aranceles en los tres países varían entre cero y 3%.

A la vista del incremento observado en años recientes en las importaciones de los tres mercados, parecen existir oportunidades para nuevos proveedores capaces de dar satisfacción a las exigencias del comprador, si bien dichas oportunidades se ven reducidas por el PMI.

Frutas secas de países de climas templados

Entre las frutas secas de este sector se cuentan las manzanas, melocotones, nectarinas, peras y frutas mezcladas. Antes de su secado, las frutas se cortan en diversas configuraciones populares. Las estadísticas comerciales agrupan manzanas y peras por una parte y melocotones y nectarinas por otra. El Reino Unido es el principal importador de mezclas de frutas, mientras que Alemania Occidental se encuentra a la cabeza en el resto. Francia y Alemania son productores de algunas frutas secas, siendo, frecuentemente, exportadores netos de mezclas.

Italia es el principal proveedor de manzanas blandas secas para los tres mercados, que obtienen sus manzanas más duras de China. Las peras secas proceden de Suráfrica, Estados Unidos y Australia, entre otros productores, mientras que los melocotones secos y mezclas de frutas se obtienen, principalmente, de Suráfrica. Las importaciones conjuntas de frutas secas de climas templados para los tres mercados pasaron de unas 5500 t en 1982 a unas 7300 t en 1987, incremento que se debió, casi por entero, al aumento en las importaciones alemanas de manzanas y peras. El nivel del resto de los productos permaneció inalterado o disminuyó.

Una razón aducida para esta reducción en las importaciones de la mayoría de los artículos era el nivel de azufre en las frutas secas. El comercio de la dietética, en particular, se halla especialmente interesado en excluir frutas secas tratadas con azufre entre sus mercados detallistas, mucho más interesados que el sector de la hostelería que otros mercados de venta al detalle. El principal uso de las frutas secas dentro de esta sección es la preparación de ensaladas de frutas secas.

La estructura del comercio y distribución es similar a la existente para otras frutas secas.

Por regla general, los precios no se publican y solamente es posible obtener cotizaciones cuando existen intenciones comerciales serias. Si bien los precios citados en el texto poseen un carácter de orientación solamente, parece claro que los productos estadounidenses son, en general, más costosos que los de otros países. En líneas generales, los productos chinos se encuentran en la parte más baja de la gama de precios. Dentro de la CE, el comercio libre de impuestos tiende a colocar en desventaja las importaciones procedentes de otros países. Sin embargo, gozan de privilegios Turquía, países ACP/OCT y países en desarrollo menos desarrollados (LDDC) con entrada libre y países GSP con tasas concesionarias para peras.

Si bien existen normas estadounidenses e internacionales para manzanas, peras y melocotones secos, los compradores solamente las utilizan a manera de guía. Parece existir cierto potencial para nuevos suministros de las frutas secas anteriormente citadas, particularmente en el Reino Unido y Alemania, con tal de que pueda darse satisfacción a las exigencias del comprador. El potencial para mezclas de frutas es escaso. Las importaciones se encuentran en declive, ya que el sector prefiere realizar sus propias mezclas con ingredientes importados. Se ha indicado la existencia de cierta oportunidad en el mercado francés para productos orgánicamente cultivados y libres de aditivos.

Albaricoques secos

Por regla general, los albaricoques secos que entran en los tres mercados son frutos enteros sin huesos, procedentes de Turquía y Afganistán, mitades procedentes de Irán, o mitades y frutos enteros procedentes de Suráfrica.

Si bien los albaricoques turcos son preferidos por su sabor, las tiendas de dietética muestran mayor predilección por los albaricoques de Afganistán, única fuente que no trata su producto con dióxido de azufre.

Este producto se importa a granel y en envases para venta al detalle, clasificados por 'contajes', por ejemplo, 140-150 por kilogramo. En general, las importaciones totales en los tres mercados se han mantenido entre 6500 y 9700 t anuales, con Alemania a la cabeza, seguida del Reino Unido y Francia.

Los albaricoques secos cuentan con usos domésticos e industriales, incluyendo panadería, producción de mermeladas, postres, ensaladas de frutas secas, tentempiés y cereales. Estos tres últimos usos se encuentran principalmente relacionados con el sector industrial.

En los tres mercados que nos ocupan, los albaricoques se venden sueltos o en paquetes de 200 y 500 g. Si bien el consumo tiende a variar en relación con su disponibilidad, las ventas son más elevadas durante los meses invernales. Valga apuntar, sin embargo, que existe una tendencia hacia un incremento del consumo. Los compradores tienden a responder a las preferencias consumidor, considerándose como factores importantes el sabor, aspecto, limpieza, ausencia de plagas, aditivos, ausencia de fermentación y método de deshuese. A nivel internacional, se cuenta con especificaciones para el comercio en albaricoques secos establecidas por la USDA y por la Comisión del Codex Alimentarius de la FAO/OMS.

La estructura comercial y de distribución es similar a la existente para otras frutas secas.

Los precios del albaricoque seco se encuentran sometidos a considerables fluctuaciones, que dependen, en gran parte, de la envergadura, o envergadura anticipada de la cosecha anual turca. La diferencia en la gama de precios durante el año excede, frecuentemente, los US\$500 por tonelada, publicándose regularmente los precios en la *Public Ledger* del Reino Unido y en el periódico francés *L'Antenne*. Los precios turcos tienden a ser superiores a los del resto de los países exportadores. Los índices arancelarios van desde cero a 7%, disfrutando de entrada libre de aranceles Turquía, países de APC/OCT y países en desarrollo menos desarrollados (LDDC).

Si bien existen posibilidades para el incremento de las importaciones en los tres mercados, todo nuevo proveedor debería evitar caer en un optimismo excesivo, ya que es probable que las exportaciones de los proveedores actuales sigan en aumento.

Higos secos

La mayor proporción de los higos secos que llegan a los tres mercados estudiados en este trabajo procede de Turquía, si bien alrededor del 25% de las importaciones alemanas son de origen Griego. Los higos secos se clasifican como naturales (secos y envasados) o manipulados (secos y sometidos a preparación subsiguiente). Se presta una preferencia particular a la variedad de higos turcos de Esmirna.

Las importaciones de los tres mercados han variado entre 19,000 y 26,000 t anuales, sin que pueda establecerse tónica alguna. Los mercados francés y alemán poseen una envergadura similar – aproximadamente 9000 t – mientras que el mercado británico es ligeramente superior al 50% de dicha cantidad. El producto se envasa comúnmente en cajas de 12 kg, que contienen 48 paquetes de 250 g para venta al detalle. También se lleva a cabo la importación de higos secos sueltos en cajas de 10-14 kg que, por regla general, son de madera, cartón de pasta de madera o cartón.

Una elevada proporción de los higos importados en los tres mercados que nos ocupan pasan al sector de la venta al detalle. Aunque los higos son principalmente para consumo directo, cierta cantidad se utiliza para fines culinarios domésticos y, en el sector industrial, para la elaboración de productos alimenticios, alcohol y tentempiés. Los higos turcos son preferidos en el sector de la venta al detalle, mientras que el sector industrial favorece los higos griegos. Su consumo tiende a aumentar durante las épocas navideña y de Pascua, poseyendo gran polivalencia los paquetes de 200 a 500 g.

La organización comercial y de la cadena de distribución es similar a la observada para otras frutas secas.

Al igual en el mercado de albaricoques, en general, el principal factor individual sobre el precio es la envergadura o esperada envergadura de la cosecha anual turca. Otros factores son los precios mínimos de exportación establecidos por los exportadores, tipos de cambio y manipulación de las existencias. Los precios se publican regularmente en la *Public Ledger* del Reino Unido y en el periódico francés *L'Antenne*.

Los índices arancelarios van de cero al 10%. Los productos griegos y turcos gozan de entrada libre de impuestos, además de contar con apoyo estatal a la industria de los higos, por lo que los exportadores de otros países se encuentran en desventaja.

Si bien la USDA publica normas de clasificación, los compradores europeos poseen sus propios requisitos con respecto al sabor, textura y manchas de la piel, limpieza, infestación, contaminantes, tamaño y presentación. En general, el potencial para nuevos productores es pobre, puesto que no se espera se produzcan grandes cambios y debido a que los principales proveedores actuales – Turquía y Grecia – cuentan con marcadas ventajas.

Dátiles

Los dátiles importados por los tres países son clasificados de maneras diversas, procediendo principalmente de Irán, Túnez, Argelia, Marruecos, Estados Unidos y Paquistán. Sin embargo, y como resultado de la reexportación, se reciben también provisiones procedentes de importantes puntos comerciales, tales como Marsella, en Francia.

Las importaciones anuales medias de los tres países ascienden a unas 26,000 t, aunque sin existir una clara tónica. Algo más del 50% de los dátiles fueron importados por Francia y más del 33% por el Reino Unido, siendo Alemania el más reducido de los tres mercados. El Reino Unido y, particularmente, Francia, son importantes reexportadores. Valga apuntar que, en los tres mercados, el consumo parece hallarse estacionario. Las tónicas comerciales varían significativamente. En el Reino Unido, una muy importante proporción de las importaciones netas se utilizan para fines industriales tales como la fabricación de encurtidos, salsas marrones, confitería y pastelería. El resto entra en el comercio de la venta al detalle para consumo directo, fines culinarios domésticos y panadería. En Francia, los dátiles no se usan, por regla general, para cocina y su uso industrial es muy reducido, pasando en su mayor parte al comercio de venta al detalle para consumo directo. En Alemania, los dátiles se utilizan en la cocina doméstica, consumo directo y una importante proporción en la elaboración de productos alimenticios, si bien no son utilizados por los fabricantes de encurtidos y salsas.

Tanto la estructura comercial como de distribución de los dátiles difiere de la tónica presentada por otros artículos estudiados. Los dátiles frescos – con algunas excepciones en Alemania, incluyendo dátiles congelados de Israel – tienden a entrar en los tres mercados, por intermedio del comercio de verduras y frutas frescas. El comercio de dátiles elaborados (calentados, hidratados y deshidratados) y de los dátiles naturales (elaborados pero no glaseados) tiene su centro en Marsella. En el Reino Unido, hay dos principales importadores. Alemania obtiene dátiles de Marsella o de sus agencias especializadas. Los dátiles secos (no elaborados para cocina y fabricación de encurtidos/salsas) tienden a ser adquiridos por agentes de frutas secas no especializados. En el sector de venta al detalle, los tres mercados utilizan el sistema de distribución de los productos alimenticios y ultramarinos.

Si bien son varios los factores que afectan los precios, el papel de los organismos gubernamentales en muchos de los países proveedores por cuanto al establecimiento de los

precios para la exportación es muy importante. Los rechazos y reexportación de importaciones por parte de los Estados Unidos pueden llevar a cambios importantes en los precios en cualquier año. Si bien aparecen, a veces, cotizaciones para dátiles secos en las publicaciones británicas *Food News* y *Public Ledger*, dichos precios deben ser tratados con precaución. Algunos de estos precios son citados en el texto.

Los índices arancelarios van desde cero al 12%, aplicándose el índice más bajo a la mayor parte de los países en desarrollo y a los países de Maghreb, lo cual les proporciona ventajas sobre otros exportadores a la CE, tal como los Estados Unidos.

Si bien existen normas internacionales y estadounidenses por cuanto respecta a los dátiles, diversos países exportadores e importadores poseen sus propios criterios, que pueden variar de acuerdo con el tipo de dátiles, el uso a que se destinan y el país específico del que proceden. Entre dichos criterios se cuentan, la limpieza, niveles de infestación y humedad, variedad, color, tamaño y modo de envase.

Con el cese de las hostilidades entre Irán e Irak, cualquier oportunidad que pudiese haber existido para nuevos productores debe haberse reducido significativamente. Es muy probable que la producción en estos dos países irá en aumento, existiendo escasa esperanza de que aumenten las importaciones a ninguno de los tres mercados bajo estudio. Sin embargo, podría ser que los productores de dátiles orgánicamente cultivados encuentren compradores interesados en los tres mercados, si los precios son apropiados.

Ciruelas pasas

El principal proveedor de ciruelas pasas para los tres mercados que nos ocupan son los Estados Unidos, seguidos de Yugoslavia, Rumanía, Chile y Argentina. La alta calidad del producto estadounidense es más apropiada para los requisitos del mercado alemán. El resto de los proveedores exporta ciruelas pasas de menor tamaño y peor calidad para la industria conservera y elaboración industrial, particularmente en el Reino Unido y Francia. Francia produce también ciruelas pasas comercialmente, siendo proveedor de los mercados alemán y británico. No existe producción comercial de ciruelas pasas en el Reino Unido o en Alemania.

Parece ser que el consumo de ciruelas pasas en Alemania ha experimentado recientemente cierto incremento, mientras que se ha estancado en el Reino Unido. Y aunque parece hallarse en aumento en Francia, ello no se refleja en las estadísticas de importación que presentan cierta reducción. En conjunto, los tres países importaron una media ligeramente superior a las 19,000 t anuales, con el 50% de dicha cantidad asignada a Alemania, un 33% al Reino Unido y el resto a Francia. Si bien las reexportaciones británicas y alemanas son despreciables, las exportaciones francesas exceden sus importaciones. En los tres mercados, las ciruelas pasas se consumen directamente, a manera de tentempié, y se utilizan en la cocina y en el sector conservero industrial. Según se cree, el 50% de las importaciones británicas se enlata, para su consumo subsiguiente.

Las tónicas comerciales y de distribución de las ciruelas pasas son similares a las de otras frutas secas.

Los precios de las ciruelas pasas se ven principalmente afectados por la envergadura o envergadura esperada de la cosecha. Otros factores que también influyen los precios son la escasez o abundancia de tamaños específicos y los tipos de cambio, particularmente el dólar norteamericano y el franco francés. De vez en cuando, los precios de las ciruelas pasas aparecen en la publicación británica *Food News*, debiéndose tener en cuenta que los precios citados en el texto tienen únicamente aplicación al período que nos ocupa, por lo que deberán ser utilizados por precaución.

El índice arancelario completo es del 12%, aplicándose un índice de cero a los países de ACP/OCT y a los países en desarrollo menos desarrollados.

Existen normas de la USDA para ciruelas pasas. Si bien los mohos constituyen un problema particular con las ciruelas pasas, resulta posible eliminarlo mediante tratamiento con ácido sórbico, variando los requisitos con los compradores. La competencia ofrecida por los Estados Unidos, Francia y países de la Europa Oriental constituyen un serio impedimento para cualquier nuevo proveedor a estos mercados. Además, no se ha observado ninguna marcada tendencia alcista en el consumo de los mercados francés y británico.

Section 1

The market for selected dried tropical fruits

THE PRODUCTS AND THEIR USES

Dried tropical fruits are not often shown separately in the trade returns of exporting and importing countries. The main commodities considered are banana, pineapple and papaya with only minor references to others including mango, guava and melon.

The term dried is used to describe the peeled fruit from which moisture has been removed irrespective of the method employed. The level of residual moisture is critical in the production of shelf-stable products and tends to vary with the particular fruit type and the ambient storage temperature, but generally the acceptable range is 8–10%.

Dried bananas are marketed mainly as banana chips and as whole dried bananas. The latter used to be called banana figs but this nomenclature is not allowed in the EC and the product is often referred to simply as dried bananas. Banana chips generally comprise the sliced (lengthwise or crosswise), unripe, or mature but semi-ripened, fry-dried product. Vegetable oils are used in frying. Dried banana comprises the generally sun-dried, mature but semi-ripened, whole fruits. Sun-drying produces a dark brown or black colour. Sometimes therefore, hot-air drying is used in producing dried banana. In the case of banana chips, a banana flavour/aroma, together with sugar or honey glaze is added.

Dried pineapple and papaya are most commonly prepared in the diced form using a two-stage drying process. The fruit is first placed in concentrated sugar solution to draw out a proportion of the water by osmosis followed by hot-air drying. Dried pineapple products vary in sizes and shapes and appear as cores, rings, chunks and granules. The colour of dried pineapple tends to be between bright yellow and dull lemon and that of dried papaya is commonly orange or red. Additives are often used to preserve these products. A colouring agent is sometimes applied to dried papaya. Dried pineapple and papaya are also prepared by cabinet drying, using a kiln or solar energy, but they have a harder texture and a less characteristic fruit colour due to oxidation.

For many years dried mango has been traded internationally but quantities remain relatively small. The various forms in the retail trade include pieces, strips and dices.

Dried tropical fruits are consumed mainly as snack food items or as ingredients in breakfast cereals such as muesli. The fruits are retailed both individually and in mixtures with other non-tropical dried fruits. Coconut chips and nuts are also included in some mixtures. The term Trail Mix is sometimes used to describe these mixtures owing to their popularity among hikers. Other uses of dried tropical fruits are as ingredients in ready-to-eat meals and desserts.

EXTERNAL TRADE AND CONSUMPTION

Tables 1–3 show that Ecuador is by far the largest supplier of dried bananas and that other sources have been Costa Rica, Thailand, Brazil, the Philippines

Table 1

Bananas, dried: imports into the United Kingdom (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	142	151	119	165	111	151
	£'000	115	135	102	189	94	125
	US\$'000	202	205	136	245	138	205
of which:							
Belgium/Luxembourg		-	-	16	2	-	-
France		-	-	-	14	1	8
West Germany		-	-	-	20	5	1
Philippines		10	72	-	26	18	1
Thailand		-	3	14	16	5	15
Vietnam		-	3	8	15	15	31
Kenya		-	-	-	-	3	-
Costa Rica		36	11	27	16	-	-
Ecuador		96	60	26	51	63	94
Australia		-	-	26	-	-	-
Other countries		-	2	2	5	1	1

Source: United Kingdom Trade Statistics, HM Customs and Excise

Table 2

Bananas, dried: imports into France (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	438	322	564	546	274	433
	FF'000	4,567	3,828	8,385	8,393	3,116	4,275
	US\$'000	695	502	959	934	450	711
of which:							
Ecuador		421	283	409	315	186	343
Netherlands		10	-	-	-	-	-
Vietnam		6	16	49	20	5	-
Philippines		1	2	47	63	32	25
Thailand		-	-	3	63	1	-
Costa Rica		-	21	29	75	40	6
Guatemala		-	-	14	8	-	-
Other countries		-	-	13	2	10	59

Source: Statistiques du Commerce Extérieur de la France, Ministère du Budget

Table 3

Bananas, dried: imports into West Germany (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	450	394	447	517	296	427
	DM'000	2,398	2,441	2,844	3,291	1,364	1,981
	US\$'000	988	956	999	1,118	628	1,102
of which:							
Costa Rica		53	-	56	-	-	-
Panama		23	-	-	-	-	-
Ecuador		344	336	327	381	162	282
Philippines		-	-	26	33	-	-
Thailand		-	-	-	-	31	-
Guatemala		-	-	-	38	-	-
Brazil		-	-	-	17	-	12
Other countries		30	58	38	48	103	133

Source: Aussenhandel nach Waren und Ländern, Statistisches Bundesamt Wiesbaden

Table 4**Banana chips: exports from the Philippines (t), 1982-87**

		1982	1983	1984	1985	1986	1987
Total	tonnes	4,877	5,989	8,113	9,276	11,354	10,381
	US\$'000	6,207	7,178	10,108	10,126	9,635	9,129
of which:							
United Kingdom		572	691	1,015	1,037	1,440	955
West Germany		114	191	403	567	1,224	1,632
France		1	1	91	364	460	549
United States		2,432	2,821	4,126	4,556	4,502	3,580
Japan		1,416	1,782	1,492	1,360	1,341	1,598
Australia		6	54	276	403	593	536
Netherlands		89	88	178	335	675	660
Canada		196	276	319	392	553	442
Other countries		51	85	213	262	566	429

Source: Foreign Trade Statistics of the Philippines

Table 5**Pineapples, dried: exports (t) from the Philippines and Thailand to selected markets, 1984-87**

	Philippines				Thailand			
	1984	1985	1986	1987	1984	1985	1986	1987
United Kingdom	-	4	6	-	37	59	-	..
West Germany	-	2	2	-	30	(100kg)	-	..
France	1	-	7	19	9	-	5	..

Source: National Trade Returns

Table 6**Papayas, dried: imports (t) into selected countries**

	1982	1983	1984	1985	1986	1987
United Kingdom	7	24	15	12	3	5
West Germany	19	13	28	49	123	105
France	39	3	906	1,424	870	426

Source: National Trade Returns

and Vietnam. The supply of banana chips to the three countries under consideration is dominated by the Philippines, a major supplier to the world market (see Table 4). Small quantities have been imported from Sri Lanka, the Caribbean and possibly Taiwan. Chips are exported either whole, used mainly for the dessert market, or broken for breakfast cereals and other industrial uses. Broken chips, as they can be closely packed, tend to bear lower transport costs per tonne. The main suppliers of both dried papaya and pineapple are Thailand and the Philippines (see Tables 5 and 6). The inadequacy of the trade statistics for papaya makes it difficult to assess which of these sources is the more important, but it is believed to be Thailand. Some apparently Taiwanese products are believed to originate in other areas including Sri Lanka. Dried mango has been supplied in bulk by Kenya, Malawi, India and South Africa.

There is a significant amount of intra-EC re-export trade in dried tropical fruits particularly in retail size packs. This trade is not shown separately in the published data but amongst the trade flows are United Kingdom and West German re-exports to France and United Kingdom re-exports to West Germany. Although dried bananas have been imported for many years, most dried tropical fruits have appeared relatively recently in the three European markets particularly in France, where in 1984 banana chips and other dried tropical fruits were virtually new to consumers. Consumption of dried tropical fruits is expanding faster in the domestic retail markets of France and West Germany than in the United Kingdom. However, future imports into all three markets will be influenced largely by the requirements of breakfast cereals manufacturers.

Importers do not specialize in particular fruit or act only as either importer, broker, merchant, packer, agent, distributor or retailer but tend to combine several functions. Brokers, however, are more important in West Germany and France. In the United Kingdom the greatest flow is in the health food sector in which organizations with several outlets tend to import in bulk and pack for retail. In France and West Germany the health food sector is less significant. Other large organizations such as breakfast cereal manufacturers also tend to do their own importing and wholesaling. Sometimes large users take delivery from the importer at the place where the consignment arrives. In addition to the health food outlets, dried tropical fruit is sold in supermarkets, department stores, greengroceries, on market stalls and in places where snack items are being retailed, e.g. railway stations. There is usually a wide range of labels which may belong to importer, packer, merchant or an overseas supplier if exports are in retail packs.

A high proportion of consumers' purchases of dried tropical fruit is made without further processing. Among the factors which affect consumers' buying habits are individual tastes, price and health considerations. The relative weight given to each varies between market sectors. In the health food sector much emphasis is placed on the sugar content, the presence and number of additives and, sometimes, the cultural practices of the country of origin; a premium is often paid for the approved product. Where dried tropical fruits are sold as snacks the price compared with those of other snack foods is important. Retail sales of some dried tropical fruits such as pineapple, reach a peak at Christmas when special packs are marketed. However, sales are not generally reported to be higher during the winter months taken as a whole.

Dried bananas

Influenced by supply factors, the imports into all three countries showed no marked trend over the period 1982–85, they declined in 1986 but recovered in 1987 to over 1000 t. The French and West German markets are of approximately the same size with imports normally 330–550 t per year while imports into the United Kingdom have been consistently under 200 t (Tables 1–3). Dried bananas are most frequently sold in cellophane-wrapped packets of 200–250 g although in France, in particular, they are also sold loose and in cellophane-wrapped trays. The product is retailed adjacent to other non-tropical dried fruit or fresh fruit and vegetables rather than with snack products, and greengroceries are a more important outlet than is the case for the other dried tropical fruits discussed. Retail prices show considerable variation with the type of outlet and during the latter part of the 1980s those observed in the United Kingdom ranged from £0.44 to £0.79 per 250 g packet. The dark, solar-dried banana is the main type of product sold but others including dehydrated bananas from Thailand, light brown in colour, are also marketed. Whereas solar-dried bananas are believed to be sold predominantly as an individual product, the other dehydrated bananas are marketed in muesli and fruit and nut mixes.

Banana chips

The market situation is best illustrated by reference to the Philippines export data (Table 4). These show that in 1987 total exports to the three countries were about 3100 t (United Kingdom 955 t, West Germany 1632 t and France 549 t). The table reflects trade opinion that, while the United Kingdom market has nearly reached maturity, at least in the retail sector, there is still good scope for expansion in West Germany and France. In 1984, trade opinion in West Germany was that the product was popular and some traders expected their sales to expand. The product was too new to the French market in 1984 for much trade opinion to have been formulated but the Philippines trade statistics show that consumption increased sharply both in that year and the following years.

Greatest sales in retail outlets are of sugar-sweetened, honey-dipped (or glazed) banana chips. There is limited demand for unsweetened chips in the health food sector, where the requirements include no added sugar and no additives, but the savoury form of the product is unknown. In the six months ending May 1987, banana chips in loose form, were being retailed in the United Kingdom at £0.30-0.40 per 100 g. Cellophane is the usual packaging material. Statistical data about the quantity of banana chips purchased by United Kingdom breakfast cereal manufacturers are not available, but one trade contact considered that the sector was comparable in size to the retail trade, while another reported that its demand for dried tropical fruit, including banana chips, was growing.

Dried pineapple and papaya

Exports of dried pineapple from the Philippines and Thailand are shown in Table 5, and imports of dried papaya into the United Kingdom, West Germany and France in Table 6. Unfortunately, probably due to problems of classification, the latter misrepresents the situation.

Trade opinion indicates that the United Kingdom imports more dried pineapple and papaya than either France or West Germany. In 1984, dried papaya was not considered to be a good seller in West Germany, while in France a clear trade opinion had yet to emerge.

Dried pineapple and papaya marketed by a number of United Kingdom companies are sold in much greater quantity than other forms of the products. Dices are the most common shape in which dried pineapple is marketed and dried papaya is sold either diced or in more irregularly shaped pieces. Dried pineapple and, to a lesser extent, dried papaya are sold individually in the United Kingdom. Sugar-free products carry a price premium at retail level. Recently, dried sweetened pineapple was being retailed in the United Kingdom at about £0.50 per 100 g, while the sugar-free product was fetching up to £0.75 per 100 g.

Other tropical dried fruit

These have been marketed primarily in the United Kingdom and include mango, guava and melon. Dried mango is sold mainly as a sugar-free product in strips, pieces and dices, and is marketed almost entirely through retail outlets including those serving ethnic groups, although it is also used in the manufacture of chutney. Despite the fact that dried mango has been imported into the United Kingdom for some years, market expansion has been limited. The main reason for this has been its high price, but it is also reported to have been due to the conservatism of consumers and the poor flavour of some of the products which have been imported. The small quantity of dried (pink) guava imported into the United Kingdom by a single importer is marketed as dices and halves. Both dried mango and guava are also used in tropical fruit mixes sold in retail packs. Dried melon has been used only by a few packers

to provide variation in dried fruit and nut mixes. Its consumption is increasing. Attempts have been made to introduce dried jack fruit but its flavour has been found unacceptable to consumers.

ORGANIZATION OF TRADE AND DISTRIBUTION

Imported tropical dried fruit pass along a marketing chain in which the companies involved act as one or more of the following: importer, packer, snack or health food supplier, distributor and retailer. Only a small proportion of producers' exports is in retail packs. In some cases one or more of the links in the marketing chain may be by-passed, especially when the retail chain is a major organization. Many processors in the EC who use dried tropical fruits are believed to secure their supplies from domestic stockists but some import direct from overseas suppliers. Some of the importing companies also undertake a significant amount of re-export in bulk as well as in retail packs.

Retail packs of dried tropical fruit carry a number of different kinds of brand labels. They may be of a national or European packing or snack food company, or the retail outlet in which the product is being sold or, particularly, with dried bananas, of the packer in the exporting country.

IMPORT PRICES

Prices offered by importers are determined by the origin, form, quality and trading volume of the product as well as market conditions. However, customs duty plays an important role especially where the rates are as high as 25%. Movements in conversion rates of the United States dollar in which prices are commonly quoted is another major influence on the imported prices.

Prices of dried tropical fruits are not usually quoted in trade journals and those given in the following paragraphs have been obtained from trade contacts. They should be regarded as orders of magnitude. However, unit values of imports can be obtained from Tables 1–4.

Dried bananas

In 1987 the cost, insurance and freight (c.i.f.) price in the United Kingdom of the solar-dried product from Ecuador was being quoted at £800 per tonne for the bulk purchases and £1150 per tonne for retail packs. Kiln-dried dices in bulk from Thailand fetched approximately US\$850–1000 per tonne, significantly lower than the prices which prevailed three years ago when the range was US\$1700–2000 per tonne. In 1984 higher prices were also obtained for Ecuadorean and Thai solar-dried bananas.

Dried pineapple and papaya

In past years the price of dried pineapple was higher than that of dried papaya, but this situation has now changed. One buyer accounted for this change as being the short supply of dried papaya in 1987. The 1987 c.i.f. UK price for Thai dried pineapple and papaya dices was US\$1000–1600 per tonne and US\$1600–1800 per tonne respectively. Thai products tend to command a premium of about 20% over those from the Philippines. With the dried papaya it is probably because the Thai product has a more attractive red colour produced by the addition of a natural colourant. The sugar-free products, however, fetch in excess of US\$2000 per tonne c.i.f. UK.

Other dried fruit

These are imported in such small quantities that it is quite difficult to obtain representative price quotations. However, in 1987 dried mango was being imported by one trader at around £2000 per tonne, and by another at over £3000 per tonne, both c.i.f. UK. Differences in rates of duty accounted for only part of the variation. Dried guava has been imported at the equivalent of around £2000–2500 per tonne c.i.f. UK.

TARIFFS

The rates of duty applying to dried tropical fruits are shown in Table 7. The table excludes special provisions which may apply to individual countries or groups of countries other than those shown.

Table 7

Dried/dehydrated tropical fruit*: tariffs from 1 January 1989 for the United Kingdom

Item†	Full rate %	GSP rate %	ACP/OCT rate %	Tariff code
Bananas, dried	20	Free	Free	0803 00900
Pineapples, dried	9	Full§	Free	0804 30000
Mangoes, dried	6	4§	Free	0804 50000
Papayas, dried	3	Free	Free	0813 40500
Pineapples, dried with sugar‡	22-24	Full§	Free	200820 various
Bananas, mangoes and papayas, dried, with sugar‡	25	6	Free	200600 various

Source: Integrated tariff of the United Kingdom, Vol. 2, 1989

Notes: * Excluding fruit mixtures
 † Descriptions are not identical to those used in source material
 ‡ An additional sugar levy may also be payable
 § LDDC-free

In determining under which tariff heading a product enters, a distinction is drawn on the basis of whether sugar is an ingredient in its production. If none is used it enters under a code heading 08, otherwise it falls within code heading 20. The particular sub-division of heading which applies depends on the size of the pack and whether the product is adjudged to contain added sugar. After this assessment, an allowance is made for the natural sugar content of the fruit. Where this is exceeded, an additional duty (sugar levy) of approximately 2%, *ad valorem*, is payable. Products are liable for sugar levy even when they are tariff-free although, in some cases, imports from countries to which the African, Caribbean and Pacific States/Overseas Countries and Territories (ACP/OCT) provisions apply are exempt.

BUYERS' REQUIREMENTS

It is not possible in this study to provide detailed specifications for the individual fruits discussed, particularly as these will vary with the buyer. However, certain aspects of buyers' requirements are common to all products and some are of sufficient importance, in respect of individual fruit, to need mentioning. The following notes are based on conversations with the trade about products already entering the market. These should be regarded only as guidelines and products with other specifications may be acceptable to particular buyers, especially if the price is advantageous to the buyers.

Buyers are likely to have specific requirements on some or all of the following: shape, taste, colour, texture, sugar content, additives, foreign matter, method of drying, cultural practices in production, size of pack and packaging. They are also likely to require a high degree of product uniformity. The importance of individual factors will vary with the market sector being serviced, for example, buyers of natural products will seek to ensure that there are no artificial colourings in their purchases, while the possible presence of foreign matter such as insect fragments is of concern to buyers in all sectors.

Dried bananas

Flavour is a more important factor with this product than with dried pineapple and papaya. The product should not be too dry but supple and tender. Some buyers are likely to have a preference for the light-coloured dried product. The most frequent complaint received from buyers was the presence of foreign bodies or insect fragments. Another was that products were prepared from unripe bananas and that they contained white streaks. Dried bananas which are exported in retail packs are wrapped in clear polythene or cellophane usually in units of 200 or 250 g. The normal export container is a cardboard carton of 3, 6 or 12 kg. When exported in bulk, dried bananas are packed in polythene-lined cardboard cartons or wooden boxes of between 12 and 20 kg.

Banana chips

The main criterion used by many buyers is taste, but the product should be crisp and free flowing. Buyers may specify thickness (normally 2–3 mm) and a maximum percentage of broken chips, although this factor is not generally considered important where the chips are intended to be used in muesli or breakfast cereals. Banana chips are packed in a sealed polythene bag inside a cardboard carton of 14–15 lb (6–7 kg) or sometimes direct into a polythene-lined carton, free from chip dust and fragments.

Dried pineapple and papaya

The dried forms of these products are normally 10–12 mm cubes with an outer size range of about 5–15 mm. Colouring, which remains fast, is important. Buyers sometimes specify that dried papaya should be red, orange or of mixed colours and that dried pineapple should be bright yellow. Products should be free flowing and not sticky. Buyers sometimes specify a maximum moisture content and that there should be no crystallization. The high sugar content often found in these products is of concern to a number of buyers and with rising consumer interest in health matters it is likely to increase in importance. A minimum acid content is sometimes required. Flavour is generally less important than with banana chips, although a specification is sometimes set. Packaging is similar to that used for banana chips and the products are usually exported in sealed polythene bags of 5 kg to make 10 or 20 kg packs in cardboard cartons.

PROSPECTS

Dried tropical fruits generally offer reasonable opportunities to new suppliers who are able to meet buyers' requirements, which are likely to become more demanding, while prices are becoming more competitive. In the United Kingdom growth in demand will probably come mainly from outside the snack food sector, and the volume depends to a significant extent on prices. In the snack food sector, products with health food specifications are likely to displace a proportion of those currently marketed. Of the other two countries considered, France offers the greater potential, although part of her demand is likely to continue being met by re-exports from other EC countries.

The current concern among an increasing number of consumers to have natural, healthy food should provide an opportunity for suppliers who can provide low sugar products, free from contentious additives. A few products based on organically grown fruit are currently being marketed and this area could offer a small outlet to new suppliers.

Regarding individual products, it seems unlikely that imports of dried bananas will show a significant upward trend in the three markets, so that opportunity for prospective suppliers is limited largely to sharing the existing market volume with current suppliers. Banana chips imports have increased significantly in all three countries but more particularly in West Germany and

France. However, United Kingdom demand for banana chips may have reached saturation point although buyers in all three markets show willingness to consider alternative sources of supply. The Philippines in particular is of interest to many buyers. Exporters in countries receiving tariff-free entry for their products could exploit their advantage over those in Thailand and the Philippines which are entitled to receive only Generalized System of Preferences (GSP) terms.

Imports of other dried tropical fruits will probably show some increase when the three markets considered are taken as a whole. In addition to those dried tropical fruits already being traded, buyers often welcome samples of new kinds, especially if these offer a new colour variation for use in mixed retail packs. Dried mango, while not a new product, also has potential, since adequate supplies of acceptable quality and price are not available at present.

While some retail packs of dried tropical fruit (other than bananas) are being imported from the producing countries, importers are still mainly interested in bulk supplies. This is because dried tropical fruit products are likely to be retailed in the largest quantity when they are either sold loose through a well-known outlet or, if being marketed in retail packs, carry a label which consumers recognize.

Section 2

The market for dried vine fruits

THE PRODUCTS AND THEIR USES

The following discussion is intended to outline the main features of the market and does not provide a comprehensive review. Dried vine fruits are obtained from drying grapes of the *Vitis vinifera* varieties. Sun drying is the main method used. The main products are currants, raisins and sultanas.

Currants produced from the Black Corinth grape, are very dark in colour and mostly seedless. The main varieties exported by Greece, the only significant supplier to the three markets, are Vostizzas which are grown in a specific area of the country and Provincials which are from no specific region.

Raisins and sultanas are obtained from green grapes. Strictly, the name sultana applies only to the dried fruit of the sultana grape. However, the term is often used more generally to include other lighter coloured products obtained through lye-dipping (i.e. dipping in a solution containing sodium hydroxide or other alkali) irrespective of the variety. The main variety of grape dried to produce raisins is the Thompson seedless, which is also known as the sultanina. The colour of the resulting product varies according to the method of drying and treatment given. However, when as is most usually the case, the grape is sun dried and no chemical treatment is used the raisin is a dark brown. In contrast a golden yellow raisin is obtained when artificial dehydration is employed and sulphur dioxide used as a preservative. It should be noted that in Australia the name sultana refers to the dried product of the sultanina or Thompson seedless grape. In France the name used for sultanas is *raisins de smyrne*.

Sultanas and most commercially traded raisins are seedless. Some seeded raisins are also marketed. These are the dried products of the green Muscat variety of grape. In Australia when these are lye-dipped the resulting product is called the Lexia raisin. Where lye-dipping does not occur the name Muscatel is used. Some dried Muscat grapes are sold with their seeds removed.

Dried vine fruits are traded internationally both in bulk, and in a wide variety of retail size packs. These include cardboard cartons, heat sealed packets and plastic tubes. Imported products are normally graded by quality and/or size.

Dried vine fruits are used in a great variety of ways but, overall, the most important, both in the case of individual consumers and of food processors, is baking, particularly for currants and sultanas. Among the most important of the other uses of dried vine fruits are snack food both by themselves and with other dried fruits or nuts, in sauce and pickle manufacture, in the confectionary trade and in breakfast cereals (muesli). In France and the United Kingdom dried vine fruits are one of the products used in the seasonal selection packs marketed during the Christmas period, e.g. packs of currants and peanuts, muscatel packs, and packs of seeded raisins.

After storage, as part of the EC's market support programme, currants and sultanas are used, amongst other purposes, for sauce and pickle manufacture and as livestock feed.

EXTERNAL TRADE AND CONSUMPTION

The external trade returns of the three countries now classify dried vine fruit into the following categories:

- (1) currants in containers of 15 kg or less;
- (2) grapes, dried, other than currants in containers of 15 kg or less;
- (3) currants in containers exceeding 15 kg;
- (4) grapes, dried, other than currants in containers exceeding 15 kg.

By far the greatest quantity of imports enter under (1) and (2). Categories (3) and (4) were combined until 1985; except for 1984, the three-country total before 1987 was 1000 ± 400 t per year, but category (4) increased significantly in 1987, most likely due to buyers taking advantage of special offers.

Table 8

Trade of dried vine fruits (t), 1982-87

	United Kingdom		France		West Germany	
	Imports	Exports	Imports	Exports	Imports	Exports
Currants in containers of 15 kg or less						
1982	35,153	112	602	89	1,869	73
1983	31,949	282	1,378	64	1,672	75
1984	35,527	129	2,128	54	1,618	70
1985	36,976	53	2,236	51	1,477	75
1986	37,742	88	1,090	45	2,042	50
1987	32,396	131	1,175	25	1,376	49
Other dried grapes including currants in containers exceeding 15 kg						
1982	69,206	1,511	15,829	1,038	46,922	968
1983	70,089	1,716	15,559	776	45,653	1,070
1984	74,321	975	18,944	2,211	53,582	1,335
1985	79,599	944	16,830	958	51,694	1,617
1986	79,889	1,320	20,142	395	51,402	1,270
1987	86,930	2,783	18,624	565	56,430	1,714

Data in Table 8 show that the United Kingdom is the biggest of the three markets. Exports (i.e. re-exports) are comparatively small in all three countries.

Tables 9-17 show imports by source. Greece is the only significant supplier of currants to all markets and is a major source of 'other dried vine fruit' to both the United Kingdom and French markets. In the case of the West German market imports of 'other dried vine fruits' from Greece are exceeded only by those from Australia. The high imports of dried grapes into all three countries in 1987 in containers of more than 15 kg are believed to be due to traders taking advantage of special offers from Greece and other suppliers.

Table 9

Currants in containers of 15 kg or less: imports into the United Kingdom (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	35,153	31,949	35,526	36,976	37,742	32,396
	£'000	20,347	18,316	18,569	17,739	21,540	20,180
	US\$'000	35,617	27,786	24,814	22,995	31,599	33,073
of which:							
Greece		34,668	31,625	35,043	36,480	37,549	31,910
Afghanistan		247	170	-	-	-	-
Yugoslavia		-	-	312	-	-	-
Other countries		238	154	171	496*	193	486†

Source: United Kingdom Trade Statistics, HM Customs and Excise

Notes:* Includes France - 195 t
Iran - 120 t
South Africa - 97 t
† Includes Denmark - 260 t
France - 154 t

Table 10

Currants in containers of 15 kg or less: imports into France (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	602	1,378	2,129	2,236	1,090	1,175
	FF'000	447	12,526	19,101	20,114	9,715	9,778
	US\$'000	68	1,644	2,185	2,327	1,403	1,627
of which:							
West Germany		—	94	133	128	92	46
Greece		519	1,013	1,915	2,079	934	1,077
Turkey		45	45	48	22	43	34
Afghanistan		—	219	27	—	—	—
United States		19	—	—	7	19	—
Mexico		16	—	—	—	—	—
Other countries		3	7	6	—	2	18

Source: Statistiques du Commerce Extérieur de la France, Ministère du Budget

Table 11

Currants in containers of 15 kg or less: imports into West Germany (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	1,869	1,672	1,618	1,477	2,042	1,376
	DM'000	5,083	3,966	3,203	2,703	3,616	2,619
	US\$'000	2,094	1,553	1,125	918	1,665	1,457
of which:							
Netherlands		—	—	—	59	—	119
Greece		1,684	1,530	1,457	1,396	2,019	1,227
Turkey		—	108	—	—	—	—
United States		68	—	151	—	—	—
Australia		87	—	—	—	—	—
Other countries		30	34	10	22	23	30

Source: Aussenhandel nach Waren und Landern, Statistisches Bundesamt Wiesbaden

Table 12

Grapes, dried, other than currants in containers of 15 kg or less: imports into the United Kingdom (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	68,711	69,589	74,320	79,193	79,375	63,657
	£'000	44,893	47,313	47,308	59,020	62,367	50,073
	US\$'000	78,585	71,774	63,218	76,508	91,492	82,065
of which:							
Greece		19,799	24,378	37,393	33,124	31,907	24,401
Turkey		18,134	12,510	9,097	9,749	13,963	11,903
Afghanistan		12,833	15,208	8,119	11,698	7,745	2,687
Cyprus		779	240	38	478	152	255
South Africa		6,371	7,034	8,768	7,991	5,622	2,151
United States		2,071	2,673	5,440	8,083	13,307	12,888
Australia		7,780	6,699	5,000	6,914	4,737	3,439
Other countries		944	847	465	1,156	1,942*	5,933†

Source: United Kingdom Trade Statistics, HM Customs and Excise

Notes: * Includes West Germany — 587 t
Iran — 340 t
Irish Republic — 335 t
† Includes Netherlands — 851 t
Iran — 1781 t
Irish Republic — 399 t

Table 13

Grapes, dried, other than currants in containers of 15 kg or less: imports into France (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	15,783	15,550	18,832	16,589	20,001	13,322
	FF'000	121,404	123,659	145,735	150,508	183,549	113,282
	US\$'000	18,472	16,225	19,122	16,674	26,501	18,847
of which:							
Greece		2,838	6,953	9,890	8,982	11,120	4,830
Spain		132	162	456	103	43	39
Turkey		8,143	4,012	2,012	2,613	3,713	4,111
Iran		301	-	-	262	287	797
Afghanistan		264	63	265	142	13	-
South Africa		1,030	1,186	1,778	1,628	1,928	1,844
United States		648	550	444	482	582	418
Australia		1,972	2,453	3,827	1,781	1,164	803
Other countries		455	171	160	596	1,151*	480†

Source: Statistiques du Commerce Extérieur de la France, Ministère du Budget

Notes: * Includes Netherlands - 323 t
West Germany - 317 t
† Includes Netherlands - 231 t

Table 14

Grapes, dried, other than currants in containers of 15 kg or less: imports into West Germany (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	46,637	45,335	46,197	50,933	50,818	36,020
	DM'000	130,310	121,449	117,796	143,268	132,020	84,091
	US\$'000	53,692	47,566	41,391	48,664	60,797	46,785
of which:							
Netherlands		102	745	1,201	679	1,071	2,818
Greece		3,252	5,436	11,606	10,721	12,732	4,384
Turkey		18,685	15,135	7,500	9,242	5,939	2,840
Iran		2,059	898	81	2,532	2,185	6,256
Afghanistan		668	487	576	436	84	244
Australia		15,571	16,218	13,851	15,811	16,881	9,612
South Africa		2,534	3,436	5,383	4,967	3,938	3,272
United States		3,306	2,705	5,742	6,296	7,422	6,471
Other countries		460	275	257	276	566*	123

Source: Aussenhandel nach Waren und Ländern, Statistisches Bundesamt Wiesbaden

Note: * Includes USSR - 260 t

Major sources of 'other dried vine fruits', in addition to Greece, are Turkey, South Africa, Australia, the United States (except France) and, in the case of the United Kingdom, Afghanistan. The tables show that Greece has increased its share of all three markets, particularly at the expense of Turkey. The main reason for this trend has been the minimum import price (MIP) system which was introduced in 1982 to assist Greek exports, Greece having become an EC member. This discriminates against third country suppliers by regulating the price at which these are allowed to enter (see 'Import prices'). Developed country exporters to the EC are less affected, since buyers are more ready to pay higher prices for the better quality product which they supply.

The main suppliers of raisins to the three markets are the United States and South Africa, while those of sultanas are Greece, Turkey and Australia. Raisins are also imported from Afghanistan and Iran. Seeded raisins are obtained from Australia, the United States and Spain.

Table 15

Grapes, dried in containers exceeding 15 kg: imports into the United Kingdom (t), 1982-87*

		1982	1983	1984	1985	1986	1987
Total	tonnes	496	500	-	406	514	25,424
	£'000	222	320	-	294	429	17,860
	US\$'000	389	485	-	381	629	29,271
of which:							
Italy		45	-	-	-	-	41
Irish Republic		19	-	-	56	90	90
Greece		18	118	-	304	173	7,354
South Africa		34	-	-	-	-	1,551
Cyprus		332	374	-	-	-	-
Pakistan		15	1	-	20	71	9
United States		20	-	-	6	-	4,257
Argentina		12	-	-	-	-	-
Other countries		1	7	-	20	180†	12,122‡

Source: United Kingdom Trade Statistics, HM Customs and Excise

Notes: * For full years 1986 and 1987 category split into currants and other:
 Currants 1986 - 86 t
 1987 - 3743 t
 † Includes Afghanistan - 93 t
 ‡ Includes Turkey - 7648 t
 Afghanistan - 2364 t
 Australia - 1314 t

Table 16

Grapes, dried in containers exceeding 15 kg: imports into France (t), 1982-87*

		1982	1983	1984	1985	1986	1987
Total	tonnes	46	9	114	241	141	5,302
	FF'000	470	97	819	2,883	977	41,181
	US\$'000	72	13	94	321	141	6,851
of which:							
West Germany		-	-	-	211	-	-
Greece		-	-	89	13	86	2,167
Italy		-	-	-	11	34	-
Turkey		3	-	13	4	11	1,655
Iran		36	-	-	-	-	210
Other countries		7	9	12	2	10	1,270†

Source: Statistique du Commerce Extérieur de la France, Ministère du Budget

Notes: * For full years 1986 and 1987 category split into currants and other:
 Currants 1986 - 118 t
 1987 - 272 t
 † Includes South Africa - 826 t
 United States - 168 t
 Australia - 241 t

Producers and/or exporters in supplying countries commonly receive assistance in a variety of forms from their trade organizations and/or governments. Examples are the minimum prices, storage and processing subsidies given in Greece and the financial contribution provided by the United States Department of Agriculture (USDA) to the promotional campaign of the California Raisin Advisory Board (CALRAB). This campaign has been instrumental in increasing United States exports to the United Kingdom and West German markets since 1983 and continued in 1988-89.

Table 17

Grapes, dried in containers exceeding 15 kg: imports into West Germany (t), 1982-87*

		1982	1983	1984	1985	1986	1987
Total	tonnes	285	318	7,385	761	584	20,410
	DM'000	748	809	1,700	551	893	45,487
	US\$'000	308	317	597	189	411	25,307
of which:							
Greece		-	53	6,872	639	450	3,346
Turkey		-	239	-	-	-	2,121
United Kingdom		-	-	60	-	-	-
Cyprus		90	-	162	-	-	-
Australia		145	-	42	-	-	6,503
Other countries		50	26	249	122	134	8,440†

Source: Aussenhandel nach Waren und Landern, Statistisches Bundesamt Wiesbaden

Notes: * For full years 1986 and 1987 category split into currants and other:
Currants 1986 - 120 t
1987 - 715 t

† Includes United States - 3451 t
South Africa - 2619 t
Iran - 2109 t

In addition to providing assistance, governments and/or trade organizations often control the quantities of dried vine fruit exported and the prices at which these are available. This factor, together with the intervention in the market, practised within the EC itself, means that the trade in dried vine fruit is highly regulated. In consequence, the supply of product 'x' can depend not only on market conditions and the size of the crop but also, for example, on decisions 'by the relevant authorities' about the proportion of the crop that should be exported, releases from stocks and, in the case of the EC, the specific purposes for which stock releases can be used. The availability of many kinds of dried vine fruit is also influenced by the trade's expectations about changes in the MIP and its surrounding regulations.

FAO production data do not record any domestic production of raisins (including sultanas) in the three countries and there is no production of currants. As re-exports are negligible, import data can be used as reasonably reliable indicators of consumption trends.

Comment on trends in imports of currants on the one hand, and of raisins and sultanas on the other, is hampered by the fact that bulk packed items were not shown separately until the full years 1986 and 1987. Tables 15, 16 and 17 show in the footnotes the quantities of currants included in the bulk categories in these years; they were small except for the 3743 t imported by the United Kingdom in 1987. For this reason, and the exceptionally high imports of bulk packed goods in 1987, Table 8 which is the basis for the ensuing comments on trends, shows imports of currants in containers of 15 kg or less, and of all other dried vine fruits including currants in containers of over 15 kg.

For currants, there have been year by year fluctuations in imports into all three countries. However, the three-year averages, 1982 to 1984 and 1985 to 1987, show an increase of 4% for the United Kingdom, 10% for France and a decline of 4% for West Germany; the three-country aggregates showed an increase of 4%. Thus the market has been static.

The other group, which is predominantly raisins and sultanas, showed three-year average increases for all three countries, 15% for the United Kingdom, 10% for France and 9% for West Germany. The year by year

progression for the United Kingdom has registered an increase in each year, but there have been fluctuations for France and West Germany. Clearly the demand for raisins and sultanas has been more dynamic than that for currants.

For some purposes buyers of dried vine fruits require either raisins, sultanas or currants but in other cases these fruits may be wholly or partially substituted. For example, raisins are needed by snack food manufacturers and alternatives are not normally acceptable. However, manufacturers of sauces and pickles can normally use either raisins or darker coloured sultanas, and those of muesli are reported to adopt mainly the price criterion when deciding which fruit should be used. Similarly, the bakery trade uses mainly sultanas and currants rather than raisins and, while currants are needed specifically for some purposes, e.g. in biscuit manufacture, for others, both sultanas and currants are considered suitable. The health food sector, which is most important in the United Kingdom, sells a wide range of dried vine fruits and is a major outlet for seeded Lexias and Muscatels.

There are differences between the three countries: the French and West German markets were reported to require lighter coloured fruits than the United Kingdom at the time of the visits to the trade in 1984, but CALRAB's promotional campaign may have reduced this preference since that time. There was also reported to be no significant market for seeded raisins in either France or West Germany and currants, though used in cooking in France, were otherwise considered not to be popular, since they were too dark in colour.

The seasonal spread of demand for the different dried vine fruits varies according to their use. Overall, demand from individual consumers is higher during the pre-Christmas months since baking becomes relatively more important at this time, and in the United Kingdom the peak period of retail sales was reported to be in October and November. Dried vine fruits are retailed both loose and in retail packs. The latter vary in size mainly between 250 and 500 g.

In the United Kingdom the trade reported that demand was growing from breakfast cereal manufacturers, the confectionary trade and the health food sector. The low price of currants was said to have stimulated their use by some manufacturers at the expense of sultanas. In West Germany where the Aldi supermarket chain is a major buyer, the demand for sultanas was reported to have fallen since less were used for baking purposes, particularly cake making. Currants seemed to have been substituted.

ORGANIZATION OF TRADE AND DISTRIBUTION

A detailed consideration of the organization of marketing in the three countries is beyond the scope of this study. Generally, the marketing and distribution of dried vine fruits is similar to that of other dried fruits (see Section 1), although it is worthwhile noting that for dried vine fruits, the existence of the MIP and its supporting regulations have a number of sometimes anomalous effects on usual procedures. Traders do not concentrate on particular fruit or particular trading functions but perform one or more of the following: importer, packer, merchant, broker, agent, distributor and retailer which is again similar to the structure described for tropical dried fruit.

Vine fruit products, which are imported in bulk and ready-washed, are usually rewashed after entering a market prior to sale to consumers, although this is not done when buyers are sufficiently sure of a product's quality to adjudge it unnecessary, e.g. some imports from the United States. Importing companies may just break bulk, as necessary, and sell onward. Alternatively, they may import and repack. In West Germany, a number of major buying groups import on behalf of their members who may be, for example, wholesalers, co-operatives or retail outlets.

Brokers are more important in the United Kingdom and West Germany than in France where buying is undertaken by a dozen or so major companies. Agents may act on behalf of exporters and/or importers/users in the importing country. Some major users and retail outlets purchase directly from overseas suppliers though this method of trading is not common. In practice, traders are likely to have varying methods of obtaining their requirements depending on the fruit concerned, and will also depart from their accustomed method of trading in a particular product when the circumstances warrant. Firms buying in large units are likely to take delivery directly from an importer or even from the port at which the fruit arrives.

It is not possible in this study to detail the full effects which the MIP system has on the marketing of dried vine fruits, however, some of the most important are:

- forward buying, which is a basic feature of the trade, is made more difficult due to uncertainty about such factors as the future level of the MIP and countervailing charges (see 'Import prices'); changes in the supporting regulatory system; the annual support levels for Greek producers and amounts to be taken in and out of stocks
- restrictions on the prices which can be offered for products: these affect lower quality products in particular since the MIP reduces the scope for buyers and reduce the price they offer; sometimes, the price which has been agreed between buyer and seller for a forward sale has to be subsequently renegotiated upwards to allow for changes in the MIP
- special arrangements are sometimes made to avoid or mitigate the effects of the MIP system
- the support given to the Greek industry has, on occasions, resulted in quality problems with its products: additionally, difficulties regularly occur in selling the annual crop of Greek currants, this is because buyers' requirements are being met to a significant extent by sales from intervention stocks, which have been built up by the EC buying currants to maintain their price.

IMPORT PRICES

The prices at which dried vine fruits are imported into the three markets are influenced to an appreciable extent by the MIP system which applies to all EC member countries. Minimum import prices were established by the EC Commission in 1982 as a means of assisting Greece's sultana exports and were made a permanent regulatory feature of the dried grape trade in 1984. Separate minimum export prices apply to raisins, including sultanas, and currants. If a consignment enters the EC below the MIP (the relevant price may be regarded as c.i.f.), a countervailing duty is charged on a sliding scale depending on the extent of the breach.

MIPs are set annually in the European Currency Unit (ECU) for the following marketing year commencing on 1 September. They are converted into individual national currencies by the application of the appropriate green currency conversion rate and monetary coefficient. The green rate is subject to change every two months and the monetary coefficient whenever a new alignment of currencies is adjudged to have occurred. The countervailing charge is set in ECUs and converted to national currencies using the green rate. Its amount is fixed and changed periodically as necessary, with reference to the price of Turkish sultanas. Before 1 September 1987 a standard MIP and countervailing charge applied irrespective of the way in which products were imported. From that date varying MIPs and charges were set depending on a product's form of importation and weight. Table 18 gives the MIPs and countervailing charges for the United Kingdom from 1 September 1988.

The change from standard rates is likely to assist the United Kingdom trade since, as noted previously, a higher proportion of its imports are in bulk form than for France or West Germany. It will also act to discourage the buying of

Table 18

MIP and countervailing charges for the United Kingdom from 1 September 1988 (per tonne)

	MIP		Maximum countervailing charges (from 14.11.88)	
	ECU	£	ECU	£
Raisins (and sultanas)				
Retail packs				
(2 kg and under)	1,049.14	760.65	321.61	217.11
Bulk packs	895.36	649.16	167.83	113.30
Currants				
Retail packs				
(2 kg and under)	1,002.85	727.09	275.32	185.86
Bulk packs	855.86	620.52	128.33	86.63

Source: Ministry of Agriculture, Fisheries and Food **Note:** weights are expressed as 'in immediate containers or a net capacity of . . .'

specially cleaned and retail packed fruits from third countries which has been practised by some EC importers.

In addition to the MIP and a product's characteristics, the prices of dried vine fruits are influenced to a major extent by the size and composition of crops in exporting countries, by movements in the exchange rate of currencies, and by the policies of those responsible in exporting countries and within the EC for price regulation. For example, marketing boards in Australia, South Africa and the United States set the prices at which products are exported and the EC Management Committee decides on the prices at which stocks can be sold. The prices of dried vine fruits are reported regularly in the journal *Public Ledger* and the periodical *Food News* published in the United Kingdom and in the French newspaper *L'Antenne*. Those quoted below are taken mainly from *Food News* and illustrate the price range within which products have been traded during the latter half of 1988.

Greek sultanas, No. 2 grade	£675 c.i.f.
Greek currants, Vostizzas	£170 ex UK warehouse
Provincials	£635-650 ex UK warehouse
Turkish sultanas, No. 9 grade, US\$900 c.i.f. UK	
United States raisins, Thompson seedless, US\$0.57 per lb f.a.s. Oakland (free along side)	
South African raisins, Thompson seedless and sultanas Orange River, £727.50-805 c.i.f. UK	
Thompson seedless bolds £772 and jumbos £805 c.i.f. UK	
Australian sultanas No. 5 grade £757 c.i.f. UK	

TARIFFS

The rates of duty on dried vine fruit imported into the three markets from outside the EC are shown in Table 19, as at 1 January 1989. Tariff codes are

Table 19

Dried vine fruits: tariffs from 1 January 1989 for the United Kingdom

Full	3%
GSP	3% (i.e. no reduction)
GSP (LDDC)	Free
ACP/OCT	Free
Turkey	Free

based initially on weight and then on the type of product concerned. These are, for example: 080620 11 dried grapes 'in immediate containers of a net capacity not exceeding 2 kg: currants'. The full and concessionary tariff rates were identical irrespective of the type of dried grapes concerned and the weight of the product.

BUYERS' REQUIREMENTS

These may be divided into product characteristics, the general attributes required in respect to all dried fruit irrespective of their type and criteria which are relevant specifically to dried vine fruit.

By product characteristics are meant such considerations as the kind of fruit wanted (raisins, sultanas, currants), its colour, origin, grade, whether it should be seeded or unseeded and packaging requirements. These factors will vary from buyer to buyer. Purchasers may also make specifications about whether coating materials and/or additives are acceptable and, if so, their type and level of use. Countries are likely to have their own legislation relating to additives (e.g. the tolerance level on sulphur dioxide is normally 2000 ppm), but the criteria adopted by buyers may be more stringent, particularly in the health food sector and especially in West Germany for sulphur dioxide.

The provision of detailed information on buying criteria for dried vine fruits specifically is beyond the scope of this study. Useful guidance is contained in standards published by the USDA for *Processed Raisins* and for *Dried Currants*, and by the joint FAO/WHO Codex Alimentarius Commission. It is emphasized, however, that products supplied in accordance with these standards will not necessarily be acceptable to all buyers. The criteria listed in the standards are set both in general terms, e.g. 'the finished product shall possess normal colour, flavour and maturity characteristics' (*Codex*) and specific. For example, the USDA *Standards* detail the criteria for grading the different kinds of raisins both by size and quality. Defects taken into account in quality grading include the number of capstems present, and the weight of damaged fruit.

The published standards do not include information on packaging. Retail packs, as noted earlier, are marketed mainly in net weights of 250–500 g. The number of packets per case is 12–48. Dried vine fruits are most usually packed in cardboard cartons which are often polylined. The net weight of bulk packs varies according to the supplying country. However, it is believed to be mainly of 15 kg or below, with 12.5 and 15 kg being common sizes.

PROSPECTS

The prospects for new suppliers to the three markets reviewed is small due to the MIP system and its accompanying regulations. The major effect of the MIP in relation to potential suppliers is to restrict their ability to compete by preventing them reducing their prices below a certain level. Despite this, the size of the market for dried vine fruit, its growth, at least in the United Kingdom, and the variety of products traded afford some scope to new exporters, although currants are probably an exception due to the amount of support given to the Greek industry.

Opportunities for new exporters are most likely to arise when one or more of a market's suppliers has a poor crop and cannot provide the quantity and quality of the exact type of products needed. As an example, in 1986 Turkey, Greece and the United States all experienced rain during the critical drying period for their crops and prices rose in anticipation that the long-standing world over-supply situation in the world market for raisins would be corrected. On a more limited scale there was a shortage of Australian Lexia raisins in 1985. Disease problems can also occasionally occur, reducing crops and providing new suppliers with opportunities, e.g. *Phylloxera* in Crete was reported to be reducing the 1987 sultana crop there (*Financial Times* 7 July

1987, *Food News* 24 July 1987). If new exporters are to establish themselves as more than stop-gap suppliers, the products which they provide must be of a competitive quality. This is likely to prove very difficult though not necessarily impossible. The new MIP system which encourages cleaning and packing within importing countries could assist third country suppliers.

Finally, some potential may exist in supplying the health food sector where, providing buyers' stipulations about coatings and additives are met, other quality criteria are sometimes less demanding than elsewhere. Within this sector there is some demand for organically grown produce which could provide an opportunity for small-scale exporters.

The market for miscellaneous dried temperate fruits

THE PRODUCTS AND THEIR USES

This section is concerned with sun dried and evaporated products, although some of the fruits, especially apples are also traded in other dried forms, e.g. dehydrated apples, apple chips and apple flour.

The dried products considered are the fruit of the common apple, *Malus pumila*, the peach tree, *Prunus persica*, the nectarine tree, *Prunus persica* var. *nectarina*, the pear tree, *Pyrus communis* and also fruit mixtures.

The fruits are traded internationally, predominantly in bulk in the following forms:

- dried apples — rings (slices) and, to a lesser extent, as wedges, cuts and dices;
- dried peaches — halved pitted fruit and some dices;
- dried pears — halved fruit which may or may not be cored and some dices.

The main use of the dried fruits included in this section, both by food processors and by individual consumers, is as ingredients in the making of dried fruit salad. They are also used individually as a dessert, for cooking purposes and for out-of-hand eating. Dried apples and pears are used, with dried apricots, to make fruit soup in West Germany, and dried pears in France to make pear cake. Some importers purchase in bulk for the purpose of repacking into retail size units and gift boxes, particularly during the Christmas season. The main fruits contained in imported mixtures are dried apricots, apples, pears, peaches and prunes. Sulphur dioxide is commonly used as a preservative and potassium sorbate is also employed to help prevent the growth of moulds in mixtures containing prunes.

EXTERNAL TRADE AND CONSUMPTION

The trade returns of the three countries classify dried apples with dried pears and dried peaches with dried nectarines. Dried apples and dried peaches are believed to contribute by far the greater proportion of their respective categories. Dried fruit mixtures are segregated into those containing and not containing prunes. A summary of trade in recent years is shown in Table 20.

The data show that:

- imports of dried apples and pears are considerably higher in all three markets than are those of dried peaches and nectarines, and dried fruit mixtures
- the United Kingdom is the biggest importer of dried fruit mixtures but that West Germany imports a greater amount of the other products
- French imports are small
- France and, in some years, West Germany, are net exporters of dried fruit mixtures.

Table 20

Trade of dried temperate fruits (t), 1982-87

	United Kingdom		France		West Germany	
	Imports	Exports	Imports	Exports	Imports	Exports
Apples and pears						
1982	1,287	54	100	14	2,701	251
1983	1,888	35	110	21	2,601	148
1984	1,738	39	165	31	3,040	193
1985	1,929	78	220	30	3,036	196
1986	1,884	141	139	73	3,500	205
1987	2,190	98	186	7	3,904	208
Peaches and nectarines						
1982	275	9	58	3	433	18
1983	251	27	51	6	282	5
1984	230	8	50	47	432	4
1985	179	11	47	3	382	12
1986	221	23	25	1	336	11
1987	252	35	184	1	371	20
Mixtures of fruit, dried						
1982	556	1	2	126	126	38
1983	460	8	2	118	112	124
1984	455	14	64	62	65	89
1985	414	4	48	132	113	147
1986	320	7	16	142	147	96
1987	249	3	17	139	142	118

Sources of supply are shown in the Tables 21-27 (only those for dried apples and pears are available for the French market).

Dried apples are obtained from a number of countries but Italy is the main source. The product supplied is a soft apple. A harder fruit is imported from China. In recent years imports into West Germany have increased from Chile, Turkey, Hungary and, to a lesser extent, from South Africa. Dried pears are supplied by the United States, South Africa, Australia, Argentina, Spain and China which sends a white product. Dried peaches are obtained mainly from South Africa. The United States, Australia, Italy and, in some years China and Argentina, are also significant suppliers. Dried nectarines are known to be imported from South Africa, Australia and Chile. Dried fruit mixtures enter the United Kingdom and French markets mainly with prunes, while those imported into West Germany are, in broad terms, equally divided between with and without prunes. South Africa is the only major supplier to the United Kingdom and France. West German supplies are obtained mainly from France and Italy.

In the United Kingdom there is no commercial production of dried apples or the other dried fruits included in this section and the export data are therefore re-exports. However, on the evidence of the import data, both dried apples and dried peaches are produced in France, and dried apples in West Germany, so that imports of these items into these two markets are not necessarily a reflection of trends in consumption. Consumption of dried fruit mixtures in all three countries is satisfied primarily by the output of domestic packers so that imports of this category are not an indication of the sizes of the markets.

Imports of dried apples and dried pears into the United Kingdom and West Germany have increased substantially since 1982, but those of all the other items being considered, including dried fruit mixtures, have generally stagnated, or fallen in all three countries. The sharp rise in the United Kingdom's imports of dried apples and dried pears between 1982 and 1983 was possibly due to the publication of the F (Fibre) Plan Diet but, despite a continued consumer interest in healthy eating, further growth has been very limited.

Table 21

Apples and pears, dried: imports into the United Kingdom (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	1,288	1,888	1,740	1,929	1,884	2,190
	£'000	2,359	3,577	4,887	5,288	5,575	6,001
	US\$'000	4,130	5,427	6,531	6,855	8,179	9,835
of which:							
France		38	20	4	45	11	-
West Germany		-	34	3	28	9	5
Italy		983	1,587	1,519	1,627	1,314	1,249
China		95	28	69	47	53	60
Australia		29	38	19	39	27	45
United States		47	54	9	12	34	78
South Africa		86	89	49	79	86	81
Other countries		10	38	68	52	350*	672†

Source: United Kingdom Trade Statistics, HM Customs and Excise

Notes: * Includes Irish Republic - 270 t
† Includes Irish Republic - 361 t

Table 22

Apples and pears, dried: imports into France (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	212	111	165	220	142	186
	FF'000	1,872	2,247	4,481	6,270	4,292	4,591
	US\$'000	285	295	531	698	620	764
of which:							
West Germany		15	13	13	72	49	-
Italy		17	19	36	39	41	71
Albania		111	10	-	-	-	-
South Africa		34	54	87	103	47	73
United States		1	12	8	3	4	1
Australia		21	-	5	-	-	4
Other countries		13	3	16	3	1	37

Source: Statistiques du Commerce Extérieur de la France, Ministère du Budget

Table 23

Apples and pears, dried: imports into West Germany (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	2,701	2,601	3,040	3,036	3,500	3,904
	DM'000	17,085	16,645	23,455	24,493	25,691	24,068
	US\$'000	7,040	6,519	8,242	8,320	11,831	13,391
of which:							
Italy		1,668	1,755	1,768	1,745	1,806	1,714
Switzerland		78	45	80	85	70	48
Turkey		158	-	-	251	370	439
Hungary		-	-	74	142	192	247
Romania		-	46	-	-	25	42
Albania		-	86	83	66	160	298
Argentina		-	59	61	45	22	113
Chile		-	-	156	258	301	306
China		453	267	295	82	145	212
South Africa		102	101	133	178	163	147
United States		117	53	210	106	120	137
Other countries		125	189	180	78	126	201

Source: Aussenhandel nach Waren und Ländern, Statistisches Bundesamt Wiesbaden

Table 24

Peaches, including nectarines, dried: imports into the United Kingdom (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	275	250	230	179	221	252
	£'000	318	340	321	338	365	342
	US\$'000	555	516	429	438	535	561
of which:							
France		14	2	2	3	1	-
Spain		3	8	28	16	9	22
Italy		-	14	49	6	34	53
China		30	27	6	3	16	6
South Africa		186	138	140	90	88	116
United States		21	32	2	26	34	9
Australia		21	28	3	33	36	40
Other countries		-	1	-	2	3	6

Source: United Kingdom Trade Statistics, HM Customs and Excise

Table 25

Peaches, dried: imports into West Germany (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	433	282	432	382	336	371
	DM'000	1,880	1,423	2,330	2,261	1,815	1,877
	US\$'000	775	557	819	768	836	1,044
of which:							
South Africa		319	191	251	262	153	219
United States		93	66	84	67	106	138
Argentina		-	-	89	35	-	-
Other countries		21	25	8	18	77*	14

Source: Aussenhandel nach Waren und Landern, Statistisches Bundesamt Wiesbaden

Note: * Includes Spain - 53 t

Table 26

Mixtures of fruit, dried: imports into the United Kingdom (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	556	460	455	414	320	249
	£'000	680	672	545	723	517	392
	US\$'000	1,191	1,019	727	938	758	643
of which:							
containing prunes	tonnes	538	442	428	388	254	211
	£'000	647	638	505	669	409	329
	US\$'000	1,133	967	674	867	600	539
not containing prunes	tonnes	18	18	27	26	66	38
	£'000	33	34	40	54	108	63
	US\$'000	58	52	53	71	158	103
of which:							
France		12	14	1	9	-	3
South Africa		516	442	434	378	289	237
United States		24	4	18	5	10	1
Other countries		4	-	2	22	21	8

Source: United Kingdom Trade Statistics, HM Customs and Excise

Table 27

Mixtures of fruit, dried: imports into West Germany (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	126	112	65	113	147	142
	DM'000	1,068	845	513	1,053	1,519	1,119
	US\$'000	440	331	181	357	700	623
of which:							
containing prunes	tonnes	53	54	30	44	96	55
	DM'000	387	373	178	340	1,090	603
	US\$'000	159	146	63	115	502	336
not containing prunes	tonnes	73	58	35	69	51	87
	DM'000	681	472	335	713	429	516
	US\$'000	281	185	118	242	198	287
of which:							
France		34	18	36	51	51	42
Italy		16	—	10	13	84	34
United Kingdom		27	—	—	—	—	—
United States		—	—	—	15	—	—
Other countries		49	94	19	34	12	66*

Source: Aussenhandel nach Waren und Landern, Statistisches Bundesamt Wiesbaden

Note: * Includes Thailand - 47 t

As noted earlier, the individual dried fruits being considered are used most extensively in the making of dried fruit mixtures (salad). With the exception of dried nectarines, for which data are unavailable, the fruits are also sold loose and in retail packs. The latter range mainly between 125 and 500 g with 250 g being the most popular pack. Consumption occurs throughout the year but is higher during the winter months.

Dried apples are believed to be sold mostly in the form of rings. In the United Kingdom and possibly in the other markets a significant quantity of dried apples is used in the catering sector. Unsulphured products of dried fruits included in this study are required by some health food outlets. The sulphur level in dried fruit is generally of concern to consumers in West Germany. The sulphur content of dried pears and dried peaches was considered by one French buyer to be a major reason why consumption was low.

ORGANIZATION OF TRADE AND DISTRIBUTION

The marketing and distribution pattern is similar for all dried fruits, as discussed in Sections 1 and 2.

IMPORT PRICES

The prices of the dried fruits included in these notes are not usually provided in the trade press and the information below is based on quotations received during visits to the trade. Unit values of imports, however, can be obtained from the import statistics in Tables 21-27.

Dried apples

There is a range of prices according to the type, quality and source of the product concerned. Suppliers quote their products in various currencies but, based on exchange rates prevailing at the time, the range of prices (c.i.f. UK) in the first half of 1985 was approximately US\$2200-3300 per tonne. The lower end of this scale relates to products from China and Chile, the upper

end to those from the United States, with those from Italy lying between but nearer the top of the scale. A more recent quotation of the price range of dried apples (September 1987) was £1900–3500 per tonne c.i.f. UK (approximately US\$3200–5800).

Dried pears and dried peaches

The prices of these fruits are similar but dried pears are slightly dearer. Quotations received in 1985 standardized to a United States dollar basis, were US\$2000–2900 per tonne c.i.f. UK. Later quotations obtained in September 1987 were £1700–1800 per tonne c.i.f. UK (approximately US\$2800–3200) for South African products and, on a comparable basis, £2400–2600 (approximately US\$3200–5800) for those from the United States.

Dried fruit mixtures

Only one price quotation was received for this product in 1985—US\$2105 per tonne c.i.f. UK (ex South Africa). Prices of mixtures vary considerably at any one time according to the proportions of the different dried fruit which they contain. The unit value of the United Kingdom's imports in 1987 was US\$2582 per tonne compared with US\$2010 in 1985, which compares well with the trade quotation above.

TARIFFS

The rates of duty applicable to dried temperate fruits imported into the three markets from outside the EC are shown in Table 28. Turkey, ACP/OCT and LDDC countries enjoy free entry for their products; GSP countries enjoy a concession only for pears, with a reduction from 8 to 4%.

Table 28

Miscellaneous dried temperate fruit: tariffs from 1 January 1989 for the United Kingdom

Item description	Full rate %	GSP rate* %	ACP/OCT rate %	Tariff code
Peaches including nectarines	7	Full	Free	0813 40100
Apples	8	Full	Free	0813 30000
Pears	8	4	Free	0813 40300
Fruit salads (i.e. mixtures)				
not containing prunes	8	Full	Free	0813 50110
containing prunes	12	Full	Free	0813 50190

Source: Integrated tariff of the United Kingdom, Vol. 2, 1989

Note: * LDDC – free

BUYERS' REQUIREMENTS

It is beyond the scope of this section to provide detailed information about buying criteria. These will differ not only between individual dried fruit but also, to some extent, between buyers. Prospective suppliers are referred to quality standards published by the USDA and also by the International Standards Organization (ISO). Both organizations have produced standards for dried apples, dried pears and dried peaches.

Many of the matters dealt with in the standards are those to which all buyers of dried fruits commonly give special attention. Among the most important of these are that the products must be clean without extraneous material and free from infestation, mould, etc. Other requirements relate specifically to particular products. These include moisture content which in the case of dried apples, both standards specify, must not be higher than 24%.

ISO standards include requirements of packing and marking, and specifies the maximum level of sulphur dioxide content as 2000 ppm (mg/kg) for all three dried fruits. However, buyers in West Germany, and in France, quoted tolerance levels of 500 ppm for dried apples and 1000 ppm for dried pears. This shows that while the USDA and ISO standards are useful as general guides, it cannot be guaranteed that products meeting the criteria will be acceptable either in all countries or to all buyers.

Published standards relating to other dried fruits also contain useful data for exporters of dried nectarines and dried fruit mixtures. However, for these products specifically, suppliers are advised to contact prospective importers to obtain their detailed requirements. In West Germany, dried fruit mixtures were reported by the trade to commonly contain 20–30% in total of dried apples, pears and peaches, with the remainder consisting of 50% prunes and 20–30% dried apricots.

ISO standards specify identical packing requirements for all three dried fruits. Scope is given for general trade practices and for particular agreements between buyer and seller. However, it is required that, where products are for direct consumption and small packages are used, import containers must be of wood or cardboard. Additionally, if dried fruits are being sent loose in wooden boxes, these must be lined with a suitable paper. Irrespective of the type of packing, a maximum size of 25 kg is specified. In practice, this is the biggest size known to be used in the trade (for Chinese dried peaches) while, at the other extreme, dried apples are sometimes packed in 4 kg boxes. A common net weight is 12.5 kg as, for example, dried fruit from South Africa and the United States.

PROSPECTS

There is some potential for new suppliers of dried apples, pears and peaches in the United Kingdom and West German markets. This view is based on opinions expressed during interviews with the trade. In West Germany, prospects are mainly for dried apples although one trader was also interested in new suppliers of high quality dried, diced pears and peaches. In the United Kingdom greater interest was found in additional sources of dried pears and peaches since regular supplies of these items were thought to be inadequate. Insufficient data are available about the small market in dried nectarines for an assessment to be made of their export potential, but it could be worthwhile for prospective suppliers of other dried fruits who are making contact with importers to ask whether they have any interest in this product. The potential for new suppliers of dried fruit mixtures is considered very small since imports appear to be declining and the traders prefer to do their own mixing from imported ingredients.

Prospective suppliers should give particular attention to the use of additives since this factor could be crucial in determining whether buyers have even an initial interest in the products. It is especially important in the health food sector where prospects could exist for additive-free and, possibly, organically grown products. This applies even in the small French market where the potential for new suppliers is considered almost minimal.

Section 4

The market for dried apricots

THE PRODUCT AND ITS USES

This section does not include dehydrated low moisture and freeze-dried apricots. Dried apricots are defined in published trade standards as the dried fruits of *Prunus armeniaca* L. Those entering the three markets are virtually all in the form of whole pitted apricots (i.e. with the stone removed) or of apricot halves. Sulphur dioxide is normally added to the fruit as a preservative and to give the fruit a brighter orange colour.

The main variety of apricot grown in Turkey, which is the major supplier to the three markets, is called Gheissi (or Kaisi). It has a light skin and delicate flavour. Dried apricots produced from this variety are usually known as Slippits. The fruit is dried with the pit inside. The pit is subsequently cut out or squeezed out by hand. The exported product is graded by size and measured in terms of the count, i.e. number of fruit per kilogram.

Dried apricots are used by individual consumers in cooking (in puddings, cakes, etc.), as a dessert and as a snack. In the food processing sector, dried apricots are used to make jam, in baking and as an ingredient in snack foods, cereals (i.e. mueslis) and (dried) fruit salad.

EXTERNAL TRADE AND CONSUMPTION

Table 29

Trade of dried apricots (t), 1982-87

	United Kingdom		West Germany		France	
	Imports	Exports	Imports	Exports	Imports	Exports
1982	1,789	29	2,171	368	1,651	12
1983	2,601	71	3,073	517	2,139	51
1984	2,756	122	3,680	291	2,345	71
1985	2,453	223	2,558	343	1,587	101
1986	2,478	120	3,362	610	2,104	95
1987	3,191	141	3,801	186	2,717	584

The data in Table 29 show that, even when re-exports are taken into account, West Germany is the largest of these markets and France the smallest, although the differences are minimal. It is likely that the large Turkish workforce and the buffer stock policy may have contributed to the level of West Germany's imports.

Suppliers are shown in Tables 30-32. Dried apricots from the main exporting country, Turkey, which supplied 77% of the three-country aggregate over the period shown, arrive in the three markets between the end of August and October. The pattern of supply reflects, to a large extent, the type of dried apricots required. For example, the Turkish product, which is supplied whole and pitted, is preferred for the general retail trade by many buyers. Iran exports mainly apricot halves which are used especially in the making of mixed fruit

Table 30

Apricots, dried: imports into the United Kingdom (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	1,790	2,601	2,758	2,453	2,478	3,191
	£'000	2,740	3,586	3,945	4,991	4,399	4,303
	US\$'000	4,796	5,440	5,272	6,469	6,453	7,052
of which:							
France		—	33	56	40	51	28
Netherlands		1	27	115	8	17	64
West Germany		16	44	—	30	31	79
Spain		37	—	50	102	15	21
Turkey		1,280	2,135	2,183	1,513	1,763	2,542
Afghanistan		20	94	70	258	205	174
Pakistan		103	22	42	70	8	115
Iran		76	—	22	—	91	53
South Africa		209	206	183	263	147	36
Australia		33	1	6	23	—	2
Other countries		15	39	31	146*	150†	77

Source: United Kingdom Trade Statistics, HM Customs and Excise

Notes: * Includes United States — 52 t
† Includes Italy — 88 t

Table 31

Apricots, dried: imports into France (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	1,650	2,138	2,344	1,587	2,103	2,717
	FF'000	25,921	31,920	44,807	48,526	38,134	43,795
	US\$'000	3,944	4,188	5,127	5,401	5,506	7,286
of which:							
Netherlands		40	—	—	—	—	—
Spain		35	—	—	—	—	—
Turkey		1,483	2,035	2,196	1,489	1,956	2,595
Iran		81	76	141	86	125	92
Other countries		11	27	7	12	22	30

Source: Statistiques du Commerce Extérieur de la France, Ministère du Budget

Table 32

Apricots, dried: imports into West Germany (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	2,171	3,073	3,680	2,558	3,362	3,801
	DM'000	10,834	13,984	16,551	15,777	18,103	16,186
	US\$'000	4,464	5,477	5,816	5,359	8,337	9,005
of which:							
Turkey		1,134	2,111	2,721	1,528	2,125	2,769
Iran		705	806	747	773	884	670
Afghanistan		228	65	—	—	—	—
South Africa		54	37	40	66	163	182
Argentina		—	—	94	71	—	—
Other countries		50	54	78	120	190*	180†

Source: Aussenhandel nach Waren und Ländern, Statistisches Bundesamt Wiesbaden

Notes: * Includes Pakistan — 90 t
† Includes Pakistan — 66 t

salad for which South African apricots are an alternative, though more expensive. Hunza dried apricots from Afghanistan, which are exported both whole and as halves, are not sulphured and are sold mainly in health food outlets. Other major influences on the quantities of dried apricots imported from particular sources are the size and quality of the annual Turkish crop and the demand from the United States which is its main market. When the crop is inadequate to meet overall market requirements a shortage is likely to occur on European markets, so that buyers have to seek alternative sources. It should be noted that this shortage need not be in absolute terms since, to date, European health requirements on the use of sulphur dioxide have been more stringent than those in the United States, so that sometimes fruits are available which could enter the United States but cannot be exported to Europe.

Dried apricots, both loose and in packets which are usually of between 200 and 500 g, are sold in the retail sectors within the three countries. Both halves and whole dried apricots are marketed with the latter sometimes being divided on a size basis. Consumption is higher during the winter months and the higher proportion of sales are made between October and March. It was reported during discussions with the trade in the United Kingdom that consumption had been stimulated by the introduction to the market of moisturized ready-to-eat fruit and, as with dried apples, the publication of an F (Fibre) Plan Diet. This is believed to have stimulated the increased United Kingdom imports in 1983 and 1984. Increases also occurred in France and West Germany at that time. Imports into all countries fell in 1985 as a small Turkish crop resulted in price rises. There was, however, a general increase in imports in 1986-87 with increased availability, thus stocks were rebuilt. Continued consumer interest in healthy eating could sustain the growth.

Traders in the United Kingdom consider that the market mainly requires an orange coloured fruit which makes sulphuring essential. However, buyers for health food outlets said that in their sector unsulphured fruit was becoming more popular. Little detail is available about trends outside the retail sector, but it is likely that in a number of areas, e.g. in snack foods and breakfast cereal mixes, the amount of dried apricots used can be adjusted over a fairly short period in response to changes in their price. The amount of dried apricots required for jam making was said to have fallen. Elsewhere, the catering sector is a significant market outlet.

In France there is a strong preference for the Turkish product and total annual imports are heavily linked to its availability. The retail sector is proportionately more important than in the United Kingdom, and dried apricots are not used in jam making. Buyers reported that consumption was static.

Consumption was also considered to be fairly stable by the trade in West Germany, where a high proportion of imports (estimates of up to 60% were quoted) are used by food processors in the production of dried fruit salad, bakery products, cereal mixes (muesli) and fruit soup. Demand for jam making is said to be small. Dried apricots are used by individual consumers more as a dessert and in recipes than for out-of-hand eating which is not popular. In West Germany dried apricots are stored for use as a buffer food stock in case of political emergencies.

ORGANIZATION OF TRADE AND DISTRIBUTION

Generally the marketing and distribution pattern is similar for all dried fruits as discussed in Sections 1 and 2.

IMPORT PRICES

Dried apricot prices are subject to considerable fluctuations and are particularly dependent on the actual and anticipated size of the annual Turkish crop. Prices of Turkish products are set in United States dollars and are thus affected

by changes in its conversion rates. At any one time the price of particular products will also vary with their quality, the count (size) and the seller. Published quotations, which appear regularly in the United Kingdom trade journal *Public Ledger* and the French newspaper *L'Antenne*, show that at any one time the overall price range differential can be more than US\$500 per tonne.

During 1987, frost damage to the Turkish crop increased the price of whole pitted apricots (free on board, f.o.b.), from US\$1800–2400 per tonne to US\$2500–2750 per tonne. In November 1985 comparable prices reached over US\$4500 per tonne. With improved supply in following years prices declined and in December 1987 Turkish whole pitted apricots were quoted as US\$2950 per tonne f.o.b. for 140–150 count. In November 1988 slowing of demand for shipments resulted in whole pitted 140–160 count being quoted at US\$2600 per tonne f.o.b.

Prices of products from other sources are published much less frequently than are those from Turkey. In February 1986, Iranian halves were quoted at US\$1700 per tonne cost and freight (c. & f.) and whole pitted apricots at US\$3200 per tonne. South Africa's prices for European markets were US\$3250 per tonne c.i.f. for choice mediums and US\$2852 for standard mediums. Turkish prices at the time were around US\$3500 per tonne f.o.b. Izmir for 140–150 count. In the first quarter of 1985, Hunza apricots were being imported into the United Kingdom at £600–700 per tonne c.i.f. More recently, in April 1987 Iranian halves were reported as being quoted at US\$1250–1350 per tonne c.i.f. Hamburg and in January 1989 Turkish whole pitted 140–150 count United States grade were US\$2500 per tonne f.o.b.

TARIFFS

The rates of duty on dried apricots imported into the three markets from outside the EC are shown in Table 33, as at 1 January 1989. The tariff code for dried apricots is 081310.

Table 33

Dried apricots: tariffs from 1 January 1989 for the United Kingdom

Full	7.0%
GSP	5.5%
GSP (LDDC)	Free
ACP/OCT	Free
Turkey	Free

BUYERS' REQUIREMENTS

These are the factors considered by buyers of dried apricots.

Flavour. The amount of acidity or sweetness required will vary not only between markets and end use but also, to some extent, with buyers' subjective opinions. For example, most United Kingdom buyers considered that the Turkish product was the most suitable for retail outlets. However, buyers for a major multiple preferred the flavour of the South African and Australian products (while admitting that Turkish dried apricots had the best appearance).

Appearance, especially colour and number of blemishes. These factors will be relatively less important when the end use is food processing. Spotting is a frequent blemish. This arises from rain damage to fruit during the growing period and buyers sometimes specify a maximum percentage of spotted fruit which they will accept.

Cleanliness. The fruit should be free of extraneous matter.

Absence of infestation. White mites are sometimes a problem, particularly when the moisture content of the fruit becomes too high.

Additives. The difficulties arising due to dried apricots containing more than the amount of sulphur dioxide permitted in European countries (2000 ppm) is probably the problem quoted most frequently in the trade press. Many buyers for health food outlets accept sulphur dioxide as a necessary additive but some require products without it.

Absence of fermentation. Dried apricots may ferment if stored at too high a moisture content.

When applicable, whether **pitting** has been done correctly.

In addition to these considerations, buyers will normally specify a particular count (as a range rather than as a specific figure). Counts vary from approximately 100 to 190 fruit per kilogram, but most trade is undertaken around the middle of this spectrum: 140–150 is probably the most common.

Generally, a lower quality product is required when dried apricots are to be used for food processing rather than for sale in retail outlets. However, health food buyers will sometimes buy products with some quality deficiencies (e.g. in their appearance) provided that other criteria are met.

Some guidance on quality requirements can be obtained from standards published by the USDA and the Joint FAO/WHO Codex Alimentarius Commission. However, it is emphasized that products meeting these criteria will not necessarily be in a form suitable for entry to European markets, particularly in respect of additives.

PROSPECTS

The potential for new exporters is considered reasonably good. Imports by the three countries increased in all years except in 1985 when there was a supply shortage. Additionally, the main supplier, Turkey, sometimes experiences weather problems which result in output being insufficient in quantitative and/or qualitative terms to meet market requirements. Further difficulties have occurred when products which have been available for export from Turkey have not been in accordance with the health requirements of importing countries. In respect to the other major suppliers, Iran faces problems due to its yet unsettled state, while South Africa's products have the disadvantage of having to pay the full rate EC duty of 7%.

Prospective market entrants should avoid over-optimism. This is firstly because traders in France and West Germany did not think that consumption was rising. Also, it may not be possible for potential exporters to provide products which satisfy the flavour requirements of European buyers. In addition, exports from existing suppliers are likely to rise when apricot trees planted in Turkey about three years ago reach maturity and when conditions in Iran return to normality. Since 1 September 1987, Turkish exports to the United States have had to meet more stringent health requirements; the maximum level of sulphur dioxide permitted is now the 2000 ppm allowed in most European countries. In the short term this is likely to exacerbate the problems of Turkish suppliers and provide opportunities for others. However, in the longer term Turkey may benefit from being able to export a product which is suitable both for the United States and European markets.

The market for dried figs

THE PRODUCT AND ITS USES

Dried figs are defined in the trade standards published by the USDA as the fruit of the fig tree (*Ficus carica*) from which the greater proportion of moisture has been removed. The main type of fig entering the markets reviewed is the brown, Turkish Smyrna variety.

Dried figs may be classified under two main headings natural and manipulated. Natural dried figs are dried naturally (i.e. by the sun) or artificially and then packed without further preparation. Manipulated dried figs are natural dried figs which have been shaped individually by hand. These are known by a wide range of names; among the most common are Leridas (wheel-shaped) and Layers (crescent-shaped). Others are Pulled (stubby-shaped), Protoben (square-shaped), and Garland (the fruit are threaded on a string). Dried figs may be sold with a coating, e.g. of glucose syrup or flour, and are also retailed in a moisturized form, although moisturization is carried out after importation. Sulphur dioxide is sometimes used as a preservative.

The greater proportion of dried figs imported into the three markets enter the retail sector. Some dried figs sold through retail outlets are used in cookery but consumption is mainly in the form of out-of-hand eating. Dried figs are also required by many food processors including bakers, manufacturers of alcohol, and convenience and snack food manufacturers. Some fruit traded in bulk is used in the importing country to make special products, e.g. moisturized figs and honeyed dessert figs and also for packing in retail sizes.

EXTERNAL TRADE AND CONSUMPTION

The recent trade in dried figs is presented in Table 34. The data do not include French exports of denatured dried figs, but these are very small, e.g. in 1986, 15 t. The French and West German markets are generally of a similar size, while the United Kingdom's is smaller. In 1987, however, West German imports fell below even that of the United Kingdom. All three countries re-export limited quantities of dried figs and re-exports from the United Kingdom and West Germany, though small, have been growing.

Imports are shown by source in Tables 35–37. The only suppliers of significance are Turkey and, in the case of West Germany, Greece. Tables 35

Table 34

Trade of dried figs (t), 1982–87

	United Kingdom		France		West Germany	
	Imports	Exports	Imports	Exports	Imports	Exports
1982	4,496	7	9,388	158	6,451	94
1983	4,978	80	8,040	242	7,190	67
1984	5,801	130	9,324	300	9,838	165
1985	5,656	173	8,001	400	8,572	250
1986	5,995	236	9,338	270	10,136	362
1987	5,920	156	8,475	281	5,315	451

Table 35

Figs, dried: imports into the United Kingdom (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	4,476	4,977	5,800	5,656	5,995	5,920
	£'000	1,925	2,143	2,686	2,995	2,858	2,687
	US\$'000	3,369	3,250	3,589	3,882	4,193	4,404
of which:							
France		3	70	61	103	65	76
Netherlands		-	22	40	6	14	1
Greece		316	384	176	190	73	15
Turkey		4,150	4,481	5,503	5,262	5,781	5,740
Other countries		7	20	20	95	62	88

Source: United Kingdom Trade Statistics, HM Customs and Excise

Table 36

Figs, dried: imports into France (t), 1982-87*

		1982	1983	1984	1985	1986	1987
Total	tonnes	9,389	8,039	9,323	8,001	9,338	8,475
	FF'000	62,758	48,547	72,636	61,384	58,728	53,427
	US\$'000	11,548	6,370	8,311	6,832	8,479	8,889
of which:							
Greece		65	-	125	63	63	21
Italy		187	45	19	101	49	51
Turkey		9,089	7,950	9,119	7,786	9,110	8,250
Other countries		48	44	60	51	116†	153‡

Source: Statistiques du Commerce Extérieur de la France, Ministère du Budget

Notes: * Data exclude imports of denatured dried figs which are very small (1986 - 15 t)
† Includes West Germany - 89 t
‡ Includes Spain - 74 t

Table 37

Figs, dried: imports into West Germany (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	6,451	7,190	9,838	8,572	10,136	5,315
	DM'000	15,359	13,573	19,800	18,355	19,024	11,478
	US\$'000	6,328	5,316	6,957	6,235	8,761	6,386
of which:							
Netherlands		-	272	1,149	207	-	-
Greece		1,584	1,604	2,614	2,276	2,448	2,735
Italy		150	140	102	208	115	193
Portugal		118	-	-	-	-	-
Turkey		4,513	5,038	5,911	5,722	7,469	2,255
Other countries		86	136	62	159	104	132

Source: Aussenhandel nach Waren und Landern, Statistisches Bundesamt Wiesbaden

and 36 show that Turkey regularly supplies over 90% of imports into the United Kingdom and France. In the case of West Germany the proportion is lower, but is normally at least two-thirds of the total, with approximately another 25% coming from Greece.

The general characteristics of the Turkish dried figs, including its softness, are such as to make it particularly suitable for the retail trade. Greek figs, which are firmer and hold their shape better, are used especially for industrial purposes and also where a moisturized product is being manufactured.

Both Turkish and Greek fig growers receive assistance. In Turkey a government support price is set which is maintained by purchases by the Union of Agricultural Cooperatives (TARIS). TARIS also processes, manipulates, packs and exports. The main shipping period is between the end of September and the end of October. Following Greece's entry into the EC, the fig industry there receives the benefit of minimum producer prices and subsidies for processing and storage. When excess production occurs figs can be withdrawn from the edible fruit market and used for other purposes.

The retail market for dried figs which is, as noted previously, their most important outlet, divides into the seasonal, mainly Christmas trade, and that which occurs throughout the year (though especially in the winter months). The all year round market is mostly for products sold loose. This demand is greater in the United Kingdom where Lerida style dried figs form an important part of the trade. Retail packs are commonly shrink-wrapped in cellophane paper, sometimes after placement on a polystyrene tray, and are sold mostly for consumption during the Christmas period. The main type of fig required is believed to be the Layer. Special packs are also produced by domestic packers for sale at this time, e.g. the gift box trade in France. Smaller consumption peaks occur at Easter and at Ramadan. The 250 and 500 g packs are popular retail sizes, others are the 400 and 200 g. The demand at retail level is predominantly for medium size figs (No. 5/No. 6), whereas that from food processors, which is of most significance in West Germany, is mainly for the smaller sizes.

In terms of market trends, some increase in imports has occurred in the United Kingdom and West German markets since 1982, but this was mainly between 1982 and 1984. This situation is echoed by trade opinion and most of those contacted thought that at best, consumption was static. The most optimism was expressed in the United Kingdom, where the advent of moisturized dried figs and the publication of the F (Fibre) Plan Diet was reported to have given an impetus to sales particularly in health food outlets. A severe fall in West German imports was seen in 1987, possibly due to exceptionally heavy buying in 1986 and accumulation of stocks.

ORGANIZATION OF TRADE AND DISTRIBUTION

Generally, the marketing and distribution pattern is similar for all dried fruits as discussed in Sections 1 and 2.

IMPORT PRICES

Probably the biggest single influence on the price of dried figs is the anticipated size of the annual Turkish crop and its composition (i.e. the quantity and quality of figs produced in the various size grades). Other major influences are the minimum export price set by TARIS, the minimum producer price set for Greek producers, changes in currency conversion rates, particularly in respect to the United States dollar in which dried figs are commonly priced, stocks held in exporting countries and the forward market factor. The last of these arises since buyers purchase forward and prices may move up or down during a season depending on the extent to which buyers anticipate their requirements correctly. The price of particular kinds of dried figs will also

depend on their quality and size. When no shortages exist smaller dried figs are cheaper than large fruit of the same quality.

Some kinds of dried fig exports by Turkey, the main supplier, are graded by quality and/or size. Size grading is based on the number of fruit weighing a kilogram. Under the system used until 1986 dried figs within a particular grade were known as 'x' Crown. Crowns were numbered from 3 Crown (the smallest fruit) up to 9 Crown plus a Luxe category. Grades now go from 1 (the largest fruit) to 12.

Prices are quoted in the United Kingdom journal *Public Ledger* and in the French newspaper *L'Antenne*. The *Public Ledger's* most frequently quoted price is of No. 5/6 Layer figs in the form of cartons of 250 g × 48 packs landed, duty paid, ex UK warehouse. In December 1986 the prices were £9.50–10.00 per carton, having increased from about £9.00 per carton in October. A comparable upward movement occurred in 1985 when prices moved from £8.70 to £9.00 per carton. Other illustrative quotations are early May 1987 No. 6 Lerida, £620 per tonne ex UK warehouse (described as virtually the end of the 1986 crop), August/September 1986 No. 5/6 Layer, US\$875 per tonne f.o.b. Izmir (1986 crop) and second quarter 1986, No. 5 Crown Lerida, (equivalent to No. 6 in the new size grading system) US\$800–830 per tonne f.o.b. Izmir (1985 crop). Quotations for the 1988 crop are £10.50–11.00 per carton of 48 packs × 250 g, for good quality, No. 6 size

TARIFFS

The rates of duty on dried figs imported into the three markets from outside the EC are shown in Table 38, as at 1 January 1989. The tariff code number for dried figs is 080420 90.

Table 38

Dried figs: tariffs from 1 January 1989 for the United Kingdom

Full	10%
GSP	10% (i.e. no reduction)
GSP (LDDC)	Free
ACP/OCT	Free
Turkey	Free

BUYERS' REQUIREMENTS

Attributes of dried figs to which buyers give particular attention are their flavour, skin texture, skin blemishes, style (i.e. Lerida, Layer, Garland, etc.) and size. The importance of these factors individually will depend on a buyer's reason for purchasing, e.g. as noted previously, the soft skin texture of the Turkish dried fig is particularly relevant in the retail trade. Other matters to which buyers of retail packs give major consideration are pack size and quality of presentation.

Additional areas of concern to buyers, and equally important to those listed already, are that the products should be clean without extraneous matter, and free of infestation and contaminants. Buyers for health food outlets and those in West Germany in general also give close attention to any additives used, and occasionally to the way in which a fruit has been grown, i.e. whether, and to what extent, artificial fertilizers and fungicides have been used.

Further information on quality aspects are contained in grading standards published by USDA. However, it cannot be assumed that dried figs produced in accordance with these will necessarily be acceptable to all buyers.

Dried figs imported in retail packs are commonly contained in 6 or 12 kg cases. Units per case necessarily vary with the size of pack, e.g. 48 × 250 g. Loose dried figs are traded in cases or wooden boxes, mainly of between 10 and 14 kg. Both forms of the product are packed in layers. Cases may be of fibreboard or cardboard.

PROSPECTS

The potential for new suppliers to any of the three markets reviewed is considered poor. Turkey, the main supplier, is thought by many buyers to provide a unique product in terms of its flavour and texture. Additionally, the Turkish industry is supported both by Government and a sale co-operative, which enable high quality products to be provided at competitive prices, while the Greek industry receives assistance from the EC. Further, Turkish products have the advantage of entering the EC duty free and Greek products are also exempt, since Greece is an EC member.

The view that very limited prospects could exist is based on the fact that some buyers expressed interest in new suppliers providing that their products match those from Turkey in price and quality. The opportunity for market entry will be more favourable on those occasions when Turkey has only a small crop (as in 1984), or when there is significant shortage in quantitative and/or qualitative terms of fruits of a particular size. This last possibility can arise even in those years when the overall size of the crop is adequate.

The market for dates

THE PRODUCT AND ITS USES

The original intention of this section was to investigate the market for dates as a dried fruit. In practice, it is impossible to ignore trade in the fresh product, although this segment of the market is given less attention. In published material, the names of individual varieties of dates are spelt in different ways. Those used in the text are amongst those commonly employed; where an alternative is also used widely, it is indicated in brackets on the first occasion on which the variety is mentioned in the text.

A description of the various forms in which dates are marketed is complicated by the fact that product names are not standardized and that the same term employed by individual traders may have different meanings. It is therefore useful initially to classify dates imported into the three markets according to their nature rather than employing trade terminology.

- (a) Dates which are not processed prior to their retail sale and are eaten fresh.
- (b) Dates which are frozen fresh during transportation to the importing country and are then eaten fresh.
- (c) Dates which are processed prior to retail sale but are then eaten without further preparation. The processes commonly used are one or more of the following: heat, hydration, dehydration and glazing. No additives are employed other than the glaze which is commonly of glucose syrup.
- (d) Dates, unprocessed which are intended primarily for cooking purposes by domestic consumers and for processing by manufacturers.

The forms in which products are traded can now be re-defined using the terminology of the trade.

- (1) Unprocessed dates consumed fresh, (a), may be referred to as *branchee*, *naturelles branchee* or *natural dates* (the term used subsequently in this study). The term *branchee* describes the branch of the palm to which, in some cases, the dates are still attached when sold to consumers. The term *natural* is also sometimes used by the trade to describe processed dates (category 3) which have not been glazed.
- (2) Dates in category (b) above are normally called *fresh dates* by the trade. In this study the name *frozen dates* will be employed to distinguish them from dates in categories (1) and (3).
- (3) The processed dates in (c) may be designated as such, but are also called *glove box dates*, due to their traditional (though by no means only) method of packing, and sometimes *dessert dates*. However, dates in (1), (2) and (4) may also be used as a dessert and the term *processed dates* may refer, especially in the United Kingdom, to those which have been processed by United Kingdom manufacturers.
- (4) Dates which are marketed primarily for the purposes outlined in (d) are designated *dry dates* and this name will be used subsequently in this study. The term partly reflects the character of the dates but is also used to distinguish them as a group from dates in categories (1)–(3) which together are called *fresh dates*. Another possible difference between these two categories is that *fresh dates* often enter the markets unpitted (i.e. complete with stone), but most *dry dates* are pitted. Additionally *fresh* and *dry dates*

have different channels of distribution (see 'Organization of trade and distribution'). However, it should be noted that some of the produce handled by importers of dry dates can be included in category (1), since when a variety is suitable, it may be marketed for consumption in fresh form.

The terms fresh and dry are also used scientifically. A fresh date is one at a particular state of ripeness (usually the khalaal); a dry date is a term used to describe one of the divisions into which dates may be placed according to their usual consistency when they reach their final stage of ripening, tamar. On this basis dates are divided into soft, semi-dry and dry categories. However, a particular variety of date cannot always be classified firmly into one of these divisions, since dryness depends, to a certain extent, on growing conditions. The majority of dates are semi-dry.

A different classification of date varieties, which is of fundamental importance to their use and potential market, is based on the type and amounts of sugar they contain. In this system dates are segregated into those having a high proportion of reducing sugars (invert sugar, glucose and fructose) and those which contain a significant percentage of non-reducing sugar (sucrose). Soft and moist semi-dry dates are in the first category while dry dates and the semi-dry variety, Deglet Noor (Daglat Nuur), are in the latter.

Dates and date products are purchased by individual consumers for eating as a snack or, particularly at the Christmas period and during some other festivals, as a dessert. They are also used in cooking to make puddings, cakes, biscuits, etc.

Manufacturers use dates imported in loose form to make date blocks (blocks of compressed dates), and chopped dates which are rolled in sugar or flour prior to sale. Both products are sold through retail outlets and are employed by consumers for cooking purposes. In past years date blocks have been obtained direct from producing countries, but this trade has now virtually ceased, principally due to quality problems with the product. Dates are also used loose or after processing by sauce/pickle manufacturers, by the bakery sector (in cakes, biscuits, puddings, etc.), by the confectionary trade (in stuffed almonds, as chocolate coated dates, etc.), by cereal manufacturers (in muesli) and by snack food manufacturers.

EXTERNAL TRADE AND CONSUMPTION

It can be seen from Table 39 that France is the largest importer of the three countries, but that French predominance is less marked if net imports are used as the basis of comparison. Imports vary but show no significant trends, although West German imports increased sharply in 1986 and 1987.

Table 39

Trade of dates (t), 1982-87

	United Kingdom		France		Exports		West Germany	
	Imports	Exports	Imports F	D	F	D	Imports	Exports
1982	11,558	2,064	13,209	133	6,385	443	1,841	60
1983	8,597	1,727	14,537	195	5,295	676	1,746	79
1984	7,192	963	13,355	289	5,768	695	1,900	64
1985	11,432	1,328	14,197	83	5,611	533	1,849	175
1986	8,445	1,380	14,728	382	5,024	534	2,467	54
1987	11,929	767	13,935	675	5,174	..	2,893	80

Notes: F = Fresh,
D = Dried

Table 40

Dates: imports into the United Kingdom (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	11,555	8,596	7,192	11,432	8,445	11,929
	£'000	10,102	8,321	7,050	10,723	9,450	10,285
	US\$'000	17,683	12,623	9,421	13,900	13,863	16,856
of which:							
France		1,804	1,645	1,472	1,326	1,364	1,390
Netherlands		31	756	39	60	27	18
West Germany		380	241	347	430	191	90
Spain		29	32	117	245	252	129
Israel		305	138	116	264	333	212
Morocco		180	802	929	701	266	453
Iraq		1,612	107	501	771	502	393
Iran		2,684	977	2,313	2,386	2,428	3,711
Kuwait		1,103	710	213	1,145	-	-
Tunisia		39	98	249	327	591	622
Pakistan		394	307	142	726	564	1,151
China		1,272	1,266	113	1,356	1,050	1,234
Hong Kong		375	76	84	73	285	1,709
United States		1,119	1,220	352	267	204	378
Canada		142	82	111	96	-	-
Australia		-	35	-	458	-	-
Other countries		86	104	94	801*	388†	439‡

Source: United Kingdom Trade Statistics, HM Customs and Excise

Notes: * Includes Oman - 325 t
Belg/Lux - 238 t
† Includes Oman - 100 t
Belg/Lux - 121 t
‡ Includes Oman - 173 t
Switzerland - 101 t

Table 41

Dates, fresh: imports into France (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	13,205	14,537	13,355	14,197	14,728	13,935
	FF'000	132,239	174,481	177,551	201,050	201,790	185,349
	US\$'000	20,273	22,894	20,317	22,376	29,135	30,837
of which:							
Iraq		530	1,699	325	939	1,925	963
Algeria		1,075	2,202	3,524	4,069	2,173	2,490
Tunisia		10,562	9,061	9,397	8,825	8,410	7,674
United States		967	1,294	38	188	2,159	2,386
Other countries		71	281	71	176	61	422*

Source: Statistiques du Commerce Extérieur de la France, Ministère du Budget

Note: * Includes United Arab Emirates - 170 t

Table 42

Dates, dried: imports into France (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	133	195	291	83	382	675
	FF'000	1,565	2,188	2,057	1,516	5,486	10,748
	US\$'000	238	287	235	169	792	1,788
of which:							
Algeria		-	-	38	21	25	112
Tunisia		24	-	226	59	152	446
Morocco		71	119	-	-	-	-
United States		26	62	11	3	176	47
Other countries		12	144	16	-	29	70

Source: Statistiques du Commerce Extérieur de la France, Ministère du Budget

Table 43

Dates: imports into West Germany (t), 1982–87

		1982	1983	1984	1985	1986	1987
Total	tonnes	1,841	1,746	1,900	1,849	2,467	2,893
	DM'000	10,720	9,220	10,322	10,835	12,747	13,134
	US\$'000	4,417	3,611	3,627	3,680	5,870	7,307
of which:							
France		416	419	885	433	366	602
United Kingdom		—	—	35	—	55	137
Israel		37	29	25	70	277	97
Algeria		89	37	60	180	59	21
Tunisia		570	347	479	463	815	842
Iraq		546	704	229	433	478	377
Iran		59	49	87	151	236	326
China		53	82	—	—	—	89
United States		20	37	16	—	50	130
Other countries		51	42	84	119	131	272*

Source: Aussenhandel nach Waren und Landern,
Statistisches Bundesamt Wiesbaden

Note: * Includes Italy – 121 t

Imports of dates into the three markets are shown in Tables 40–43. France and, to a lesser extent, the United Kingdom are significant re-exporters. French trade statistics distinguish fresh and dried dates. The basis of the division is not known, but it is likely to be sugar content (fresh dates have a sugar content of 20–25% compared with 75% for the dried product).

Interpretation of the supply patterns shown in the tables is complicated by the different kinds of dates traded, the effects of the Iran-Iraq war and the roles of France as a processor of imported dates and of the United States as a source of reject dates (see 'Organization of trade and distribution').

The major exporters are listed in the following table.

Supplier	Type or variety
France	Mainly processed dates. Varieties: Deglet Noor, Zahdi and Hallaawi.
Israel	Frozen dates. Variety: mainly Chiani.
Iraq and Iran	Dates for most purposes but particularly for cooking and manufacturing. Some Iraqi dates are used for processing in France. Main varieties: Iraq–Sayir, Zahdi and Hallaawi, Iran–Sayir.
Tunisia and Algeria	Mainly natural dates, for processing in France and processed dates. Varieties: Deglet Noor plus some Kinta (Kenta), Alligh (Aliig) and Khouat Alligh.
Pakistan	Dates for a range of purposes. Varieties: Asseel plus a number of others.
China	Mainly a supplier of Iraqi dates (especially Zahdi) which have been hand pitted in China after importing from Iraq.
United States	Grows and exports dates for the fresh market and for processing in France (Deglet Noor). It is also a source of dates which have been imported for the United States domestic market but rejected as being of insufficient quality. Varieties: primarily Sayir and Hallaawi.
Kuwait	Primarily a trans-shipment point for Iraqi dates.

In addition, Oman exports a small quantity of highly regarded sweet Fardh dates and Morocco exports organically grown Boustham dates; both are for eating fresh.

One last factor should be noted when considering the sources of supply to the three markets. Whereas the United Kingdom and French trade statistics show the countries from which produce is consigned, West German data are believed to be based on the country of origin.

The following factors also exert a major influence on the short-term supplies of dates:

— the size of crops in producing countries

- the extent to which a variety can be stored and quantities available for release from storage
- the Iran-Iraq war, different trade views were held as to how much this affected the volume of supplies, but it was generally thought to have adversely influenced product quality and added uncertainty to the market
- the proportion of potential United States imports which are rejected in a particular year. Recorded imports are 10,000–12,000 t per year, rejections which do not enter trade statistics have been up to 50%.

On a longer term basis Tunisia's production, mainly for export, has been increasing rapidly with government assistance and is likely to continue to expand. Israel's production will also rise significantly from already planted trees. These dates are also intended primarily for export in both frozen and other forms. Of possible greater significance to supplies are experiments being conducted in the micro-propagation of dates. Since date palms take at least 10 years to become fully productive, the impact of this research will not be felt for some time. Nevertheless, if successful, it is likely to have the effect of removing some of the present constraints on increasing supplies of particular varieties such as Deglet Noor.

The United Kingdom is important as a centre of international trade in dates (especially dry dates) as well as for its domestic market, and dates which are purchased by buyers may be for re-export, though not necessarily in the form in which they are imported. United Kingdom buyers also trade in dates which never enter the country. The domestic market requirements are mainly for processed and dry dates, with imports in the latter category being the higher. Frozen dates are believed to be obtained only from Israel and, as Table 40 shows, form only a small proportion of total imports. Some natural dates are imported, mostly for ethnic groups, but only in small quantities. Processed dates, often referred to in the United Kingdom trade as glove box dates, are in fact imported not only in this form of container, but also in trays (mainly of polystyrene) and in clear plastic tubs. The trays are in various shapes such as the gondole, shaped like a Venetian gondola. Sales of dates in trays and tubs have been rising, but are still less than those in the glove box.

Based on discussions and an analysis of imports from known sources, glove box dates probably form around 30% of total imports. Traders held different views about the state of the market, but it is thought unlikely that consumption is showing any significant trend. Sales of glove box dates are highly seasonal, mainly (75% plus) between October and Christmas. Other periods of significance are Ramadan, the Muslim month of fasting, and the Jewish New Year. Dates imported in glove boxes and trays are obtained mainly from France and North African countries. Deglet Noor is the main glove box date, but other varieties including Zahdi, Hallaawi and Kinta are also marketed. Glove boxes are most frequently of 225 g and at Christmas 1988 were retailing at about £1.20–1.80 each.

After excluding frozen and glove box dates, a major importer estimated that about 50% of those in the residual category were used for processing and that the rest went to retail outlets and to the bakery sector. The manufacture of pickles and brown sauces was considered to be the major processing outlet followed by that of chopped dates and date blocks. Chopped dates of various shapes and sizes are used in breakfast cereal mixes, in tropical fruit and nut mixes, in confectionery and elsewhere, as well as being sold, after coating, in retail outlets. When interpreting this information it should be remembered that the magnitudes are the opinion of essentially one importer, albeit a major one, but it is most likely that other traders would agree that the outlets mentioned are important. However, the use of dates in sauce/pickle manufacture has fallen appreciably during the last 10 years with increases in date prices and competition from vine fruit. In contrast, the sale of dates through health food outlets, though small in comparison, is increasing and has been stimulated by consumer interest in nutritional matters.

The sale of dry dates is less seasonal than that of glove box dates since they are required for processing purposes throughout the year. However, sales of dates through health food outlets and of date products used for cooking are higher during the winter months. Sayir is the main variety of dry date imported, although this name is sometimes loosely employed to cover a number of other varieties, including Hallaawi and Khadraawi. Dry dates are traditionally imported pitted but in recent years concern about the quality of the end product and price considerations have resulted in increased imports of unpitted dates.

In France dates are used primarily in three ways: for consumption fresh in natural form; for consumption fresh after processing; and for export, mainly after processing. Dates are not normally used in cooking by individual consumers and only small quantities are used by processors outside the date industry itself. There were divergent opinions in the trade about whether consumption of natural or processed dates was the greater and it is possible that there may be significant regional variations with natural dates being more popular in the south of the country. Considerable seasonality of consumption was reported by the trade, but it would appear to be slightly less marked than in the United Kingdom. Dates are sold loose and in a wide range of packs, including some large sizes of up to 10 kg. Packed dates are especially popular at Christmas when they form part of selection boxes of dried fruit and nuts. The glove box style of packing (in France called *boite marseillaise*) for processed dates is much less important than in the United Kingdom. The French date consumer, including the significant number of Moroccan guest workers, was considered much more discriminating than the British consumer. Consequently, the Deglet Noor variety forms a higher proportion of total domestic sales, especially in the natural market, where other varieties are considered to be of insufficient quality.

Domestic consumption was reported to be either static or falling; high prices were mentioned as a reason. Some traders reported that natural dates were gaining in popularity compared with the processed product. The quantity of dates imported for processing and re-export, based on export data, is also static. The demand for United States dates for this purpose varies with the availability of supplies from North Africa.

In West Germany, the smallest of the three markets, dates are consumed fresh, required for cooking and also used by food processors. The retail sector is more important than processing outlets and, within this sector, more are eaten fresh than used for cooking. West Germany is a more price and less quality conscious market than France. Processed dates are sold in much greater quantity than the natural product. The sweetness of dates was thought to limit their attractiveness to the indigenous population. A further constraint on the consumption of fresh dates is that they are regarded as a semi-luxury. Moroccan and Turkish guest workers in West Germany form a significant sector of the market. The glove box form of packing for processed dates is unimportant and they are sold in a wide range of trays with shrink wrapping. The most popular pack sizes are 200 and 250 g. As in the other two markets consumption is highly seasonal, although dates are consumed by the guest workers throughout the year. The Zahdi is the main processed date imported both on grounds of price and varietal characteristics and it was estimated to have upwards of 70% of the market. Other varieties imported in processed form include Hallaawi, Khouat Alligh and Deglet Noor. Dates are used to make cakes, biscuits and bread, both by individual consumers and by food processors. They are also used in the confectionary trade but, unlike in the United Kingdom, are not an ingredient in sauces or pickles. The main variety of date purchased for cooking and processing is the Sayir, although the name may refer to a number of dates with similar qualities.

Traders held different views about consumption trends but only one thought that demand was showing even small growth. The data in Table 43 would seem to show, until 1985, that, overall, the market was static and unless

considerable promotional activities are undertaken it appears unlikely that the rise in imports which occurred in 1986–87 will be sustained.

ORGANIZATION OF TRADE AND DISTRIBUTION

There is a clear division between the organization of the trade in fresh dates and that of the dry product. This extends to sources of supply where, as noted, North African countries, the United States and Israel supply dates for the fresh market, while Iran and Iraq supply dry dates.

Trade in natural and processed dates is traditionally centred in Marseilles, France from where a high proportion of the processed dates sold in all three countries are imported. Processing in Marseilles is now undertaken only by a limited number of importing companies and there are believed to be only three of major importance: COLOR, GICA and Micasar SA. These companies also re-export dates. Other companies also trade in processed dates, including those which are processed and packed outside France (principally in Tunisia). In recent years more processing and packing has been undertaken in North Africa and, where necessary, packing materials and labels are supplied by French traders, some of whom have links with particular companies. Although North Africa is the main source of French imports, dates for processing are also obtained from Iraq and the United States. Processed dates are not necessarily sold in the year in which processing occurs but may be put into storage and marketed for the next seasonal sale period, so that the product is sometimes advertised as new or old crop. Natural dates are also marketed through Marseilles. They are sometimes purchased on the tree. As with processed dates packaging and labels may be sent to exporting companies from France.

Israeli dates are marketed through importers of fresh fruit and vegetables. Their onward transmission is mainly direct to major buyers, such as supermarket chains, or to the major wholesale markets for ultimate sale to greengrocers, i.e. retail outlets handling predominantly fresh fruit and vegetables.

Natural and processed dates are distributed within the three markets as follows:

- in the United Kingdom purchases, which are almost entirely of processed dates, are made mainly by two companies: Geest Industries Ltd and J. O. Sims Ltd. Dates bought by these companies may go to supermarket chains and other major retail outlets who have placed orders or to wholesale markets for sale to greengrocers and others; the higher proportion of imports goes ultimately to the retail sector
- in France distribution is similar to the above except that the companies from which dates are purchased are those in Marseilles or their local agents; dates are retailed loose more frequently than in the other two markets, including sales on stalls in local open air markets
- dates for the West German market are purchased direct from French traders in Marseilles or from their agents in West Germany. Alternatively, some West German importers have associated companies or representatives in France. There are also some purchases made direct from Tunisian exporters. Some companies pursue several of these various methods of purchasing on their own account, since in West Germany both fresh and dried dates may be marketed by the same company.

Packaged dates carry the brand labels of exporting/processing companies in their countries of origin, of packers or importers in France, of importers/distributors in the importing countries and of the retail outlet in which they are sold. The product labels often indicate the origin, variety, grade, the coating material (where relevant) and the packer where this is not otherwise shown. Exporters and packers may use different labels for products of different quality.

Dry dates are purchased in all three countries by companies specializing in the dried fruit trade. These companies may act as agents for exporting countries or have agents in these countries. In the United Kingdom, at least, there is also some direct importing by users, e.g. those in the sauce/pickle trade. Imports may arrive direct from origin or via a trans-shipment country. To avoid quality problems when the dates arrive at least one company offers an inspection at source service. Significant quantities of Iraqi and Iranian dates which have been rejected by the United States have entered the European market. This has occurred since dry dates command a higher price in the United States than in Europe so that the United States market received priority over other markets when the crop is marketed each year. The application of stringent United States quality standards has meant that sometimes large quantities of relatively high quality dates have been rejected and become available for purchase by European buyers. However, United Kingdom traders have also, on occasions, had problems with HM Customs restricting the entry of reject dates and this may be one of the reasons why imports into the United Kingdom from the United States have fallen in some years (Table 40). Dates purchased by United Kingdom importers may be physically handled by the companies themselves or, more frequently, go direct to the organization on whose behalf a shipment has been arranged. Some dry dates are exported to West Germany from the United Kingdom but a higher proportion of West German imports enters through Rotterdam, Netherlands (as well as through West German ports), which is a major distribution point for the product.

At retail level dry dates are distributed, most commonly, through supermarkets (with other dried fruit), grocers, department stores and, especially in the United Kingdom, through health stores. Dates are also sold by greengrocers, particularly during the Christmas season.

IMPORT PRICES

Major factors which affect the price of dates of all kinds are:

- the setting of export prices by governmental bodies in many supplying countries
- currency fluctuations, particularly by the United States dollar and the French franc in which export prices are commonly quoted
- expectations of future trading conditions; purchases are usually made in advance of requirements and prices offered will depend, amongst other factors, on buyers' opinions of the size and quality of the crop(s)
- speculation, but it is difficult to evaluate its effect on prices
- the variety of date being purchased and, where applicable, its grade within that variety
- the quantity of dates in store and their availability for release on the market. Dry dates are not held for any length of time in Iran or Iraq but dates originating in these countries may be kept in store both in Europe and elsewhere. Dates for the fresh market are held in exporting countries (United States, Tunisia, etc.) by French packers and traders, and in importing countries.

As noted previously, dates intended for the United States market may be rejected and diverted to others. The volume of actual and anticipated rejections has been another major factor affecting prices offered by buyers, and is one reason why dry date prices can alter appreciably during the season. The prices set by packers for processed dates may also change significantly within a season as well as between them. Quotations for processed dates entering the United Kingdom market in mid-1985 for glove boxes of 225 g were £0.55–0.65 c.i.f. each. Dates packed in trays were about £0.05–0.10 cheaper.

During the visit to French traders in 1984 bulk dates for processing were being imported from Tunisia at FF10–12 per kilogram c.i.f. Those obtained from Iraq were quoted at FF9 per kilogram c.i.f., while pitted dates from the United States were quoted at FF16 per kilogram c.i.f. Natural dates were being sold onward by importers at FF16–20 per kilogram. The price quotations for glove box dates obtained in 1984, together with those subsequently received in the United Kingdom, indicate that prices were rising at about FF1 per box per year. These prices were for Deglet Noor dates. Other varieties can be appreciably cheaper, sometimes by as much as 40%. In West Germany, the prices quoted in 1984 for processed dates packed in weights of 200 and 250 g were DM1.15–1.60 per pack depending on weight and date variety. The most recent quotation available for United States Deglet Noor dates in retail packs is for June 1985 when these were quoted in the trade press at US\$20.42 f.a.s., 42 × 8 oz (225 g).

Quotations for dry dates appear in the United Kingdom publications *Food News* and *Public Ledger*. Unfortunately, it is difficult to obtain a price series or price trends, since quotations are not on a consistent basis. The most recent prices show that in 1987 pitted Sayirs from Iraq and Iran were being traded at US\$1200–1300 per tonne c.i.f. On the basis of previous quotations unpitted Sayirs were about US\$200 per tonne cheaper than the same variety in pitted form. During the last three years f.o.b. prices of dates from Iraq and Iran have usually been in the range of US\$1200–1400 per tonne. A trade contact estimated that the difference between Select and Fair Average Quality (f.a.q.) dates from these two sources was normally about a sixth. Quotations for Pakistan dates and for dates repacked and exported from China are lower than for Sayirs obtained from Iraq or Iran. The extent of the difference varies appreciably depending on the variety and quality of the products on offer. Pakistan dates for industrial purposes fetch appreciably under US\$1000 per tonne c.i.f., and in April 1987 were being offered at US\$680 per tonne c.i.f.

TARIFFS

The rates of duty applying to dates imported from outside the EC as at 1 January 1989 are shown in Table 44. The tariff code for dates, fresh or dried, is 080410.

The following points should be noted in respect to these rates.

- (a) The full rate of duty is suspended and products are admitted duty-free under provisions for end use relief when dates, fresh or dried, are imported for specified purposes:
 - for packing for retail sale into immediate packings or a net capacity not exceeding 11 kg;
 - when intended for the processing industry other than for the production of alcohol.
- (b) In respect to products entering the EC under GSP provisions, the rate applying to dates imported for industrial transformation, excluding the manufacture of alcohol, or for conditioning for retail sale in immediate packings with a net capacity of 11 kg or less is 8.0% (LDDC rate—nil).
- (c) The Maghreb rate applies only to dates in immediate packs of a net capacity not exceeding 35 kg.

Table 44

Dates: tariffs from 1 January 1989 for the United Kingdom

Full	12% (see note (a) above)
GSP	12% (see note (b) above)
GSP(LDDC)	Free
ACP/OCT	Free
Maghreb	Free (see note (c) above)

BUYERS' REQUIREMENTS

There is an agreed quality standard, the *Codex Alimentarius Standards*, by which dates traded internationally are assessed, although a number of exporting and importing countries have their own criteria. The *Codex* deals mainly with whole dates in pitted or unpitted forms packed ready for direct consumption.

Buyers' detailed specifications vary with the kinds of dates in which they trade, the uses to which the dates are to be put and, to some extent, with the country for which they are purchasing. However, there are a number of general requirements which apply irrespective of these factors. The most important of these requirements are:

- dates should be clean; this is very important where they are being exported in a form suitable for human consumption without further processing or repacking
- dates should be free of infestation. Problems in this area are probably more common than in any other, and sometimes result in shipments being refused entry to a market. White maggots nestling next to the pit are a particular problem with processed dates and, while means of reducing such infestation and of killing them *in situ* exist, no method has been found of removing the carcasses and/or frass without pitting
- dates should be of uniform size and colour; this is important even where a buyer has not made size or colour specifications
- dates should be of the weight shown on their container (or agreed in the contract), especially when being supplied in retail packs
- dates should be of a variety acceptable to the buyer.

Moisture content is another criterion used by some buyers, although during trade discussions no specific levels were mentioned as being required. The appropriate moisture level varies with the variety of date. The published *Codex Alimentarius Standards* specify a maximum moisture content of 26% for cane sugar, i.e. sucrose, varieties, and 30% for invert sugar varieties and Deglet Noor (except for Deglet Noor which have been dried or hydrated to adjust moisture content or washed and/or pasteurized). Moisture content may also be reflected in the stickiness of dates—a further buying criterion—although this can also be a reflection of a date's variety. Dates purchased in bulk should be free flowing, although this is more important for some uses than for others.

Many traders in bulk dates use the standards of the USDA as a basis for their quality judgements. These standards define a number of grades for dates with the quality of products being determined by colour, uniformity of size, absence of defects, e.g. broken skin, deformity, scars, etc., and character, i.e. their state of development and texture. In practice, bulk dates are normally traded as Select or f.a.q. Most trade is in the f.a.q. grade. Buyers of Select dates are also likely to adopt size criteria (one quoted as being applied widely is that unpitted dates should be 3–4 cm long and with a count of 145–155 per kilogram).

Bulk dates are packed in cartons of a range of types and sizes. For dry dates fibreboard cartons lined with waxed paper are commonly used. The packing of dates from North Africa is determined largely by specified export standards. However, cardboard cartons and wooden boxes with capacity up to 30 kg are normally employed. Those used to carry dates for processing in Marseilles are often of 14–15 kg. Dates which are exported in natural form for retail sale are sent in a range of containers of up to 14 kg but 6 kg is the popular size.

Processed dates are sometimes assessed on the basis of published standards but, more frequently, buyers prefer to use their own subjective judgement, particularly in France. Factors which are commonly taken into account include texture, flavour and sometimes colour. The dates should also have a moist, unshrivelled appearance. Buyers may also have a size preference expressed

by the number of dates required to be in the container, e.g. 13 or 15 dates on a polystyrene tray or 11, 13 or 15 dates in the top layer of a glove box (the bottom layer may vary from this number to allow the correct net weight to be made).

Glove boxes, which are normally 225 g, are now commonly made of plastic rather than wood. They have a plastic centre divide, are lined with paper and have cellophane on top of the dates. They are transported within cartons (usually 30 to a carton). Among the most common of the wide variety of other processed date packs are 225 g plastic tubs and gondola shaped polystyrene trays with net weights of 200 and 250 g and the package shrink-wrapped.

PROSPECTS

On the basis of conversations held with the trade, there could be some potential for new suppliers of Deglet Noor (and possibly other varieties) to the French market, and of processed (especially, but not essentially, Deglet Noor) and pitted dry dates to the United Kingdom. The situation in the West German market is more limited but could benefit from promotional work particularly of the processed Zahdi variety.

Prospective suppliers should consider the following points when deciding whether further exploration of the three markets is worthwhile.

- Dates intended for the French domestic market will need to be of very high quality. Importers may have an interest in natural dates (probably only Deglet Noor), in dates for processing and in processed dates. The first of these may have the greatest potential since suppliers of processed dates will need to compete with domestic, as well as other external, suppliers. The demand for dates for processing will depend heavily on the availability of North African supplies.
- Processed dates packed in glove boxes or on trays may be of interest to the United Kingdom importers if competitive in price and quality with those from France and North Africa. Importers are few and these may insist on the Deglet Noor variety being supplied. Greater potential could exist in the dry dates market for well pitted Sayirs (or dates with similar characteristics). Importers of such dates do not generally have difficulties in obtaining adequate quantities (though this can occur), and are likely to use mainly quality and price criteria when evaluating new products.
- West Germany is a particularly price conscious market. The quality of products in terms of being fit for human consumption must be high. In other respects good, but not necessarily first class, quality dates are required.
- A small, but probably increasing demand could exist in all three countries for organically grown dates, mainly for the fresh market.

The above factors relate to date consumption. However, those affecting date supplies are likely to have at least as important an influence on prospects, in the long term. In particular:

- date production, mainly for the export market, is expected to continue to increase in Tunisia and, probably on a lesser scale in Israel
- with the cessation of hostilities between Iran and Iraq both countries are expected to increase production
- if experimentation in the micro-propagation of dates is successful, it will be possible to increase the production of selected varieties considerably more quickly than hitherto.

Finally, date palms have a long gestation period before production starts and full yields are attained. Growing of dates under conditions different from those in existing production locations may sometimes result in products unacceptable to the market. There is therefore a clear risk involved in planting dates in new areas for the international market.

The market for prunes

THE PRODUCT AND ITS USES

Prunes are obtained by drying particular varieties of plums. This section does not include dehydrated low moisture prunes. The main variety used in the United States and supplied to the three markets is Prune d'Agen. Prunes are normally produced by a dehydration process. They are often stored until required by the market when they may be hydrated and, if necessary, pitted, i.e. their stones are removed. Prunes from any source, may also be hydrated after importation if found to be too dry. Exporters grade their prunes based on the number of fruits per pound. Prunes traded internationally are usually sorbated, i.e. dipped in a solution containing sorbic acid to help prevent the growth of moulds. Unsorbated prunes are required by some health food retail outlets.

Prunes are traded internationally in unpitted and pitted forms both in bulk and in a wide variety of retail packs. Those purchased in retail outlets are believed to be consumed mainly as a dessert, hot or cold, after soaking. They are also increasingly eaten fresh as a snack and dessert. Ready-to-eat prunes, produced in the EC, are marketed in the United States. Prunes are also used in cooking, especially puddings and cakes and, in West Germany, as a stuffing for meat dishes.

The importance of prunes in food processing varies appreciably among the three countries. A major requirement, particularly in the United Kingdom, is for canning. Prunes are also used in the manufacture of prune paste, ready-to-eat meals, dried fruit salad, jam, and in the confectionary trade, e.g. prunes in alcohol. Additionally, they are imported in bulk for repacking into retail sizes and for making the moisturized product.

EXTERNAL TRADE AND CONSUMPTION

Table 45 shows that West Germany, is the biggest of the markets, followed by the United Kingdom. France, in contrast, is a net exporter. Tables 46–48 show imports by source. The United States is the main supplier to all three countries and has usually provided more than 50% of French and West German imports and a little less of the United Kingdom's imports. France also supplies the United Kingdom and West German markets. Other suppliers of

Table 45

Trade of prunes (t), 1982–87

	United Kingdom		France	Exports	West Germany	
	Imports	Exports			Imports	Exports
1982	6,308	313	4,898	9,732	8,760	424
1983	7,998	446	2,612	10,454	7,507	461
1984	5,671	379	8,773	9,863	8,402	229
1985	6,651	193	2,837	8,976	7,984	166
1986	6,621	326	2,795	8,044	9,272	216
1987	7,080	308	1,556	9,599	10,701	220

Table 46

Prunes: imports into the United Kingdom (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	6,306	7,997	5,672	6,651	6,621	7,080
	£'000	4,007	5,283	3,791	5,028	4,498	4,971
	US\$'000	7,014	8,014	5,065	6,518	6,599	8,147
of which:							
France		545	841	413	1,261	1,619	821
West Germany		-	160	139	-	-	-
Italy		604	194	92	78	111	25
Yugoslavia		131	2,062	1,987	798	121	1,651
Romania		613	360	435	1,017	908	1,122
Bulgaria		289	36	119	-	68	76
Chile		436	-	-	314	194	101
United States		3,608	4,249	2,457	2,972	3,172	3,232
Other countries		80	95	30	211*	428†	52

Source: United Kingdom Trade Statistics,
HM Customs and Excise

Notes: * Includes Greece - 85 t
Poland - 82 t
† Includes Argentina - 378 t

Table 47

Prunes: imports into France (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	4,856	2,612	8,773	1,837	1,795	1,556
	FF'000	31,518	19,526	68,869	19,495	12,951	9,780
	US\$'000	4,796	2,562	7,880	2,170	1,870	1,627
of which:							
Yugoslavia		180	917	3,032	398	264	947
United States		4,666	1,471	5,651	1,138	1,409	465
Other countries		10	224*	90	301*	122*†	144

Source: Statistiques du Commerce Extérieur de
la France, Ministère du Budget

Notes: * Includes returns to France 1983 - 193 t
1985 - 178 t
1986 - 56 t
† Includes Chile - 66 t

Table 48

Prunes: imports into West Germany (t), 1982-87

		1982	1983	1984	1985	1986	1987
Total	tonnes	8,760	7,507	8,402	7,984	9,272	10,701
	DM'000	32,926	29,121	34,991	33,573	32,157	32,678
	US\$'000	13,567	11,405	12,295	11,404	14,809	18,181
of which:							
France		964	1,554	1,864	1,848	1,317	1,500
Italy		349	247	254	159	204	241
Bulgaria		280	126	210	-	94	87
Yugoslavia		282	442	425	625	284	1,001
Chile		560	643	237	500	675	607
Argentina		179	134	295	382	455	171
United States		6,024	4,273	5,029	4,274	6,190	7,011
Other countries		122	88	88	196*	53	83

Source: Aussenhandel nach Waren und Ländern,
Statistisches Bundesamt Wiesbaden

Note: * Includes Bel/Lux - 92 t

significance are Yugoslavia, Romania, Chile and Argentina. The sources of supply used by particular countries reflect, to a large extent, the types of products required. The French market wants, primarily, a high quality prune for the retail sector for which the United States product is most suitable. The United Kingdom and West Germany also import prunes for this purpose but purchase these, particularly on price considerations, from France and some other countries. Other sources such as Yugoslavia, Romania and those in South America are used mainly because these countries are able to supply smaller and/or cheaper prunes which are needed for canning and other processing purposes.

The French prune industry is assisted by the EC. A minimum producer price and a processing subsidy are set annually. In the marketing year 1986–87 (September–August) the latter was FF3.69 per kilogram, while the minimum product price was FF11.86 per kilogram (based on 66 fruits per 500 g). The United States industry is highly organized with its own trade organization, the Prune Marketing Committee, which coordinates its marketing activities. The industry also receives Government funds for promotional purposes.

Prunes marketed through retail outlets are sold both loose and in packets, common sizes of which are 200, 250 and 500 g. The size of the prunes being sold is often indicated in broad terms, e.g. small, jumbo, etc., as is usually their origin, particularly if this is the United States or, in France, a domestic product. Prunes are consumed throughout the year but consumption is higher during the winter period, especially around Christmas.

There is no commercial production of prunes in the United Kingdom or West Germany, so that net imports can be taken to indicate consumption. On this basis, consumption has shown some increase since 1983 in West Germany, though not in the United Kingdom. French consumption has also risen, though this has not been reflected in increased imports. The greater proportion of West German imports are for the retail sector: trade estimates put this at 70–80% in 1984. The retail multiple chain Aldi is a major buyer. Imports of pitted and ready-to-eat prunes are reported to be increasing. Food processors require unpitted prunes except where the fruit is purchased as an ingredient in the manufacture of dried fruit salad. Unpitted prunes bought in retail outlets are used especially for cooking. Prunes are purchased by the West German Government for storage in West Berlin in case of political difficulties.

Consumption in the United Kingdom is said to have been stimulated by the advent of moisturized prunes and the publication of the F (Fibre) Plan Diet. Consumer interest in healthy eating and an adequate fibre intake, which prunes provide, has continued. The trade reported, as in West Germany, that consumption of pitted prunes was rising and also that the main sizes of prunes sold in retail outlets were counts 30–40 and 70–80. Smaller prunes (counts around 70–80, 80–90) are required for canning, which is the only significant food processing outlet in this market. A trade contact estimated that this use absorbed as much as 50% of the United Kingdom's imports. Another important outlet for cheaper prunes is the catering trade.

The amount of French imports depends mainly on the size and composition of the annual domestic crop, e.g. the record imports in 1984 were due, in particular, to an acute shortage of larger sized prunes. As noted, prunes are imported primarily for the retail sector for which high quality products are required. Though some canned prunes are eaten, French consumption is predominantly of the fresh product. It has been reported—Horticultural Products, United States Department of Agriculture (USDA) June 1986—that between-meal consumption of prunes as a snack food is rising in France, due to dietary concerns and promotional campaigns.

ORGANIZATION OF TRADE AND DISTRIBUTION

Generally, the marketing and distribution pattern is similar for all dried fruits, as discussed in Sections 1 and 2.

IMPORT PRICES

The main influence on the prices of prunes is their actual and expected supply. In more exact terms it is the availability of products from different sources and of different counts both overall and in relation to each other. For example, prices of United States 30–40s may rise either because there is a shortage of this size, or because although there would normally have been an adequate supply, buyers demand more of the United States product than is available. Currency conversion rates, in particular, those of the United States dollar and, to a lesser extent the French franc, are another important factor affecting the prices which buyers have to pay.

Food News prices of United States prunes are normally quoted per 50 kg f.a.s. US port. The price of the popular 30–40 count in August 1987 was US\$72.75 for the new California crop, compared with US\$65.00 at the beginning of 1987, US\$51.00 in March 1986 and US\$52.75 at the end of 1985. A full range of prices for all counts is not published and prices of comparable size from different sources are published infrequently. The following quotations for 50–60s appeared in the *Food News* of 16 August 1985:

United States 52–53 cents per pound (approx US\$1160 per tonne), basis not stated but probably f.a.s. US port
France FF10.5 per kilogram (US\$1235 per tonne) delv. UK
Romania £800 per tonne (US\$1112 per tonne) delv. UK.

TARIFFS

The rates of duty on prunes imported into the three markets from outside the EC are shown in Table 50 as at 1 January 1989. The tariff code for prunes is 081320.

Table 50

Prunes: tariffs from 1 January 1989 for the United Kingdom

Full	12%
GSP	12% (i.e. no reduction)
GSP (LDDC)	Free
ACP/OCT	Free
Turkey	Free

BUYERS' REQUIREMENTS

Many of the matters to which buyers of prunes give particular attention are similar to those which they consider when buying other kinds of dried fruit. Among the most important of these are that products should be clean without extraneous material and free from infestation. Mould is a particular problem with prunes but it is unlikely to be a major difficulty where sorbic acid is used as a preventative and their moisture content is kept sufficiently low (though prunes can also be over dry). The USDA's *Standard for Dried Prunes* specifies maximum moisture levels for bulk packs packaged in non-hermetically sealed containers containing 10 lb or more of prunes to which no preservative has been added. These are 25% for prunes with an average count of 60 or less and 24% for others. These standards form a useful guide to prospective exporters, but compliance will not guarantee that products will be acceptable to all buyers.

The attributes required of prunes in respect to such factors as count, size and style of pack and whether a sorbated product is acceptable will necessarily

depend on the end use of the product being purchased. In more general terms, buyers will evaluate flavour (especially whether prunes have become sugary), texture and, when applicable, whether pitting has been done correctly.

United States prunes exported in bulk are packed in 12.5 and, less commonly, 5 kg cardboard cases. The wide variety of retail packs also exported include heat-sealed bags, cardboard cylinders with metal caps and, in recent years, ring-pull cans. Retail packs of French prunes are packed in heat-sealed bags and shrink-wrapped on polystyrene trays.

PROSPECTS

Generally, the potential for new suppliers of prunes is considered small. This is mainly because prospective exporters will experience considerable difficulty in competing with the quality of United States and French products and, probably, with the price of those from the centrally planned European economies such as Yugoslavia and Romania. Additionally, both the United States and French industries are highly organized and receive government aid, in the case of France, EC assistance.

Additionally, neither United Kingdom nor French imports show an upward trend and traders were mostly pessimistic about the chances for new entrants to these markets. The limited prospects that do exist are due to the fact that the United States and French prune crops are sometimes insufficient, even with stock withdrawals, to meet market requirements. A further possibility could exist, particularly in the United Kingdom market in providing the health food sector with non-sorbated and, perhaps, organically grown products. Importers in West Germany, however, were more optimistic than those in the United Kingdom and France about the potential for new suppliers.

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Appendix

APPENDIX: SELECTED LIST OF IMPORTERS OF DEHYDRATED/DRIED FRUITS

This list is not to be regarded as comprehensive and the inclusion of any firm does not mean that ODNRI has any knowledge of the financial standing of the firm.

United Kingdom

Percy Dalton's Famous Peanut
Company Ltd
Old Ford Works
Dace Road
London E3 2PE
Tel.: 01-985-9241
Tlx.: 896993
Fax.: 01-986-3028

Gill & Duffus Landauer Ltd
St. Dunstons House
201 Borough High Street
London SE1 1HW
Tel.: 01-407-9521
Tlx.: 887162
Fax.: 01-403-4656

T. M. Duche & Sons Ltd
Ford Land
Pendleton
Salford M6 6PB
Tel.: 061-736-3041
Tlx.: 668834
Fax.: 061-745-7312

Petty Wood & Co. Ltd
15/16 Dufferin Street
London EC1Y 8NY
Tel.: 01-251-2311
Tlx.: 263934
Fax.: 01-250-0552

A. Rennell Pugh & Co. Ltd
47 Watergate Street Row
Chester CH1 2LE
Tel.: 0244 311428
Tlx.: 61461 pugh-g
Fax.: 43904

Whitworth Ltd
Victoria Mills
Wellingborough
Northants NN8 2DT
Tel.: 0933 76351
Tlx.: 311352
Fax.: 227420

Real Foods (Buying Dept)
Ashley Place
Edinburgh
EH6 5PX
Tel.: 031-554-4321
Tlx.: 72189
Fax.: 031-555-0550

Community Foods Ltd
Micross
Brent Terrace
London NW2 1LT
Tel.: 01-450-9411
Tlx.: 8955257 COMFODG
Fax.: 01-208-1803

Roderick C. Thorne Produce Ltd
Thorne House
Franc Station
Belle Yew Green
Nr. Tunbridge Wells TN3 9BJ
Tel.: 089-275-577
Tlx.: 954-51 wander g

H. & T. Walker Ltd
Walker House
London Road
Riverhead, Sevenoaks
Kent TN13 2DN
Tel.: 0732 450711
Tlx.: 957260
Fax.: 0732-459288

Sortex Ltd
Pudding Mill Lane
London E15 2PJ
Tel.: 01-519-0525
Tlx.: 262773
Fax.: 01-419-5614

France

Edouard Saman sa
2- Avenue No. 36
13127 Vitrolles—Z1

UNIPAK
Boite Postale 220
75007 Paris

West Germany

Fruchtehandels-Compagnie
Hegewisch GmbH & Co.
Fruchthof
Postfach 10 22 09
Zentrale
2000 Hamburg 1

Wilhelm Liebelt & Co.
Wendenstrasse 255
Postfach 26 04 30
2 Hamburg 26

M. Bunger Osteinbeck
Im Hegen 7
D-2000 Hamburg 74

E. H. Worlee & Co. GmbH
Bellevue 7-8
2000 Hamburg 60



