



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

Study of the main European markets for dates and of the commercial potential of non-traditional varieties



**Study prepared for the Horticultural Products Group
Raw Materials, Tropical and Horticultural Products Service
Commodities and Trade Division, FAO**

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Study by



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For more information on this study please contact:

Mr Paul Pilkauskas
Senior Commodity Specialist
email: paul.pilkauskas@fao.org

or

Mr Pascal Liu
Commodity Specialist
email: pascal.liu@fao.org

Horticultural Products Group
Raw Materials, Tropical and Horticultural Products Service
Commodities and Trade Division, FAO

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Summary

Europe represents a small market in quantity terms in world trade in dates

Of 5 million tonnes produced and consumed in the world, Europe, with 50 000 tonnes, accounts for barely 1 percent.

It is, however, a market showing steady growth overall

European imports in quantity terms are rising by an average of 4 percent per year, thus showing some dynamism which could generate optimism throughout the sector, were it not masked by the pressure on prices.

Spain, Germany and France are growing markets while the United Kingdom and Italy are stagnating

Spain, Germany and France are the main markets showing growth since, for reasons difficult to pinpoint, date imports into the United Kingdom and Italy have levelled off for some years at around 10 000 tonnes in the case of the former and 5 000 tonnes in the case of the latter.

France, United Kingdom, Germany, Italy and Spain account for 83 percent of European imports

Only 17 percent of imports are made by the other 11 countries of the European Community. From simply analyzing the market in the five leading countries the authors have enough insight to draw conclusions in relation to the market as a whole.

Europe's choice is Tunisia and Algeria

There is no question that it is Tunisia (with 46 percent) and Algeria (with 19 percent) which dominate European imports. If one were to add to this the 7 percent re-exported to Europe by France which is also of Tunisian and Algerian origin, these two countries account for three-quarters of European imports.

The United Kingdom stands out by preferring Iran

Only the United Kingdom, among the five European countries, does not look to Tunisia and instead favours Iran, which, with 9 000 tonnes, ranks third among suppliers to Europe.

Overall preference in Europe for Deglet Nour

If one were to add up the imports of Deglet Nour by each country, a total of approximately 30 000 tonnes would be reached; this indisputably puts Deglet Nour in first place among imported varieties. Here too, however, differences may be observed between southern Europe and northern Europe.

Southern Europe's choice is Deglet Nour

Through their culture and history, France, Spain and Italy have always had strong links with Tunisia and Algeria. It is from these two countries that 90 percent of the Deglet Nour produced in the world originate, with the remaining 10 percent coming from the United States and Israel. It is to be expected that

their preferences should orientate towards this variety. With 25 000 tonnes, the three of them import 85 percent of the Deglet Nour. Southern Europe, in particular, consumes nearly all the natural Deglet Nour, since this product is rarely seen on the market in Germany and the United Kingdom.

Common dates are northern Europe's choice

With less of a link to the Maghreb countries, the United Kingdom and Germany import approximately 10 000 tonnes of common dates as against 4 200 tonnes of Deglet Nour. In the case of Germany, this choice is dictated by economic imperatives which, until recent years, encouraged buyers to go more for price than for quality.

There is a heavy industrial utilization of this type of date in the United Kingdom. The country is also certainly influenced in this choice by its colonial past and its very substantial population originating in the Indian subcontinent.

Stagnation on the common date market

While the quantities of common dates are substantial, with approximately 16 000 tonnes imported, this figure has not changed much in recent years. This also appears to denote a shift in demand in favour of quality products. Only the processing industry seems to sustain the consumption of common dates.

Overall, the *processed product*^(*) sells slightly more than the *natural one*

There are no statistical data which break down dates by kind. Nevertheless, the authors do know, for example, that Tunisia exports practically as many natural dates as processed ones and that Algeria exports more of the natural product, whereas France exports the processed product almost exclusively. On the basis of this information, it has been estimated that 55/60 percent of the quantities imported are processed.

Europe stands out through the variety of its packaging but the tray dominates the market

There is no real uniformity of packaging and weight in Europe. Apart from the 5 kg carton of loose dates common to all countries importing them, cardboard or plastic boxes, with or without a window, packets, boxes, tubs and everything weighing from 150 g to 2 kg are variously to be seen, with the 227 g typical of the United Kingdom in between.

Among this diversity, the polystyrene tray is universally used although it differs in weight among the countries (250 g in the case of the south, 200 g in the case of the north).

Small packs are preferred in large scale retail to the loose product

For practical reasons, there is a marked preference throughout Europe for small packs.

Wholesalers remain loyal to the loose product

Wholesaler customers are fruit and vegetable retailers who are used to loose sales. In this field, the southern countries are the leaders.

(*) See p. 5 for a definition of "processed dates".

Prices are coming down

The reduction in prices is due to a combination of factors. The abnormal growth in the number of Tunisian exporters is pressing prices down. Taking advantage of this confusion, large scale retailers apply their negotiation methods to achieve increasingly favourable terms. Currently, in the case of trays, prices have reached levels which, in the view of some importers, cannot be brought down further.

Medjool is attracting intense interest

Originating from Israel or California, Medjool, with a moderate tonnage of approximately 1 800 tonnes in 1998 is intriguing the market through the enormous upsurge in demand and strong prices. Currently imports are limited by the low level of production, but are already to be found on all European markets. Medjool seems to have very favourable prospects for development. As was the case in the United Kingdom, it still has to be taken up by large scale retailers in other countries to reach a larger number of consumers. While the United States is currently involved in this trade, it will be handicapped through high transport costs and customs duties of 10.6 percent even if prices eventually go down.

Hayani does not unanimously find favour

Israel is the sole supplier of Hayani dates. With imports standing at 1 200 tonnes, it is only to be found in Spain and in the United Kingdom. Sold loose and in 500 g window boxes, it must be defrosted before being put out on the shelves. As far as the rest of European countries are concerned, this particular characteristic is a hindrance to its marketing since it cannot be stocked in fruit and vegetable shops which do not have freezers. It is also a problem for large scale retailers to categorise it, being both a frozen product and a fresh one.

France

France remains the chief importer and leading consumer of dates and is also one of Europe's most important suppliers.

France is losing its foothold as the predominant packing country, yet, despite losing this added value, it continues to use its expertise and business skills to trade substantial quantities of dates (7 500 tonnes in 1998).

France is also the main importer of Deglet Nour and the biggest consumer of natural dates. It is also the only country in Europe not to consume common dates.

Large scale retailers and traditional retailers share the market for dates, the prices of which have fallen to very low levels.

United Kingdom

After France, the United Kingdom is the most important market for dates. It is a market which has been stagnating for some years and which has a marked preference for common dates, Deglet Nour being mainly sold in 227 g glove boxes for the Christmas holidays. Large scale retailers dominates the market, demanding small packs with price and quality requirements which are often incompatible.

Germany

Germany is the third biggest importer and consumer of dates in Europe. Following reunification, consumption has been forging ahead at the rate of approximately 7 percent per year.

The product most in demand is the 200 g tray of common dates, which is mass marketed at very low prices.

Spain

With 5 000 tonnes, Spain is the smallest importer among the five countries but at 8 percent per year it is showing the steepest rate of increase.

It is the country where Deglet Nour reigns supreme; the preference is for the natural product sold loose in weights of 5 kg rather than processed. Common dates, which are bought by consumers in a 250 g tray, are very much on the decline.

Conclusion

The marked preference in Europe for Deglet Nour makes this area a protected market for it, reserved for producers of this variety (mainly in Tunisia and Algeria). Commercial prospects would exist for an equivalent product with more rigorous conditions observed. As for Medjool, this is a variety which could offer real opportunities for producing countries.

Preliminary remarks

Source of numeric data

Figures relating to imports and exports of dates have been supplied to us by:

- Eurostat in the case of European imports
- DNSCE in the case of French imports
- GID in the case of Tunisian exports

Figures on date production have been supplied to us by FAO.

Figures relating to buying and selling prices have been supplied to us:

- by importers
- by wholesalers
- by records in retail shops and large-scale outlets
- by the National Dried Fruit Union

Prices

The choice has been made to adhere to customary practice in sectors which display prices per kilo for the loose product (natural dates) and per unit in the case of small packaging. As each product has a market and characteristics of its own, the 250 g Deglet Nour cannot be compared with the 200 g tray or the 227 g glove box.

When the authors refer to the FOB or CIF price for a product, they are taking invoices or offers of prices designated by these terms as our basis. When they refer to a purchase price or an import cost price, they are reproducing information provided by importers. They either present these data as they stand or average them out or else they extrapolate them to establish a price range.

Are dates fresh fruit or dried fruit?

Traditionally, dates are categorized as dried fruit on the same basis as almonds, pistachios, raisins, etc. Although acknowledged by everybody, this classification does seem to us to be reductive at marketing level since it does not fully reflect the physical reality of the product. Dates are on the borderline between dried fruit and fresh fruit.

They are a dried fruit because they have a moisture reduced by natural or artificial drying and thus fairly long keeping potential. This is particularly true in the case of dates referred to as **processed dates**, which are rehydrated dried dates generally covered with a glucose syrup which makes them shinier and therefore more attractive to the consumer.

They are fresh fruit because they are kept optimally only optimum in a chilled atmosphere in order to avoid it fermenting and becoming unsuitable for consumption. This is the case with natural dates, which are generally branched, gathered from the palm and packed without any processing, and

also with Hayani, which are frozen as soon they are harvested and which, once thawed, are placed by the distributor in a chilled display unit in which they can be kept for 10 days or so. It additionally applies in the case of Bahri dates, which are harvested before ripening and marketed quickly in order to be consumed, after being kept for some days, by informed consumers.

This distinction between dried fruit and fresh fruit is important, since these two categories of products are not distributed and marketed in the same way. Although both products are often to be found in the fresh fruit and vegetable channel, the upstream distribution chain is not always common to both types. On the one hand, there is a channel for the distribution of dried fruit, presenting a defined range and which follows a commercial pattern adapted to the nature of its products. In this case dates will, for example, be able to form part of a reference of a range of dried fruit products negotiated once a year with a central buying office. On the other hand, there is a distribution channel for fresh fruit presenting a completely different picture, with very specific buying habits, and above all completely different logistical constraints. In this context, dates will be bought, for example, by fruit and vegetable wholesalers each week on the national markets of major conurbations.

The packaging of dried fruit and fresh fruit also differs. Whereas dried fruit can be hidden away in closed packaging, such as packs and boxes of different kinds, fresh fruit needs to be seen and can be sold better loose or in transparent packaging which shows the product in its entirety. Dates will therefore be in the same closed boxes as almonds or raisins in the dried fruit department, or loose in 5 kg cartons side by side with other fruit. As was seen earlier, dates must be kept chilled whereas dried fruit may be kept for a long time at room temperature. Without underestimating the behaviour of consumers, it is nevertheless clear that a person buying a box of almonds and a box of dates on the same day and putting them in a cupboard in his kitchen only to consume them several months later is in for a surprise when he opens the dates whereas the almonds will not have changed.

Finally, dried fruit is displayed all the year round whereas most fruit is seasonal. This is so in the case of dates, which are in practice on the markets from October to January.

It can clearly be seen that dates adapt in both these environments, although it may be questioned with what effectiveness and with what outcome. Which of these two markets will evolve best in relation to the constant changes in demand, which today seeks a compromise between taste, freshness, nutritional balance and price?

The example of prunes is quite revealing in this connection. In France, prune consumption was on the decrease. The product was traditional and of very mediocre quality. Some producers took action and endeavoured to come out of the dried product market by creating a more mellow product with an earlier sell-by date. They rediscovered the taste and freshness which the product had lost and at the same time learned how to win back and gain a now loyal customer base composed largely of young people.

Will today's children, who will be tomorrow's buyers, know how to find in dates those qualities which make good products?

Dates are a seasonal product

Available on markets from September onwards, dates are eaten mainly at the end of the year, particularly at Christmas time, in all European countries. Outside this period, consumption is very low. Dates are thus a typically seasonal product.

For importers this has major consequences. Depending on the date of harvesting (which may be more or less late), delays in production, transportation and marketing, the importer will have to choose his source so as to respond optimally to the delivery requirements imposed on him by the market. Generally, Israel is first, at around 15 September, followed by Tunisia at the end of October and finally, at the end of November, by Algeria. It may clearly be seen that in such short selling periods, each day's delay is very costly, particularly in the case of those last in line. It is true that frozen stocks from the previous season can make good any shortfalls, but it is well known that the new season's products are always preferred to those of the old.

By contrast, this seasonality plays slightly less of a part in the case of Medjool, the sales of which, despite peaking at the end of the year, are spread more evenly over the year depending on the country concerned. This is not the case with Hayani, which has secured its place in the fresh fruit department and is consumed more or less regularly throughout the year.

Ramadan

Dates are to be found in many Islamic countries, where they form part of the diet and are accordingly to be seen at many feasts, particularly during Ramadan, and Europe's sizeable Islamic population can therefore always be expected to affect date consumption during this time. This feast is subject to the Islamic calendar and accordingly varies each year by 10 days in relation to the European calendar. When it coincides with the date season, there is a very marked upsurge in demand. It will be noticed that in the last 10 years, the periods of Ramadan have followed on from each other between March and December.

Infestation

Among the different pest attacks and diseases affecting dates, the major problem for importers is the infestation of the fruit by the date pyralid moth. This lays eggs on the surface of ripe dates. The larva burrows inside and leaves traces which cause the fruit to lose its commercial value.

The problem is twofold:

- the treatment of palm trees
- the selection of fruits.

Regarding the problem of the treatment of palm trees, the authors cannot say whether there are differences in treatment between the different producing countries. Spreading techniques are the same and the protection of systems using plastic bags seems to be widespread. As for the products used, Decis has been known to be applied followed by biological products like Bactospeine. In biological control, research studies have been carried out to find predators which can destroy the moth. The authors do not know whether new products or new methods are giving better results.

By contrast, there are essential differences when it comes to the screening and selection of dates. The Israelis, like the Americans, know the level of infestation of each tree. Directly the dates are picked, their origin is identified and they are put into lots of 500 kg. They can then be treated with methyl bromide to destroy live pests before they are frozen. In Tunisia, the packer buys the dates from collectors who mix the lots, making it impossible for any action to be taken.

On this subject, a study to replace methyl bromide by another gas is under way.

The authors have already seen a number of specifications from the veterinary services of certain major European distributors stipulating 0 percent infestation. Such demands clearly disregard the fact that all dates, of whatever origin, are subject to insect attacks and have a percentage of infested fruits of varying proportion. Also, it is currently acknowledged that a threshold of 5 percent infestation is acceptable; beyond this, the product could be rejected. It is obvious that if all customers made the necessary checks and applied this rule to the letter, few dates would be on the markets. The economic and practical reality is that substantial quantities of dates have been marketed for years with high rates of infestation and that, paradoxically, there are few complaints. The market therefore acknowledges infestation as intrinsic to the product. This is not say that the problem should not be remedied. Action obviously needs to be taken in such a way that the palms are treated in the way the Israelis or Americans treat them. Yet today, despite what may be said, the criterion of infestation is not a deciding factor for the majority of buyers. The expectation, however, perhaps needs to be that one day it will be.

Date varieties

Europe has made its choice from hundreds of varieties of dates and only imports a limited number. In this study a distinction is made between Deglet Nour and common dates. In this study common dates are classified as Kenta, Alligh, Kouat Allig, Sayer, Zahedi and Mozafati. No reference is made herein to the lesser-known varieties, the volumes of which are low. Medjool, Hayani and Bahri are classified separately.

Natural dates and processed dates

Natural dates, as their name implies, do not undergo any processing. They are packed directly, with or without branches. Processed dates, by contrast, whose raw material is drier, undergo rehydration by steaming, which restores improved consistency and a shinier appearance. Deglet Nour has unique properties in this connection, being the only one to contain sucrose; the other varieties contain invert sugar (glucose and fructose). This characteristic enables a shiny date to be obtained by simple steaming whereas, in the case of common dates, glucose needs to be added in order to achieve the same effect. However, it is being seen that packers are increasingly adding glucose to Deglet Nour and also potassium sorbate to solve the problem of fermentation. European Union Directive 95/2/EEC sets the maximum limits of 1 000 mg/kg in the case of the preservative E200 (sorbic acid), E202 (potassium sorbate) and E203 (calcium sorbate).

I – Introduction

European Community countries imported just over 60 000 tonnes of dates in 1998. If intra-Community trade is deducted from this figure, a yearly consumption figure of approximately 50 000 tonnes of dates is arrived at. By comparison with the world market, this is a micro-market accounting for approximately 1 percent of world consumption. European imports, which are not very uniform, vary substantially from country to country in line with their economic and human potential. Clearly, those countries which are the most heavily populated import the most dates. However, imports are also correlated to the importance of so-called *ethnic* markets in each of the countries which combine populations culturally associated with the consumption of dates. This is the case, in particular, with the Maghreb populations living in Europe.

1998	Gross imports	Gross exports	Net imports	Combined %
France	22 870	7 491	15 379	30%
UK	10 747	410	10 337	51%
Italy	6 235	158	6 077	63%
Germany	6 160	911	5 249	73%
Spain	4 936	168	4 768	83%
Netherlands	2 714	561	2 153	87%
Benelux	2 554	63	2 491	92%
Denmark	1 835	27	1 808	96%
Sweden	800	22	778	97%
Austria	749	119	630	98%
Finland	273		273	99%
Ireland	218		218	99%
Portugal	196		196	100%
Greece	187	10	177	100%
Total	60 474	9 940	50 534	

Source : FAO

Within this small market, on which buying habits are ingrained by years of practice, changes and innovations are seldom seen. However, for some years now, a number of changes affecting the nature of the products imported, their varieties, their types of packaging and their source, have been observed.

Since dates are a product requiring labour, there are fewer and fewer economic advantages in buying them as raw material and repackaging them in Europe at a necessarily higher cost. The movement initiated some 10 years ago has expanded and today most of the packaging is carried out in producing countries, thereby reducing the proportion produced by packers - particularly French ones - who were the most active in this sphere. Less loose but more finished products are therefore being imported.

Moreover, as a reaction to the decline in quality which has been seen for some years, due to the fierce struggle among importers, demand for quality products has clearly become increasingly pressing. While Deglet Nour is more predominant than ever, new varieties, like Medjool, are expanding their share of the market each year even though their prices are three times higher than those of the most expensive dates.

These changes substantially alter the data and open up prospects to new sources like Algeria, whose potential in terms of Deglet Nour is known, or Israel and the United States, which control infestation problems and which primarily produce Medjool.

II - The 5 leading date importing countries in Europe

France, United Kingdom, Germany, Italy and Spain between them account for over 83 percent of the volumes of dates imported into Europe; these have been rising steadily by about 4 percent per year since 1990. It is therefore on these five countries that this study are going to focus our attention and study in detail the development, origin and nature of their imports.

A - The countries supplying the Europe of 5

Tunisia, Algeria and France are combining their efforts to maintain the predominance of Deglet Nour despite the upsurge of new varieties and new sources.

Tunisia

Exports in 1998 to	France	United Kingdom	Germany	Italy	Spain	Total
Tonnes	11 500	1 700	2 300	5 000	3 000	27 300

Tunisia produces 95 000 tonnes of dates, which represents just under 2 percent of world production. Despite this very modest place, it has the major asset of possessing more than 50 percent of the world's palm trees producing the Deglet Nour variety. The other 50 percent is shared by Algeria (1 million palms), the United States (250 000 palms) and Israel (50 000 palms). This natural potential puts it in the forefront of suppliers to Europe, with 23 500 tonnes of dates imported in 1998, or 46 percent of total European imports.

With two production areas, namely Djerid (Nefta and Tozeur) and Kebili, it also produces common varieties, the best-known of which are Kenta, Alligh and Khouat Allig in addition to Deglet Nour.

The marketing of dates in Tunisia is in the hands of private companies, the number of which has grown and grown, driving down prices through competition on the domestic market. The Tunisian date sector is currently suffering from structural problems, leading to an inevitable reduction in prices on account of the fragmentation of supply, regardless of the quality and size of the harvests. Even when a harvest could justify high prices, this internal competition keeps up the pressure on prices. To maintain their margins, importers are trimming cost prices, often to the detriment of quality.

Algeria

Export 1998 to	France	United Kingdom	Germany	Italy	Spain	Total
Tonnes	9 300	-	-	-	500	10 000

Algeria, with 390 000 tonnes, is a major producer of dates and the second world producer of Deglet Nour. With 9 800 tonnes, it ranks second among

suppliers in Europe. It does, however, owe this place to France, which imports nearly all these quantities. Not greatly esteemed by European importers, it is ignored by all European countries except Spain, with which it maintains a small flow of trade.

Since the National Dates Board (OND) closed down, the date economy has been allowed freedom. The palm tree groves have been privatized and a slow rehabilitation of the entire sector has been seen since then. Algeria still exports natural dates for the most part, since only two factories (SOCODAT and SID) are capable of producing processed products. It does, however, have choice raw material in this sphere, since traders in the packing business are of the unanimous opinion that Algerian dates lend themselves perfectly to steaming. It is a solid date whose shiny appearance is obtained naturally without the addition of glucose. On the other hand, it is disadvantaged by being harvested later than Tunisian dates, since its products do not appear on the market until late November. It is also limited by the absence of capital to invest in cold stores, which would allow it to bridge the gap between two seasons.

Because there are few players and Algerian packers are very attached to a highly personalized system of commercial relations, the packer/importer combination plays a key role. For some years, a few French importers have been backing Algeria's prospects and endeavouring to promote this origin in a big way. However, as the laws of commerce are inflexible, this alliance will operate only as long as economic conditions allow each one to retain its margins. Algerian dates are today bought at a slightly lower price than those of Tunisia. This is, and will remain, an essential condition of their development.

Iran

Export in 1998 to	France	United Kingdom	Germany	Italy	Spain	Total
Tonnes	300	5 900	800	-	-	100 000

Iran is the world's biggest producer of dates, with a production of 900 000 tonnes per year. It is, however, only the third supplier to Europe with 7 000 tonnes and 14 percent of the total. Although not a producer of Deglet Nour, it is making marked headway, being aided in this by the United Kingdom, which imports 85 percent of these quantities; it is also aided by Iraq's departure from a market with a strong demand for common dates. From early September onwards, it exports the Mozafati variety, followed by Sayer and Zahedi as from October/November.

France

Export in 1998 to	United Kingdom	Germany	Italy	Spain	Total
Tonnes	900	1 800	200	600	7 500

With 3 500 tonnes exported to the other European countries examined in this study, France is steadily reducing its market share, which fell from 11 percent in 1985 to less than 7 percent in 1998. France's historical links with Algeria and Tunisia and the number of traders and processors engaged in packing dates mean that it still has an expertise and business standing which allows the country to be present at the highest level on this market. However, it is increasingly losing the added value which packing activity gave it. In recent years, the pressure on prices from large scale retail buyers has caused packers to lose products requiring a large labour force to the benefit of producing countries. This development has given rise to a major concentration in the trade, resulting in the disappearance or absorption of renowned firms. Today, among packers, only the VG fruit group and the Saman group remain. At the same time, producing countries, endowed with a new expertise, successfully launched themselves on the European market, taking shares of the market from France.

Israel

Export in 1998 in tonnes	France	United Kingdom	Germany	Italy	Spain	Total
All varieties	900	1 450	120	860	1 670	5 000
Of which Hayani	0	250	150	100	700	1 200

Israel is indisputably the country whose sales have advanced the most, rising from 300 tonnes in 1985 to 2 500 tonnes in 1989 and 5 000 tonnes in 1998. It is a small producing country with a small local market; the bulk of its production is exported. Five packers share the market and their installations are actually within the palm groves maintained by the kibbutz farmers. These practice rigorous methods, which allow infestation to be reduced and the traceability of the products to be guaranteed. While Israeli Deglet Nour is drier, pruning the bunches does allow larger and more regular fruits to be obtained. It has the advantage of an early harvest, which enables its products to be on the market from September onwards. Israel is, moreover, the only producer of fresh Hayani and, with the United States, the only supplier of Medjool.

Other suppliers

We would mention for the record:

The United States, with 1 200 tonnes, the main producer of Medjool.
Pakistan, with 1 200 tonnes.

B – France

France is the foremost European importer, with 23 000 tonnes of dates imported in 1998. Over the period 1990-1997, the country's foreign trade statistics show that imports fluctuated between 17 000 tonnes and 20 000 tonnes without any marked upward trend. Imports reached a very high level in 1998.

Progression of French imports (in tonnes)

90	91	92	93	94	95	96	97	98
18 351	18 569	19 047	20 445	17 782	16 986	20 210	18 793	22 975

Its colonial past has led France to source dates from Tunisia and Algeria.

Countries supplying France

Tunisia: with 11 000 tonnes in 1998, Tunisia is the foremost supplier to France. France is also Tunisia's biggest European customer, since by itself it accounts for the same volume as the total of the four other countries studied.

Algeria: with 9 000 tonnes in 1998, Algeria is a major competitor of Tunisia. The quality of its products, particularly in processed form, is improving each year and its prices are competitive. From 1992 onwards, Algeria caught up with Tunisia, forcing it to review its prices downwards in order to maintain its leadership. These have fallen by 15 percent since that date.

Israel: with 890 tonnes in 1998, this country is maintaining its tonnage due to Medjool, the sales of which are on the increase.

United States: with 200 tonnes, the United States is hardly represented any more in France whereas barely five years ago the volumes imported fluctuated between a 1 500 and 2 000 tonnes. This country was, in fact, the only one capable of producing dates with less than 5 percent infestation. This condition was essential for packers to be able to sell glove boxes in 'the United Kingdom. The reduction in the volumes of glove boxes, gradually replaced by the tub and the tray and the transfer of part of these production facilities to Tunisia cost the United States virtually all of this market.

French exports

While each of the European countries can record date export figures, France stands out greatly in this area since it re-exports 7 500 tonnes of dates, or more than 30 percent of the volume imported: Germany, United Kingdom, Spain and Italy were customers of France, taking approximately half this tonnage.

The varieties imported by France

Deglet Nour is the supreme variety for the French, who buy it primarily for their own market but also impose it on European markets. The common varieties, Kenta and Khouat Allig are intended mainly for export. According to sources in the trade, 50 percent of imports are natural dates and 50 percent are processed dates.

Deglet Nour

France is the biggest importer of Deglet Nour, with approximately 18 000 tonnes. It takes them in natural and processed form in packages strictly regulated by weight, since under the legislation in France only packages weighing 50 g, 125 g, 250 g, 500 g, 1 kg, 1.5 kg, 2 kg, 5 kg, 7.5 kg and 10 kg are permitted.

Natural branched Deglet Nour dates are primarily sold in a 5 kg carton of loose dates to wholesale customers on the government-instituted wholesale food markets. They are also sold in 2 kg and 1 kg cartons and in 500 g bunches: the latter two forms of packaging are more particularly intended for large scale retail.

Prices of natural Deglet Nour dates

	FOB price	Importer cost price	Importer selling price
5 kg branched	FF14.00 per kg = €2.1	FF 16.00 per kg = €2.28	FF 16.50 per kg = €2.51
500 g bunch	FF 16.00 per kg = €2.43	FF17.00 per kg = €2.59	FF 19.00 per kg = €2.89

Processed Deglet Nour

Cartons of 5 kg of loose dates account for a small proportion of imported quantities. They are sold to certain wholesalers who are dried fruit specialists. Processed Deglet Nour dates are imported in 250 and 500 g polystyrene trays. Packers, two in number, purchase the natural merchandise in 10 kg loose form. This cheap merchandise (FF 8 per kilo) is then steamed and repacked in 250, 500 g and 1 kg window boxes for the French market and mainly as 200 g packs for export.

Prices of processed Deglet Nour

	FOB price	Importer cost price	Importer selling price
250 g tray	FF 2.10 = €0.32	FF 2.30 = €0.35	FF 2.50 = €0.38
500 g tray	FF 3.75 = €0.57	FF 4.15 = €0.63	FF 4.15 = €0.63

The 500 g tray remains a standard product which everybody fights for, thus reducing margins to zero.

Common dates

4 300 tonnes of Kenta, Alligh and Khouat Allig dates were imported by France

in 1998. All these quantities are re-exported to European countries, mainly in 200 and 250 g trays and window boxes.

Date paste

This is a small item which supplements the range and is intended for use in the preparation of oriental pastries, the best-known of which is makroust.

Packaging

We show here only the packs intended for the French market; those for the export trade are shown in the section devoted to each of the countries studied.

Packages for natural branched Deglet Nour



5 kg



2 kg



1 kg

Packages for processed Deglet Nour



5 g



1 kg



250g / 500 g window box



500 g tray



250 g tray

Medjool

After the United Kingdom, France is the biggest importer of Medjool dates with approximately 400 tonnes per year, 300 tonnes from Israel and approximately 100 tonnes from the United States. It is a market which has been steadily expanding for three years. The constraint on its current development continues to be its price and its absence from large scale retail, whose rather cautious buyers are waiting for its commercial potential to be demonstrated.

In the case of small packaging, marketing trials in large stores and specialist outlets have not been successful. This is the case in particular with the company France Prune, which was obliged to withdraw from sale a 250 g Medjool window box which did not sell well enough. Only the company Brousse Vergez succeeded in launching the marketing of a 250 g window box, sales of which are moving slowly. More recently, it has created a 150 g container at an attractive price intended for customers wishing to get to know the product.

In general, Medjool dates are imported in a 5 kg carton of loose dates in the three sizes jumbo, large and medium (or fancy) and are intended almost solely for fruit and vegetable wholesalers. This product, which has been on sale for several years now, has established its position and in the case of Israeli Medjool in particular, the *black carton* has become a standard product.

Average prices of Medjool

	Average FOB/USA price	Average CIF price	Importer selling price
Medjool 5 kg loose USA	FF 35 per kg = €5.33	FF 45 per kg = €6.86	FF 52 per kg = €7.92

The prices shown are average prices. There is, in fact, a substantial difference in price between the three sizes jumbo, large and medium. By way of example, in the case of Israeli Medjool, the CIF Marseilles price is FF 47 for the jumbo, FF 43 for the large and FF 35 for the medium, in other words a divergence of 34 percent between the jumbo and the medium.

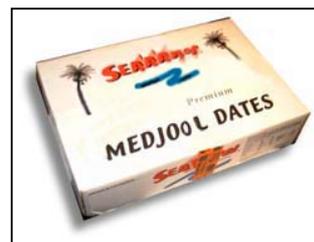
Medjool packaging



5 kg Medjool Israel



5 kg USA Bard Valley



5 kg USA Coachella Valley

Medjool 250 g



Hayani

After the failure of a marketing campaign by Hadiklaim in 1996, which will be dealt with in the next section devoted to Hayani, it may be said that today's sales of this product in France are very low, not to say non-existent.

Bahri

With 150 tonnes sold per year from September to October, Bahri represents a very small market in France. Originating from Israel, it is sold by specialists (Fetaya) to wholesalers dealing in exotic products and for consumers who are, in the main, Jews familiar with the product and who know how to appreciate it. It is packed in 5 kg cartons and presented on the branch.

Prices of Bahri

	CIF Marseilles price
Bahri 5 kg carton	FF 80 per carton = €12.20

Importers (see the Annex for details)

Packers/importers: Saman VG fruits

Importers: Sacim Brousse-Vergez Soria Avon Fabre Crosier
Fetaya Laparre Lenoble Agrusud Saisof Arbona

C - United Kingdom

With 11 000 tonnes in 1998, the United Kingdom is the second biggest European importer of dates. However, these volumes are stagnating. They were 11 000 tonnes in 1985 and 10 500 tonnes in 1990.

United Kingdom's suppliers

Iran: with 6 000 tonnes, Iran is the foremost supplier to the United Kingdom. It has been growing constantly for 15 years at an average rate of 7 percent per year and has taken the place left vacant by Iraq, which has had problems since the Gulf War.

Tunisia and France: with 1 700 tonnes, Tunisia occupies second place. Also surging ahead, it is gradually taking over the market share of France which, at 900 tonnes, is diminishing each year. Since French exports are made up for the most part of Tunisian dates, it may be said that Tunisia, directly or indirectly, accounts for a quarter of the quantities imported.

United States: with 900 tonnes in 1998, this is the 4th major supplier to the United Kingdom. Benefiting from the very close relations which exist between the two countries, American exporters have established strong footholds on the British market and their sales are steadily expanding each year, being spurred on by Medjool, sales of which are forging ahead, with the volume of traditional tub sales being maintained.

Pakistan: with 900 tonnes in 1998, this is a traditional supplier to the United Kingdom although, depending on the year, it is beset by major fluctuations in quantity that the authors cannot account for.

Israel: with 220 tonnes sold in 1998, Israel is a small supplier to the United Kingdom which is mentioned for the record, since it is a major player as far as Medjool dates are concerned.

Imported date varieties

The United Kingdom is a nation of diversity and here, in variable proportions, a large number of varieties, particularly of common dates, are to be found.

Common varieties

Among European countries, it is in the United Kingdom that common dates account for the bulk of imported quantities since, with over 7 000 tonnes in 1998, they account for two-thirds of British imports. Originating mainly in Iran, Sayer, Saadi (Zahedi) and Mozafati constitute what are termed cooking dates, used to make culinary preparations.

A substantial proportion also provides ingredients for industry. These are very inexpensive dates which are negotiated at approximately US\$0.65 per kilo. British industry uses dates in widely varied and often unexpected connections,

such as in the production of Worcester sauce. As an ingredient is involved, the development of industrial dates depends on the commercial potential of the products in which they are incorporated.

The Tunisian varieties Kenta and Khouat Allig account for a minimal proportion of approximately 800 tonnes, mainly packed in 200 g polystyrene trays which the British call the cheap tray, which clearly indicates its position on the market.

Prices of processed common varieties

	FOB price	Importer cost price	Importer selling price
Khouat Allig 200 g tray	€0.26	€0.29	€0.30

Deglet Nour

This comes from Tunisia, France and the United States. With approximately 2 400 tonnes in 1998, it accounts for just under a quarter of British imports.

It is imported almost solely in the form of processed dates.

The 227 g *glove box* is a typically British packet, one which has been carefully put together and in which only Extra category dates are packed. The packaging, which was formerly made of wood covered with serrated paper and cellophane, is replaced today by a plastic packaging in the same form, recently provided with a tamper-proof closing system. While it was the Marseillais who invented it, nearly all imports today come from Tunisia and, to a lesser extent, from Israel. It is a product which also possesses the specific feature of being sold only during Christmas time. Also found on the market is the tub, which is a round plastic window box with a printed lid and which contains 227 g or 250 g of Deglet Nour imported dates of US origin.

Deglet Nour prices

	FOB price	CIF price	Importer selling price
227 g glove box	€0.83	€0.99	€1.14

Three components account for the difference in price between a 250 g tray and a 227 g glove box:

- the cost of the packaging: this is approximately €0.04 in the case of the tray and €0.18 in the case of the glove box;
- the quality of the dates: large dates with plenty of body are packed in the glove box, whereas only small dried dates are to be found in a tray;
- the glove box is a specific product which is not subject to any competition.

Packaging



Glove boxes



Tub



200 g window box

Medjool dates

As in the rest of European countries, Medjool dates have been making constant headway for several years and it is today estimated that 800 tonnes were imported in 1998. They came mainly from California as far as 2/3 of the tonnage was concerned, with the rest coming from Israel. They are imported loose and repackaged by importers, being given an early sell-by date, in 200 or 227 g window boxes generally bearing the distributor's trade mark. Payment of the 10.6 percent customs duty imposed on the loose product if it is resold in its original state is thus avoided.

Prices of Medjool

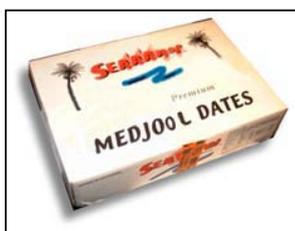
Since the bulk of Medjool imports come from the United States, it is difficult to arrive at an average buying price since. There are very substantial differences depending on the sizes, but also depending on the exporters. There may be, for one and the same size, more than €1 difference between the different producers. If we add to this the variations in price between sizes, there may be a difference of over €3 between a jumbo Bard Valley and an extra fancy Coachella.

	Average CIF price/kg
Medjool loose USA	€6.37

Packaging



Medjool 5 kg
Bard Valley
USA



Medjool 5kg
Coachella
USA



Medjool 5 kg
Israel

Hayani

The Hadiklaim company, which is the main exporter of Hayani, recorded a figure of 250 tonnes in 1998. This is tantamount to stating that the product is not present on the market, all the more so since it is making no headway.

Prices of Hayani

	FOB price/kg	CIF price/kg	Importer selling price/kg
Hayani 5 kg	€1.67/€1.82	€1.83 /€1.98	€2.28

Bahri

According to the same sources, Bahri accounted for less than 200 tonnes in the United Kingdom in 1990.

Main importers (see the Annex for details)

Sapphire Geest Hart and Friedman Compagnie Fruitière
Jo Sims

D – Germany

Germany is a contender with Italy for third place among date importers. The quantities have been constantly increasing for 10 years, rising from 3 300 tonnes in 1989 to 4 800 tonnes in 1994, topping 6 000 in 1998: this is an average rate of growth of over 7 percent per year.

Countries supplying Germany

Tunisia/France: since 1992, Tunisia has become the first supplier of dates to Germany, doubling its tonnage during this period to reach 2 000 tonnes in 1998. If it is considered that most exports from France to Germany are made up of Tunisian dates, and if one adds the 1 800 tonnes imported by France, it may be estimated that 65 percent of the dates consumed in Germany come from Tunisia.

Iran and Pakistan: providing 800 and 400 tonnes respectively, they supply the German agrifood industry with common dates; it uses them as ingredients in preparations.

Israel and the United States: among suppliers to Germany, there are also Israel and the United States which, with 126 and 72 tonnes respectively, are noteworthy on account of the low level of their quantities.

Date varieties imported into Germany

Traditionally, Germany imported common dates for the most part. On a price market led by large scale retail and with consumers making no distinction between varieties, Kenta and Khouat Allig held the lion's share. For two to three years, the marked trend has reversed, so that preference tends to be given to quality products.

Common varieties

With 3 400 tonnes, common varieties account for the bulk of German imports. However, a distinction needs to be made between the varieties, such as Iran's Saadi, which is used in industry, and other more expensive varieties, like Kenta, which are intended for the retail trade.

As was stated earlier, the German food industry consumes between 1 000 and 1 200 tonnes of dehydrated dates which are incorporated in the composition of other products, the best-known being muesli. As an ingredient, it is an inexpensive product whose average price per kilo is DM 1.5. In the case of these quite specific dates, Iran and Pakistan are the main suppliers.

The remaining 2 200 tonnes of common dates come for the most part from Tunisia and are mainly packed in window boxes and in 200 g polystyrene trays.

Common date prices in Germany

	Importer purchase price
Khouat Allig 200 g	Between DM 0.57 and 0.60 = €0.29 and 0.30
Saadi 200 g window box	Between DM 0.55 and 0.59 = €0.28 and 0.30

Deglet Nour

With 2 000 tonnes in 1998, Deglet Nour comes from France and Tunisia. Natural Deglet Nour, whether branched or standard, only accounts for a small volume of trade. It is purchased for the most part by the small-scale traditional trade and its sales have been going up, particularly in the Ramadan period. It is to be found in its two standard 5 kg loose and 1 kg packs. In the case of Deglet Nour, as in the case of common dates, the bulk of the tonnage is in the form of 200 g window boxes, 200 g polystyrene trays and 200 g wooden trays. For some years, an expansion in sales of 250 g polystyrene trays has been noted, and some importers who were asked about this affirmed that the 250 g quantities exceeded the 200 g ones. Approximately 150 and 200 tonnes of stoned Deglet Nour dates are imported each year on behalf of the companies Seeberger and Herbert Kluth, which offer this product throughout the year in a 200 g vacuum pack presented in combination with other dried fruit. Since Germany is the country where organic food is really coming into its own, an importer has recently trialled organic dates with Tunisia.

Deglet Nour prices in Germany

	Importer purchase price
200 g wooden tray	Between DM 0.78 and 0.80 = €0.39 and 0.41
200 g polystyrene tray	Between DM 0.65 and 0.70 = €0.33 and 0.36

Packaging



Deglet Nour 1 kg
Natural standard



200 g
polystyrene and
wooden tray



Seeberger
200 g pack

Medjool

In Germany, imports of Medjool dates are also rising fast. They went up from 200 tonnes in 1998 to 300 tonnes in 1999. Originating from Israel but also from the United States, they are sold in a 5 kg carton of loose dates and in three sizes: jumbo, large and medium.

Few sales are made in the form of small packets. In cash and carry stores, particularly Fegro, 500 g packs are to be found, although the rather untempting presentation is at odds with a very expensive selling price.

As far as small packages are concerned, Agrexco has had 150 g packs produced which have been sent to the importer by air freight. The authors have not yet any feedback on the results of this trial.

Medjool price in Germany (price/kg)

Medjool 5 kg loose	
Average importer purchase price	Importer selling price
DM 12.10 = €6.18	DM 13/14 = €6.65/7.16

Packages



5 kg USA



5 kg Israel



150 g Agrexco



500 g Fegro

Hayani

After promising trials, it would seem today that the experiment has come to a sudden end and that the quantities on the market do not exceed 100 tonnes or so. The reason for this failure is thought to be linked to the actual structure of German distribution, which is not very well adapted to bulk selling. The market for this type of product remains the small retail food trade in which the concept of fresh dates is already familiar. From the refrigerated cabinets of some retailers, 700 g packs of Iranian dates sold are sold to consumers at between DM 5 and 6.



Bahri

Bahri dates are not to be found on the German market.

German importers

Rewe
Dankat

Frupa

Internut

Tilouche

Stolzenberg

E - Italy

Italy imported 6 300 tonnes of dates in 1998. Although this figure is the highest in the last 10 years, Italian imports are stagnating at between 5 and 6 000 tonnes per year.

Countries supplying Italy

Tunisia: the profile of Italian imports has hardly changed for 15 years. The country remains loyal to Tunisia, which, with 5 000 tonnes in 1998, accounted for 80 percent of its tonnage.

Israel: the only notable change in the supply of dates to Italy relates to Israel, which since 1993 has strengthened its position. In 1998 it imported just under 900 tonnes.

Date varieties imported by Italy

Italian imports show a profile which is fairly similar to that of France. Here too, Deglet Nour predominates and natural dates occupy an important position allowing common dates a minimal portion.

Deglet Nour

According to the information communicated by the GID, Deglet Nour accounts for the bulk of Italian imports. Natural Deglet Nour dates are therefore sold in 5 kg loose lots but also in 500 g bunches. As in the rest of Europe, the processed product is mainly sold in 250 g and 500 g trays.

Prices of Deglet Nour:

1 - natural (price/kg)

	FOB price	Importer cost price
5 kg branched	€2.1	€2.30/2.35
500 g bunch	€2.43	€2.60/2.65

2 - processed

	FOB price	Importer cost price
250 g tray	€0.32	€0.38/0.40
500 g tray	€0.57	€0.65/0.70

Common dates

Italians have a preference for light-coloured dates, which is why they buy newly-harvested Kenta, as this variety displays this characteristic at that time. For 1999 estimated imports of this variety approximate 500 tonnes. Kenta prices vary between €1.05 and €1.20 FOB Tunis.

Packaging



5 kg loose pack



500 g bunch



250g tray

Medjool

Imports of Medjool in 1998 are estimated as totalling 300 tonnes, originating from Israel. In the medium size, they are packed in a 5 kg carton of loose dates.

Hayani

The Israeli exporter Hadiklaim estimates that Hayani imports total 100 tonnes. The authors are sceptical about the accuracy of this figure since they do not have information on the consumption of this product in Italy.

Bahri

These dates are not imported into Italy.

Italian importers

Ventura

Noberasco

Murano

F – Spain

With 5 000 tonnes per year, to which should be added approximately 700 tonnes of Hayani, Spain ranks fifth among European importing countries. Constantly on the increase, imports of dates have practically doubled since 1993.

Countries supplying Spain

Tunisia: with more than 3 000 tonnes per year, Tunisia accounts for over 50 percent of the tonnage imported. There are, in fact, very long-standing relations between the two countries which facilitate trade. One Spanish importer has, moreover, invested in a south Tunisian factory, whose production he controls entirely.

Israel: with 900 tonnes of dates and 800 tonnes of Hayani, Israel has in less than 10 years become a partner of some importance for Spain.

France: with 600 tonnes per year, France is maintaining a regular volume of business, dealing directly with major importers such as Importaco, Meneu or Bernabe Biosca, but also via agents very familiar to more modest importers or distributors. France, as Tunisia's foremost customer, benefits from the very good image of Tunisian dates shared by Spanish buyers.

Algeria: with 450 tonnes, Algeria is Spain's last partner. This is a modest role which is not in keeping with the potential it possesses. Buyers think of it as a centralized country, lacking flexibility and difficult of access.

Date varieties imported by Spain

While Deglet Nour largely dominates imports, Khouat Allig and Kenta of Tunisian origin are out to be found on the market as well as Medjool, Hayani and Bahri from Israel.

Deglet Nour

This accounts for over 65 percent of the tonnage with approximately 3 300 tonnes. Branched natural Deglet Nour continues to be the leading product. It is sold mainly in a 5 kg carton of loose dates and is found on all wholesale markets from November onwards. In lesser quantity, it is also presented in 1 and 2 kg cartons which are especially favoured by cash and carry stores.

Deglet Nour prices in Spain (per kilo)

Deglet Nour dates 5 kg natural branched	
Average importer buying price	Average selling price to wholesalers
ESP 366 = €2.2	ESP 398 = €2.4

Processed Deglet Nour dates are more especially in demand from large scale retailers, particularly in 250 g polystyrene trays. They are also offered in the form of a 500 g tray and a 500 g window box and are additionally to be found in closed 150 and 250 g window boxes (whole or stoned), generally presented in a uniform range with other dried fruit. The Borges company is a prominent player in large scale retail, with display units of attractive dried fruit but these do not seem very suited to dates. The trend today is towards packaging which displays the product so as to place it on a par with fresh fruit. The 5 kg cartons are mainly intended for the few industrialists equipped to repack the product in consumer packaging.

Prices of processed Deglet Nour

Processed Deglet Nour date, packed 250 g tray	
Average importer buying price	Average importer selling price
ESP 70/78 = €0.42/ 0.47	ESP 85 = €0.52

As in the other EC countries, the tray continues to be a product which is fought over and the gain of a few centimes is often made at the expense of quality.

Common varieties

Whether in the form of Khouat Allig or Kenta, imports into Spain total approximately 1 300 tonnes of common dates. This is a substantial volume but one unanimously held by importers to be markedly on the decrease in recent production years. They are primarily sold in 250 g polystyrene trays. A little branched Khouat Allig is found in southern Spain but it is of no commercial interest.

Prices of common varieties

250 g Khouat Allig tray	
Average FOB price	Average CIF price
ESP 53 = €0.32	ESP 60 = €0.37

Packaging

Natural branched products



5 kg



2 kg



1 kg

Processed products



Medjool

These come entirely from Israel, since the United States is not a supplier to the Spanish market. Although present on most of the wholesale markets, Medjool dates are in the commercial development stage. Imported in small quantities, they are mixed with other products from Israel. The quantities imported in 1998 are estimated at 80/100 tonnes. They are sold in a 5 kg carton of loose dates (black, gold or red carton) and some large scale retail trials using a basket weighing approximately 500 g have been carried out by Agrexco. Given its very mediocre presentation, fruit with loose skin and high price, it is doubtful the product will be a commercial success.

Medjool prices in Spain

Medjool loose 5 kg medium	
Average CIF price	Average importer selling prices
ESP 900 per kg = €5.42	ESP 1000/1100 = €6.02/6.60

Packaging



5 kg loose pack



500 g Agrexco

Hayani

Spain launched the marketing of Hayani dates very early on and the quantities of dates imported in 1998 (all from Israel) are estimated at 700 tonnes. The company Meneu Distribution, which is the main importer of this product, estimates 1999 imports at 1 000 tonnes. This commercial success is due to large scale retail, which has had faith in the product. It is sold today in a 5 kg carton of loose dates, in refrigerated display units, in the fruit and vegetable department.

Trials are currently under way to offer the product in 500 g window boxes with a 10-day shelf life. Bearing in mind the sound reputation of the product, it might be thought that this type of packaging will acquire a significant market share if all the logistical problems can be resolved. It will, initially, be indissociable from the loose product, with which it is to appear in the same display unit.

Hayani prices in Spain

Hayani loose 5 kg
Average importer buying price/kg
ESP 290 = €1.75

At the beginning of the 1999 production year, the CIF prices for the standard product were €1.98 per kilo from Hadiklaim and €1.82 from Agrexco. When the authors went to Spain, importers pointed out to us that prices were on the way down, although they did not specify their purchase prices. By contrast, at wholesale level, the authors noted that the 5 kg product was sold at ESP 1 850 per carton, or €2.22 Euros per kilo. This allowed us, by back calculation, to estimate the CIF price at approximately €1.75. To calculate the cost price of a kilo of Hayani, €0.04 by way of transit and insurance costs and €0.04 by way of storage costs need to be added. If a price range had to be calculated, a cost price for Spanish importers of between €1.83 and €2.06 would be arrived at. The public selling price is approximately ESP 650, or €3.91.

By comparison with Medjool, the relatively low price of Hayani is an asset as far as its commercial development is concerned.

Packaging



5 kg loose



500 g box

Bahri

Bahri dates also come from Israel, from the end of August until mid-October. They are reserved for a number of specialist distributors who sell them primarily in southern Spain to initiated consumers. In the absence of any precise statistical data, and bearing in mind the opinion of the importers who were questioned, the authors estimate the volumes of Bahri dates sold during this short period as being between 100 tonnes and 150 tonnes. They are sold branched in a 5 kg carton of loose dates.

Bahri prices in Spain

5 kg loose Bahri	
CIF importer price	Average importer selling prices
ESP 400 per kg = €2.40	ESP 470 per kg = €2.83

Spanish importers

The main Spanish importers of dates are:

Bernabe Biosca Importaco Borges Meneu Distribution Frit
Ravitch Frumesa Grupo Fernandez

Spanish production of dates?

Some statistical documents record Spanish production varying between 8 000 and 9 000 tonnes per year. While it is accurate to say that there are a number of palm groves in southern Spain and in the Alicante region, the authors do not have information enabling them to state that they are exploited and that their products are marketed, even at local level. Date production for human consumption is not thought to amount to more than several hundred tonnes.

III - The distribution and consumption of dates in Europe

The easier it is to have a relatively accurate picture of the upstream date sector, from importer level (because there are a relatively small number of players), the more difficult - indeed impossible - it becomes to have reliable information when one goes beyond this level. From the wholesale stage onwards, one is already faced with several thousand traders, several hundred thousand retailers and millions of consumers. It may clearly be seen that the information becomes diluted as one goes down the distribution strata and that knowing what is being sold by one or the other, and who is consuming what quickly becomes impossible.

However, one could remain at the importer stage and study his customers' profile with him. The information could be consolidated and the proportion of wholesalers, large stores/specialist outlets and industrialists could thus be known and the market share of each one calculated. Now unfortunately, there are numerous factors which distort these statistics so that they cannot be exploited. It is known, in particular, that a proportion of trade does not take place via importers and it is also known that channels are not partitioned and that there are very substantial patterns of trade between wholesalers and large stores and specialist outlets. In other words, a product sold by an importer to a wholesaler may quite easily be resold by the latter to a hypermarket or to a regional buying office. In the case of dates, one is also dealing with a low-volume, seasonal article whose movements are lost in the statistics of each one in the midst of a range of more important products .

For these reasons, no attempt is made to give the market share in respect of dates of each of the players in the distribution chain. Similarly, the authors are very careful not to outline the profile of the date consumer, research into which would require means far beyond the framework of this study. At the very most, they point out that everybody is agreed that ethnic markets, particularly Muslim ones, have a greater propensity to consume dates and that the Ramadan period continues to be a prime time for sales of this product.

The authors therefore stay with the general data of distribution in Europe. This study evaluates date consumption per inhabitant by country and points out trends. Finally it presents, for heavily consumed products, price ranges evaluated at the wholesaler and consumer stage, pointing out that there may be very substantial differences which have a knock-on effect at each level as far as the final consumer.

A - Distribution in the Europe of 5

Upstream of the retail trade, putting it simplistically, date importers are either fresh fruit specialists or dried fruit specialists. The former have always developed their business, within the framework of the traditional wholesaler

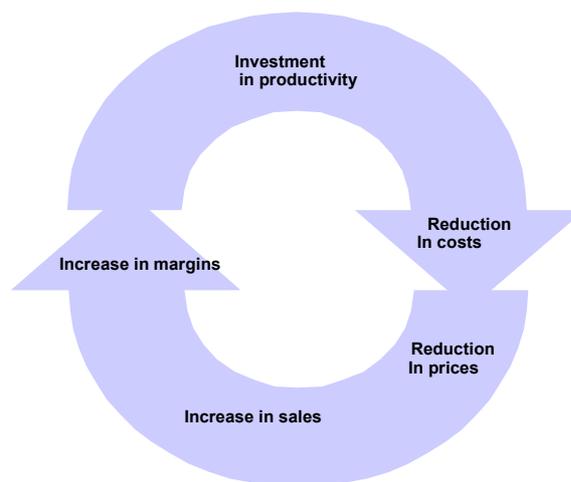
channels and have turned towards large scale retail, encouraged somewhat by events. As for the latter, who include packers, they developed very early on a concept of a range of dried fruits and small packs adapted to the constraints of selling and to the demands of large stores and specialist outlets.

Among the five countries studied, the food retail trade is in the hands of approximately 500 000 enterprises, whose combined turnover exceeds €530 billion. They comprise large scale retailers, supermarkets and small retail shops. This substantial number must not mask the dense concentration of the sector in the hands of large stores and specialist outlets which account for the bulk of turnover. This development is particularly evident when the proportion of the so-called specialized food trade is analyzed. While this predominates in numerical terms, with 60 percent of firms, it only represents 13 percent of total combined turnover.

The main European distribution groups			
Turnover, incl. tax, in € billion in 1998			
Metro	46.9	Tesco	24.3
Intermarché	34.1	Auchan	23.6
Rewe	33.7	Leclerc	21.34
Promodes	32.6	Sainsbury	22.08
Carrefour	31.2	Karstadt	16.9
Tengelmann	27.5	Casino	16.7
Edeka	26.6	Delhaize	12.9
Ahold	26.5	Marks Spencer	12.01
Aldi	26.1	Migros	9.53
Total turnover, incl. tax		444.56	

It is a sector which is undergoing profound changes. The trend towards concentration ought to continue intensifying in the next 10 years. This is not to say that small retailers are going to disappear, for while the giants in the sector are going to become even more concentrated through mergers and acquisitions, small retailers will join certain cooperatives or become franchise-holders of these large new organizations, but will not disappear. It may even be thought that the decline in small-scale trade is going to end and that the exodus which has been seen for 20 years will be halted, aided in particular by regulations seeking to limit the expansion in the number of large stores and specialist outlets. Concentration within national markets is, in fact, already well advanced, particularly in northern Europe and it is now spreading in southern Europe: the Promodes Casino battle is a perfect illustration of this. It is today spilling over the borders, as the examples of France's Auchan with Italy's Rinascente and of Metro with Makro show. A medium-term consequence of this development is that in 10 years, the number of major distribution groups will be halved.

While these considerations may appear remote from our main subject, they may nonetheless have major long-term repercussions on the distribution of dates. The initial effect of this concentration relates to prices which, according to the all too well-known productivity curve, ought to come down further. One might, however, wonder whether the levels reached today on the date market can be reduced any further. In any case there is little chance of seeing another upward movement.



Inevitably, the concentration of large stores and specialist outlets entails a concentration upstream; the number of wholesalers is on the decrease. They will have to adapt in order to survive. They may regroup, as is being seen in other sectors. They will in all cases have to be able to ensure an increasingly complete service (price, range, logistics) following the example of wholesalers with national coverage who are already present on the markets. Upstream, too, importers whose survival is threatened and who are seeing the number of their customers going down have wholeheartedly entered a price war, to the great benefit of large stores and specialist outlets. With small volume products like dates, such stores and outlets are recovering the margins they are losing in the product war. The case of the 250 g tray is very revealing as far as this principle is concerned. While the purchase price in the chain as a whole has gone down by more than 40 percent in a few years, the selling price of this article in large stores and specialist outlets has hardly changed.

The questions which are still outstanding are of vital importance:

- Until when, and up to what level, will the transfer of margin from upstream to downstream to the benefit of large scale retailers alone be accepted?
- To what level of reduction in quality will one be able to go without completely discouraging consumers?
- How is one to organize the marketing of production as far as the intermediate stage in order to avoid fruitless competition?

The consumer has little influence on date prices, since dates are a very marginal product in the consumer's food basket, and that demand elasticity in relation to price barely applies. The market is not one on which there is an abundance of products to offer but an abundance of suppliers. Concentration will be beneficial to the sector.

B – Date consumption in the Europe of 5

In 1998, consumption in the five leading importing countries was approximately 42 000 tonnes, increasing steadily by 4 percent per year. This represents approximately 140 g of dates consumed per head per year, which, compared with the 83 kg of fruit consumed per head per European per year, places dates among niche products in the fruit category.

Even if their place is modest in this context, their position continues to be interesting in various respects. They are definitively integrated in fresh fruit departments throughout Europe and these are of very great importance for distributors from a strategic point of view.

Fruit departments form part of the first three sources of profit per square metre and convey an image for shops (freshness, pleasure, cleanliness) more than anything else, one which radiates out to all the other departments in the shop. Moreover, distributors are induced to seek differentiation in various forms to free themselves from the pressure of competition and raise their margins. Despite their low quantities, niche products continue to be a source of very substantial profit.

C - Date consumption in France

1998	Consumption (tonnes)	Population	Cons./inhabitant
France	15 379	60 million	0.25kg

France is the leading consumer of dates in Europe, primarily the packed and natural Deglet Nour variety. Its consumption has always been sustained by consumers from the former colonies and by a large Maghreb population.

FRANCE		
Selling price (FF)	Wholesale selling price	Retail selling price
5 kg branched Deglet Nour	2.90/3.20 per kg	3.65/5.35 per kg
Deglet Nour bunch	3.35/3.65 per kg	4.60/6.00 per kg
250g Deglet Nour tray	0.45/0.55 per tray	0.90/1.20 per tray
500g Deglet Nour tray	0.75/0.80 per tray	1.05/1.60 per tray
Medjool	8.40/9.90 per kg	11.40/16.80 per kg

D - Date consumption in the United Kingdom

1998	Consumption (tonnes)	Trend	Population	Cons./inhabitant
United Kingdom	10 337	Stagnation	57 million	0.18 kg

Despite high consumption (the second highest in Europe), the date market in the United Kingdom continues to be very stable. The presence of a large immigrant population, mainly from Asian countries and especially the former Commonwealth nations, definitely affects the consumption of common dates. The major distributors, such as Tesco, Sainsbury and Marks and Spencer, have always sought to identify what fosters innovation and the development of new products. This is what has happened in the case of Medjool, which is gradually making its mark.

United Kingdom		
Selling price in euros	Wholesale selling price	Retail selling price
Glove box 227g	1.30/1.50	1.70/2.40
Khouat Allig 200 g tray	0.35/0.40	0.45/0.70
Medjool	8.00/9.00	10.50/15.00

E - Date consumption in Italy

1998	Consumption (tonnes)	Trend	Population	Cons./inhabitant
Italy	6 077	Stagnation	58 million	0.10 kg

Italy is certainly the most traditional country as far as the consumption of dates is concerned. These constitute, and will for a long time continue to constitute a year-end product whose consumption all but ceases in the first few weeks in January. This type of consumption is a restriction on their development and is the reason for the market stagnating between 5 000 and 6 000 tonnes, with a very low rate of consumption per head. On the other hand, Italy is still a country of connoisseurs, and Deglet Nour are the dates primarily consumed. In particular, natural date consumption is fostered by the country's very dense network of fruit and vegetable shops. With over 22 000 specialist points of sale, it far exceeds France and the United Kingdom, which each have about 6 000. This also shows that Italy is a country where large stores and specialist outlets dominate distribution to a lesser extent and further accounts for the fact that prices are charged there which still have a certain economic significance for the chain as a whole.

Italy		
Selling price in euros	Wholesale selling price	Retail selling price
5 kg natural Deglet Nour	3.00/3.20	5.00/6.00
500 g bunch	3.25/3.60	5.50/6.50
250 g DN tray	0.45/0.50	0.60/0.90
Medjool	8.50/9.50	11.00/15.00

F - Date consumption in Germany

1998	Consumption (tonnes)	Trend	Population	Cons./inhabitant
Germany	5 249	+ 7% per yr.	81 million	0.06 kg

Despite a gratifying growth rate which is unquestionably linked to its reunification with the GDR, Germany does not seem to us to possess favourable conditions for being one of the key markets for dates in Europe. Its highly concentrated method of distribution, which is dominated by the hard discount, has fostered the marketing of products of very average quality and lacking in attractiveness. Although a change in demand is being seen tending towards products of better taste and appearance, it is still an uphill struggle to impose dates on customer who are not at all familiar with them.

Germany		
Selling price in euros	Wholesale selling price	Retail selling price
200 g Khouat Allig tray	0.38/0.41	0.50/0.70
200 g Saadi window box	0.35/0.40	0.45/0.65
200 g wooden tray	0.51/0.55	0.7/1.2
200 g polystyrene tray	0.45/0.50	0.60/1.00
200 g pack	1.4	1.8
Medjool	9.00/9.50	17.00/19.00

G – Date consumption in Spain

1998	Consumption (tonnes)	Trend	Population	Cons./inhabitant
Spain	5 500	+ 8% per yr.	39 million	0.14 kg
Including Hayani	700			

With a modest figure of 140 g per inhabitant per year, Spanish consumption is distinguished by the highest growth rate in Europe. Since its accession to the Common Market in 1986, Spain has undergone a profound economic transformation, resulting in particular in an increase in purchasing power. This could account for the rise in date consumption which would follow the general trend and which, moreover, has decidedly benefited from the expansion in the immigrant population attracted by a demand for cheap labour.

In this movement, large scale retail (particularly French) has staked out its territory and acquired new market shares, bringing small packs of prepared dates to the fore and boosting consumption of Hayani which, with approximately 700 tonnes per year, is showing a performance unmatched by it anywhere else.

Spain		
Selling price in euros	Wholesale selling price	Retail selling price
5 kg branched Deglet Nour	2.75/3.00	3.6/5.00
250 g Deglet Nour tray	0.60/0.65	1.30/1.60
250 g Khouat Allig tray	0.47/0.55	0.95/1.1
Medjool	7.00/8.00	10.00/13.00
Hayani	2.00/2.20	3.00/4.00

IV - New varieties of dates

A – Medjool

History tells us that it was the Americans who, from a plantlet discovered in Morocco, established and improved this variety in their country, in California to be precise, to make from it the product that is known today. In Europe, Medjool dates have actually been known since the early Nineties and it is only in the last three to four years that they have really taken off. They are to be found on the market of the main European countries:

Imports of Medjool in Europe (1999)

United Kingdom	800 tonnes
France	400 tonnes
Germany	200 tonnes
Spain	100 tonnes
Italy	300 tonnes
Total	1800 tonnes

With approximately 1 800 tonnes per year, and especially an exponential growth, these dates are arousing a lot of interest and hopes among importers. On a market on which there is seldom any innovation, the promising beginnings of Medjool give some reason to think that, in coming years, it will be a major product in the range of dates on offer.

Countries producing Medjool

The United States and Israel today share the European market. The United States is the foremost producer. Located in California, the palm groves lie mainly in the two areas of Bard Valley, which by itself produces 70 percent of Medjool dates, the second area being Coachella Valley. Their exports rose to approximately 800 tonnes in 1999.

Israel is playing the part of a challenger effectively. In the opinion even of American traders, the country offers an interesting alternative to buyers. This source has improved its quality, it guarantees the traceability of products and continues to be less expensive by virtue, in particular, of lower transport costs. It is developing its production (2 000 tonnes), mainly in the regions of Eilat and the Dead Sea. As in the case of other varieties of dates, the marketing of Medjool has been entrusted to two companies, Agrexco and Hadiklaim. According to these traders, exports to Europe exceeded 1 000 tonnes in 1999.

The period of production

This extends from the end of August to the end of November in the case of both origins, which allows the markets to be supplied from September to May, bearing in mind the possibilities of keeping the product under refrigeration.

Logistics

From Israel, imports take place in 20' refrigerated containers containing 1 440 palletised cartons, as well as collectively by refrigerated truck. Transit time is approximately two weeks.

From the United States, imports - in the case of complete consignments - also take place in 20' or 40' refrigerated containers containing 3 600 palletised cartons. By boat, the transit time is three to four weeks. Other consignments primarily take place by air freight, which obviously adds to the cost the product but does allow greater flexibility of supply in the case of a product which is gathering momentum and above all which is worth more than €7 per kilo.

Sizes

Whether in the case of Israel or the United States, three sizes are offered: jumbo, large and medium (fancy).

In the case of the United States, the jumbo size represents approximately 40 percent of the quantities harvested, the other two sizes representing approximately 30 percent each. As for Israel, the problem of size is a little more difficult to handle.

Size of Medjool	Number of fruits per lb.	Number of fruits per kilo
Jumbo	16/21	35/47
Large	22/26	48/57
Medium	27/30	59/66

Qualities

In the case of Medjool, there is not really any quality standard. It normally has its best degree of maturity and full flavour when it turns dark brown, almost black, and soft to the touch. There is, moreover, a market for a very mature and very fresh quality of date. It is, by contrast, very awkward to pack. In France, some pallets of this product have been sold and been much appreciated. Generally speaking, Medjool has a light dusty appearance on the surface of the skin, which is in fact the sugar of the date which is being released. The British prefer it like this. The French, used to Deglet Nour, would rather it was lighter and shinier in appearance. On the other hand, it may display detachment of the skin which renders it rather unattractive. For a quality product, the presence of fruit of this type needs to be minimal. Under open air storage conditions, the date also tends to sweeten more rapidly than Deglet Nour as it dries.

Storage conditions

Medjool stored under positive refrigeration retains all its qualities for six months. It may also be frozen, which extends its keeping and above all allows the gap between seasons to be bridged.

Customs duties

Dates from the United States are subject to 10.6 percent taxation when they enter the EC. There is exemption from this tax if the product is imported in order to be repackaged. This is what the British do to avoid the charge. They import Medjool dates in 15 lb. cartons of loose dates and repackage them using their customers' trademark.

Loose packaging

Packaging intended for re-packers is generally 5 kg or 15 lb. That intended for loose sale is 5 kg. It is generally packaging which is very carefully produced using quality kraft material and sufficient thickness to avoid any sagging. The carton is generally telescopic with a printed lid which may, like the Bard Valley one, serve as a display. The bottom is of the same quality as the lid. It is covered with a film which protects the dates and has a cardboard divider which prevents the fruit being compressed in the course of handling.



Individual packaging

Only the United Kingdom, through large scale retailers, has so far succeeded in getting a small package onto the market. In Germany, trials with a 150 g pack are under way. In France, a 250 g window box is selling sluggishly. On the other hand, the Brousse Vergez company has just created a 150 g pack which it calls the *Cristal* pack, the dual advantage of which is matching quality to a product of this price and not being very expensive per unit on account of its low weight.



France
250 g Medjool



Germany
150 g Medjool



France
150 g Medjool

Medjool prices

Prices vary depending on the origin, the manufacturer, the size and the means of transport.

Purchase prices per kilo

US Medjool Bard Valley	Jumbo	Large	Fancy
CIF price	€7	€6.2	€5.5
Cost price	€7.9	€7.2	€6.4

Israeli Medjool	Jumbo	Large	Medium
CIF price per kilo	€7.2	€6.55	€5.05
Cost price	€7.3	€6.7	€5.44

The promotion of Medjool

In the case of Medjool from the United States, the Californian Date Commission is normally authorized to receive funds from the US Government under the Market Access Program to promote exports of dates to Europe. These sums are intended to reimburse a proportion of the promotion costs defrayed for dates from California. To our knowledge, the requests from European importers have failed to elicit any response. It would seem that priority is being given to the American market rather than to export.

Current limits on the development of Medjool

The first limit on the development of Medjool stems from the low quantities currently produced. The direct consequence of this small volume of supply is the high price of the product, which, after the succession of margins applied to it within the distribution system and to which taxes are to be added, reaches the consumer at €13 or 15 per kilo. Paradoxically, the high price is one of the current driving forces in the development of Medjool, since while consumers lose out somewhere along the line, packers, importers and distributors, making fat profits all gain. They push the product since today one container of Medjool brings in more than 15 truckloads of Deglet Nour trays and is relatively easier to sell.

The second limit on the development of Medjool is the capacity or willingness of large scale retailers to invest in the product. After all, if Medjool is to be accessible to consumers as a whole, it is essential that it should be available in the departments of large hypermarkets and supermarkets. While this appears to be the case in the United Kingdom, it is not in other countries. Germany is up against the high price of the product, which is alien to the mentality of discount buyers and do not see the benefit of such an expensive product. France and Spain are subject to the centralization of the decision-making systems of major distributors if they seek to impose a new product on people whose job is to do what works and not what might work. In other words, the product will be available in those countries when the traditional retail trade has done its work of promotion among the largest number of consumers.

How can an exporter of Medjool dates overcome the obstacle of large scale retail?

As consumption stands at present, it seems to us to be impossible for an exporter to get onto the European market on his own. He needs a logistical and commercial base in order to be able to sell, supply and invoice the different outlets and central buying offices. The role of the importer is one which cannot be ignored. The question therefore is: which importer is the best to be able to sell in the large scale retail system?

Today the authors tend to think that fresh fruit specialists are better equipped to introduce a product into large scale retail. Generally speaking, dried fruit follows a standard referencing channel whose starting-point is the national central buying office and which goes right down to shop level. Fresh fruit can follow a shorter circuit. It is possible for access to regional outlets and even, in some cases, directly to shops. On the other hand, the ideal packaging suited to the fresh fruit department has yet to be found.

B – Hayani

Through its form, texture, taste and storage characteristics, Hayani is very distinct from other dates. It is a fresh fruit in its own right. Familiar in Israel, where it is sold practically throughout the year, the marketing of this product in Europe has been undertaken for ten years or so with limited success by the Hadiklaim company, since outside Spain, which takes 700 tonnes, the other European countries only take 500 tonnes per year. Moreover, the authors have some reservations about the figures provided by the exporter. While all agree on the total import of 1 200 tonnes, it may be that the estimated tonnage for France and Italy is grossly overestimated, while Spain may take more than the 700 tonnes reported.

Production period

September/October

The keeping of Hayani dates

The Israelis call Hayani “Fresh All Year Round Dates”. They are frozen, pitted or unpitted, immediately after harvesting. The fibrous texture of the fruit and its high sugar content allow it to undergo this treatment perfectly and to remain in perfect condition in terms of appearance and taste. Once it has been thawed, it really does look as though it had just been harvested.

Logistics

Hayani dates are exported in a 20’ refrigerated container containing nine pallets.

Sizes

There are two sizes, jumbo and standard, but they are not always adhered to.

Packaging

They are mainly imported in a 5 kg carton of loose dates. Consumer packaging is handled directly by importers, generally distributing 500 g transparent plastic window boxes.

The prices of Hayani dates

The Israelis always offer CIF prices. According to the latest information the authors have, the price of Hayani at source is on the decrease.

Hayani 5 kg carton	Average CIF price/kg
Jumbo	€1.98
Standard	€2.38

Logistical constraints on Hayani dates

Loose product: the product is supplied frozen directly to the shop. It is then thawed and put on display chilled, depending on demand. It thus retains a shelf life of approximately 10 days. Legally, the shop is bound to indicate that the product has been thawed.

Packed in window boxes: EC legislation provides for the packed products having to show a sell-by date. If the shop is supplied with the frozen product and it thaws it to put it on display, as it would do in the case of the loose product. It is obliged to indicate the sell-by date on each packet. This operation is impossible in practical terms. It can therefore only accept products which are already marked and therefore ones already thawed ready to be put on display. It can clearly be seen that with window box packaging, all the benefits conferred by the frozen product are lost. This becomes very restrictive, since it means the importer has to carry out this marking operation himself. And, above all, it considerably reduces the quantities supplied. In the case of fresh products, shops can only order the quantities needed for several days' sale. It accordingly limits importers of this type, who must be able to guarantee the logistics of the fresh fruit sector - in other words, be capable of supplying shops rapidly over a wide area under profitable economic conditions.

The marketing of Hayani dates in Europe

This is dependent on the exporter/importer combination. The Israeli system is based on two principles: a pooling of exports and the choice of a small number of importers per country. As far as the Hadiklaim company - which markets Hayani dates but also all other Israeli dates - is concerned, the type of partners they work with already in each country is a determining factor. The ideal importer must therefore be able to sell both products at once. He must be at the same time the seller of dried fruit and the seller of fresh fruit and in addition he must have refrigeration installations and sufficient resources to repack the product when necessary. It is obvious that ideal candidates are few and far between. In Spain, for example, the Meneu company sells Hayani very well, yet only markets a few pallets of Medjool.

Limits on the commercial development of Hayani dates in Europe

In this connection, the experiment in France in 1996 by the Hadiklaim company and its importer is very revealing. The operation was intended to promote Hayani dates in French large scale retail. The products were offered in two sizes, standard and jumbo, and were packed in 500 g window boxes and loose in 5 kg lots. The customers contacted were the heads of department in hypermarkets with more than 8 000 square metres of floor area. The operation consisted of placing a pallet of 100 cartons and a promoter at the disposal of this store; for two days, the promoter was responsible for promoting sales. Each promoter had sales leaflets and posters. Where stock remained unsold, the importer also undertook to take the remaining products back. The public selling price was FF 19.90 per kilo,

carriage paid to the store, for a purchase price of FF 13 per kilo, which left a comfortable margin of just over 30 percent. Following more than fifty promotions, the average quantities sold were 63 cartons per promotion, or approximately FF 7 000 in turnover in two days per store. From these results, the sales potential could be estimated at FF 5 000 per week under normal conditions, viz. without a promoter. Despite these promising results, the importer never managed to go beyond the stage of promotion exercises and get the product bought and stocked in large scale retailers.

The reasons for this commercial failure are manifold. Firstly, it is due to the centralizing of purchasing decisions in large scale retailers. Establishing a new product requires an intense commercial effort to convince the different decision-makers, from the top of the organization downwards. Buyers are uncomfortable with the hybrid nature of the product, since it straddles two types of regulations and health rules. It does not integrate well in the merchandising organization of the fruit and vegetable department since it has to be sold loose where it would be preferable to see it in pre-packaged form and it has to be put in chilled display cabinets which are generally used specifically for salads and prepared products. Finally, it does not fit into the organization of purchases, which is based on families of products, under which frozen products are generally stored separately from fruit and vegetables.

C – Bahri

Bahri is a date which integrates fully with fresh fruit. Approximately 500 tonnes per year are imported into Europe, mainly into France, United Kingdom and Spain, which share this tonnage in equal proportions.

Producing country

Bahri dates are imported from Israel and marketed by Agrexco and Hadiklaim.

Production period

August/September

Packaging

Bahri dates are packed in 5 kg cartons. The fruit is on branches approximately 30 centimetres long.

Storage

Like all fresh fruit, Bahri dates are stored under positive refrigeration.

The price of Bahri dates

5 kg loose Bahri	
Importer cost price/kg	Average importer selling prices/kg
€2.40	€2.83

Bahri's commercial potential

Bahri dates continue to be a specialist product reserved for a small clientèle of consumers who know the product.

Its particular taste and the bitterness of the fruit do not count in its favour with someone tasting it for the first time.

Conclusion

To conclude this study and put it in a slightly different perspective, the authors felt it would be interesting to put themselves in the position of a date producer wishing to gain a foothold on the European market. This particular approach will highlight the strengths and weaknesses of the present-day sector.

Armed with the different findings that have been made, three choices seem open should one have to draw up a marketing strategy.

1) Establishing a position on the most important segment, occupied by Deglet Nour

Any country wishing to develop its exports of Deglet Nour will come into competition with sources already solidly established in Europe, particularly Tunisia which, as seen above, has the greatest share of the market. Tunisia is the indisputable leader yet there are structural weaknesses beneath the surface. This study has referred already to the disorganization of its commercial system; it could also add a reference to its inconsistent manufacture, very rough and ready conditions of packaging and palletising, to which should be added a relatively high rate of infestation.

Although, as can be seen, there are weaknesses in the Tunisian date sector, it seems only Algeria currently has the power to enlarge its market share in Europe. It is, in fact, the only country currently capable of a production of Deglet Nour which is sufficient and essential in order to respond to the European market, whose demand for this variety is high.

The authors exclude from their choice Israel, the quality of whose Deglet Nour remains inferior, and the United States, whose cost prices are too high. Finally, they rule out all the other countries which are not already producers of Deglet Nour, since the time needed to set up production would be far too long.

2) Establishing a position on the segment occupied by common dates

Common dates have acquired a share of the market by virtue of their low price. A strategy based on this criterion alone seems to be bound to fail. Buyers today are swayed by the three considerations of price, quality and service. Large scale retailers, which dominate the processed product market, could draw up a standard profile of a type of date to which could it give preference, and which is not Deglet Nour.

It would be:

- a light date of a good size with a taste and texture akin to those of Deglet Nour;
- one with a rate of infestation of less than 5 percent;
- one with a guarantee of total traceability;
- one packed in a 200 g window box of bearing the distributor's trademark;
- one in collective cartons with a barcode and on perfect pallets;

- one whose net price does not exceed €0.35 invoiced in the currency of the importing country or in euros;
- and terms of payment of at least 30 days.

Does such a product exist? Regardless whether it does or not, current players ought to give some thought to some of these criteria in order to improve their supply.

3) Establishing a position on the new varieties segment

The authors rule out from their choice Hayani and Bahri, the market for which seems to be very small. Only Medjool, in their opinion, merits any interest, although it is still a little early to know whether it will take the place on the market it seems to want to. Nonetheless, it might be a good idea to take the risk and get ready early enough for when the time comes.

Advantages and disadvantages of out-of-season dates

The authors have not quizzed importers on this subject. However, they can categorically assert that the seasonal nature of dates, which is rooted in the habits of buyers and consumers, does not allow sales to be extended to any significant degree beyond a period ranging from October to February. Over 80 percent of the volume is handled during that period.

On the other hand, in five to six years and during the 20 years which will follow, a peak in consumption outside this period corresponding to Ramadan ought to be seen. This demand has always been absorbed by refrigerated stock.

As far as Medjool dates are concerned, only the United Kingdom has today been able to ensure there is a market for them all year round. There could be a place for competitive out-of-season Medjool dates. We understand that Israeli exporters are already exporting a small quantity of South African Medjool dates to the United Kingdom.

It may clearly be seen that the European market for dates has very specific features rooted in years of consumption practices and habits. It is not easy to break into it without major assets which can be called on in marketing.

Before launching into the European market, one might legitimately wonder whether - despite an attractive rate of growth - the relatively low quantities of dates consumed is not a handicap when set against other markets possibly enjoying greater growth.

Annex – European date importers

	Address	Address	Code	City	Telephone	Fax
SPAIN						
BERNABE BIOSCA	Ctra Alicante-Valencia Km 120		3560	El Campello-Alicante	96 56 36 000	96 56 36 400
PRODUCERS FRIT RAVICH SL	POLIGONO INDUSTRIAL MACANET SN		17412	Macanet de la Selva	972 85 80 08	972 85 92 38
FRUMESA SL	CRA DE GANDIA S/N	PARTIDA REBOLLET	46780	Oliva	96 28 51 269	962 85 17 05
IMPORTACO SA	POLIGONO INDUSTRIAL NORTE	BARRANCO SN	46469	Beniparrel	96 12 11 650	961 21 17 71
MENEU DISTRIBUCION SA	AVDA DEL MAR 11	POL IND MEDITERRANEO	46550	Albuixech	96 14 01 406	96 14 01 403
BORGES	C/Notari Rull 41		43205	Reus	977 30 90 53	93 262 22 90
GRUPO FERNANDEZ	Mercabana	Longitudinal 5, 19 A	08040	Barcelona	93 262 89 20	93 262 22 90
UNITED KINGDOM						
HART & FRIDMANN LIMITED	Unit B Western Trading Estate Off		NW10 7LY	London	20 89 61 51 71	20 89 61 61 33
J O SIMS HOLDINGS LIMITED J	Pudding Lane, Pinchbeck	Lincolnshire	PE11 3TJ	Spalding	17 75 84 21 30	17 75 84 21 01
Fesa	Hawthorn bank	Lincolnshire	PE11 3TJ	Spalding	17 75 71 47 00	17 75 71 47 20
Geest Bananas	White House Chambers, Albion Street	Lincolnshire	PE11 2AL	Spalding	17 75 76 31 54	17 75 76 04 78
Saphir Produce ltd	Eurocentre Whistable Rd		ME13 8BG	Faversham	17 95 56 23 45	
GERMANY						
STOLTZENBERG NUSS GMBH	GROSSMARKT STAND 382/384		20097	Hamburg	40 32 81 120	40 32 34 90
ERNEST LEUDERS	GROSSMARKT		20097	Hamburg	40 32 55 500	40 32 55 50 40
Frupa Fruchtback und Nuss	Grosser Schippsee 38		2-1073	Hamburg	40 76 60 020	40 76 65 500
Internut Handels	Lippeltstr 1		20097	Hamburg	40 30 80 40	40 30 804 201
Vertrieb Marketing	Bunger Ingredient	Im Hegen 7	22113	Osteinbek	40 71 488 725	
Tilouche Fruchimport GmbH	Thalkirchner 81		81371	Munich	777180/938266	
REWE						
DANKAT						

FRANCE	Address	Code	City	Telephone	Fax
V.G.Fruit (Color)	16 rue Gaston Castel	13016	Marseilles	04 91 46 64 70	04 91 03 82 84
A. Fetaya	38 rue d'Agen	94584	Rungis cedex	04 45 12 24 60	01 46 87 47 59
S.A. Lapparre	Castelnaud de Gatecambe	47290	Cançon	05 53 01 67 32	05 53 01 74 30
Sagime	1 rue des Tropiques E 132	94538	Rungis	01 45 60 44 73	01 49 79 10 10
Saisof	29/31 rue des Investisseurs	91560	Crosne	01 69 83 89 10	01 69 83 88 18
Sté Edouard Saman	N. 36 2ème Avenue	13743	Vitrolles Cedex	04 42 15 15 15	04 42 79 28 46
Brousse Vergez	2 Quai de la Joliette	13471	Marseilles Cedex	04 91 14 08 80	04 91 91 25 60
Arbona et Cie	8 rue des Fabres	13201	Marseilles Cedex	04 91 91 64 99	04 91 91 64 74
Avon S.A.	MIN Bât O	84000	Avignon	04 90 88 40 67	04 90 88 75 04
Crozier S.A./Lenoble	Min de Lyon Bât C2	69297	Lyon Cedex	04 72 77 80 20	04 78 37 43 56
Soria & Cie	MIN des Amavaux Bât B	13323	Marseilles cedex 3	04 91 98 04 48	04 91 63 27 02
Fabre	94/98 Av du Merlan	13344	Marseilles Cedex 15	04 91 60 32 06	04 91 60 30 72
Agrusud	Centre fruitier international	13344	Marseilles	04 91 09 41 10	04 91 60 21 67
ITALY	Address	Code	City	Telephone	Fax
Noberasco	Regione Bagnoli 5 CP 86	17031	Albenga	18752201	01 87 54 06 70
Murano	Via delle Puglie 187	80038	Naples	818423022	08 15 22 19 30
Ventura	Via Santuario della Guardia 88	16142	Genoa	10711856	0 10 71 20 84