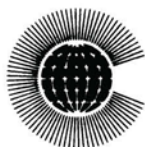


# **Guidelines for exporters of avocados, mangoes, pineapples, papayas and passion fruit to the UK market**



Prepared by the Commonwealth Secretariat's  
Export Market Development Division and funded by the  
Commonwealth Fund for Technical Co-operation



**Commonwealth Secretariat**

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the Commonwealth Fund for Technical Co-operation.  
This is the first in a planned series of publications providing  
practical guidelines on exporting for the benefit of  
Commonwealth producers.



**Commonwealth Secretariat**

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## Introduction

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These guidelines are designed to address the basic questions which exporters of avocados, mangoes, pineapples, papayas and passion fruit need answered before they try to venture into the UK market: WHAT, HOW, WHERE and WHEN?

Entrepreneurs should have the answers to these four questions before they invest money in an enterprise which relies on selling in an export market. It is essential that they have detailed information and are sure that conditions on all aspects of market requirements are satisfied prior to despatching any exports.

This booklet aims to provide the hard facts in an easy-reference format, to help anyone in the business, or wishing to enter it, research the market and make those important contacts. The changing nature of the UK market has made it even more vital for the exporter to have the hard facts. The increasing importance of the larger supermarkets (often referred to as multiples), with their strict specifications for all fresh produce, means that exporters have to be prepared to meet these requirements if they are to succeed.

The Export Market Development Division (EMD) of the Commonwealth Secretariat decided to prepare these guidelines for a number of reasons. Requests from potential exporters, or existing exporting countries, for information on the exotic produce market are constantly received. EMD has assisted a number of the enquirers, either through market research or, in some cases, through test marketing produce. The information in this booklet should help exporters reach the stage where they are ready to ship produce to the market, saving them time and money.

The choice of fruits for the publication was made on the basis that they are grown in a number of Commonwealth countries, where there is a great deal of interest in exporting them. They are also products on which EMD has already carried out marketing work. Most importantly, however, the "exotics" segment of the fresh produce market is expanding very rapidly in the UK: an increasing number of outlets stock a wide range of exotics, and a greater section of the population are aware of the availability of non-traditional fruits and are buying them. Consumption of exotics more than doubled in the UK between 1980 and 1986; estimates suggest consumption of some fruits has doubled again since then and the trade considers there is still potential for enormous growth in this sector.



## What fruit does the market want?

This section describes the type and condition of fruit which is demanded by the buyers in the market. The specifications, which change over time, are those required at receipt by importer, unless otherwise stated.



### Avocados

<b>Varieties:</b>	Most popular - Hass, Fuerte
	Others acceptable - Ettinger, Nabal, Edrinol
	Less popular - Lula, Pollock (too large)
<b>Size:</b>	150-400 grams, with 270-330 grams being most popular. Size requirements vary for different markets and accurate size grading is essential. UN/ECE standards stipulate that the minimum weight should not be less than 125 grams and buyers prefer weight to be guaranteed over the minimum
<b>Shape:</b>	Pear shape, with no large, loose stones. If a stalk is present, it must be less than 10mm and cut cleanly. Uniformity of shape is important
<b>Colour:</b>	Bright green, typified by Fuerte, though Hass, which turns a deep purple/black, is acceptable in the UK and is reported to have a longer shelf life than other varieties
<b>Ripeness:</b>	Firm, slightly unripe, no bruising or disfigurement. Long shelf life more important for wholesale market than for supermarket trade, which sometimes ripens fruit centrally for consistency
<b>Taste &amp; Texture:</b>	Smooth, creamy, no fibre, no bitterness

## ——— What fruit does the market want? ———



### **Mangoes**

**Varieties:** Most popular - Tommy Atkins, Haden, Keitt and Kent

Others acceptable - Alphonso, Amelie, Apple, Graham, Irwin, Sensation and Zill

Less popular - Boribo, Dashehari, Julie, Langra, Ngowe, Peach and Ruby

**Size:** 225-400 grams, with accurate size grading essential

**Shape:** Oval

**Colour:** Some colour visible (yellow or red depending on variety). Red blush very popular

**Ripeness:** Fully mature but firm, no bruising or disfigurement

**Taste & Texture:** No fibrous tissue, no turpentine flavour, easy stone removal and fragrant

## What fruit does the market want?



### Pineapples

<b>Varieties:</b>	Most popular - Smooth Cayenne
	Others acceptable - Queen and Red Spanish
	Less popular - Abacaxis and Sugar Loaf
<b>Size:</b>	1-2 kg with accurate size grading essential
	Grade A - over 1.5 kg - fruit achieves a premium
	Grade B - 1.1-1.5 kg
	Grade C - 0.9-1.1 kg
	Grade D - below 0.9 kg - least in demand
	Supermarkets have further range of bands within these grades
<b>Shape:</b>	
	Oval, with firm, green leaves at crown
<b>Colour:</b>	
	Deep yellow or copper orange, green fruit still being associated with unripeness, though becoming more acceptable. Bright green crown
<b>Ripeness:</b>	
	Two-thirds coloured preferred, to allow for ripening during distribution
<b>Taste &amp; Texture:</b>	
	Sweetness important, non-acidic flavour, not too fibrous, but firm flesh

## ——— What fruit does the market want? ———



### **Papayas**

<b>Varieties:</b>	Most popular - Solo Others acceptable - Amazon Red
<b>Size:</b>	250-500 grams
<b>Shape:</b>	Oval
<b>Colour:</b>	Yellow, orange or red
<b>Ripeness:</b>	Firm to touch, element of colour
<b>Taste &amp; Texture:</b>	Firm, sweet and juicy

## What fruit does the market want?



### Passion fruit

<b>Varieties:</b>	Most popular - purple variety  Others acceptable - yellow variety, but Grenadilla more successful than Maracouya, which is not consistently sweet.
<b>Size:</b>	45-59 grams, 45-50 mm diameter, uniform grading important
<b>Shape:</b>	Oval, sometimes round
<b>Colour:</b>	Purple preferred, yellow acceptable
<b>Ripeness:</b>	Skin not too wrinkled or dimpled
<b>Taste &amp; Texture:</b>	Juicy

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## How to get to market

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This section describes what the exporter needs to do to get the fruit to the UK market, beginning at the picking stage, the first active phase of the marketing chain. The intention is to concentrate on the marketing of fruit, and not with production details, but the grower, as well as the exporter, should be able to profit from the information in this publication. After all, initial post-harvest handling is as important as correct picking as far as the grower is concerned. The market should guide the grower in terms of what crop to grow, in what quantities and what production techniques to use. Some major buyers are realising this and are working directly with growers to ensure their produce supply matches their variety, packaging and quality requirements exactly, rather than rely solely on intermediaries, such as export agents.



### Avocados

#### Harvesting, Handling and Storage

Avocados need to be carefully picked, either such that the stalk is removed from the fruit, but without surface breaks, or leaving a stalk no more than 10 mm in length, cut cleanly. This is as specified by UN Economic Commission for Europe standards for avocados. Produce should be harvested at the correct stage of maturity, when hard and with a minimum oil content of 12%. It should be picked early in the day, to avoid overheating. Careful handling is essential. Fruit should be kept cool and packed as soon as possible, having been sorted and treated, frequently being waxed for protection before shipping.

Fruit must be picked to allow for ripening time during transport and distribution. Up to 14 days transport time is considered satisfactory, though unripe avocados can be held for up to four weeks if the temperature is kept between 5.5° and 8° C. For ripe avocados, the holding temperature should be lower, between 2° and 5° C. Transportation is by sea, unless being sent early in the season to gain a price premium. This is dependent on availability of air freight and access to a sea port. Kenya, for example, traditionally air freights to Europe.

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## **How to get to market**

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### **Packaging**

Fruit should be packed in a single layer, fibreboard box, of around 4 kg net weight and approximate size of 300 mm x 390 mm x 88 mm. Preferred counts to a box are 12, 14, 16, 18 or 20. Fresh air ventilation is important and boxes should have ventilation holes. Fully lidded boxes are best, to give strength and rigidity. Semi-lidded or tuck-lidded boxes are liable to be damaged if picked up incorrectly. Dividers may be used to prevent rubbing during transportation, but are not a necessity. The pack should be attractively presented and clearly labelled, with country of origin, count and brand. Much fruit is also individually labelled.

### **Branding and Promotion**

Avocado sales in the UK are dominated by Israeli produce imported by AGREXCO and South African produce. Both use brand names: Carmel for Israel under the para-statal organisation, and a variety of private brands from co-ops and growers for South Africa. The latter is currently less keen to advertise the origin of the fruit and carry out consumer promotion campaigns.

Produce coming into the UK has to compete with both these high quality, well packaged and well advertised products. However, there are possible spin-off effects from any intensive promotion campaign in terms of the impact on overall avocado sales, limiting the need for advertising by new market entrants.

### **Import regulations**

The avocado is classified under tariff number 0804 4010010 (1st December - 31st May) and 0804 4090010 (1st June - 30th November). Tariffs are those in force for the EEC:

**(continued)**

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## How to get to market

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	Dec-May	June-Nov
<b>Full tariff:</b>	4.0%	8.0%
<b>GSP countries:</b>	3.5%	6.0%
<b>Israel, Algeria, Morocco:</b>	0.8%	1.6%
<b>Turkey:</b>	Free	Free
<b>ACP countries:</b>	Free	Free
<b>Least developed countries (LDDC):</b>	Free	Free

In order to receive preferential tariff treatment, produce must be accompanied by the appropriate forms: EUR 1 for ACP countries or Form A for GSP or LDDC. No other import regulations apply. Certain hygiene standards must be met and all fresh fruit entering the EEC must be accompanied by the original of a phytosanitary certificate, but there is no other legislation governing entry of these fruits to the UK. (See Appendix 1)





### Mangoes

#### Harvesting, Handling and Storage

Maturity measurements for mangoes are not standardised, differing from variety to variety and between growing areas. Skin colour changes can be used for some varieties, to indicate when they should be picked, but many mangoes are now picked and shipped green, then ripened on arrival ready for sale. This protects the fruit from damage during transport and ensures that the retailer knows at just what stage of ripeness the fruit is. However, it also makes it more difficult for the grower to decide when to pick. Other ways of identifying when the fruit should be harvested are weight, specific gravity and their chemical make-up.



Fruit can be picked entirely by hand, tipping the fruit to snap the stem, or by holding the fruit and cutting the stem, taking care not to bruise or puncture the fruit. The stem is sometimes trimmed to 1 cm: leaving the stem means that sap is less likely to damage the appearance of the fruit and regularity is always preferred by buyers. Before packing the fruit is washed and/or given fungicidal or heat treatment, occasionally being wax-coated to prolong storage life.

Mangoes have usually been air freighted in the past, owing to their susceptibility to damage from poor handling or storage. However, sea shipments have been made successfully from South America and the Caribbean and are likely to increase as trade expands, given the constraints of space and the cost of air freight. This requires earlier harvesting and careful temperature control throughout the journey. Holding temperatures need to be between 7° and 14° C and, under correct conditions, mangoes can be held up to four weeks. For ripening, the temperature range is between 20° and 32° C.

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## How to get to market

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### Packaging

Fruit should be packed in a single layer fibreboard carton, net weight 4 to 5 kg, with between 8 and 20 fruit per carton. The most popular count has been 12 in the past, but the trade has noticed a consumer shift to preferring the larger sizes, and is buying more 8's and 10's. The box must have holes for adequate ventilation and should be fully lidded to give better protection.

Polystyrene nets, paper or paper straw are used to package individual fruits inside the carton.

### Branding and Promotion

There are mangoes entering the market from so many suppliers that branding is less significant to the consumer than it is for avocados, where two brands dominate. The lack of a dominating supplier has also meant that there is no generic advertising. The major supermarkets do occasionally carry out promotional campaigns in their own stores for mangoes or for exotics overall.

### Import Regulations

Mangoes come under tariff number 0804 500091 and tariffs are as follows:

<b>Full tariff:</b>	6%
<b>GSP countries:</b>	4%
<b>Egypt, Jordan, Lebanon, Israel:</b>	2.5%
<b>Least developed countries (LDDC):</b>	Free
<b>ACP countries:</b>	Free
<b>Turkey:</b>	Free

In order to receive preferential tariff treatment, produce must be accompanied by the appropriate forms: EUR 1 for ACP countries or Form A for GSP or LDDC. No other import regulations apply. Certain hygiene standards must be met and all fresh fruit entering the EEC must be accompanied by the original of a phytosanitary certificate, but there is no other legislation governing entry of these fruits to the UK. (See Appendix 1)

### Pineapples

#### Harvesting, Handling and Storage



Cayenne pineapples should be harvested when half yellow in colour and, if destined for long term storage or transport time, placed under refrigeration as soon as possible. Picking is normally done by twisting the fruit from the stalk, later trimming it to 1 to 3 cm. Mechanical harvesting is used in large plantations. Ethylene-releasing compounds have been used for some time in the Ivory Coast to stimulate uniform ripening and colouring and other countries are beginning to follow suit.



Pre-cooling is required for successful sea shipments and the temperature controlled between 7° and 10°C during the journey, depending on the storage time required and the maturity of the fruit. Fruit going below these temperatures is liable to suffer chilling damage. Mature green fruit can be safely stored at temperatures between 10° and 13°C. The expected life of fruit kept in the right conditions is a maximum of four weeks. The relative humidity of the store should be high, to help keep the fruit's fresh appearance. The Ivory Coast and South Africa ship by sea, except in the early part of the season, but Ghana and Kenya generally freight by air.

#### Packaging

Fruit can be packed either flat or upright (though some retailers express a preference for upright packing) in 12 to 15 kg cartons, with 8 to 20 fruit per pack, depending upon the grade of fruit. Cartons must be well ventilated for sea freighting. For larger, luxury fruit it is more important that the crown be protected during shipment; the extra cost of freight space for no return on smaller fruit means that the crown is trimmed to a minimum prior to packing. (In the Ivory Coast the crown is trimmed before harvesting.)

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## How to get to market

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### Branding and Promotion

The supermarkets do sometimes promote pineapples as a generic product, and usually expect a promotional contribution if this is carried out in conjunction with a particular brand. Supermarkets currently promote pineapples by country of origin, drawing attention to differences in size, colour or other characteristics.

### Import Regulations

Pineapples come under tariff number 0804 3000090 and tariffs are those in force for the EEC:

<b>Full tariff</b>	9%
<b>Least developed countries (LDDC):</b>	Free
<b>ACP countries:</b>	Free

In order to receive preferential tariff treatment, produce must be accompanied by the appropriate forms: EUR 1 for ACP countries or Form A for LDDC. No other import regulations apply. Certain hygiene standards must be met and all fresh fruit entering the EEC must be accompanied by the original of a phytosanitary certificate, but there is no other legislation governing entry of these fruits to the UK. (See Appendix 1)

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## How to get to market

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### Papayas

#### Harvesting, Handling and Storage

The UK retail market for papayas suffered initial difficulties as a result of fruit going on to the market having been harvested too early and not ripening fully. Harvesting has to be timed with precision. As fruit should already be fairly ripe when picked, it has to be transported with great care to avoid spoilage. Its perishability also necessitates transportation by air. Expected life after harvesting is a maximum of three weeks.

#### Packaging

Packaging should be in a 3 to 4 kg net weight box with counts of 8's to 12's, though some retailers are looking to sell larger fruit and so counts of 6's and 7's are being sold. Sometimes papayas are individually wrapped, for protection, but this increases handling time at the receiving end and so well packed, visible fruit are preferred.



#### Branding and Promotion

To date there has been little promotion of papayas, except in advertising exotics fruits in general. Brazil, which is the main supplier, does not have a country-wide brand name.

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## How to get to market

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### Import Regulations

Papayas come under tariff number 0807 2000000 and tariffs in force are as follows:

<b>Full tariff:</b>	3%
<b>GSP countries:</b>	Free
<b>Turkey:</b>	Free
<b>Least developed countries (LDDC):</b>	Free
<b>ACP countries:</b>	Free

In order to receive preferential tariff treatment, produce must be accompanied by the appropriate forms: EUR 1 for ACP countries or Form A for GSP or LDDC. No other import regulations apply. Certain hygiene standards must be met and all fresh fruit entering the EEC must be accompanied by the original of a phytosanitary certificate, but there is no other legislation governing entry of these fruits to the UK. (See Appendix 1)





### **Passion fruit**

#### **Harvesting, Handling and Storage**

The passion fruit plant may be used as an intercrop between tree crops and is quick to mature and therefore can provide a useful earning crop for small farms. However, the fruit is highly perishable and as a result has to be handled carefully and air freighted to the market. Temperature has to be carefully controlled after harvest, as a red discoloration of the flesh is likely to occur at temperatures below 7°C and mould sets in. However, expected life can be up to four weeks after harvest, if the fruit is handled carefully. Passion fruit exude ethylene when stored and therefore it is important to store them away from certain fruits, such as avocado, which ethylene ripens.

#### **Packaging**

Buyers are less restrictive in their requirements for passion fruit packaging, in that suppliers use various types of fibreboard containers. Kenyan exporters (the major suppliers) use 2 kg net weight single layer trays with lids and internal dividers, about 40-48 fruit to the tray. Brazilian exporters pack in double layer 4 kg cartons, with counts of 46-48. Other suppliers use cartons of up to 7 kg weight and this is a size preferred in the ethnic market. Larger supermarkets prefer the single layer trays and are currently experimenting with an even smaller size of carton, so that they have a ready supply of smaller quantities of passion fruit to ensure freshness on the shelves. So far, only UK pre-packers are working with these smaller containers.

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## How to get to market

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### Branding and Promotion

There is no major brand name in the passion fruit market. Kenya has been the most important supplier, and there have been some store promotions of its fruit; they have also been included in promotions under the general exotic head.

### Import Regulations

Passion fruit are classified under tariff number 0810 909020, and tariffs are those in force for the EEC:

<b>Full tariff:</b>	11%
<b>GSP countries:</b>	6%
<b>Least developed countries (LDDC):</b>	Free
<b>ACP countries:</b>	Free
<b>Turkey:</b>	Free

In order to receive preferential tariff treatment, produce must be accompanied by the appropriate forms: EUR 1 for ACP countries or Form A for GSP or LDDC. No other import regulations apply. Certain hygiene standards must be met and all fresh fruit entering the EEC must be accompanied by the original of a phytosanitary certificate, but there is no other legislation governing entry of these fruits to the UK. (See Appendix 1)



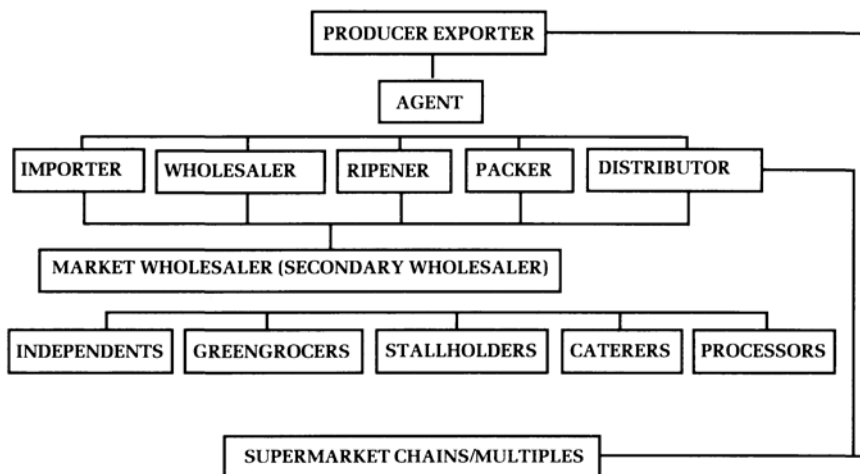
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## Where to send it

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There are a number of channels for trading exotic fruits in the UK and the situation has been changing as the multiples (larger supermarkets) increase their market share of the fresh fruit trade. They are now estimated to control about 50% of this trade and an even greater proportion of the exotics trade.

The following diagram indicates the various ways in which produce gets on to the market.



The producer/exporter has several options available for selling his produce:

- to deal with either a large, or even small, specialist importer who could offer to buy the product, work on a joint-account basis, or sell the produce on commission. Working from an office, his customers will be both the multiple trade and the wholesale markets.
- to deal with an importing company which also has its own distribution network mainly servicing multiples. This would generally include depot and pre-packing facilities, and a transport service arrangement handling centralised distribution. It will broadly be through this level of contact that direct association can be made with supermarkets.
- to deal with an importing company which may alternatively have wholesale premises in the primary markets, such as New Covent Garden, Liverpool or Birmingham.

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## Where to send it

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- to deal with a company which, while it has premises on major markets, could also undertake the distribution of fruit on a wider geographical basis, by the creation of a 'panel', or appointed franchised wholesalers selling on its behalf in other markets. These would include the smaller, but often very useful, markets such as Bradford and Leicester, which often have large ethnic consumer populations.

There are also a few large importing/wholesaling companies carrying out all activities prior to getting the produce on to the shelf and this has reduced the participants in the marketing chain. In some cases the multiples are dealing directly with the producer/exporter, though mostly retaining the involvement of their importer/distributor, since the supermarkets rely on them for operating their storage/ripening/distribution depots. Nonetheless, this process does cut down the number of intermediaries. The independent greengrocers, market stalls and caterers still use wholesalers to procure produce, but the quantity of produce moving through the traditional wholesale markets (New Covent Garden, Spitalfields) is reported to be on the decrease.

The choice of market contact for an exporter depends, to a large extent, on what volumes and quality will be exported to the market and whether the exporter is looking for a long term commitment from a buyer. If an exporter can assure steady supplies of high quality, well-packaged produce, it may be worth contacting larger multiples direct. Even if retailers have an existing relationship with an importer, they are keen to identify new suppliers themselves and communicate their requirements direct to the producer. Programmed volumes and shipping dates, linked to a broad price commitment, have to be rigorously adhered to if the exporter is to make a success of this business.

The next option is to sell to one of the larger importer/wholesalers on an agreed contractual basis. Exporters can contract at a specific price on a weekly basis, or even sometimes on a monthly basis, if that is thought to be advantageous. Again, if shipments are not up to standard, or the exporter's price is considered too high, the importer is liable to discontinue business. The market is very competitive.

It is also fairly difficult to enter business through these channels. Although both supermarket retailers and importer/wholesalers make visits to potential supplying countries, they rarely turn up "on spec" to growers or exporters. So it is no good waiting for a buyer to arrive - the potential exporter has to get in touch with buyers and persuade them that it is worth buying their goods. Once this has been done, the exporter does have a reasonably assured market for the produce, so long as quantity and quality specifications are met.

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## Where to send it

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If an exporter is not so concerned with having a secure sales outlet, and is willing to risk fluctuations in price, then one of the smaller importers or importer/wholesalers may provide the best opportunity for a smaller exporter. Quantity and quality requirements are less rigid, though still high. The exporter has to communicate with or visit prospective buyers before despatching produce, which is then usually sent as a test-case consignment. Once a test consignment has reached the market, to the satisfaction of both parties, further shipments may be made. The importer, if he has not agreed to buy the produce outright, or offered a joint-account arrangement guaranteeing a minimum price, will sell on commission in the order of 8-10% of the wholesale price, though this can be negotiated. A problem with this method is that the exporter is dependent upon the importer for achieving the best price in the market and only then knows what returns will be made. So there has to be a great deal of trust between contracting parties. If the exporter can negotiate through family contacts with smaller importers he may feel this offers better security, and this is one of the reasons traditional trade in the exotics sector has gone through such channels.

One of the disadvantages of selling through these “smaller business” channels is that there may be less likelihood of expanding trade to optimise on increased multiple sales, since they do not generally trade with the smaller importers. There are also dangers of the smaller importers being squeezed out of business as the structure of trade changes, leaving the exporter with no UK outlet.

A further option is where in the country to sell to. The market is largest and growing fastest in the South-east of England and the majority of this exotic fruit is traded through London, using Heathrow and Gatwick airports. However, there are significant pockets of demand throughout the UK, such as Birmingham, Bradford, Leeds, Manchester and other centres in the North-east of England. If either air or sea freight space is available to a destination other than London, such as Liverpool or Cardiff, the exporter can also pursue contacts in that area.

This brief outline of how the market works shows that the exporter is the one who has to identify a buyer and prove that the fruits are worth buying, whichever way they are traded. It is not an easy market; standards are high and competition is strong. On the positive side, the market is growing so fast that the major buyers are anxious to identify new suppliers and, if they think their standards can be met, are willing to try working with exporters or even growers.

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## When to sell

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### Avocados

#### Timing

The market is supplied throughout the year by the major suppliers:

<b>Israel:</b>	September-April
<b>South Africa:</b>	April-October
<b>United States:</b>	November-July
<b>Kenya:</b>	May-September

There is some evidence of price peaks at the changeover period between Israeli and South African supplies, ie March/April and September/October, but this cannot be relied upon. Demand tends to be higher during the summer months, when more salad foods are eaten, so offers a more secure market than winter months, when prices can fluctuate. This period also offers greater prospects, due to some retailers' preference for fruit from an origin other than South Africa.

Average prices during 1988 for avocados were 540 pence per 4 kg carton, with a low of 390 pence during July and highs of 690 and 730 pence in March and October respectively. (See Appendix 4 for an approximate percentage breakdown of costs incurred before the produce reaches this stage of the market.)

#### Market Trends

Opinion within the trade is fairly confident as to the prospects for market expansion for avocados. The UK market already stands at around £30 million, representing the highest value market of fruits examined in this publication. At the moment, average consumption in the UK is only one avocado per person per annum and this is after a trebling of imports to around 15,000 tonnes per annum over the last ten years. The indications are that the upward trend will continue. Recent problems with the Israeli crop, as a result of changing weather patterns over the past two seasons, have encouraged importers to diversify their sources, which has expanded the opportunities available to new exporters. However, tropical exporting countries should be aware of competitors, such as Spain, which, as a member of the EEC, is likely to gain most from increased demand during its season.



### Mangoes

#### Timing

Supplies on the market are greatest in the months of April to August, with a number of countries exporting at that time:

- |                   |   |
|-------------------|---|
| <b>Mexico:</b>    | February-September<br>(peak May-August) |
| <b>Brazil:</b>    | all year, peaking October-December      |
| <b>Venezuela:</b> | February-August (peak April-June)       |
| <b>India:</b>     | February-December<br>(peak April-June)  |
| <b>Pakistan:</b>  | October-August (peak June-July)         |

There is a lull in supplies in October and November, and the period between January and April is not well supplied either. Prices for mangoes appear to peak in October/November, the rest of the year remaining fairly stable. The average price in 1988 was 730 pence per carton (4-4.5 kg), but rose to 920 pence in November.

#### Market Trends

Imports of mangoes into the UK have risen consistently during the 1980's and are standing at over 9,000 tonnes per annum (this includes guavas and mangosteens, which are grouped with mangoes in the trade statistics). Countries already producing the fibreless varieties and sea freighting have the best prospects of meeting the lower price, which the trade sees as a requirement for expansion in this market. Those currently able to do so are Brazil, Peru and Israel.



### Pineapples

#### Timing

Supplies are available throughout the year, but the Ivory Coast, which has 80% of the market, has low output during the wet season (June-August) and a peak production period during October-January. Prices do not appear to fall during this period, because the Christmas season is also a period of peak demand. In 1988 the average annual price of fruit at New Covent Garden Market was 105 pence per pineapple, with higher prices in September, October and November. Analysis of previous years' prices, however, does not indicate that this increase is a normal trend and is more likely to be a result of the production problems which the Ivory Coast was experiencing. This led to shortages on the market and has opened opportunities in the market for other supplying countries. Averaging the prices also disguises the substantial difference between grades of pineapple: Grade A ranged between 100 and 160 pence, while Grade D ranged from 45 to 100 pence.

#### Market Trends

Imports have been increasing over the last ten years, though there was a decline during 1984. Imports are now around 20,000 tonnes per annum. This level is expected to continue, at minimum, though many in the trade are very optimistic about expansion. The optimism has been encouraged by the recent upward trend in popularity of the larger (Grade A and B) pineapples for the household. These sizes were previously only in demand by the catering trade.



### **Papayas**

#### **Timing**

Brazil supplies all year, dominating imports at about 90% of the total. Although there are not any apparent gaps in the market, the trade is keen to find alternative sources for papayas, in order to reduce reliance on one supplying country. The average price in 1988 was 660 pence per 4 kg box, but this is based on a fairly small sample of papayas, with fluctuating prices, since papayas are still not in regular supply.

#### **Market Trends**

Although imports of papaya have grown from virtually nothing over the last ten years, there are still only around 1,000 tonnes per annum imported into the UK. Retailers give the impression that the market is already expanding quite rapidly and they are certainly interested in identifying new sources of supply.





### Passion fruit

#### Timing

Passion fruit are available all year round on the market and there are no visible gaps in supply. The average price per carton (40-48 fruit) was 500 pence during 1988, with no major fluctuations. However, prices have tended to be lower in the months of December-January and June-August.

#### Market Trends

It is not possible to be specific on the quantities of passion fruit being imported into the UK, as they come under the classification "other fresh berries". Around 300 tonnes are being imported annually under this heading, but as imports of the other categories (cherimoya and physalis) are not very large, this can be considered a reasonable estimate for passion fruit imports. The value of the passion fruit market is estimated at around £1 million. Retailers feel that there are opportunities for expansion, particularly if educational promotion campaigns were to be carried out to help overcome consumer resistance to a 'wrinkled' fruit.



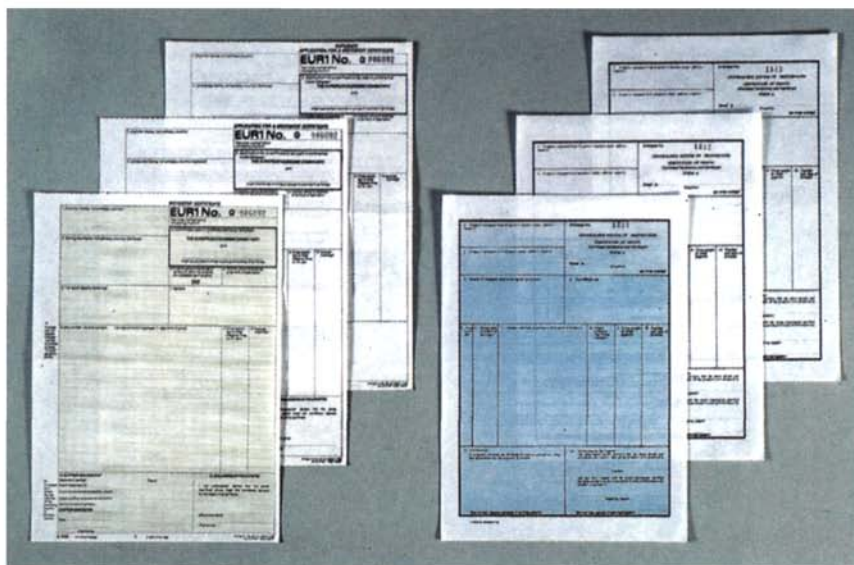
### Import legislation

#### Preferential Tariff Documentation

Commonwealth countries are likely to benefit from preferential tariffs under three categories: those available to ACP countries, the Generalised System of Preferences (GSP), or those available to Least Developed Developing Countries (LDDC). The rules of origin covering the ACP countries are more straightforward than those governing GSP, so, where both systems offer the same tariff, an exporter would generally opt for ACP. For example, produce freighted from an ACP country to the UK, but diverted through another ACP country, is still eligible for the preferential tariff. The same need not apply for produce originating from a country benefiting from GSP.

An additional reason is that generally the exporting country's Customs and Excise Department is responsible for the handling of ACP exports, whereas the relevant Ministry is in charge of LDCC or GSP exports. Dealing with the Customs and Excise, who have to deal regularly with such procedures, may be more straightforward for an exporter.

#### ACP Exports



(continued)

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## Appendix 1

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Form EUR 1 (see page 27) must accompany produce sent from ACP countries, if the exporter is to benefit from the lower tariffs applicable. These forms should be available from the exporting country's Customs and Excise Office, which is responsible for classifying the goods as originating from an ACP source, the Ministry of Trade, or Chamber of Commerce. Alternatively, the importer should be able to offer assistance in acquiring these forms.

Commonwealth ACP countries are:

### **AFRICA**

Botswana  
The Gambia  
Ghana  
Kenya  
Lesotho  
Malawi  
Mauritius  
Nigeria  
Seychelles  
Sierra Leone  
Swaziland  
Tanzania  
Uganda  
Zambia  
Zimbabwe

### **CARIBBEAN**

Antigua & Barbuda  
Bahamas  
Barbados  
Belize  
Dominica  
Grenada  
Guyana  
Jamaica  
St Kitts & Nevis  
St Lucia  
St Vincent & the  
Grenadines  
Trinidad & Tobago

### **PACIFIC**

Kiribati  
Papua New Guinea  
Solomon Islands  
Tonga  
Tuvalu  
Vanuatu  
Western Samoa

### **GSP and LDCC Exports**

Form A must accompany produce sent from qualifying countries, to benefit from the lower GSP or LDCC tariff. These forms should be available from the country's Ministry of Trade, or the Chamber of Commerce in the exporting country, but otherwise may be obtained with assistance from an importer.

### **Customs Entry**

The importer is responsible for customs clearance and presentation of the Customs Entry form (C88).

### **Health and Hygiene Legislation**

All fresh fruit entering the EEC must be accompanied by the original of a phytosanitary certificate, submitted by the authority given that responsibility in the exporting country.

There are currently no other regulations in force, but there are certain standards and a number of importers already test for chemical residue in fruit. Legislation governing residue levels in food was brought in in the UK during 1988, but did not cover the fruits dealt with here. However, legislation may eventually be brought into force for all EEC countries.

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## Appendix 2

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### Contacts in the market

The organisations included in this list, which is by no means exhaustive, are known to trade or have a wish to trade in the items included in this booklet. However, it should be noted that all exporters should carefully assess the capability of any company with whom they hope to trade, since the Commonwealth Secretariat takes no responsibility for the financial standing of these organisations.

NB Telephones: The international dialling code for the UK is 44, after which the area code and number are dialled, but excluding the 0 at the beginning of the area code. London numbers are to change on 6th May 1990, after which the 01 code will become 071 or 081 instead of 01. The new code is noted in brackets.

#### MAJOR MULTIPLES (supermarkets)

##### **Argyll Foods PLC**

(Argyll, Safeway, Presto)  
Argyll House  
Millington Rd  
Hayes  
Middlesex UB3 4AY

phone: 01 848 8744 (081)  
telex: 934888

##### **Asda Stores**

Asda House  
South Bank  
Great Wilson Street  
Leeds LS11 5AD

phone: 0532 435435  
fax: 0532 418666

##### **Budgen Ltd**

P.O.Box 9  
Stonefield Way  
Ruislip  
Middlesex

phone: 01 422 9511

##### **Littlewoods Organisation PLC**

J M Centre  
Old Hall Street  
Liverpool  
Merseyside L70 1AB

phone: 051 235 2222

##### **Gateway Foodmarkets Ltd**

Cater Road  
Bishopsworth  
Bristol BS99 7TZ

phone: 0272 785555  
telex: 44313

##### **Marks and Spencer PLC**

Michael House  
Baker St  
London W1A 1DN

phone: 01 935 4422 (071)  
telex: 267141

##### **J Sainsbury PLC**

Stamford House  
Stamford St  
London SE1 9LL

phone: 01 921 6000 (071)  
telex: 264241

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## Appendix 2

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### **Tesco PLC**

Tesco House  
PO Box 18  
Delamere Road  
Cheshunt  
Hertfordshire EN8 9SL

phone: 0992 32222  
telex: 24183

### **Waitrose Ltd**

Doncastle Road  
Southern Industrial Area  
Bracknell  
Berkshire RG12 4YA

phone: 0344 424680  
telex: 847271

### **William Jackson & Son PLC**

(Grandways)  
40 Derrington Street  
Hull, North Yorks.

phone: 0482 224131

### **William Low & Co. PLC**

Baird Avenue  
Dryburgh Industrial Estate  
Dundee

phone: 0382 814022

### **Wm Morrison Supermarkets**

Hilmore House  
Thorton Road  
Bradford

phone: 0274 687202

### **WHOLESALEERS/IMPORTERS**

#### **Bluebell International Ltd**

616b Finchley Rd  
London NW11 7RR

phone: 01 459 4466 (081)  
telex: 923940  
fax: 01 459 4000

#### **K S Butt & Co Ltd**

Smithfield Wholesale Market  
Pershore St  
Birmingham B5

#### **Compagnie Fruitiere (UK) Ltd**

Paddock Wood  
Tonbridge  
Kent TN12 6UU

phone: 089 283 6111  
fax: 089 283 6055

#### **Condor Fruit Ltd**

29/33 Wholesale Fruit and  
Vegetable Market  
Edge Lane  
Liverpool

phone: 051 259 1301/2  
telex: 627179

#### **Consolidated Fruit Co Ltd**

25/26 Humber St  
Hull

phone: 0482 24058  
telex: 592252  
fax: 0482 225090

#### **Dunbar Fruit Importers Ltd**

138 Chesterfield Rd  
Ashford  
Middlesex

phone: 0784 247363  
telex: 938226  
fax: 0784 248680

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## Appendix 2

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**Exotic Farm Produce Ltd**

628 Spur Road  
Feltham  
Middlesex TW14 0SX

phone: 01 890 2222 (081)  
fax: 01 890 6261 (081)

**Fagan**

Balmoral Industrial Estate  
Balmoral Road  
Belfast BT12 6QA

phone: 0232 663691  
telex: 747593

**FII-Fyffes Ltd**

12 York Gate  
Regents Park  
London NW1 4QS

phone: 01 487 4472 (071)  
telex: 919186  
fax: 01 487 3644 (071)

**Garber Produce PLC**

Office C134-143  
Fruit & Vegetable Market  
New Covent Garden  
London SW8 5NN

phone: 01 720 2255 (071)  
telex: 917538  
fax: 01 489 0406 (071)

**The Geest Organisation**

White House Chambers  
Spalding  
Lincolnshire PE11 2AL

phone: 0775 61111  
telex: 32481  
fax: 0775 60254

**Glass Glover & Co Ltd**

Coldharbour Road  
Elizabeth Way  
Pinnacles Industrial Estate  
Harlow  
Essex CM19 5BE

phone: 0279 35422  
telex: 817208  
fax: 0279 441509

**Hunter Saphir PLC**

10 Finsbury Square  
London EC2A 1AD

phone: 01 638 8222 (071)  
telex: 914952

**Janic Import Export Ltd**

70 St Paul Street  
London EC2

phone: 01 729 0290 (071)  
telex: 7395650

**JC Exotics Ltd**

B60/61 New Covent Garden  
London SW8

phone: 01 720 0482 (071)

**John Denis Food Group Ltd**

Wholesale Market  
Pershore St  
Birmingham B5 6UN

phone: 021 622 5473  
fax: 021 622 6686

**J O Sims Ltd**

Borough Market  
London SE1 9AQ

phone: 01 247 7688 (071)  
telex: 886769

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## Appendix 2

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**Joseph Low & Sons**

25-28 NE Wholesale Fruit Market  
Tea Valley Trading Estate  
Gateshead  
Tyne & Wear NE11 0QY

phone: 091 482 2551  
telex: 379622  
fax: 091 487 9021

**JP Fruit Distributors Ltd**

Suite H291  
East Bridge  
New Covent Garden  
London SW8 5JB

phone: 01 720 7185/6 (071)  
telex: 916942

**Kirby International Foods Ltd**

17 Swan St  
Congleton  
Cheshire CW12 4BN

phone: 0477 34506  
telex: 367484  
fax: 0477 37170

**Lambert & Ellice Ltd**

111-117 Commercial St  
London E1

phone: 01 247 2343 (071)  
telex: 817662

**Louis Reece Ltd**

B124/129 Fruit & Vegetable Market  
New Covent Garden  
London SW8 5LS

phone: 01 720 6931 (071)  
telex: 91759  
fax: 01 627 5845 (071)

**Mack Multiples Division Ltd**

Church Road  
Paddock Wood  
Kent TN12 6ES

phone: 089 283 5577/3366  
telex: 95215  
fax: 089 283 4890

**Max Levin & Partners Ltd**

215 Market Towers  
New Covent Garden  
London SW8 5NL

phone: 01 622 6255 (071)  
telex: 919277

**Minor, Weir and Willis**

Smithfield Wholesale Market  
Pershore Street  
Birmingham B5

phone: 021 622 3984

**Pascual (Fruit Importers) Ltd**

Paddock Wood  
Tonbridge  
Kent TN12 6UX

phone: 089 283 2333

**Poupart Ltd**

Station Approach  
Waltham Cross  
Hertfordshire EN8 7LU

phone: 0992 700711

telex: 266351  
fax: 0992 768233

**O M Sharif & Co**

Wholesale Market Precinct  
Pershore St  
Birmingham B5

phone: 021 622 3949  
telex: 339551  
fax: 021 666 6835

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## Appendix 2

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**SMT Exotics**

Unit B39  
Fruit and Vegetable Market  
New Covent Garden  
London SW8 5NN

phone: 01 622 1436

**Suma Fruit International Ltd**

Suite 22/23  
The London Fruit Exchange  
Spitalfields Market  
Brushfield Street  
London E1 6HB

phone: 01 247 3381/6 (071)  
telex: 945858

**Sunzest Ltd**

101 Commercial Road  
London E1 1RD

phone: 01 377 9000 (071)  
telex: 918083  
fax: 01 247 7159 (071)

**Wealmoor Ltd**

Jetha House  
Springfield Road  
Hayes  
Middlesex UB4 0JT

phone: 01 569 1760 (081)  
telex: 888725  
fax: 01 569 1755 (081)

**William McGrattan & Sons Ltd**

Balmoral Fruit Market  
Belfast BT12

phone: 0232 663581  
telex: 747624

**PACKAGING SUPPLIERS****Corby Cases**

Ainsley Road  
Weldon Industrial Estates  
Corby  
Northants NN17 1QW, UK

phone: 0536 60848  
fax: 0536 400132

**Consolidated Bathurst Inc**

PO Box 69  
Montreal  
Quebec H3C 2R5  
Canada

**Corrugated Products Ltd**

Butlers Leap  
Clifton Road  
Rugby  
Warwickshire CV21 3RQ  
UK

phone: 0788 70612

**Domtar Packaging**

PO Box 7211  
Montreal  
Quebec H3A 1L6  
Canada

**Lin Pac**

Paper Mill Road  
Rawcliffe Bridge  
Goole  
Northumbria DN14 8SL  
UK

phone: 0405 83331

**Metal Box Ltd**

Queens House  
Forberry Road  
Reading  
Berks, UK

phone: 0734 581177

**Reed Corrugated Cases**

Aylsford  
Maidstone  
Kent ME20 7PF  
UK

phone: 0622 77755

### Transportation and packaging

#### Transport

Fresh produce goes through at least three stages of transportation and it is in the exporter's interest to monitor the first two of these very carefully. There is initial transport from the growing area to the place of shipment, which is the second stage, by sea or by air, and the final stage is from port of arrival into the UK to point of sale, ultimately to the consumer. Once the produce has reached the importer, with whom the exporter has contracted, his responsibility, apart from selling, includes all other aspects of distribution.

There are a number of factors influencing the state of the produce on arrival and so it is in the exporter's interest to ensure they are correct:-

- timely departure;
- careful loading and stacking;
- temperature control - from pre-cooling, through cold storage/refrigeration;
- adequate ventilation, particularly when using sea freight.

The exporter needs to know the approximate maturity of the fruit. This could vary in relation to a number of different factors, such as when it was picked and whether it has been sufficiently cooled prior to shipment.

It is important that fruits are not transported with items which could impair their quality or flavour. For example, avocados should not be stored with passion fruit, since ethylene is expelled by passion fruit and this causes avocados to ripen. Fruits will take on the flavour of strongly scented goods, if stored alongside, so this should be avoided.

#### Packaging

Packaging should be selected with the type of journey in mind, to make sure it is suitable. Strong, neat, easy to handle, preferably by pallet, and well labelled packaging is more likely to be carefully handled at the receiving end. There are a number of types of packaging and it is advisable for the exporter to consult with the importer on the preferred style.

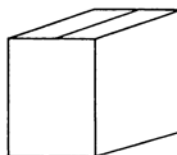
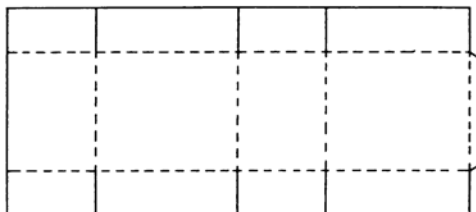
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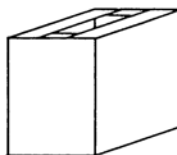
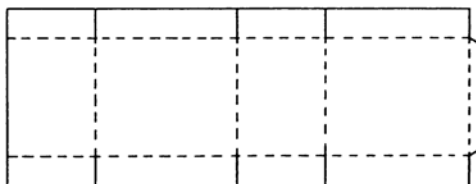
## Appendix 3

There is an International Fibreboard Case Code, under which boxes are given reference numbers. Commonly used types for fresh fruits and vegetables are:

**Code 0201** a one-piece box.



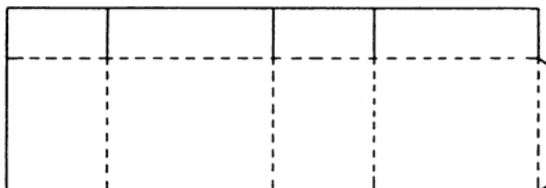
Variation (a)



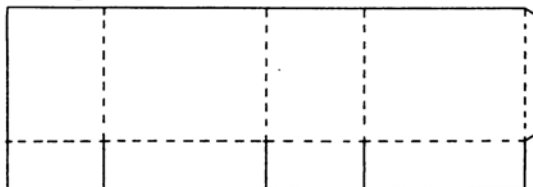
Variation (b)

**Code 0320** full telescope box (a two-piece in which the lid slides over the lower part and covers the full height of the box).

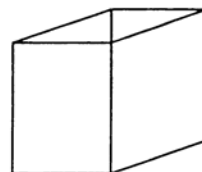
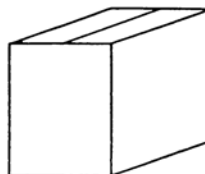
Upper part (lid), blank



Lower part (base), blank



Assembled box



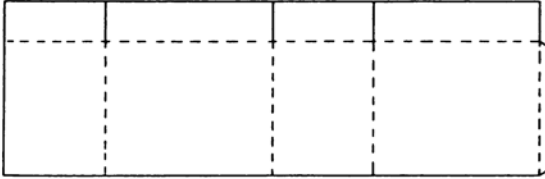
Variation (a)

(continued)

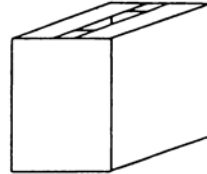
## Appendix 3

### Code 0320

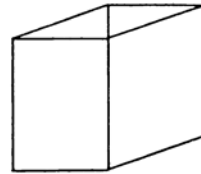
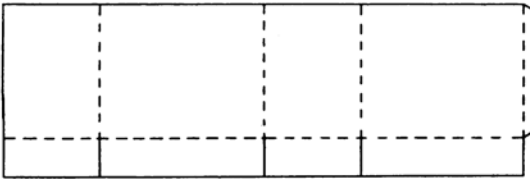
Upper part (lid), blank



Assembled box



Lower part (base), blank

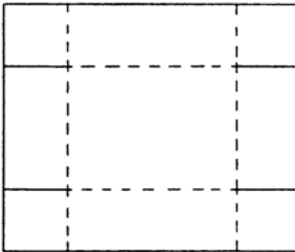


Variation (b)

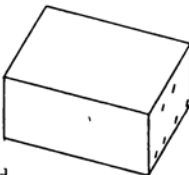
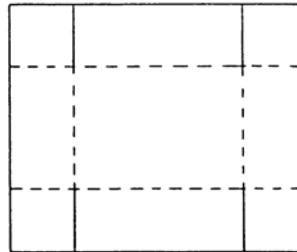
### Code 0301

case lid box (a two-piece box without manufacturer's joints, requiring erection using staples or glue).

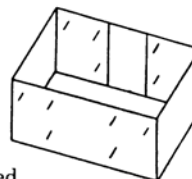
Upper part (lid), blank



Lower part (base), blank



Assembled  
upper part (lid)



Assembled  
lower part (base)

(continued)

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## Appendix 3

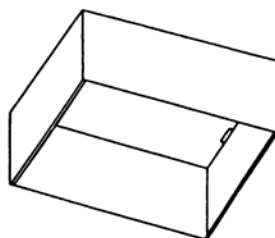
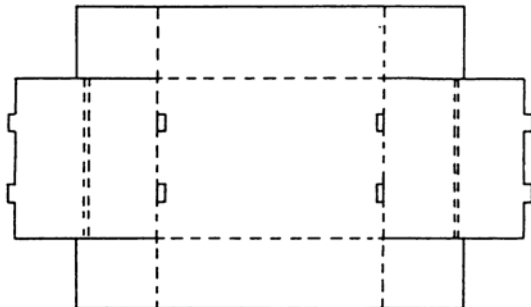
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### Code 0422 to 24

two-piece folder type boxes, die-cut (the shape is cut and the creases formed, for easy erection).

Stackable trays are also used, but are not coded.

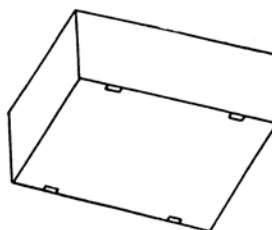
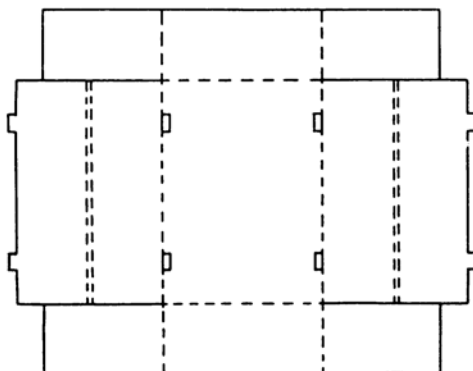
Upper part, blank



Assembled upper part

### Code 0423

Lower part, blank



Assembled lower part

(continued)

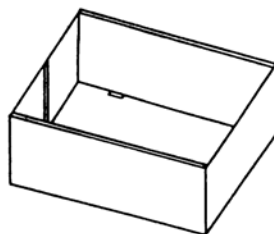
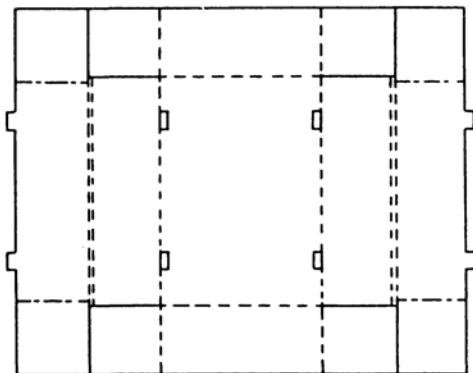
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## Appendix 3

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### Code 0424

Lower part, blank



Assembled lower part

The ITC has recently published a handbook which gives details on how to package fresh fruit and vegetables (Manual on the Packaging of Fresh Fruit and Vegetables: ITC - See Appendix 5). It may be that it is difficult in an exporting country to acquire the correct type of box. A limited list of some possible packaging suppliers is given in Appendix 2.

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## Appendix 4

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### Costs to reach the market

Actual costs vary according to country of origin, type and quality of fruit and the quantity being sold, but the exporter needs to take account of all costs listed below in order to calculate whether it is profitable to ship produce to the UK.

<b>Grower</b>	Grading, packing and transport cost between growing area and port of embarkation
<b>Exporter</b>	Letter of credit
	Export duties
	Customs duty
	Freight costs
	Insurance costs
	Commission to importer (8-10% of wholesale price)
	Customs entry
	Handling charge to importer (small charge deducted from wholesale price)
<b>Retailer</b>	Overall mark up range by retailer (35-40%)

With any system of selling (fixed price, joint-account or commission trading, but particularly the latter), it is in the exporter's interest to know overall market prices prevailing at the time of sale, since his own returns are dependent upon the end price. Regular price information is available from a number of sources, such as the International Trade Centre or COLEACP (see Appendix 5), but this is not always detailed enough to enable an exporter to make a decision on whether it is worth shipping produce for a market 48 hours away. This emphasises the need to identify a monitoring source.

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## Appendix 4

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An example is given below to illustrate how the system has worked for pineapples, but it must be stressed that each exporter should assess the costs applicable to his or her own situation very carefully.

400 cartons of pineapples were air freighted to the UK and were sold in three separate lots - each realising a different price. The middle of the three prices obtained was £13.20 per carton, and on the assumption that it had cost the exporter a total of £3 per carton to get his produce to the point of despatch, the cost build-up and outcome would have been as follows:

<b>Costs to exporter</b>	<b>£ per carton</b>
Ready packed for export, at point of despatch (assumed cost)	3.00
Letter of credit	0.10
Insurance	0.03
Air freight (charged by kg)	6.84
Airline charge	0.57
Handling (London distribution)	0.25
Commission (10% of gross value of £13.20)	1.32
<b>Total costs to exporter</b>	<b>£12.11</b>

On this basis, a margin of £1.09 per carton would have been made. On the other hand, one of the wholesale prices achieved was much lower, such that the exporter could have incurred a loss on some of the cartons. It is therefore essential to have an estimate of the wholesale price level before shipping, so as to be as certain as one can that a satisfactory margin will be earned.

The costs of trading with multiples can be higher than those shown in the above example (for example, bulk breaking and sorting costs may be added). The rewards, however, can be greater, and prices may be fixed over a period of time - so that the exporter knows the margin he will make before shipping.

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## Appendix 5

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### Useful addresses

#### **COLEACP**

5, Rue de la Corderie  
Centra 342  
94586 Rungis Cedex  
FRANCE

phone: 331 468 70206  
telex: 205166 F  
fax: 331 468 63315

Offers trade information, trade promotion and technical assistance to ACP fruit exporters. (Countries from Africa, the Caribbean and the Pacific - see Appendix I for list of Commonwealth countries included)

#### **Commonwealth Secretariat**

Marlborough House  
Pall Mall  
London SW1Y 5HX

phone: 01 839 3411 (071)  
telex: 27678  
fax: 01 930 0827 (071)

Has market information on fruits available and publishes Fruit and Tropical Products twice yearly. Export Market Development Division can offer technical assistance, if requested by member Government

#### **Developing Countries Trade Agency (DECTA)**

69 Cannon St  
London EC4 5AB

phone: 01 248 4444  
telex: 888941 LCCI G

Provides information on UK market and importing requirements to exporters

#### **Fresh Produce Journal**

Lockwood Press Ltd  
430-438 Market  
New Covent Garden  
London SW8 5NN

phone: 01 622 6677 (071)  
telex: 915149  
fax: 01 720 2047 (071)

Publishes weekly wholesale prices and general information on UK market trends

#### **Fruit Importers Association**

Room 408/9 Market Towers  
New Covent Garden  
London SW8 5NQ

phone: 01 720 1387 (071)  
telex: 919219

Trade association representing UK fruit importers, can provide details on association members and market information

#### **International Trade Centre**

UNCTAD/GATT  
54-56 rue de Montbrillant  
1202 Geneva 10  
Switzerland

phone: 41 22 34 60 21  
telex: 289466 MNS CH (for news service)

Transmits market information on fresh horticultural products through Market News Service (MNS), helps exporters with contacts, provides export packaging and other advisory services. Recent publications:

(continued)

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## Appendix 5

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*Manual on the Packaging of Fresh Fruits and Vegetables (1989);*

*Tropical and Off-Season Fresh Fruits and Vegetables: A Study of Selected European Markets (1987).*

**Overseas Development Natural Resources Institute (ODNRI)**

Central Avenue  
Chatham Maritime  
Chatham  
Kent M4 4TB

phone: 0364 880088

fax: 0364 880077

Scientific Unit of the Overseas Development Administration, which provides technical assistance to developing countries and can offer advice on post-harvest technology. Recent publication:

*Hallam, D with Molina, JP (1988)  
The UK Market for Fresh Exotic Fruit (Bulletin No.13).*



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