

The Monthly Magazine for Food and Agricultural Exporters

AgExporter

United States Department of Agriculture
Foreign Agricultural Service

August 2004



**Connoisseurs and Consumers
In South Africa and Thailand,
Gastronomes and Gourmets
In Belgium and France,**

*Add Up to Food Service Markets Around the World—
And a Banquet of Opportunities for Agricultural Goods*





TRADE SHOW OPPORTUNITY

7TH AMERICAS FOOD AND BEVERAGE TRADE SHOW AND CONFERENCE

MIAMI, FLORIDA

The Show: The premier food and beverage exhibition for the Americas—the 7th Americas Food and Beverage Trade Show and Conference—promises to be another major commercial opportunity, attracting more than 500 exhibitors from across the hemisphere.

Market: Over \$1.4 trillion is spent annually on food and beverage purchases in the Americas, and export sales are expected to double by 2007. Miami serves as the sales and distribution center for food and beverage products transiting these markets, and 32 percent of U.S. food product exports to the Caribbean and Latin America flow out of Floridian ports.

Dates: Dec. 2-3, 2004



Best Products: Bakery products, beverages such as beer, wines and liquor, as well as nonalcoholic drinks such as juices and water, breakfast cereals, candies and other confectionery products, coffee and tea, convenience foods, dairy products, diet foods, ethnic foods, exotic, fresh, processed and dried fruits and vegetables, frozen foods, gourmet foods, grocery products, health and organic foods, kosher foods, meats and poultry, pet foods, sauces, spices and condiments, seafood and snacks



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Features



Tourism Sparks South Africa's Economy **4**

It's mostly a niche market now for U.S. suppliers, but as South Africa's tourism industry grows, so will appetites and opportunities for value-added exports.

Thailand's Hotels and Restaurants Looking for U.S. Products **6**

Thailand is Southeast Asia's second largest economy, and its growing food service businesses are heavy users of imported foods and beverages.



Gastronomy Favored Pastime in Belgium **8**

Eating out is a favorite pastime for Belgians, which helps explain why their food industry is the country's second largest industrial sector.

French Cuisine Still a Haven for Connoisseurs **10**

Visiting and domestic gourmets can find comfort that high culinary standards remain intact in the French HRI sector, despite extensive growth.



Trade Notes **15**

Trade Show Opportunities

Americas Food and Beverage **2**

BioFach **12**

HI Europe **13**

Fruit Logistica **14**

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Tourism Sparks South Africa's Economy

By Margaret Ntloedibe

Tourism is the fourth largest—and the fastest growing—industry in South Africa, which attracted 6.6 million visitors in calendar 2002. That same year, the industry contributed 8.2 percent, or \$10.3 billion, of South Africa's GDP (gross domestic product) and has a projected 12-percent yearly growth rate for the next few years.

That growth rate will receive an extra bounce from the recent decision that South Africa will be hosting the FIFA (Federation International Football Association) World Cup 2010™ expected to bring 270,000 soccer fans to South Africa.

Africa's complex HRI (hotel, restaurant and institutional) sector, an integral part of the tourism industry, is the country's largest employer with 500,000 workers.

In the HRI food service sector, worth roughly \$2 billion in sales in 2003, restaurant receipts account for about 70 percent of the market. Hotels claim 20 percent,

and institutional food catering companies make up the last 10 percent.

Western Influences

Though independent restaurants are plentiful, South Africa has a highly developed web of fast-food and chain restaurants. Improving economic conditions mean that families are patronizing these outlets more than ever before.



South Africa as Hub

In relation to Africa, South Africa accounts for 6 percent of the continent's population, 50 percent of its purchasing power, 18 percent of the GDP, 50 percent of the electricity generated and 45 percent of all mineral production.

South Africa's stable political climate and relative economic strength guarantee the country a pivotal role in Africa's future. However, other factors—transportation infrastructure and geographical location—promise an enhanced commercial role for the country as a regional trade hub.

Most business travelers pass through the Johannesburg International Airport on their way between major cities in southern Africa. Also, the South African rand is readily accepted as legal tender in Lesotho, Namibia and Swaziland.

Imports often transit through the port of Durban, South Africa, en route to other destinations. This transshipment offers suppliers a cost-effective means of gaining entry to the countries that make up SACU, the South African Customs Union: South Africa, Namibia, Botswana, Lesotho and Swaziland.

An FTA (free trade agreement) with the SACU nations is expected in 2005, with implementation a year later. The new agreement would give the United States guaran-



teed preferential access to a market of 50 million customers.

It would also level the playing field in areas where U.S. suppliers have been at a disadvantage due to the European Union's FTA with South Africa.

In short, South Africa is a logical conduit

for most commercial activities in the region—retailing, channels of distribution, after-sales service, as well as continent-wide strategic planning and project management—and now is the time for U.S. companies to prepare their business development plans in southern Africa for these projected market openings.

Franchised fast-food chains, which have introduced U.S.-style cuisine and consumption patterns, have had a phenomenal run over the past few years.

In 2002, franchise fast-food outlets increased 7 percent, to 2,947, from the year before; half of these new outlets serve U.S.-style cuisine. Fast-food restaurants, however, do face stiff competition from supermarkets and convenience stores that also offer ready-to-eat meals.

Concurrent with fast-food sector growth, consumers are also becoming aware of the benefits of healthy eating. This trend has upped consumption of chicken, fish and fresh foods.

Restaurants tend to buy dry groceries from catering wholesalers, while perishables and frozen products come directly from the manufacturer or distributor.

Hotel Investment Up

A complete range of accommodations welcomes visitors to South Africa, from five-star hotels, game lodges, guesthouses, B&B (bed and breakfast) establishments, to youth hostels.

B&B, guesthouse and game lodge facilities lead the sector in growth. The number of accommodation establishments increased from 5,045 in 2001 to 5,763 in 2002, a 14-percent gain. Game lodges showed exceptional growth of 32 percent, from 397 to 524. B&B facilities, representing 45 percent of the accommodation industry, grew 8.5 percent, from 2,387 to 2,590.

Overseas investors are providing capital for joint venture hotels. Smaller, independent owners have also benefited from investment that enables them to compete with larger businesses.

Twenty national parks have resorts with their own restaurants administered

Best Prospects

Products present in the market with continuing sales potential include:

- Fats and oils
- Vegetables
- Fruits and nuts
- Animal feeds

Products not present but with good potential include:

- Fish and seafood
- Baking ingredients
- Meat products
- Cocoa powder
- Tea and spices
- Spirits

by SANParks (South African National Parks). SANParks also negotiates contracts for food products needed by its restaurants.

Most major hotels are owned by large local companies but are managed by international hotel management chains.

Each hotel operates autonomously in terms of food purchases. Generally, hotels do not import foods and beverages directly. Hotels prefer to buy directly from specialty retailers, local manufacturers and producers. Dry groceries are usually sourced from catering wholesalers. Local suppliers provide baked goods, fruits and vegetables, meats and dairy products.

Institutional Sector Concentrated

State entities account for almost a quarter of the institutional sector's value. A few large catering companies dominate the remainder of the sector.

Generally, catering companies purchase directly from local manufacturers, wholesalers and distributors. Companies and public organizations with in-house food services usually buy foods as needed from wholesalers and local specialty retailers.



60265

Stand By for Opportunity

With the food service industry mostly tapping into local sources, export opportunities may not be apparent. But this will change when the local supplier base can no longer totally support the demands of an increasing number of outlets that must be competitive in the price and quality of their products.

Besides the opportunities presented by the tourism sector, an expanding middle class and relatively stable economy offer additional room for U.S. niche food products.

South African importers are actively seeking suppliers who can provide top-quality products at competitive prices. As food trends develop, U.S. exporters are well positioned to provide South African restaurants with innovative, competitively priced products. ■

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Thailand's Hotels and Restaurants Looking for U.S. Products

By *Sukanya Sirikeratikul*

Thailand, covering 198,114 square miles in the heart of Southeast Asia, is the gateway to Indochina. Over 10 percent of the country's 64.3 million inhabitants live in Bangkok, which accounts for 90 percent of the sales of fast-moving consumer goods.

Thailand's economy has shown remarkable improvement since the financial crisis of 1997 with growth forecast to be 9 percent for 2004, following growth of 6.3 percent in 2003. Higher consumer confidence resulting from falling unemployment and rising incomes is boosting consumption. This has given a spurt to Thailand's large food service sector that now comprises some 100,000 restaurants and 5,000 hotels.

Rise in Tourism

Hotels, resorts and restaurants are heavy users of imported food products, and because tourism is flourishing, demand for such products is on the rise.

Thailand's diverse geography offers tourists a tremendous range of adventures and activities such as diving, sailing, trekking, golfing, cave exploration and rock climbing. This makes Thailand one of the world's favorite tourist destinations, with nearly 11 million people visiting the country each year. For 2004, the number of tourists may reach 12 million.

The Tourism Authority of Thailand is aggressively marketing the country as a tourist hub for Asia, emphasizing the renowned hospitality of Thai culture.

Along with this marketing campaign, Thailand has developed into a major convention destination for the Asian region, competing with Singapore and Hong Kong.

Opportunity Knocks for U.S. Suppliers

With the ongoing growth in the hospitality sector, the opportunities for U.S. suppliers of food and agricultural products abound. Hotels and restaurants import some 30 to 35 percent of the foods they serve their customers, and about 20 percent of these imports come from the United States. Thailand typically ranks among the top markets for U.S. agricultural, fish and forest goods and bought a record \$689.4 million worth in fiscal 2003.

The wide range of restaurants and menus to meet demands of tourists requires a variety of products. Particularly popular are U.S. beef, Alaska king crab,

scallops, fish, potato fries, fruits (apple, cherry, grape, stone, etc.), seasonings and wines.

Like U.S. consumers, Thais are eating out more often. Upper and middle-income Thais like to spend money on food, especially during the holidays. Consumption of imported food products peaks during the New Year, Christmas, the Chinese New Year and the Thai New Year seasons, with coffee, tea, milk, snack foods, jellies and jams, crackers, nuts, fruit juices, wines, beer, whiskey, health foods and fresh fruits often given as gifts. In general, Thai consumers view U.S. foods and beverages as being of high quality, and they rate them as some of the best in the world. Excellent opportunities exist for U.S. producers targeting niche markets.

Road Map for Market Entry

In order to be successful, U.S. exporters will need to learn about the



A WIDE RANGE OF RESTAURANTS AND MENUS TO MEET DEMANDS OF TOURISTS REQUIRES A VARIETY OF PRODUCTS.



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supporting market promotion campaigns to attract new consumers.

It is important to note that the climate for trade with Thailand may be improving. After the U.S.-Thai Trade and Investment Framework Agreements of 2002 strengthened bilateral relations, Thailand and the United States agreed, in October 2003, to begin FTA (free trade agreement) negotiations. Elimination of Thailand's high duties and other barriers in the agricultural sector would create new opportunities for U.S. suppliers in this major market. But the competition will remain stiff: Thailand is also negotiating FTAs with China and Australia.

Thai market and be ready to compete with suppliers from China, Japan, Australia and New Zealand, which have some advantages in geographic proximity. In addition, high tariffs on U.S. products give an advantage to Asian and Oceanic countries. U.S. exporters must be aggressive in

Direct contact with local food service importers is the best entry strategy for U.S. exporters. Hotels and resorts do not import food directly in high enough volumes to be attractive to U.S. exporters. It is easier for hotels and resorts to order from food service importers because they

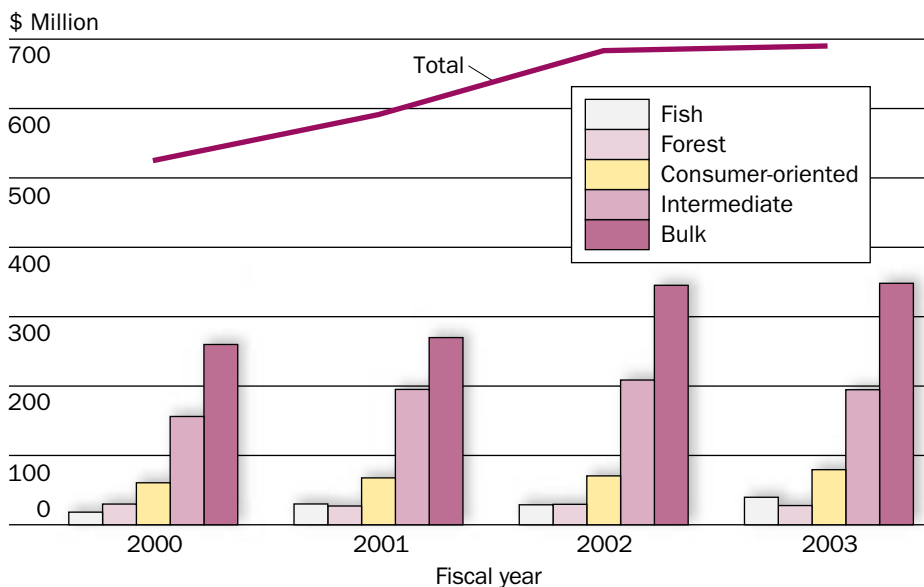
Best Market Prospects

- Fresh and frozen seafood
- Beef, poultry and processed meats
- Spices, seasonings and sauces
- Fruit and nut mixtures
- Jams and jellies
- Almonds, walnuts, hazelnuts and macadamia nuts
- Baking products
- Breakfast cereals
- Canned foods
- Dairy products
- Fresh fruits and vegetables
- Fruit juices
- Wines and whiskey

specialize in providing high-quality U.S. products to the five-star hotels and restaurants. Fast-food chains and family-style restaurants also order and purchase imported food from food service companies or from affiliate companies that act as their distributors.

Five-star hotels and resorts are heavy users of U.S. food products. Making direct contact with catering services that manage these hotels and resorts is important for U.S. suppliers trying to enter this market for the first time. ■

Overall, U.S. Exports of Agricultural, Fish and Forest Products to Thailand Have Shown Considerable Expansion in the Last Few Years



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For details, see FAS Report TH4030. To find it on the Web, start at www.fas.usda.gov, select **Attaché Reports** and follow the prompts.



Gastronomy Favored Pastime in Belgium

By Marie-France Rogge

With sales of \$34.3 billion in 2003 (\$1=0.886 euro), the Belgian food industry has maintained its No. 2 place among Belgium's industrial sectors. The HRI (hotel, restaurant and institutional) segment of the industry, with sales near \$10 billion in 2003, has 45,223 outlets with 145,000 employees.

Total HRI sales posted an estimated 6.4-percent increase in 2003, compared to an economic growth rate of 1.1 percent in the same time period. Restaurant sales grew by 7 percent, cafés by 6 percent, catering and canteens by 4 percent, while the hotel subsector sales remained unchanged.

Investments, though, dropped by 8.5 percent in 2003, after a 9.7-percent increase in 2002. Restaurant investment tends to originate nationally, while hotel establishments receive national and international funding.

Restaurants Account for Half of Sales

Restaurant sales dominate the HRI sector—22,677 restaurant outlets had sales approaching \$5 billion in 2003. Cafés represent 17 percent of HRI sales, or \$1.7 billion.

Although traditional Belgian cuisine is still popular, a trend toward ethnic and health food consumption is being fed by younger consumers. Also, time-honored home cooking is falling prey to time-starved consumers who have less opportunity to prepare meals and tend to use convenience items or eat away from home.

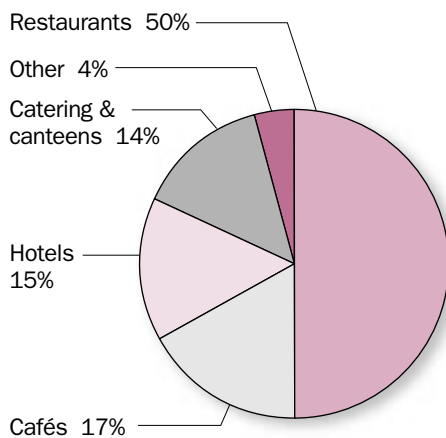


While the total number of food outlets has been decreasing about 1 percent each year, café numbers have fallen the most—some converting to the restaurant

category, which permits them to offer more menu choices and more easily conform to food preparation guidelines.

Restaurant buyers tend to purchase at

Restaurants Dominate Belgian HRI Sales



2003 Sales Almost \$10 Billion.

early morning markets from one importer/distributor for fresh fruits and vegetables. Meats and seafood are usually bought from small companies. For dry goods and other products, they purchase from large, specialized HRI wholesalers, supermarkets or local or regional suppliers.

Value-Added Products Lead Prospects

Belgian food industry buyers are accustomed to importing, and internationalization of the food culture could fuel demand for U.S. ingredients.

While some products face significant barriers—beef from cattle treated with growth promotion hormones, poultry and products derived from biotechnology—there are proven U.S. best sellers:

- Wines
- Seafood
- Nuts
- Beef certified to be from cattle not treated with growth hormones
- Processed fruits and vegetables
- Sauces and condiments
- Game meats

Hotels and Resorts

About 1,500 companies operate hotels in Belgium. The top five have a 19-percent market share, or nearly \$1.5 billion for 2003. Food sales in hotels accounted for 15 percent of HRI sales.

Large hotel chains tend to centralize their purchases, working on a national level with a limited number of wholesalers or distributors for meats, fish and other grocery items. Some products, such as beverages, fruits and vegetables, are purchased through regional or local suppliers.

Catering for Retirees

Catering and canteen sales accounted for 14 percent (\$1.4 billion) of the HRI sector in 2003. Only retirement homes have posted significant growth in the Belgian catering sector. As life expectancy continues to rise, growth is assured for this population category.

Within other catering categories, school meals remain stable, while hospital meals are decreasing due to shorter stays and a cap on the number of beds.

Though fresh products are still bought locally, caterers increasingly are buying from international rather than local suppliers. Another trend is for smaller, less competitive companies to make joint purchases.

Entry Strategies for U.S. Suppliers

The fragmentary nature of the restaurant and hotel subsectors erects barriers to foreign firms hoping to enter the market. The lack of organized distribution further limits broad market access.

Depending on product and company size, exporters should contact importers, distributors, wholesalers or specialized HRI retailers. A note for new exporters: besides competitive pricing, a focus on



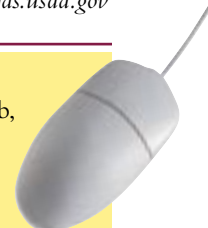
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innovation and quality is vital to attracting consumers.

The Belgian food industry is very international, and has access to many food product providers. Imports from other European Union countries, mainly next-door France, the Netherlands and Germany, represent 84.4 percent of total imports. ■

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French Cuisine Still a Haven for Connoisseurs

By Roselyne Gauthier

France's 60 million residents, with a per capita income of \$18,609 in 2003, spent 18.3 percent of their household income that year on foods.

They spend more on foods than any other people in Europe, a frank confirmation of a continuing tradition of fine cuisine. They also enjoy meals out, which helps support France's \$62-billion-a-year HRI (hotel, restaurant and institutional) sector.

Nine Billion Meals a Year

France's large and highly diversified food service sector has many small- and medium-sized players. During calendar 2002, the sector served 9 billion meals worth \$62 billion in the two subsectors of commercial and institutional catering.

Commercial catering accounted for 5 billion meals and took in \$44.7 billion in sales, or 72 percent of the sector as a whole. It includes restaurants, hotels and resorts, leisure parks, cafeterias, cafés, brasseries and fast-food outlets (including street vendors).

At 38 percent of sales, cafeterias, cafés and brasseries make up the largest commercial catering segment and are very price-competitive. They serve sandwiches and quick lunches at reasonable prices to customers who are mainly young business people, other workers and students.

Traditional restaurants and chains represent 35 percent of commercial catering. While still serving a large range of traditional foods, more are trending toward



17273

ethnic cuisines from Asia, Africa and the United States.

Chains are growing at a faster rate than independent restaurants. Customers include middle- and high-income families, business people, tourists and affluent French youth.

Hotel and resort restaurants make up about 13 percent of commercial catering and usually serve domestic travelers and tourists. However, French gourmets do

frequent well-known hotel restaurants rated by famous travel guides. These restaurants serve traditional and ethnic foods.

Fast-food outlets and street vendors represent 10 percent of the commercial catering segment. McDonald's leads fast-food sales, with France's Quick chain a distant second. Customers include low- and middle-income workers, families, teenagers, young adults and students.

Institutional contracts make up 4 percent of the commercial catering food service pie. This includes 50 leisure parks that serve 32 million meals a year, some with their own purchasing offices.

Most U.S.-style restaurants and chains buy their food in France or other European countries, as do most other large restaurants and chains. But niche opportunities for U.S. suppliers exist for a range of products, including seafood, exotic meats, sauces and salad dressings, food ingredients, wines and frozen ethnic foods.

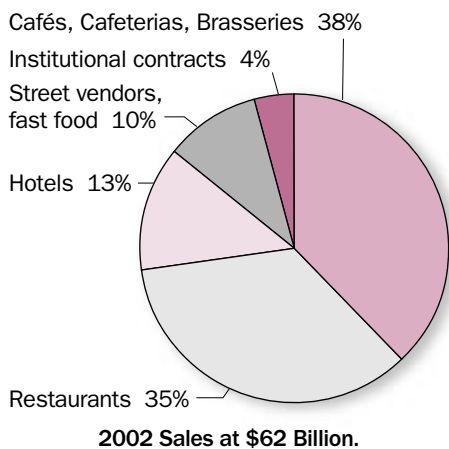
Some restaurant chains have their own buying offices. Most buy either through cash-and-carries or specialized wholesalers.

Institutional catering, with a 28-percent share of the food service market, includes education, factory, health and

Rewards Can Outweigh Challenges

Opportunities	Challenges
Steady growth rate for the food service sector means \$113 billion worth of sales within 10 years.	French "food culture" dominates food sector output with emphasis on local products; 75 percent of imports originate from other EU (European Union) countries.
Strong euro benefits U.S. products.	Price competition is fierce.
European fleet catch is declining; fish and seafood imports are increasing.	U.S. suppliers must comply with complex regulations and standards.
France is Europe's leading meat consumer, preferring natural, lean meats.	U.S. beef must comply with EU nonhormone-treated cattle program.

Cafés Edge Out Restaurants in French Commercial Catering



elder care and business facilities; the military and prisons; and air and sea catering.

Institutional catering has been growing 5 percent yearly since 1999. Three sub-sectors served 4 billion meals worth \$17.3 billion in 2002.

- Contract catering businesses include company restaurants, schools and universities, hospitals, and nursing and retirement homes. Contracted meals in



this segment averaged a 5.2-percent annual increase from 1996 to 2002.

- Concession catering includes services provided aboard transportation and in towns, as well as leisure catering, which includes museums and exhibition and sports centers. The annual average growth rate of 3.6 percent in recent years is expected to increase to 3.9 percent.
- Most of the food purchases for air and sea catering are domestic. Servair is the major supplier for the segment.

Demographics Assure Growth

In 2003, the total HRI sector was expected to grow 6 percent; this yearly rate is expected to continue through 2010 with a number of factors driving increased demand:

- Over 20 percent of France's population is over 60, which boosts meals served at senior citizens' facilities.
- Now with an average 1.8 children, decreasing household size reduces the need for meals served at home and correspondingly boosts catering demand, with more women eating in the workplace and children eating at school.
- Greater urbanization draws people to the cities, where they eat out more frequently.
- Eating patterns are changing as a growing number of people eat five or six times daily instead of the traditional three meals.
- A growing workforce with more women (40 percent of the working population) has raised the frequency of eating out.
- A decline in work hours has freed up more time for leisure-related activities.
- Increasing independence among French teenagers has led to more inter-

Vive l'Occasion!

Frozen foods represent 20 percent of the products used in the French food service industry. The best opportunities for U.S. frozen foods include:

- Fish and seafood
- Bison meat
- Fruits and vegetables
- Frozen desserts
- Ready-to-eat meals
- Ethnic sides or meals

Other good prospects for U.S. suppliers include:

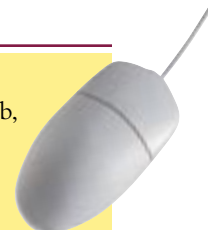
- Salad dressings, tomato sauces and spices
- Fruit juices and soft drinks (including flavored water)
- Dried fruits
- Fresh fruits, including grapefruit and tropical items
- Vegetables
- Snack foods
- Tree nuts
- Soups
- Breakfast cereals
- Rice and edible dried beans

est in fast foods, including snacks and ethnic foods.

- France's 24.9 million households are expected to expand 228,000 per year until 2010. ■

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TRADE SHOW OPPORTUNITY



BIOFACH 2005

N U R E M B E R G
G E R M A N Y

The Show:

BioFach, held annually, has become the world's leading international organic trade exhibition. BioFach 2004 welcomed 1,900 exhibitors and nearly 30,000 trade visitors from 67 countries.

Dates:

Feb. 24-27, 2005

Location:

Nuremberg, Germany

Deadline:

Oct. 1, 2004

Options:


The USA Pavilion at BioFach 2005 offers a variety of participation alternatives designed to meet the objectives of all prospective exhibitors—complete booth, work station, pavilion space only, new-to-market showcase and service package. Consider exhibiting your organic products at this USDA-endorsed event. Call today!




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TRADE SHOW OPPORTUNITY



HI EUROPE

A M S T E R D A M
N E T H E R L A N D S

The Show:



Health Ingredients Europe is the only exhibition and conference in Europe this year dedicated solely to the health food ingredients industry. As the health, organic and functional foods markets are taking off across Europe, this three-day event offers a platform for suppliers to exchange ideas, discuss new developments and sell products.

Location:

Amsterdam, Netherlands



Dates:

Nov. 16-18, 2004

Deadline:

Sept. 30, 2004

The Market:

Worldwide demand for health and natural foods, diet foods and food supplements has triggered an explosion of demand for natural aromas, colorings, spices, plant extracts, vitamins and minerals, as well as fat and sugar substitutes. In addition, the worldwide call for organic and functional foods has fueled the demand for health and organic food ingredients among European product manufacturers.

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 International Trade Fair for Fruit and Vegetable Marketing 

F R U I T L O G I S T I C A 2 0 0 5

BERLIN, GERMANY

The Show:

Fruit Logistica, an annual event, has become the world's leading international trade exhibition for fresh produce marketing. Fruit Logistica 2004 welcomed over 1,100 exhibitors, and some 22,000 trade visitors from more than 90 countries walked the aisles sampling fresh fruits and vegetables, dried fruits and nuts.

Dates:

Feb. 10-12, 2005

Location:

Berlin, Germany

Deadline:

Sept. 1, 2004

Join Us:

The USA Pavilion at Fruit Logistica 2005 is endorsed by FAS. Since its inception, the USA Pavilion has provided a nationally branded platform for U.S. exhibitors. The USA Pavilion offers a variety of participation alternatives designed to meet the objectives of all prospective exhibitors. Call today!



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Thailand Trade Mission Explores Market

In April, FAS sponsored a trade mission to Bangkok and Phuket, Thailand, to promote high-value U.S. food products. FAS and WUSATA (the Western United States Agricultural Trade Association) worked closely on recruiting participants and planning for the sales mission. Eight companies and one cooperator group participated, representing a wide range of products including almonds, dried fruits, salted snack foods, macadamia nuts, organic products, nutritional products, low-carb and dietetic products, energy drinks and ice cream. The participants received market briefings, held product displays, went on retail tours and had 70 one-on-one meetings with buyers. Six of the nine participants anticipate sales from this event, with four of the six new to the Thai market. Twelve-month sales forecasts for this trade mission event top \$1 million. (For an overview of Thailand's food service market, see the article on pages 6-7 in this issue.)

Under One Big Tent at the International Fancy Food Show

In May, four trade shows—the Annual Food Marketing Institute Show, All Things Organic, United Produce Expo and Conference, and the U.S. Food Export Showcase—joined together in Chicago, IL, under one roof to create a comprehensive American display of specialty foods, mainstream grocery items and equipment, organic products and produce. The combined shows had 1,800 exhibitors with 150,000 food products, and attracted 42,000 members of the trade. FAS sponsored a booth at the Fancy Food Show, which is considered to be the premier marketplace for specialty foods in the Midwest. The show hosted 400 companies displaying 40,000 specialty food products from all over the world.

FAS Updates Country Listings in Online Database

FAS is changing its country groupings in its online PSD (production, supply and distribution) database to reflect the expansion of the EU (European Union) from 15 to 25 countries. In addition to the EU-15 designation in the commodity tables, a new designation, EU-25, has been added to reflect EU expansion. The EU-15 shows data through 1998, and the new EU-25 includes data beginning in 1999. The country categories Eastern Europe and Other Western Europe are discontinued, and the remaining non-EU countries are rolled into Other Europe.

The PSD database covers 108 agricultural commodities in more than 190 countries. It is updated monthly and has historical data back to 1960. It provides users with a global picture of crop production broken down by commodity attributes, countries and years. Users can view all facets of the database onscreen or download data to a spreadsheet file. Pre-defined tables categorized by commodity groups are readily available, or users can customize queries for specific commodities.

The PSD database can be found on the FAS Web site at: www.fas.usda.gov/psd. In addition to this database, FAS also maintains trade databases with import and export statistics for bulk, intermediate and consumer-oriented products. Links to all of these databases are located at: www.fas.usda.gov/data.html. For further information or help, e-mail: PSDOnline@fas.usda.gov



Also in This Issue:

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