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ROMANIAN MARKET FOR FRESH AND FROZEN FRUITS AND VEGETABLES

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INTRODUCTION

This report aims to offer the Moldovan exporters information on fresh/frozen fruits and vegetables market from Romania.

The general objective of the study is to identify and evaluate export opportunities for fresh and frozen fruits and vegetables on the Romanian market. Specific objectives of the study are the following:

- Introduce the market and consumption trends;
- Present the distribution system;
- Analyse Romanian foreign trade with investigated products;
- Present price trends;
- Present market access conditions;
- Identify market opportunities and constraints;

The results of the study can be used by Moldovan producers as a guiding material to develop marketing strategies for the Romanian market; also the results of the study can indicate priority measures necessary to increase sales and satisfy market demand.

Methodology

The methodology applied in this study corresponds with methodologies used in the academic circles and consulting services. Hence, the study is based mainly on primary information needed to identify and evaluate the situation on the Romanian market for preserved vegetables and fruits.

Data collection

This study is based on primary information as well as on secondary information. The secondary information was collected during the initial stage of the study to identify market features. Sources of secondary information were data from the National Institute of Statistics, Eurostat, FAOSTAT, Patronage of fruit and vegetables producers – Prodcom, the Ministry of Agriculture, Forests and Rural Development of Romania, studies previously made by the consultant, audit retail studies performed by specialised companies (MEMBR Romania and AC Nielsen), reports and articles from the mass media, etc. In order to collect the data a number of insightful interviews were made with similar product distributors on the Romanian market, purchase managers from the international store networks.

Data processing and analysis

The collected information, both secondary and primary, was studied thoroughly, and statistical data contributed to identifying trends of the fresh/frozen fruits and vegetables market and its development. While processing data a special attention was paid to the quality of interviews made, thus trying to characterise as good as possible the market and the opinions of its representatives.

Barriers and limits of the study

In the process of collecting and analysing data were identified several impediments. First of all statistical data from different information sources do not correspond. Moreover, in several cases data can not be found or various sources offer different data.

Another impediment is the refusal of sector representatives to offer detailed information, which according to them is secret. Some companies even though participated at interviews, refused to answer to questions like: products sale structure, working conditions with suppliers, development perspectives, etc.

CHAPTER 1: FRESH FRUITS AND VEGETABLES MARKET

1.1 Market Volume

Compared to other EU countries Romania has a medium-sized market for fresh fruits and vegetables, accounting for 5% of the EU market. The total consumption (industrial and consumer) of fruits and vegetables in 2007 was 5.92 million tonnes. With a population of 21.5 million people, this was the equivalent of 275,3 kg of fruits and vegetables consumption per capita. Between 2001 and 2007 the consumption increased by 40.96%.

Table 1. Consumption of fresh fruits and vegetables per capita

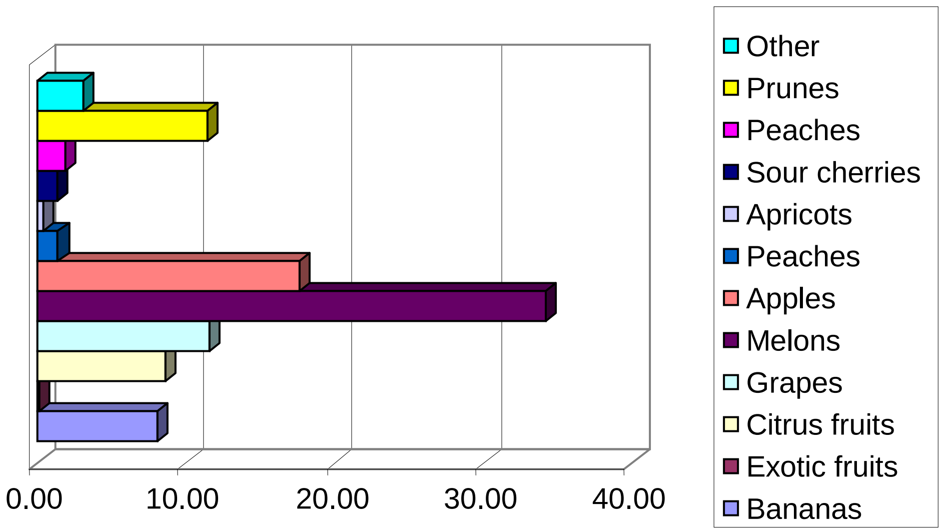
	2001	2002	2003	2004	2005	2006	2007
Fruits	48.1	45.4	59.6	77.4	75.9	83.2	88.1
Vegetables	147.2	147.2	177.7	183.3	162.6	181.7	187.2
Total	**195.3**	**192.6**	**237.3**	**260.7**	**238.5**	**264.9**	**275.3**

Source : FAOSTAT, EUROSTAT, THE NATIONAL INSTIUTE OF STATISTICS

Fruits

In 2007 the fresh fruits market totalled 1.89 million tonnes, which was equivalent to 88.1 kg per capita. Between 2001-2007 the consumption of fresh fruits increased by 83.16%. In the fruits consumption structure, the melons and watermelons account for 34%, apples – 18%, grapes – 12%, prunes – 11%, citrus fruits – 9%, bananas – 8%, pears, sour cherries, peaches and nectarines – about 15.% each.

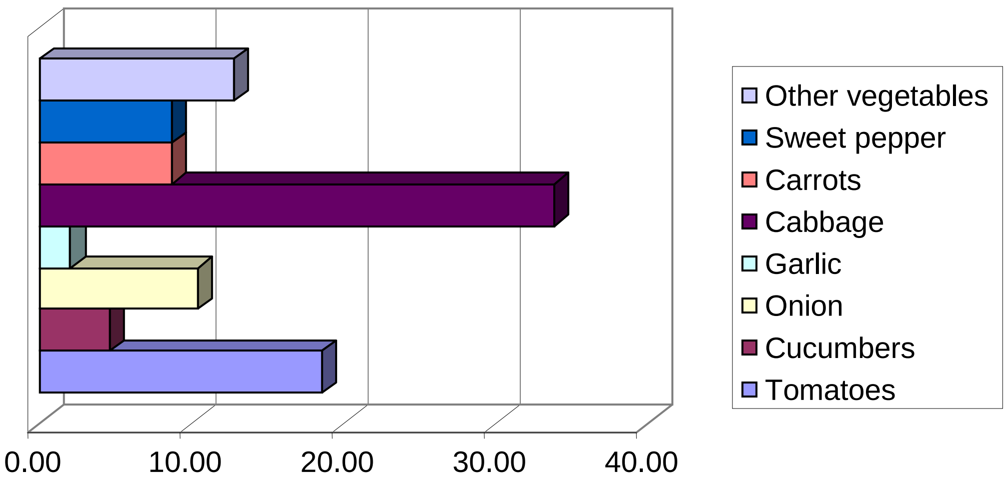
Graph 1. Fruit consumption structure, %



Vegetables

The fresh vegetables market totalled 4.03 million tones in 2007, which was equivalent to 187.2 kg per capita. Between 2001-2007 the consumption of fresh vegetables increased by 27.17%. The structure of vegetables consumption is the following: cabbage – 34%, tomatoes – 19%, onions – 10%, carrots and sweet peppers – 9% each, cucumbers – 5%, garlic – 2%, and other vegetables.

Graph 2. Vegetable consumption structure, %



1.2 Market Value

In 2007 the total value of fresh fruits and vegetables market was estimated at €700 million, growing by 15% compared to 2006. According to preliminary data for 2008, the market value will reach €1 billion, fresh vegetables accounting for approximately 60%, and fresh fruits 40%. The market value growth is mainly conditioned by the increase in internal market prices.

1.3 Market Features

The supply of vegetables and fruits on the Romanian market can be structured in two categories: domestic products and imports. The supply of domestic fruits and vegetables has two peak periods: summer and autumn seasons. The supply of imported production hits its peak during winter-spring. The domestic products supply does not cover the entire period of the year – summer registering the highest values and winter a total lack of products.

The Romanian market tends to orient consumption towards domestic fruits and vegetables, which are considered to have natural taste.

With regard to fresh fruits and vegetables purchasing and consumption behaviour, a change in mentality is observed – the buyer is willing to pay more for a quality product, and at the same time is open towards new and eccentric products. Although the Romanian consumer is known as a traditional consumer, in recent years the consumption of certain specialties, such as Eisberg salad, Chinese cabbage, asparagus, endives, cherry tomatoes has increased.

This increase relates to the development of the gastro segment, the emancipation of clients tastes, as well as to the purchasing power growth. There are at least two categories of consumers: with reduced budget, who are looking for cheap products, where the appearance does not count much, and consumers with a high budget who accept only impeccable products.

The market registers an ascendant trend, which is influenced to a certain extent by the consumers demand, and by the appearance and expansion of international retail chains or by the development of the Horeca segment.

1.4 Seasonal Sales

The sales of fruits and vegetables are not uniform during the year and have prominent seasonal features. Generally, these products are consumed during the warm season, a period which registers 70-80% growth, compared to winter months. Starting with May, the share of the domestic production consumption accounts for 60%. During this period the highest ratio have cucumbers, tomatoes, early cabbage, and green stuff. The higher level of consumption is also conditioned by relatively low princes for fruits and vegetables during the respective period.

1.5 Market Segmentation

The fresh fruits and vegetables market in Romania can be divided into three important segments: retail sales segment, HORECA segment and processing industry segment. Their share in fruits and vegetables sales are presented in the following way:

Retail trade segment holds 50% of the sales volume, HORECA segment – 30% and processing industry segment - 20%.

The retail sales segment is divided in three main groups: modern selling represented by big store chains, traditional trade represented by small shops and farmers markets.

All three groups are important channels for selling fresh fruits and vegetables. The share of these channels fluctuates depending on the season. Thus, the market has a significant share during summer-autumn period, it being an important channel for selling domestic products. With regard, to the large store chains, around 70% of the fruits and vegetables sold through them are imported. This is due to the product quality requirements set by these chains: relating to the product aspect, calibration, packaging and service offered by the supplier and, specifically the prompt delivery (every 2 days), the permanent availability of the supplied products and a complete product range. Usually local manufacturers cannot meet these requirements. The share of the big store chains in total fruits and vegetables sales increases in the off-season period. The traditional trade, represented mainly by small shops does not play yet an important role in the fresh fruits and vegetables trade, mostly due to their limited spaces to expose the products and storage conditions. Furthermore, this segment is influenced by several aspects: proximity to the consumer, necessity to widen the range of products offered, especially of first need products to be able to compete with the big store chains, and increased awareness of fresh fruits and vegetables importance for the business turn-over and profitability.

The processing industry segment is an important 'consumer' of fresh fruits and vegetables, both domestic and imported, especially in periods when domestic products are not available in the necessary quantities. The share of this segment fluctuates on a year basis, from various reasons, such as lack of raw materials, determined by the unfavorable climatic conditions, high prices for raw materials leading to a high final price. In the aforementioned cases sector enterprises either import products, and as a result become major buyers for external producers, or decrease their production volumes if the external offer does not meet the requirements, a fact registered in the last couple of years.

This segment has a high degree of concentration; there are several large enterprises with the biggest market share in terms of volume and raw material purchase.

The HORECA segment became more important in last years. The outdoor consumption increased as a result of population income growth, especially within active persons, or in families without children where both partners are employed.

Also, the Horeca segment includes institutionalised units such as hospitals, penitentiaries, schools and universities. The main products that are sold within this segment are salads, basic vegetables (tomatoes, cucumbers, cabbage), as well as specialties such as endives, cauliflower, etc.. Products are supplied directly, through cach&carry chains, or are purchased in markets. To the institutionalised units these are sold through auctions.

1.6 Production

Romania is one of the most important producers of fruits and vegetables from the European Union, on the 6th place in 2006 accounting for about 5% in total EU production volume. Fresh fruits and vegetables sector has a higher share in the total food production, compared to the EU average. At the same time the production is more fluctuant then in the EU, most probably due to the lack of a sector development strategy. The domestic production is fragmented, 90% coming from private enterprises and only 10% from farms and companies.

Fruits

In 2007 the total production of fresh fruits (including grapes used for producing wine) was estimated at around 2.1 million tonnes.

Grapes represent the most important product with a share of 39% in fruit production volume. Approximately 75% of grapes production are hold by technical variety of grapes used in wine production, 25% - table grapes for human consumption.

Melons and watermelons are on the 2nd place in the fruits production volume with a 30% share and a volume of about 640 tonnes in 2007. The 3rd and 4th places are held by apples and prunes with 15% and 10% share. Overall these four product groups account for 95% in total fruit production volume.

The analysis of fruit production development during the last 5 years shows a continuous decrease per total products groups, it being influenced, amongst others, by the unfavourable climatic conditions in the vegetation period. Thus, at present the domestic production covers only 15% of the necessary amount of fruits in Romania (source: Prodcom – The Fruits and Vegetables Producers' Patronage).

Table 2. The production of fresh fruits in Romania, 2003-2007, thousand tonnes

	2003	2004	2005	2006	2007
Total fruits, of which:	**3880.3**	**3724.3**	**2796.8**	**3002.1**	**2100.3**
Grapes*	1078	1230.4	505.8	912.4	821.3
Watermelons and melons	764.6	765.1	691.8	641.8	640
Apples	811.1	1097.9	638.0	590.4	316.4
Prunes	909.6	475.8	622.3	598.8	219.4
Cherries and sour cherries	98.5	51	117.9	104.8	26.1
Pears	103.8	45.9	88.9	62.4	22.7
Strawberries	14.9	14.5	18.2	21.6	15.3
Peaches and nectarines	18.0	19.6	29.8	17.4	9.2
Apricots	42.6	20.7	52.4	38.8	6.8
Other fruits	39.2	3.4	31.7	13.7	23.1

* This category includes technical and table grapes
Note : it includes fruits for direct and industrial consumption
Source : FAOSTAT, EUROSTAT, THE NATIONAL INSTITUTE OF STATISTICS

Vegetables

The production of fresh vegetables was estimated at 3.2 million tonnes in 2007. The statistical data indicate that the main vegetables cultivated in Romania in quantitative order are the following: cabbage (35%), tomatoes (18%), onions (10%), sweet pepper (9%). Since 1999 until present the production of vegetables had periods of decline or stagnations.

Table 3. The production of fresh vegetables in Romania, 2003-2007, thousand tonnes

	2003	2004	2005	2006	2007
Total vegetables: of which	**3919.9**	**4008.8**	**2932.8**	**3497.1**	**3172.7**
Cabbage	1019.2	919.1	1009.4	1106.0	1120.0
Tomatoes	818.9	1330.1	627.0	835.0	555.4
Dried onions	350.4	332.8	363.6	390.7	312.2
Sweet peppers	249.1	237.2	203.8	279.1	280.0
Carrots	227.4	209.4	222.0	265.6	266.0
Cucumbers	151.3	199.5	142.9	156.4	157.0
Dried garlic	76.5	65.9	68.4	64.2	65.0
Other vegetables	1027.1	714.8	295.7	400.1	417.1

Note: It includes vegetables for consumer and industrial consumption. It does not include melons and watermelons.
Source : FAOSTAT, EUROSTAT, THE NATIONAL INSTITUTE OF STATISTICS

Compared to the Central and Eastern European countries, Romania holds the 3rd place with 600,000 hectares of cultivated land. This places it much ahead the next country (Hungary with about 140,000 hectares), and much behind the top countries, respectively Russia with 5 million hectares and Poland with 1 million hectares cultivated with vegetables.
Even though the cultivated lands slightly increased during the last five years, the domestic production of vegetables was fluctuant due to some meteorological events and weak management of activities in agriculture. Thus, Romania maintains its third place position in the zone in total production, with a weak production per

hectare, which is below Russia and much below Hungary and Poland. At present the domestic production of vegetables covers around 70% of the consumption (source: Prodcom – The Fruits and Vegetables Producers' Patronage).

1.7 Market Trends

The volume and quality of the fresh fruits and vegetables depend directly on the climatic conditions. The last years are characterised by drought periods or abundant rains, which negatively influenced the production of certain categories of fruits and vegetables. These fluctuations have a direct influence on prices and imports and are difficult to predict. At the same time the lack of professional associations domestic producers, low productivity determined by an underdeveloped irrigation system, insufficient investments in the sector will continue to condition the decline of domestic production, thus favouring imports. Another important sector aspect is the decreasing number of producers as a result of difficulties encountered while trying to conform to the European regulations.

The main sector weaknesses specified by its representatives, and which can be "speculated" by the external producers, are the following:

- Significant cutback on fruit tree plantations, disintegration and dispersal of land cultivated with vegetables;
- Lack of modern farming and processing technologies;
- Low yielding per hectare;
- Lack of storage spaces;
- Fruit tree plantations in decline and abandoned;
- Low level of farmers association in groups of producers;
- High production costs.

With regard to consumption trends the consumer behaviour studies show that major changes are determined by the following factors:

- Change in the population structure and specifically the rapid increase of the old age population and a decline in the number of the young population;

- Family 'attenuation' – the number of family members decreases due to low number of children. Moreover, the number of one-person families grows, which makes this group very important for the food products suppliers:

- The population income growth has an influence on the life style and consumption preferences. Even if incomes grow, the Romanian food market becomes more and more competitive and reaches the point of saturation, and the sales dynamics will be determined mostly by redirecting consumers towards new products.

Food and nutrition preferences are the following:

- Food safety – food products must be healthy, and their consumption must not create risks for health;

- Healthy food – the content of fats, sugar and salt in food products must be limited ;

- Consumption of fresh fruits and vegetables – the interest towards these products is constantly growing, especially due to vitamins and antioxidants which presumably endow these products with cardiac and cancer prevention properties;

- Collusion – the population is more actively involved in the labour market and social life. As a result there is less time to prepare food. Therefore the demand for semi-finished products is growing.

CHAPTER 2. FROZEN VEGETABALES AND FRUITS MARKET

During the last years the Romanian market of frozen fruits and vegetables registered an ascending trend, as a result of competition development, product quality improvement, assortment diversification and competitive pricing. The progress evidenced in the Romanian economy in general, the increase of consumer incomes, of the level of living and education furthered an increase in the number of stores and restaurants and implicitly of product range for sale. All these together generated an ascendant trend of sold frozen fruits and vegetables. The market strives to reach the level of the European Union member states.

Given the limited number of frozen fruits and vegetables producers active on the domestic market, when only two of them offer large scale domestic production, the supply of frozen fruits and vegetables is strongly influenced by imports, which cover around 85-90% of consumption. Romania has become in the last years a real market for such imported products, and due to limited number of domestic producers, this tendency will be maintained in the future. Taking into account the consumption trends, sector companies consider that the Romanian market has an important potential to be exploited and that in the future imports will continue to dominate if the consumers of frozen fruits and vegetables become more product quality oriented.

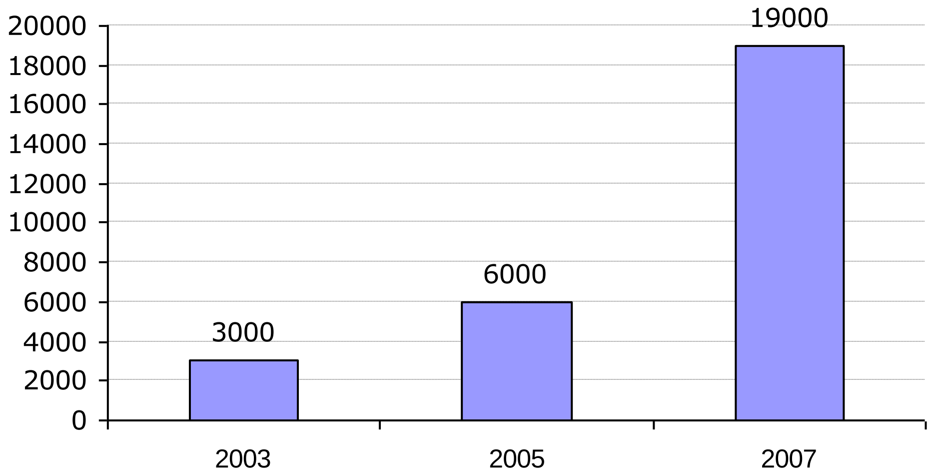
2.1 Market Volume

The Romanian market for frozen fruits and vegetables is rather small and therefore not reflected in the consumption statistics. Thus, the frozen fruits and vegetables market will continue to be analyzed through the statistics of frozen vegetables.

The Euromonitor classification of frozen vegetables includes all packed vegetables that were processed beforehand. The processing refers to peeling and cutting vegetables, thus obtaining a product ready to be prepared or mixed with other ingredients. In this category are included vegetables, such as peas, maize, green beans etc., as well as mixes of vegetables or rise-based mixes. From this category are excluded frozen potatoes, and are added products such as carrots with mushroom dressing, cauliflower with white dressing, or vegetables with sour cream dressing.

The market volume of frozen vegetables was estimated at around 19.000 tonnes in 2007 (graph 3). During 2003-2007 the total sales dynamics of frozen vegetables showed a growth in volume between 50-100% per year. The spectacular progress is conditioned by easy access of EU producers to Romania, and improved behaviour of the urban consumers. Lately the consumer mentality changed significantly, the consumer becoming aware of the fact that frozen products are very healthy and they maintain their initial properties. Thus, the market developed due to increased information level of the consumer with regard to healthy nutrition. Furthermore, the category of the frozen products was triggered by the expansion of hyper- and supermarkets, which allow generous spaces for this product segment, thus becoming one of the most important factors for consumption motivation.

Graph 3. The dynamics of frozen vegetables sales, in tonnes



In 2007 the consumption of frozen vegetables was estimated at 19,000 tonnes, and the average per capita consumption - 0.84 kg. For comparison, this indicator at the European Union level is of 5.61 kg per capita. The highest consumption is registered din France - 9.8 kg per capita annually.

2.2 Market Value

In 2007 the Romanian frozen vegetables market value was estimated at approximately €25 million. The market dynamics registered a progress similar to the one for sales volume.

2.3 Products Sale Structure

The recent years development of the Romanian retail sales and its consumers orientation towards a healthy life style conditioned a progress in the sales of frozen vegetables. The 'five per day' principle, i.e. five portions of vegetables and fruits per day (recommended by the World Health Organisation) has found its place in the consumer's mind. The frozen vegetables offer solutions even when various vegetable assortments are not yet mature.

According to an audit retail study (made by MEMBR Agency, Romania) during December 2007 - November 2008, the group of basic products, such as peas, green beans, gumbos accounted for 42% in sales volume and 38% in sales value, including peas with 64.5% sales volume. The group of vegetable mixes registered 41.5% share in value, and rise-based mixes with a share of 15.4% in volume and 16.4% in value, the rest – vegetable mixes. On the last place are special products (asparagus, maize, broccoli, mushrooms, Brussels cabbage and others) with a 16.5% share in total sales volume and 17.8% in value. Within this group, spinach, maize and broccoli register illustrative sales.

2.4 Seasonal Sales

The sale of these products is also season-oriented. Thus sales registered a growth of up to 200% in the last 2 months of the year and during February-March, compared to other months. Furthermore, sales tend to grow during summer time, meaning that the consumer becomes more faithful to these products during the entire period of the year, the peaks remaining for the October-April period.

2.5 Production

On the domestic market there are few active producers of frozen fruits and vegetables, only two of them Frigorifer (Tulcea) and Legofruct (Timisoara) with large scale production facilities, the other being small companies. Furthermore, it is worth mentioning that both companies have extended their production capacities rather recently.

In 2006 Frigorifer Tulcea increased its production capacities up to 600 tonnes/month, as a result of modernizing the equipment. The analysis of assortments produced by this company showed that preserved vegetables account for 100% of the unit production. In 2006 Frigorifer produced 2,100 tonnes, following to increase its production within the next 5 years up to 10,000 tonnes.

Legofruct launched its products only in 2008. The production capacity of this company estimated in terms of production capacity per hour, storage capacity and functioning period was estimated at 6,000 tonnes/year. For the 2008 year was planned to produce 2,000 tonnes. The product range of this company includes both frozen vegetables and fruits.

2.6 Segments

Market segments are grouped in two big categories – retail and HORECA. The first segment can be characterised in the following way: special clients – international store chains, with a rapid development (hypermarket, supermarket, cash&cary) and small shops, food shops chains with small surfaces and with a limited product range.

The retail segment continues to expand as a result of merchants' awareness of the Romanian market potential, these competing in launching new products and improving the existent products' image. The modern retail brings around 80% of sales.

The HORECA segment covers the hotel and restaurant network, and accounts for about 20% of sales. For this segment are specific frozen wrapped vegetables of 1-2.5 kg.

2.7 Market Trends

The Romanian market tends to shift from dried vegetables and fruits (canned fruits and vegetables) towards frozen vegetables. This trend will gradually develop, conditioned by the big stores policy (for example, the creation of specific sections for wrapped fresh products), and by information campaigns performed by the producers.

Changes in the life style will influence consumers' preferences towards products which are comfortable, simple and rapid in preparation. Consumers of frozen vegetables become more quality oriented and pay more attention to the price/quality correlation, while wrapping methods and accessibility are going to be important factors in the purchasing process.

The market will expand as a result of the purchasing power growth, store chains development, consumer nurturing and changing consumption preferences. In the future the consumption of frozen vegetables will increase due to a more active life style.

It is estimated that only strong competitors with good and very good product quality will remain on the market.

CHAPTER 3. DISTRIBUTION SYSTEM

In Romania the retail trade can be grouped in two categories : modern trade (international store chains, such as Metro, Carrefour, etc.) and traditional trade, which consists of all other stores.

The correlation between traditional and modern trade is of about 70/30, with a higher modern trade share in urban areas, it being practically absent in rural areas. The tendency is specific for the West European countries, where modern retail accounts for 80% of the market. Its development in Romania shows that in the next coming years modern trade will prevail the traditional trade.

3.1 Romanian Retail Structure

The Romanian modern retail is developing fast, even though it is not at the level of West European countries. It attracts more and more consumers disadvantaging the traditional retail, despite it's important role in selling nation-wide consumption products, especially food products.

The food retail infrastructure changed a lot in the last years, conditioning the development of modern trade and disfavouring traditional trade.

Universal food & non food stores	2006	2007
Hyper/Supermarkets	403	543
Food stores ≤20 sq.m	32582	32574
Food stores 20 - 40 sq.m	33221	31626
Food stores > 40 sq.m	8992	9542
Booths	5730	5001
Pharmacies	5408	6078
Butcheries	780	815
Petrol stations stores	1463	1241
Cosmetics stores	1092	1103
Animal food stores	1758	2024

The 2007 year is considered important for the Romanian trade for several reasons, and specifically : the territorial expansion of the retailers was exceptionally rapid, a period of concentration started, the presence of stores from the same chain in the same town being already a common thing for the population. The modern trade enters the smaller towns mainly through discounters, which already trigger localities of 15,000 inhabitants.

The Nilsen data show that traditional trade is relatively stable, at least in food store (over 20 sq.m.) segments. Booths are regressing strongly, however there is a development of the so-called 'specialised' stores, of naturist, ecological products, butcheries, etc., which gain a considerable share in sales share of FMCG.

Hypermarkets

The Hypermarket concept is to bring "everything under the same roof". In the stores the consumer can find bread and vegetables, food and wide consumption goods, even books, clothing, furniture, domestic appliances, and gardening tools.

The quantity of products sold in a hypermarket can reach 10,000. Besides product variety, another strong point of hypermarkets is client's comfort, with large modern selling spaces, well illuminated and with a direct access to the shelf. Services are offered by a big number of employees – over 700 in each store. Also, around hypermarkets are usually placed various specialised stores (for ex., at Carrefour exist Bricostore and Mobexpert), all these concentrating in a commercial centre which satisfies all consumer requirements.

Hypermarkets are successful within the Romanian population, because they give the possibility to choose and offer various services and entertainment. At the national scale, these stores account for about 14% of FMCG expenditures value, a share which almost doubled compared to 2006 (8%).

Chain	Number of branches 2007	Opened in 2008
Carrefour	9	8
Real	14	7
Kaufland	31	10
Auchan	3	3
Cora	3	1
Pic	4	3

Supermarkets

Supermarkets are divided into two categories: (i) chains of national coverage, belonging to most international retailers and (ii) chains of local coverage, at the town/city level.
As other chains Supermarkets continued to extend, although not as rapid. This retail format is still seeking to find it's optimal positioning in a market where competition comes from hypermarkets and discounters. These stores are the most 'hunted' target for acquisition by bigger formats. In the first half of 2007, hypermarkets accounted for almost double share compared to 2006, correlated to the same period, the market share of supermarkets remained almost constant- 15% (according to the GfK classifications, supermarkets are defined as self-service stores and with at least two check-outs).

Chain	**Number of branches 2007**	**Opened in 2008**
Billa	28	10
Mega Imge	20	6
Ethos	16	5
GMarket	7	4
Trident	5	4
La Furmi	15	4
Primavara	9	2
Wolf	4	2
Interex	10	6
Spar	14	11
Artima	21	-

Discount Stores

These stores have a specific type of suppliers and a specific target public, which adores cheap things. Discount stores have less products, but with lower prices then in supermarkets or other stores. Prices are lower than at a permanent stock clearing, however periodically, they have ultra special offers, of leading products at low prices. Another characteristic of these stores is the high number of visitors. Here are sold products of a wide usage (food, vegetables, fruits, bakery products, dairy, cosmetics, hardware, clothing).

There are two types of discount stores: hard and soft. The first type, as it title says, resumes its offer at least for 700-800 products, the majority of own trade marks, account for up to 90% share. Such stores offer products at very low prices, sacrificing for this purpose the ambience, services, merchandising, etc. Soft-discounters are more friendly, with a more generous product offer, even up to 1,500 articles, and with a wider selection of national trade marks. In Romania discount stores are closer to the soft-discount concept, because the consumer does not trust products which are not known, likes to choose and wants to be indulged while shopping. Discounters from Romania got used to these traditions and will continue to adapt there assortment; re-branding, re-modeling stores or associating with butcheries or bakeries, as additional attraction points serve as a proof of this. Also, some chains in Romania promote the concept of hypermarket discount (promoted by Auchan and Kaufland), but the selling area and product range cannot be compared to the classical discounter described above.

The share of the discount stores reached 5% and might double in 2008, analyzing expansion projects of this segment players.

Chain	Number of branches 2007	Opened in 2008
Pennny market	20	20
Profi	35	10
Plus discount	50	30
Minimax discount	10	20

CASH&CARRY

Although still being confused with hypermarkets and supermarkets, Cash&Carry stores have defined their activity area: small merchants and Horeca sector. Thus, all actions of the two cash&carry operators were directed towards gaining the trust and building faithfulness of professional clients, targeting the gastro segment, which spectacularly developed during the last years. According to GfK, the cash&carry stores (together with other retailers) account for 5% share at the national level.

Chain	Number of branches 2007	Opened n 2008
METRO	23	0
Selgros	16	2

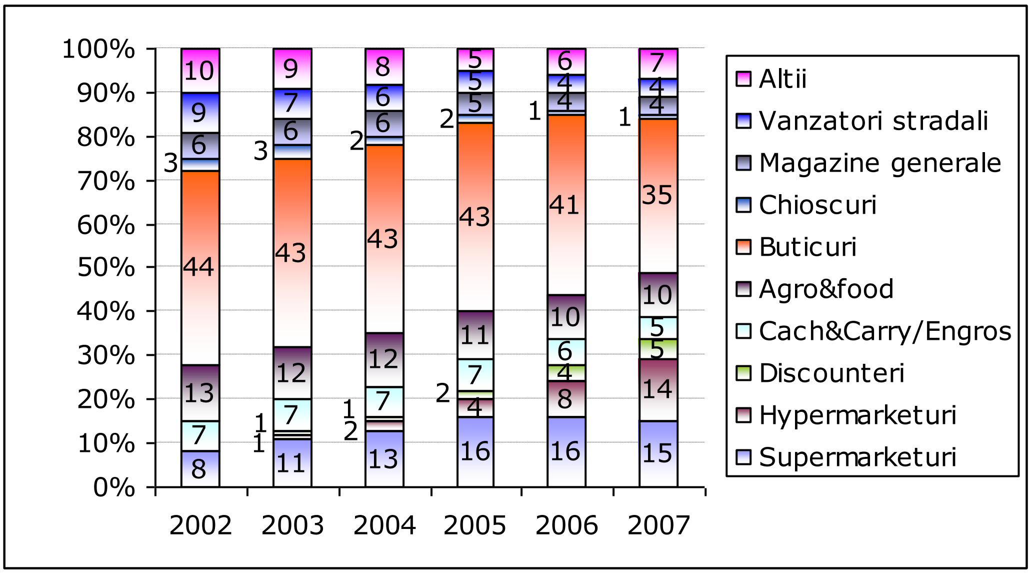
At the national level, modern trade formats have a more definite role covering about 38% of wide consumption products during the first two months of 2007. The most spectacular growth registered hypermarkets – from 8% in 2006 to 14% in the first three quarters of 2007. A special contribution to this had Kaufland which is in the top of main retailers. Hypermarkets gained by attracting a larger number of consumers, about 70% more than in the first nine months of 2006, thus between January-September, 2007 half of Romanian families visited these stores to buy various products. The higher purchasing frequency in hypermarkets brings added value, contributing to the growth registered in the market share, and to the loyalty towards these stores.

Supermarkets continue to have an important role, maintaining there position on the market with a 15% share. The discount stores registered the most spectacular territorial expansion, especially in small and medium-sized towns, which led to a 5% share, exceeding by 25% the 2006 value. However, traditional retail registered decline.

Romanian Retail Trends

In Bucharest modern trade overdeveloped the traditional trade, reaching a 70% market share of wide consumption goods, reminding of the developed countries trade structure. Hypermarkets have the highest share among all trade formats, around 38% (a 30% share in 2006). Supermarkets are on the second place featuring a stability in sales of wide consumption goods, compared to a continuous and consistent decrease of number of boutiques.

The modern trade development rhythm gained during the last years will be maintained in the future. The highest numerical growths have discount stores and hypermarkets. For 2008 are announced to be open 170 new locations.

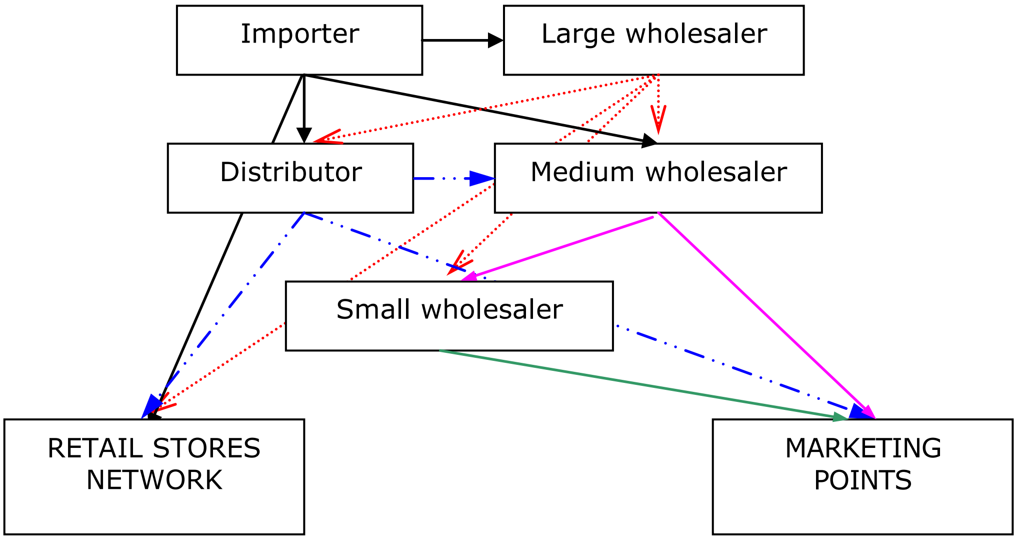


3.2 Distribution Chain in Romania

The study of the Romanian market for fresh/frozen fruits and vegetables distinguishes the following distribution channels and systems:

1. Agent, Importer, large wholesaler;
2. Distributor, medium size wholesaler;
3. Small wholesaler;
4. Retail stores network; Marketing point.

Distribution channels structure and possible supply channels schemes



Analyzing the above chart we can conclude that there are several options for a distribution channel, which can be grouped in the following way:

- **Direct distribution,** by eliminating several intermediary steps (for ex., Metro stores network is directly supplied by importers or large wholesalers); or

- **Indirect distribution,** through the entire intermediation chain (for ex., street/market booth which usually appeal to small wholesalers, which are supplied by superior structures); however, it is not excluded that goods can be both from a large or medium-size wholesaler.

The main functioning scheme is through large wholesalers and national distributors of imported fruits and vegetables (fresh or frozen), with subsequent selling. The relationship between wholesalers/distributors and buyers can be long term (years) and short term (seasonal), or even a one time transaction. An interesting fact is that most medium and small retailers are active seasonably, during off-season period the main market 'players' remain the large wholesalers and distributors, as their revenues are more significant and they can bear high off-season import prices.

Fresh/frozen fruit and vegetables retailers can be structured in two categories:

Large retailers, as MegaImage, Billa, Carrefour, Metro, etc. supermarkets.

These supermarkets have well supplied fresh/frozen fruit and vegetables sections, and some products are offered at a even lower price than on agrifood markets, in case of fresh fruit and vegetables. The supply policy is centralised, and price negotiations are based on large quantities for the entire network. Supermarkets are organised in networks / national chains, have specialised purchasing departments, usually in Bucharest, and the access of suppliers, especially of the new ones is relatives complicated.

Restrictions with regard to one or another supplier do not exist, however the offer must be made at the central office, for the purchasing department, and requirements (supply frequency, delivery quantities and terms) are severe.

Independent stores

Such stores are many and usually these are neighbourhood stores (proximity) which supplement lack of a market or of a supermarket from a certain zone, or long distance until the closest agrifood market.

Usually these stores are supplied by local producers or even by agrifood markets in the warm seas and by wholesalers/distributors in the cold season.

The offer differs it containing the most common fresh fruits and vegetables and also frozen fruits and vegetables. Prices are in most cases a bit higher than in the agrifood markets or supermarkets, but comparable with those.

Street booths sell fresh fruit and vegetables.

This is the case of small merchants, usually authorized physical persons who offer amongst others, several types of fresh fruits and vegetables. The provisioning is made on a daily basis, almost exclusively from the agrifood market.

Commercial adds-on for each element of the distribution channel are at least 10% during the season and can reach up to 25-100% in the off-season period. Importers can apply a 10-50% addition of the import price, the maximum level being practiced by societies dealing with import and direct distribution of products to retailers. Wholesales and distributors add between 10-25%, but this can be higher or lower depending on the offered service (for ex., direct delivery to stores). At the retail level these additions vary between 50-60%. Specialised stores or even certain agrifood markets (such as Dorobanti market from Bucharest) of high segment or single-line -additions can reach the level of 100%. If an agent is involved in the process another 3-5% are added (usually agents work on a basis of a commission contract, holding responsible for imports and direct delivery of goods to wholesalers or distributors).

The most successful collaboration between producers of fresh/frozen fruit and vegetables from the Republic of Moldova would be long term contracts with big wholesalers or national distributors, stipulating regular product delivery (weekly, monthly).

5. TRADE: IMPORT AND EXPORT

Fresh Fruits and Vegetables

4.1.1 Import volume and value

Romania imports significant quantities of fresh fruits and vegetables. Imports of fruit prevail imports of vegetables. One of the reasons is the high share of consumed fruits, such as bananas and citrus fruits, which are not cultivated in Romania, the demand being covered exclusively through imports. With regard to vegetables, most varieties are/can be cultivated in Romania, and imports supplement eventual lacks on the market, generally during the off-season periods. Sector patronage data show that 75% of fruits and 25% of vegetables sold on Romanian market originate from import.

Fruits

In 2007 Romania imported 479.09 thousand tonnes of fresh fruits of a total value of €226.11 million. In the total import of fruit (by volume) from countries outside the EU account for 63%, the rest being imported from the EU. It is worth mentioning that the share of imports from the EU increased significantly in 2007, the year when Romania joined the EU. Between 2003-2007 import of fruit increased both in volume and value.

Table 4 Import of fresh fruit in Romania, 2003-2007 by value, in million €

	2003	2004	2005	2006	2007
Total Romania	**73.01**	**85.19**	**125.96**	**151.34**	**226.14**
of which					
Intra- EU	22.74	21.25	35.72	42.37	106.07
Extra- EU	50.27	63.94	90.24	108.97	120.07

Table 5 Import of fresh fruit in Romania, 2003-2007 by volume, thousand tonnes

	2003	2004	2005	2006	2007
Total Romania	**259.91**	**310.03**	**452.09**	**500.10**	**479.09**
of which					
Intra- EU	82.09	86.96	149.13	150.90	179.61
Extra-EU	177.81	223.07	302.96	349.20	299.48

Vegetables

In 2007 Romania imported 194 thousand tonnes of fresh fruits of approximately €100 million value. Imports from countries outside EU represent 71% in volume and 63% in value.

Between 2003- 2007 import increased by 338% in value and 17% in volume per total. However, the situation in communities differs. Intra-community import registered a 9% decline in volume, while the extra-community import increased by 32%.

Table 6 Import of fresh vegetables in Romania, 2003-2007 by value, in million €

	2003	2004	2005	2006	2007
Total Romania	23	21	29	38	100
of which					
Intra-EU	8	8	10	14	37
Extra-EU	15	13	19	24	63

Source : EUROSTAT

Table 7 Import of fresh vegetables in Romania, 2003-2007 by volume, thousand tonnes

	2003	**2004**	**2005**	**2006**	**2007**
Total Romania	**166**	**152**	**158**	**180**	**194**
of which					
Intra-EU	61	61	61	65	56
Extra-EU	105	92	98	114	139

Source : EUROSTAT

The growth of fresh fruit and vegetables import can be explained by several factors. Some of them will be presented later in the document. The first factor is the domestic production decline for both fresh fruits and vegetables given the internal consumption growth. Another factor is seasonal production and inability of domestic producers to saturate the market with fresh fruits and vegetables during the entire year. The third very important factor is the role of international store chains that demand products of a certain quality and aspect, requirements which at present cannot be met by the domestic producers. Their weight in the retail selling of these products grows each year. The fruits and vegetables processing industry also became an important importer of these products, mainly due to inability of domestic farmers to supply the industry with the necessary raw materials and its high cost conditioned by the low productivity in the sector.

4.1.2 Import structure

Fruits

The main imported products are bananas - 33% (of total import of fruit by value), citrus fruits - 31%, apples - 10%, peaches and nectarines - 8% and grapes - 6%. Between 2003-2007 all product groups registered growths.

The following tables present the information regarding the import of the main groups of fruits in Romania.

Table 8 Import of main fresh fruit groups in Romania, 2003-2007, by value, in € million

	2003	2004	2005	2006	2007
Total fruits of which	**73.015**	**85.194**	**125.963**	**151.344**	**226.145**
Bananas	29.929	37.986	52.666	59.641	75.385
Exotic fruits	0.508	0.867	1.293	2.574	4.788
Citrus fruits	34.074	34.775	41.821	54.952	69.493
Grapes	0.921	1.628	4.417	5.648	14.186
Melons and water melons	0.672	0.826	1.100	1.311	3.885
Apples	5.161	4.269	11.333	12.158	22.271
Pears	0.349	0.424	1.598	2.931	6.623
Apricots	0.009	0.084	0.529	0.630	1.509
Cherries and sour cherries	0.003	0.021	0.048	0.109	0.440
Peaches and nectarines	0.491	2.964	7.543	6.609	17.549
Prunes	0.012	0.031	0.104	0.164	0.767
Berries and other fruits	0.885	1.319	3.511	4.617	9.248

Source : EUROSTAT

Table 9 Import of main fresh fruit groups in Romania, 2003-2007, by volume in thousand tonnes

	2003	2004	2005	2006	2007
Total fruits din care	**172.60**	**310.03**	**452.09**	**500.10**	**479.09**
Bananas	87.3	109.7	143.2	154.3	156.4
Exotic fruits	1.1	1.4	1.7	3.3	4.2
Citrus fruits	108.5	118.0	141.6	181.1	167.2
Grapes	4.2	8.9	18.3	19.4	19.1
Melons and water melons	7.0	9.0	9.5	9.9	18.9
Apples	45.4	41.1	86.0	78.3	54.0
Pears	1.5	1.9	6.1	9.8	10.9
Apricots	0.1	0.4	2.1	2.2	2.4
Cherries and sour cherries	0.0	0.1	0.2	0.2	0.4
Peaches and nectarines	2.4	15.5	32.5	28.7	30.3
Prunes	0.1	0.2	0.3	0.3	1.4
Berries and other fruits	2.6	3.9	10.5	12.5	13.7

Source : EUROSTAT

The next section presents fresh fruits which can be of a particular interest for exporters from the Republic of Moldova

Apples

Apples are the most important product imported within the 'domestic fruits' category (domestic fruits are those cultivated in Romania as well). In 2007 were imported 54,000 tonnes of fresh apples of a total value of € 22 million. Between 2003-2007 import of apples in Romania increased by 19% in volume and by 4 times in value.

The main EU suppliers are: Italy, Poland, Austria, Holland, Hungary together accounting for 85% of imports. Macedonia and Moldova - 94% of Romania's import value from outside the community area.

Peaches and nectarines

In the list of 'domestic fruits' imported in Romania peaches and nectarines are on the 2nd place, with 30,000 tonnes import volume and €17.5 million import value. Peaches account for 55% of import volume, and 45% nectarines. Between 2003-2007 the import of these fruits increased by 12 times in volume and 35 times in value.

The main suppliers are : in the EU - Greece, Italy and Spain with 94% of imports in value, and Turkey with Serbia from the extra-community area with 95%.

Grapes

Grapes are on the 3rd place in the list of 'domestic fruits' imported in Romania, with 19,000 tonnes import volume and €14 million import value. Between 2003 - 2007 the import of grapes increased by 4 times in volume and 15 times in value.

The main suppliers are: from the intra-community area - Greece, Italy, Holland and Spain which hold together 93% of import value ; from the extra-community area – Turkey and Macedonia with 95%.

Peaches

With the import volume of 10,000 tonnes and €6.6 million import value, peaches are situated on the 5th place in the list of imported 'domestic fruits'. Between 2003-2007 the import of peaches increased by 7 times in volume and 18 times in value.

The main suppliers are Italy, Holland, Greece (86% cumulated) from the community area, and Turkey with China (with 98%) from the extra-community area.

Sour cherries, cherries and apricots

Despite the biggest import growth experienced during 2003-2007, and specifically over 30 times in volume and 160 times in value, these fruits have a non-significant share both in volume and value of import.

Vegetables

In 2007 Romania imported 194,000 tonnes of fresh vegetables, equivalent to € 100 million. Between 2003 -2007 import increased in total by 338% in value and 17% in volume.

Table 10 Import of the main groups of fresh vegetables in Romania, 2003-2007, by value in million €

	2003	2004	2005	2006	2007
Total vegetables	**22.79**	**20.99**	**28.79**	**38.29**	**99.85**
of which					
Tomatoes	3.93	5.00	10.95	12.84	56.18
Alliaceous vegetables (onion, garlic, etc.)	13.54	10.76	7.54	9.94	9.73
Cabbage, cauliflower, kohlrabi	0.53	0.52	1.31	1.81	3.33
Green salad and chicory	0.18	0.23	0.40	1.02	2.92
Carrots, kales, beet root, roots, etc.	2.93	2.01	3.67	5.08	7.10
Cucumbers and gherkins	0.23	0.40	0.59	0.94	5.63
Podded vegetables (peas, beans, etc.)	0.01	0.03	0.03	0.04	0.41
Other vegetables	1.43	2.04	4.30	6.62	14.55

Source : EUROSTAT

Table 11 Import of main fresh vegetables groups in Romania, 2003-2007, by volume in thousand tonnes

	2003	2004	2005	2006	2007
Total vegetables	**166.13**	**152.46**	**158.14**	**179.69**	**194.30**
of which					
Tomatoes	28.87	40.16	52.70	51.43	71.06
Alliaceous vegetables (onion, garlic, etc.)	97.17	78.77	52.40	65.16	42.62
Cabbage, cauliflower, kohlrabi	5.69	5.34	11.82	13.02	18.44
Green salad and chicory	0.36	0.46	0.67	1.42	2.37
Carrots, kales, beet root, roots, etc.	26.09	16.95	21.60	24.84	30.09
Cucumbers and gherkins	1.29	2.16	2.84	5.11	7.78
Podded vegetables (peas, beans, etc.)	0.09	0.17	0.11	0.17	0.46
Other vegetables	6.58	8.45	16.01	18.53	21.48

Source : EUROSTAT

Tomatoes

Tomatoes are the main fresh vegetables imported in Romania. In 2007 were imported 71.06 thousand tonnes of a € 56,18 million value. Between 2003-2007 import increased by 14 times in value and 2.5 times in volume. In total import of fresh vegetables tomatoes account for 37% in volume and 56% in value.

The main EU suppliers are: Italy, Holland, Hungary, Poland, Spain with 94% of import by value, and Turkey with Syria with 97% share in extra-EU imports.

Alliaceous vegetables (onion, garlic, etc.)

It represents the second most important group of fresh vegetables imported in Romania with a total share of 22% in import volume and 10% in import value. In absolute figures imports of these vegetables was estimated at 42.62 thousand tonnes and € 9.73 million in 2007. Between 2003-2007 import declined in volume by 56% and in value by 28%. Within this group 88% are imports of onion and 11% of garlic (by volume).
The main EU suppliers are: Holland, Poland, Italy, Spain holding 83% of intra-EU import; while Egypt, Turkey and Ukraine 98% of extra-EU import.

Brassicas (cabbage, cauliflower, kohlrabi, etc.)

In 2007 the import of this group of vegetables accounted for 10% in volume and 3% in value. In absolute numbers this represents 18.44 thousand tonnes and € 3.33 million. Between 2003-2007 imports increased by 3 times in volume and 6 times in value. Within this group import of cabbage accounts for 92%.

The main EU suppliers are: Germany, Hungary, Holland, Italy, Poland with 92% of community imports and Bosnia-Herzegovina, Macedonia, Serbia and Turkey are the main non-EU suppliers accounting for 90% of the respective import.

Root vegetables (carrots, kales, beet root for salad, etc.)

Despite the fact that this group has the smallest share – 1.22% by import volume, it is amongst the leaders with 7% share in import value. Thus, in 2007 Romania imported 30.09 thousand tonnes of vegetables in volume of a total value of € 7.10 million. Between 2003-2007 import increased by 15% in volume and 148% in value. The import of carrots accounts for about 85%.

The main suppliers are: Holland, Poland, Italy, Germany, Austria – 90% of intra-community import, Turkey -99% of extra-community import.

Cucumbers and gherkins

In 2007 Romania imported 7.78 thousand tonnes of cucumbers and gherkins of a value of €5.63 million. The share in total import of fresh vegetables accounted for 4% in volume and 6% in value. Between 2003-2007 imports increased by 6 times in volume and 24 times in value.

The main suppliers are: Greece, Hungary, Italy, Spain, Holland from the intra-community area with a share of 93% of import and Turkey and Syria – countries from outside EU - with 96% of import.

Podded vegetables (peeled or unpeeled)

This group has an insignificant share in the import of fresh vegetables both in volume and value. Thus in 2007 were imported 0.46 thousand tonnes of a value of €0.41 million. Between 2003-2007 import increased by 6 times in volume and 33 times in value. Beans account for 53% of the import of this group of vegetables and peas – 45%.

The main suppliers are Spain, Poland, Hungary, Germany, Bulgaria, accounting for 80% of EU import. Outside the EU most vegetables were imported from the USA (93%).

Other vegetables

This group includes a wide range of vegetables such as asparagus, celery, sweet pepper, egg plants, truffles, spinach, etc. Import of this group of vegetables was of

21.48 thousand tonnes in volume and €14.55 million in 2007. During 2003-2007 it increased by 3 times in volume and 10 times in value. The most important products from this group are egg plants and sweet pepper, which account for 8.4% and respectively 60% of the import of this group.

4.1.3 Export of Fresh Fruits and Vegetables

Fruits

Romania exported 25.77 thousand tonnes of fresh fruits in 2007, with a value of €9.92 million. Between 2003-2007 fruit exports fluctuated, the only significant progress being registered in 2007 year. Over 95% of fresh fruits were exported to the EU countries. The main exported products were grapes, apples, fruits with stones.

Table 12 Romanian exports of the main fresh fruit groups in 2003-2007, by volume in tonnes

	2003	2004	2005	2006	2007
Total Export	**18309**	**12979**	**48**	**11701**	**25767**
of which					
Bananas	2	2	40	24	38
Exotic fruits	7	14	1	9	73
Citrus fruits	106	169	4	229	408
Grapes	957	3389	0	85	917
Melons and watermelons	1277	377	0	1317	227
Apples, peaches and quince	908	193	1	641	19776
Apricots, cherries, sour cherries, peaces and nectarines	13312	7414	0	8270	3311
Berries and other fruits	1741	1423	2	1125	1018

Source : EUROSTAT

Table 13 Romanian exports of main fresh fruit groups in 2003-2007, by value in thousand €

	2003	2004	2005	2006	2007
Total Export	**7544**	**6081**	**38**	**6489**	**9916**
of which					
Bananas	2	2	20	17	28
Exotic fruits	16	29	3	19	108
Citrus fruits	67	110	3	130	285
Grapes	285	795	1	77	1074
Melons and watermelons	90	39	0	148	87
Apples, peaches and quince	233	92	1	169	4743
Apricots, cherries, sour cherries, peaces and nectarines	5082	2941	1	3398	1906
Berries and other fruits	1769	2075	10	2532	1684

Source : EUROSTAT

Vegetables

In 2007 Romania exported 12.75 thousand tonnes of fresh fruits with a value of €29.09 million. Between 2003- 2007 exports increased by 22.6% in volume and

61.43% in value. Moreover, starting with 2005 exports of vegetables declined in volume, but grew in value. Over 95% of fruits were exported to the EU market. The main exported products are cucumbers and gherkins.

Table 14 Fresh vegetables (by main groups) exported from Romania, 2003-2007, by value in million €

	2003	2004	2005	2006	2007
Total vegetables	**18.02**	**20.19**	**23.51**	**23.13**	**29.09**
O which					
Tomatoes	0.33	0.27	0.20	0.09	0.42
Alliaceous vegetables (onion, garlic, etc.)	0.02	0.01	0.02	0.01	0.14
Cabbage, cauliflower, kohlrabi	0.02	0.07	0.01	0.31	0.04
Green salad and chicory	0.04	0.05	0.03	0.12	0.04
Carrots, kales, beet root, roots, etc.	0.01	0.01	0.02	0.02	0.01
Cucumbers and gherkins	2.92	2.12	2.22	3.47	3.37
Podded vegetables (peas, beans, etc.)	0.01	0.01	0.48	0.55	0.28
Other vegetables	14.67	17.65	20.53	18.56	24.79

Source : EUROSTAT

Table 15 Fresh vegetables (by main groups) exported from Romania, 2003-2007, by volume in thousand tonnes

	2003	2004	2005	2006	2007
Total legume	**10.40**	**9.57**	**15.10**	**16.57**	**12.75**
din care					
Tomatoes	0.80	0.47	0.36	0.13	0.20
Alliaceous vegetables (onion, garlic, etc.)	0.07	0.04	0.06	0.03	0.26
Cabbage, cauliflower, kohlrabi	0.04	0.13	0.05	1.06	0.28
Green salad and chicory	0.02	0.04	0.01	0.16	0.03
Carrots, kales, beet root, roots, etc.	0.01	0.03	0.03	0.06	0.04
Cucumbers and gherkins	7.17	5.58	5.79	8.54	7.66
Podded vegetables (peas, beans, etc.)	0.02	0.10	4.96	3.71	0.87
Other vegetables	2.27	3.19	3.84	2.88	3.41

Source : EUROSTAT

4.2 Frozen Fruits and Vegetables

4.2.1 Import Volume and Value

Frozen fruits

In 2007 Romania imported 639.8 tonnes of frozen fruit with a value of €827.1 million. The share of frozen fruit in the total import (frozen fruits and vegetables) accounts for 3% in volume and 5% in value. Between 2003-2007 imports registered a 62% growth in volume and 50% growth in value. The main import markets are the EU member countries with a share of over 96% in import by value and volume. Imports from EU practically doubled in 2007 after Romania joined the

EU and were eliminated tariffs in force until that moment. Imports from countries outside the EU diminished during 2003-2007 period.

Table 16 Import of frozen fruits in Romania, 2003-2007, by volume in tonnes

	2003	2004	2005	2006	2007
Total Romania	**99.3**	**190.9**	**299.8**	**357.7**	**639.8**
of which					
Intra-EU	58.4	111.5	199.5	316.4	626.3
Extra-EU	40.9	79.4	100.3	41.3	13.5

Source : EUROSTAT

Table 17 Import of frozen fruits, 2003-2007 , by value in thousand €

	2003	2004	2005	2006	2007
Total Romania	**169.0**	**224.5**	**358.5**	**470.2**	**827.1**
of which					
Intra-EU	104.3	165.6	262.8	418.4	791.8
Extra-EU	64.7	59.0	95.7	51.8	35.3

Source : EUROSTAT

Among frozen fruits the most important are strawberries, wild strawberries and forest berries (raspberries, blackberries, etc.), which account for over 20% of import volume and 25% import value. Between 2003-2007 import of berries increased on average by 74% per year in volume and 57% in value, exceeding the average registered in total products. Other imported frozen fruits are tropical fruits, cherries and sour cherries.

The main EU suppliers are Hungary, Poland, Belgium, Germany, Greece, which account for 80% of total import by value. From countries outside the EU, Serbia was the only country from which Romania imported in 2007.

Table 17 Import of frozen fruits (by main groups) in Romania, 2003-2007, by volume in tonnes

	2003	2004	2005	2006	2007
Total fruits	**99.3**	**190.9**	**299.8**	**357.7**	**639.8**
of which					
Strawberries and wild strawberries	45.9	35.7	45.5	43.3	52.8
Raspberries, blackberries, etc.	10.6	27	39.6	77.2	78.2
Other	42.8	128.2	214.7	237.2	508.8

Source : EUROSTAT

Table 18 Import of frozen fruits (by main groups) in Romania, 2003-2007, by value in thousand €

	2003	2004	2005	2006	2007
Total fruits	**169.0**	**224.5**	**358.5**	**470.2**	**827.1**
of which					
Strawberries and wild strawberries	80.13	64.15	53.61	56.35	94.99
Raspberries, blackberries, etc.	19.4	30.02	47.56	87.73	114.47
Other	69.44	130.34	257.3	326.08	617.61

Source : EUROSTAT

Frozen vegetables

The share of frozen vegetables from this group account for over 95% in import by value and 97% by volume. In 2007 import was of 18.76 thousand tonnes with a value of €16 million. Between 2002-2007 import registered a constant growth with an annual average of 44% in volume and 47% in value. The main suppliers are also the EU countries with a share of 92% both in value and volume. It is important to mention that Romania's adherence to the EU did not have a negative impact on import of frozen vegetables from countries outside the EU. In 2007 it doubled compared to the previous year.

Table 19 Import of frozen vegetables in Romania, 2003-2007 by volume, tonnes

	2003	2004	2005	2006	2007
Total Romania	**4447.2**	**5396.9**	**8626.7**	**12399.4**	**18760.9**
of which					
Intra-EU	4330.6	5182.5	7817.2	11623.5	17243.5
Extra-EU	116.6	214.4	809.5	775.9	1517.4

Source : EUROSTAT

Table 20 Import of frozen vegetables in Romania, 2003-2007 by value, thousand €

	2003	2004	2005	2006	2007
Total Romania	**3491.4**	**4506.7**	**6924.4**	**10995.0**	**16234.9**
of which					
Intra-EU	3395.0	4224.5	6312.8	10256.5	15269.6
Extra-EU	96.3	282.3	611.7	738.5	965.3

Source : EUROSTAT

The import of products is structured in the following way: 'one product' products – peas with a share of 22.4% by volume and 24% by value is on the 1st place in total import, followed by green beans (9.19% by volume and 9.7% by value), spinach

(6% by volume and 5.5% by value), vegetable mixes with a 23% by volume and 31% by value. Between 2003-2007 the shares of these products in the total import were relatively stable, despite a slow decrease of 'other products' group, which includes the following vegetables: artichokes, asparagus, broccoli, mushrooms. These products' share growth in total imports proves the change of consumer mentality, who is already looking for high value products.

The main EU suppliers are: Belgium (42%), Poland (25%), Hungary (12%), Italy (8%), Germany (4%). The most important suppliers from outside EU are: China (40%), Serbia (28%), Egypt (14%), Macedonia (11%) and Moldova (6%), together accounting for over 90% of non-EU imports by value. Moldova's weight in Romania's import of frozen vegetables significantly decreased. In 2005 Romania's import from Moldova accounted for 26% of total import. The main products imported from Moldova are peas and sweet maize.

Table 21 Import of main groups of frozen vegetables in Romania, 2003-2007, by volume tonnes

	2003	2004	2005	2006	2007
Total vegetables	**4447.2**	**5396.9**	**8626.7**	**12399.4**	**18760.9**
of which					
Peas	1061.0	1305.1	2449.9	2873.8	4203.1
Beans	362.1	572.6	937.4	1530.8	1725
Other podded vegetables	82.4	3.2	48.7	20.7	5.9
Spinach	394.9	448.3	733.5	1074.3	1128.9
Sweet maize	219.2	186.8	334	435.2	531.5
Other vegetables	885.2	1064.8	1252.7	2190.3	6708.7
Vegetable mixes	1442.4	1816.1	2870.5	4274.3	4457.8

Source: EUROSTAT

Table 22 Import of main groups of frozen vegetables in Romania, 2003-2007 by value, thousand €

	2003	2004	2005	2006	2007
Total vegetables	**3491.4**	**4506.7**	**6924.4**	**10995.0**	**16234.9**
of which					
Peas	778.3	1007.6	1824.7	2388.3	3913.0
Beans	274.63	426.2	695.77	1208.56	1471.78
Other podded vegetables	69.19	1.91	32.73	13.82	5.93
Spinach	287.81	333.1	531.99	801.17	892.54
Sweet maize	192.97	181.38	294.69	412.46	471.11
Other vegetables	662.13	958.8	1086	2280.92	5172.46
Vegetable mixes	1226.3	1597.8	2458.6	3889.75	4308.06

Source : EUROSTAT

4.2.2 Export Volume and Value

Fruits

Compared to imported frozen products (fruits and vegetables) where frozen vegetables have the highest share, exported frozen fruits represent the most important group of exported frozen products (73% by volume and 56% by value). Between 2003-2007 exports fluctuated, 99% of exports being made from the EU.

Table 23 Export of frozen fruits from Romania, 2003-2007 by volume, tonnes

	2003	2004	2005	2006	2007
Total fruits	**4246.8**	**4825.9**	**4385.7**	**5081.5**	**5805.5**
of which					
Strawberries and wild strawberries	60.1	42.2	40.9	62.4	82.7
Raspberries, blackberries, etc.	1500.3	670	383.5	969.9	1017.2
Other	2686.4	4113.7	3961.3	4049.2	4705.6

Source : EUROSTAT

Table 24 Export of frozen fruits from Romania, 2003-2007, 2003-2007 by value, thousand €

	2003	2004	2005	2006	2007
Total fruits	**3768.4**	**3659.5**	**5163.3**	**10519.5**	**9486.8**
of which					
Strawberries and wild strawberries	155.15	83.94	111.53	90.79	105.52
Raspberries, blackberries, etc.	1472.17	658.99	338.83	1192.17	1373.27
Other	2141.1	2916.55	4712.91	9236.52	8007.97

Source : EUROSTAT

Frozen vegetables account for 44% in the total export of frozen products. However, during the last 3 years export of frozen vegetables fluctuated and slightly diminished. The main exporting countries are the EU member states with 99% share of exports.

Table 25 Export of frozen vegetable from Romania, 2003-2007 by volume, tonnes

	2003	2004	2005	2006	2007
Total Romania	**1450.2**	**2724.7**	**3446.0**	**1621.6**	**2170.7**
Peas	0.3	0.2	0.7	17.9	0.0
Beans	0.6	0.1	0.1	0	0
Other podded vegetables	0	0	0.1	0	9.3
Spinach	0.4	0.6	1.3	8.9	0
Sweet maize	8.2	31.1	14	25.4	41.6
Other vegetables	1438	2691.1	3425.9	1556.8	2095.8
Vegetable mixes	2.7	1.6	3.9	12.6	24

Source : EUROSTAT

Table 26 Export of frozen vegetables from Romania, 2003-2007, 2003-2007 by value, thousand €

	2003	2004	2005	2006	2007
Total Romania of which	**6073.3**	**10585.6**	**14036.1**	**6393.7**	**7320.6**
Peas	0.4	0.2	1.0	10.4	0.0
Beans	0.89	0.2	0.12	0	0
Other podded vegetables	0	0.05	0.08	0	5.73
Spinach	0.48	0.91	1.98	12.47	0
Sweet maize	4.65	15.41	6.77	12.69	7.81
Other vegetables	6062.8	10566.14	14020.2	6332.95	7236.9
Vegetable mixes	4.12	2.69	5.94	25.2	70.13

Source : EUROSTAT

Conclusions

The analysis of Romanian foreign trade of fresh and frozen fruits and vegetables shows that Romania is a net importer of these products. Products for which export prevails import are frozen fruits. Also, it is important to mention that all product groups registered significant growths during the analysed period, and the role of countries outside EU is quite significant in supplying the Romanian market with fresh fruits and vegetables.

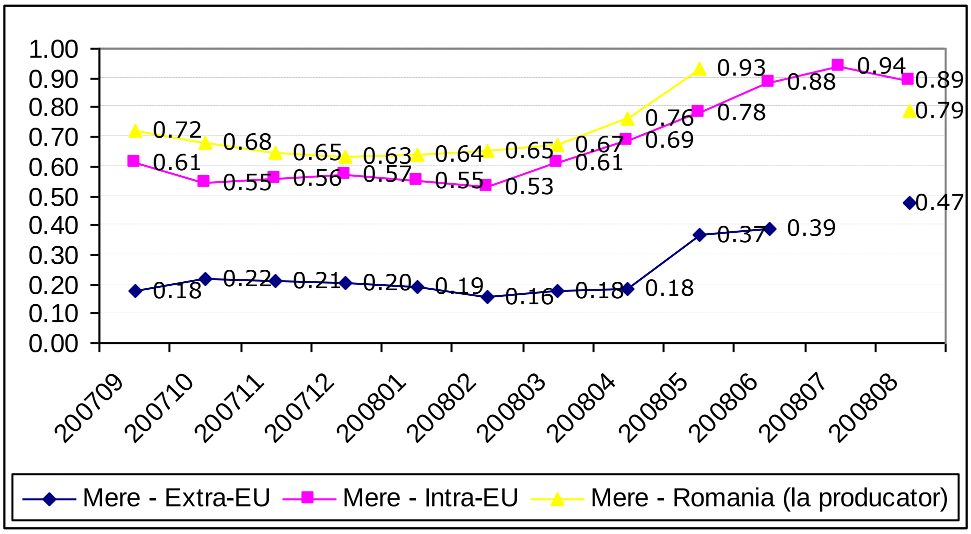
The growth of imported frozen fruits and vegetables, and specifically of frozen vegetables, is mainly due to high demand for these products on the Romanian market, which at present can be satisfied through imports given the limited domestic production. However, producers' development strategies which materialize through investments made during 2007-2008 aim at increasing the domestic production up to 100,000 tonnes by 2010, representing 50% of the current market volume.

CHAPTER 5. PRICE DEVELOPMENTS

Fruit and vegetables prices are influenced by several factors, and namely: varieties, quality class, country of origin, selling period and length of the distribution chain. The same elements persist in case of frozen fruits, plus additional factors which can influence the price level – product composition (composition of mixes), weight and type of packaging used.

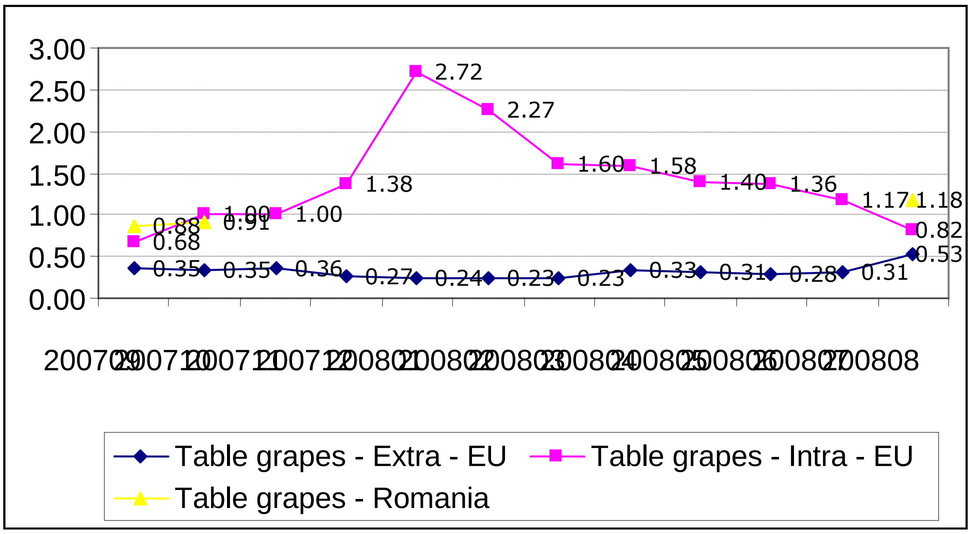
The graphs below present monthly price evolution of apples and table grapes, products exported by the Moldovan producers to Romania.

Graph 4 The Dynamics of average monthly prices of fresh apples, €/kg



Source : Eurostat, The Ministry of Agriculture and Forests

Graph 5 The Dynamics of average monthly prices of table grapes, €/kg



The analysis of the selected products price evolution reflects a growing trend of prices in the off-season period and a recurrence to the initial level at the beginning of next marketing year; price level adjustments at the beginning of the new marketing year (in agriculture – September) are conditioned by the volume and cost of agricultural production obtained in the respective year.

Moreover, prices set (at the factory) by domestic producers for apples and table grapes are higher than import prices. Products imported from countries outside the EU have the lowest prices. These, however, once enter the EU territory are adjusted by applying specific import taxes.

Internet is the most frequently used information source for obtaining daily prices (for ex., on the website of the Ministry of Agriculture and Forests from Romania, www.madr.ro are published monthly prices for basic agricultural products, collected from various selling points – agricultural markets, supermarkets, small stores, etc.). Also, it is difficult to determine product prices based on quality, etc., therefore the most useful information sources can be importers and product merchants.

CHAPTER 6. MARKET ACCESS

Import of goods on the EU market is regulated by a complex set of laws, regulations and standards. These regulations refer to tariffs, food security, and quality aspects. Moreover, fruit and vegetables market players have elaborated themselves a number of standards and requirements.

Customs Tariffs
In order to find out which import tax rate is applied it is necessary to know whether the product benefits/does not benefit from any preferences. It is essential to know the customs code of the product in the Harmonized System. It is possible to obtain a reduced rate if the product is exported from a country which has a preferential trade agreement with the EU.

Rules of origin
Products originating from countries with different preferential schemes can benefit from reduced rates only when these were 'integrally obtained' in the beneficiary country. The rules of origin stipulate that all fruits and vegetables are considered as being 'integrally obtained' in a country, if these were harvested in the specific country. To prove that rules of origin were respected, the exported must present the 'Certificate of Origin'.

The exporter is responsible to ensure that origin-related requirements are met. It is very important that all documents are presented, because prior to import customs authorities will verify if goods satisfy the rules of origin. If goods are not under a preferential treatment, the importer is obliged to pay the entire import tax rate.

Import Regulations
The European Union regulations regarding the import of fruits and vegetables refer to: quality, packaging, marking, labelling, information regarding nutrition, additives and food security control. These regulations are compulsory and an exporter must respect them in order to be able to sell products on the EU market. Additionally, importers, distributors and store networks usually set their own specific standards which refer to quality, transport, packaging, etc.

Quality Standards and Grading

EU has set merchandizing standards for quality and grading for a number of fresh fruits and vegetables; at the moment these are 40 (see table).

EU merchandizing standards	
EU merchandizing standards for fresh products applied to the following fruits and vegetables	
Fruits	**Vegetables**
Apples	Artichoke
Apricots	Asparagus
Avocado	Egg plant
Cherries	Beans
Grapes	Bruxelles cabbage
Kiwi	Cabbage
Lemon	Carrots

Mandarins	Cauliflower
Melons	Celery
Nectarines	Pumpkins
Oranges	Cucumbers
Peaches	Garlic
Pears	Iceberg green salad
Prunes	Leek
Satsuma mandarins	Endives green salad
Strawberries	Mushrooms (cultivated)
Water melon	Onion
Fruit mix	Peas
	Spinach
	Salads
	Sweet pepper
	Tomatoes
	Chicory
	Vegetable mix
Source: EU Regulation No48/2003	

Merchandizing standards include specifications regarding minimum quality, classification, dimensions, packaging and marking. Products that do not meet these standards cannot enter the EU market. Moreover, a Certificate of Conformity issued by an official control body, is required.

For products not included in the EU merchandizing standards are applied the UN standards. Even if these are not compulsory, they can be viewed as a guidance for what is considered minimum requirements.

Also it must be mentioned that lately the European Commission, at the request of fresh fruit and vegetables producers, revises certain quality requirements imposed on products merchandized in the commercial network. For example, the Commission's decision to allow merchandizing fresh 'non uniform' apples in the retail network with the condition that it is clearly specified that these products will be used for processing. Such kind of decisions will be adopted for other products as well.

Food safety

Imports of fresh/frozen fruit and vegetables in the EU must conform to general and specific provisions, intended to prevent public health risks.

A basic law regarding food, in force since 2005, includes general procedures regarding food safety and food products traceability. Other normative acts refer to food hygiene and contaminated substances from food. Also, there are special provisions regarding genetically modified products.

Imports of fresh products must conform to regulations regarding maximum levels of residues for a high number of pesticides.

More fruits and vegetables can be imported in EU with the condition that a phytosanitary certificate, issued by a plants protection authority from the yielding country, is presented during import at the entrance customs point.

Upon arrival a plants protection national body is authorised to inspect products in order to censure that the lot is free of pesticides quarantine and conforms to existent regulation of the importing country. A special fee is paid by the importer for this inspection.

Also, if fresh/frozen fruits and vegetables are sold as organic food, these must conform to EU regulations regarding ecological products.

Food Labelling

All food products sold in the European Union must conform to EU rules for labeling, both general and specific national provisions.

General rules applicable to fresh/frozen products stipulate that all labels must contain the name of the product, net quantity, minimal expiration date ('to be consumed before' or 'to be used until' date), special storing or using conditions, name and address of the producer, or wrapper/packer, or importer, place of origin, usage instructions, and for food products – marking on the container.

Additional Market Requirements

Transportation

The EU does not have specific official transportation rules. As a result it is the producer's or importer's sole responsibility to ensure that products are transported to reach the EU in good condition. Usually, a rapid and safe transportation is essential, as well as optimal climatic conditions during the entire transportation period.

Packing Requirements

Requirements with regard to packaging fresh fruit and vegetables are set by the Standard for general packing, marking, storing and transportation conditions STAS 6952-83. Hence, it stipulates that:

- Packages used to manipulate, transport, store and sell fresh fruits can be: cases, baskets, carrier bags, boxes and shelves;
- Fresh fruits and vegetables sold in presentation and self-service units can be sold in adequate packaging, for ex.: simple or perforated bags, shopping bags, etc.;
- Packaging accessories can be: alveolar platforms, baskets, labels, sheds, adhesive paper, staples, stuffing, etc.;
- Packages and accessories must ensure product ventilation and cooling, must be new or recycled, clean, without foreign flavour and must not modify quality features of the packed product;
- Each package must contain products of the same variety, specie (if such is the case), quality and calibre, must be homogeneous from the point of view of maturity degree and phytosanitary state.

Packages are marked with labels or directly on packaging gins. Packages are manipulated, transported and stored and will mark the following:

- Name of production unit or of the distribution unit;

- product name (if product cannot be seen from exterior);
- variety name (is such is the case);
- product quality and standard number;
- calibre (if necessary);
- net weight;
- number of packages (bags, etc.) and net content of a package.

Packages will be marked with the following:
- name of product distribution unit;
- product name (if product cannot be seen from exterior);
- soil name (if such is the case);
- quality and number of product standard;
- calibre (if necessary);
- net nominal content (without pointing out the tolerated error);
- packaging date;
- net nominal content price.

Marking is done using visible materials, which are resistant and do not diffuse in the marking machine.

The package type and volume differs depending on merchandised products and their beneficiary (retail network or HORECA).

Thus, there are three types of material used to package fresh fruits and vegetables: cardboard, plastic and wooden boxes. The number of layers in package vary from 1-4. In general for premium products are used wooden packages with one or two layers in which fruits and vegetables are stored in separate cells. Other products are placed in several layers, up to 4 per box. Some products can have individual packages, such as grapes which can be packaged additionally in polyethylene bags (one grape per bag). By weight packages differ depending on product, thus for apples are preferred wooden boxes of 12 kg with cells for each fruit or cardboard telescope boxes of 18 kg capacity (for mass use products); for grapes can be used wooden or plastic boxes and cardboard boxes of 4-8 kg capacity; for premium products is obligatory individual packaging (paper or plastic bag); tomatoes, peppers are packaged in wooden, plastic boxes or in cardboard boxes of 3-10 kg.

Frozen fruits and vegetables are wrapped in plastic bags with a weight between 450 gr. – 1 kg for retail trade products and of 2.5 kg in case of HORECA network.

Quality aspects

In general, the European market sets very high requirements regarding fresh/frozen fruits and vegetables. Other quality aspects are important as well: management, delivery safety, social responsibility and environment aspects. During the last years more international standards became vital for the European buyers of fresh/frozen products. The most applicable standards are the following:

-HACCP, analysis of critical control points risks, for quality management standards
-ISO 9000 series, standards for quality management and production process assurance
- ISO 14000 series, standards for environment management

- ISO 22000 series, standards for food safety management
- ISO 26000 series, the guidance standard for social responsibility (also called ISO SR)
- SA 8000, standard for social responsibility
- BRC global standard, food safety management standard
- EurepGAP (Good Agricultural Practice), standards for best agricultural practices.

Adopting these standards or working with similar quality system will, most probably, be an obligatory condition to compete successfully on the European market for fresh/frozen fruit and vegetables.

Also, individual importers, retailers groups, etc., might have their own set of quality specifications. These include manipulation with the product between harvesting and delivery, as well as packaging procedures and transportation. Thus it is recommended to verify together with the buyer the requirements regarding all quality types and other related issues.

CHAPTER 7. OPPORTUNITIES AND CONSTRAINTS

The market for fresh/frozen fruits and vegetables offers opportunities as well as constraints for Moldovan exporters. Opportunities are determined primarily by the ascending product consumption trend and the inability of domestic producers to satisfy the existent demand, it being the reason Romania became a net importer of fresh and frozen fruits and vegetables. In the future this situation might change with the consolidation of the Romanian sector for fruit and vegetable cultivation and processing, European investments in the irrigation systems, storing and processing capacities, thus increasing market competition and limiting market access especially for medium-sized producers. Romania's natural conditions (climate, agricultural land, etc.) and the availability of funds for the respective sector create the opportunity to regain the leading position in the fresh/frozen fruit and vegetables trade – situation registered until 1989.

7.1 Opportunities

The analysis of the consumption structure revealed that on the Romanian market could be successfully sold the following products:

- Fresh fruits – apples, grapes, peaches and nectarines;
- Fresh vegetables – tomatoes, sweet pepper, onion, cabbage and niche products (endives, cherry tomatoes, etc.);
- Frozen products – vegetables and mixes.

Fresh fruits

Apples: It is worth mentioning that the majority of Romanian consumers do not pay attention at the variety name and care more about the color and dimensions of the product. In general, only cheap apples are classified by colour, these being sold under the names "yellow apples", "green apples", "red apples". The variety name is important for 'premium' products, the most popular being Jonathan and Idared, followed by GoldenDelicios, Jonagold, Golster, Granny Smith, Starkinson, etc. By dimensions apples are classified in small with the diameter up to 70 mm, medium – 70-90 mm and big with a diameter of over 90 mm. Small apples are usually sold in agricultural markets and in little shops. In supermarkets and hypermarkets are sold big and medium-sized apples. The dimensions, besides other features have a considerable influence on the price – the bigger the diameter the higher the price. The packaging most preferred by merchants are one layered wooden boxes, preferably with cells which offer a nicer general aspect, intended to attract the consumer's attention. These boxes are used to pack apples of superior quality. For lower quality apples are used cupboard boxes in which apples are arranged in several layers. The quality aspects such as calibration, color selection, lack of defects (stains, bangs, different forms, etc.) are important for all merchants, and are obligatory if products are to be sold in store chains. Moreover, starting with 1 July, 2009 through the European Commission Directive the retail merchants were allowed to sell non-standard apples, which are generally used for processing, with the condition that the label contains the following inscription "for processing". This decision was adopted by the Commission taking into the consideration the following aspects: to obtain a quality product without defects are necessary special works and treatment in the vegetation period, which increases the cost of the product, and chemical treatment diminishes considerably their nutritive features.

Barriers which can diminish apple export refer to minimal import prices set for apples of outside-community origin, reducing considerably the competitive advantages of the Moldovan producers. The analysis of the medium import prices versus minimal import prices in the analysed period showed that prices of apples imported from the Community countries (for ex., Poland, Hungary) are below those set for exporters from the outside-community countries. At the moment the only opportunity for the Moldovan producers is to export premium products intended for store chains, which however must comply to quality, packaging, etc. requirements (described above). Also it is necessary to monitor the effects of the EC Directive with regard to non-standard apples which might open the 'door' for the Moldovan apples. The best selling period is between January-June, when the domestic production is disappearing on the market. The major competitors for the Moldovan apple producers are exporters from Poland, Hungary, Italy and Macedonia.

Grapes: It is a product with a consumption exceeding the general average and which in a significant proportion is covered from imports. Imports rise on annual basis, as well as the supply sources. The main features that attract consumers' attention are colour and dimensions of grapes. Preferences are given to grapes with big and sweet berries. The most popular varieties are: Hamburg, Cardinal, Muscat, Red globe, Victoria, Crimson, etc. Grapes must be packed in wooden or plastic cases, cupboard boxes where grapes are placed in a single layer. Besides big packages each grape must be wrapped in a plastic bag, especially when it is sold in chain stores. With regard to quality, the berries must be intact, without defects and clusters with relatively equal dimensions and weight, these requirements being obligatory if sold in supermarkets. The analysis of medium import prices versus minimal imposed prices shows that the biggest majority of imported grapes are over the minimal imposed prices, which represents an opportunity for the exporters from Moldova. The main competitors are: Greece, Turkey, South Africa, Holland, Italy, France, Spain, Hungary, Chile, Poland, Slovenia. The best period to sell grapes is between January-July when import prices are maximal, determined first of all by imports from South Africa, Chile, etc.. For the Moldovan producers it seems to be of a great export potential if quality requirements are met and if supplied in the January-July period.

Peaches and nectarines: These are products with a high consumption rhythm covered considerably from imports (around 70%). Consumers consider important the dimensions, colour, form and taste of the fruit. Most preferred are products with intense colours. The imported varieties are Redhaven for peaches and Stark Red Gold for nectarines. Quality requirements refer to calibration, lack of product deteriorations. There are two types of packaging on the market – with 2 and with 4 layers, with cells. An important factor that determines the acquisition is the price. The cheapest are the domestic products positioned on the lower market segment. Among cheapest imported products are peaches and nectarines imported from Serbia and Turkey. Also, the basic player of the Romanian market is Greece; its products are in the middle market segment in terms of price. Another important players are Italy and Spain. With regard to import price, those originating from the Community area enter Romania with higher prices then minimal prices set for imports from countries outside the Community, which creates opportunities for the Moldovan exporters. The period with highest imports is between June-August.

Other fruits that can be exported on the Romanian market are pears, cherries, sour cherries and apricots. Despite the highest import and consumption rhythms in the analysed period, their share in the total products sold is not significant, thus being considered as niche products (not as relevant for pears).

Fresh vegetables

Tomatoes : The main imported product from the vegetables category. Consumers distinguish these products by form (round, in the form of prune, pear, etc.), dimensions and colour (yellow, green, red), varieties being of no significance. Red tomatoes of medium dimensions are the most preferred by consumers. The packaging used by merchants are wooden, cupboard or plastic cases with a 5-10 kg capacity. Quality requirements refer to calibration, sorting, colour, product uniformity, without deteriorations. The main competitors are Turkey, Holland, Poland, Spain, Italy, Hungary. As in case of fruits, minimal entry prices are applied, however taking into account that customs duties for tomatoes exported from Moldova are similar to those from Turkey - one of the main tomatoes exporter on the Romanian market, we can conclude that even for the Moldovan producers there are opportunities on this market. The main requirements which must be met refer to supplying capacities during the entire year and quality standards.

Onion : Another product with a significant import and consumption share. Products are differentiated by colour (yellow, red onion), variety being of no importance. Usually they are sold in nets of a capacity of up 20 kg to wholesale merchants, and in 1-2 kg capacity nets in chain stores. As for other products, calibration, colour sorting and also humidity requirements must be respected. Usually re-packaging is made by the importer. The main competitors are: Poland, Italy, Spain, Holland, Turkey, Egypt, Ukraine. For Moldova the main competitors are countries outside the community area. The advantages of Moldovan producers would be the distance and market entry preferential tariffs (especially comparing to products imported from Ukraine). The seasonality of imports is not prominent, imports decreasing in periods when the market is supplied with domestic production.

Sweet pepper: Is a product with a constant consumption during the year, which increases in the summer period due to its availability on the market and attractive prices. Consumers classify products by colour (red, yellow, orange, green). The most demanded are red peppers, and less demanded are green peppers (which prevail in Moldova). Peppers are packed mainly in cupboard boxes or wooden/plastic cases. Besides colour and dimensions the price is another main purchasing factor. The quality requirements which must be respected are similar to those applied to other products (sorted by dimensions, colour, etc.). The best selling period is between November-May when prices are the highest and domestic production is practically absent on the market.

Other exported vegetables are : carrots, egg-plants, and niche products such as endives, kohlrabi, cauliflower, cherry tomatoes.

Frozen vegetables

Within this product group can are distinguished two categories – one vegetable product (peas being mostly demanded) and mixes (rise mixes being on top). Tariff preferences, market proximity, local natural conditions, Romanian market trends offer good opportunities for Moldovan producers to launch products with competitive price and quality. The demand is relatively constant during the year, registering a slight increase of sales during holidays and fasting periods. Moldovan producers can try to supply pre-packed products for retail or Horeca sector, or can supply in bulk (bigger packaging) to producing companies, with subsequent packaging under their brand name, thus avoiding additional costs related to promoting products in order to succeed on the market.

Frozen fruits

According to distributors of frozen products the demand of frozen fruits on the Romanian market is minimal and does not present any interest.

Selling period

The most profitable selling period of imported products are the off-season months (November-June, depending on the product) for fresh fruit and vegetables and the entire year for frozen vegetables. The domestic production is abundant during the rest of the year at prices lower than those which can be officered by the Moldovan producers (due to minimal import prices) which makes their offer not competitive.

Market access

It is recommended to access the market through importers with an adequate distribution and logistical network. Products must adjusted and portfolio created at importers recommendations, as well as taking into account the market segment which is targeted by the exporter (supermarkets, small shops, HORECA). Store chains offer more opportunities to suppliers which can ensure constant supply during the year and have a big product offer. If the producer can satisfy the demands of chain stores, the delivery can be made directly through producer's own company registered in Romania, thus avoiding several links of the distribution chain. Also it must be taken into account that exporters who wish to enter the market must compete with the existent suppliers and must have comparative advantages in terms of price, quality, delivery terms or delivery period.

7.2 CONSTRAINTS

The main constraint for the Moldovan producers refers to supply capacities in terms of volume, product rage, quality level and availability of products especially during off-season periods. Large importers and store networks prefer to work with a limited number of efficient suppliers (on time, all year, in compliance with agreed quality requirements, and with wide product range). For Moldovan producers, most of them small exporters with a limited product range, the only possibility to increase their delivery capacity in terms of volume and product range can be made by uniting efforts and creating groups of exporters, thus increasing the chances to attract the attention of important buyers. Ignoring this fact can lead to limiting export possibilities for small importers which operate on limited market segments, generally on 'economy' segment (low prices). On long term this segment will develop and will leave no space for small importers which will eventually lead to loosing the market for the exporter.

Other possible constraints for the Moldovan exporters are minimal import prices and imposed quality standards.

7.3 CONCLUSIONS

The general conclusion of the study is that the Romanian market can become a strategic market for the Moldovan producers. The main advantages are the dimensions, consumption level, trends and the proximity - an important factor for perishable products. In order to succeed on the market a special attention must be paid to quality aspects and specifically to sorting, calibration, packaging and standards compliance. It is suggested to create alliances between Moldovan producers and large Romanian importers to make a product portfolio and adjust products to the market requirements. Importers are the main information source regarding the multitude of aspects that must be fulfilled by producers from Moldova. Thus risks and costs related to accessing the market will be minimized.

ANNEX 1 LIST OF IMPORTERS

Below are presented several important players on the fresh & frozen fruits and vegetables market

Fresh fruits and vegetables

1. Interfruct
Address : Soseaua Centura Dreapta 4A, Afumati / Ilfov, Romania
Tel. : +40-21-3522248, 3522249, 3522250, 3522251
Fax : +40-31-8174799, +40-21-3522252
E-mail : office@interfruct.ro

Field of activity : Import and distribution of fresh fruits and vegetables, around 120 products.

Description : The company operates in a 3,000 sq.m. warehouse divided in several refrigerating spaces. Products are purchased internally during the season, and externally during the off-season periods. The company owns sorting and packaging lines for fruits and vegetables (hard and delicate) in small dimensions packages for the retail network. Products are distributed on the entire territory of Romania. The distribution channels are covered by HORECA, all international networks from hypermarkets to supermarkets.

2. Asil 2000 Trading

Address : Soseaua Bucharest - Urziceni, nr. 1A, SUMARKET, Judet Ilfov.
Tel/Fax : +40213690909

Field of activity : Import and distribution of fresh fruits and vegetables, all types of fruits and vegetables

Description : The company operates in a modern warehouse, HACCP certified. Products are purchased mainly from the externally. Suppliers are: Poland, Bulgaria, Chile, Paraguay, Brazil, Turkey, Italy, Spain, Austria, South African Republic, Egypt, etc. Products are sold by wholesalers and regional distributors through the entire territory of Romania.

3. Atacret

Address: Soseaua Borsului, Oradea, judet Bihor, Romania
Tel. : 0259/463988, 0259/470007, 0259/470472, 0259/479945

Field of activity : Import and distribution of fresh fruits and vegetables

Description : Medium-size company, importer and distributor of fresh fruits and vegetables especially in the Western zone of Romania. Company clients are small wholesalers, retailers and Horeca from the covered zone. Product range includes all types of fresh fruits and vegetables.

4. Romfruit Comex

Address : str. Poetului, nr.97-1 Arad, Romania
Tel. :+40-(257)-270633
Fax : +40-(257)-270633
E- mail :contact@romfruit.ro

Field of activity: Import and distribution of fresh fruit and vegetables.

Description : A company with its own logistics necessary for import, storing, sorting and distributing fresh fruits. Coverage – entire Romania. Supplies most international networks from Romania. Its production includes the entire range of fruits and vegetables. Among its clients, besides store chains, are wholesalers, bulk markets and distributors.

5. Livcom Impex

Address : Sos. Pantelimonnr.119 bl.205 sc.A, ap.28, sector 2, Bucharest, Romania
Tel. : +40-21-250.64.73/ 250.19.27
E-mail : contact@livcom.ro

Field of activity: Distribution of fresh fruits and vegetables

Description : The company is a distributor of fresh fruits and vegetables in Bucharest municipality. The distribution chain includes clients from HORECA sector. The company is one of the biggest suppliers from the respective sector. It has its own logistics (refrigerating spaces and cars to transport products). The production range includes all types of fruits and vegetables which are requested in the respective sector. Products are purchased on internal and external markets.

6. Grup XL Company

Address : Calea Chisinaului, nr. 35, Iasi, Romania
Tel. : 0232 227 282,
Fax : 0232 224 554,
E-mail : iasi@depozitxl.ro

Field of activity : Import and distribution of fresh fruits and vegetables.

Description : The company operates mainly within four judets in the North-Eastern zone of Romania. In each judet the company has its own cooling warehouses of 600-1500 sq. m.. Warehouses are divided into ecological cooling cells equipped with electronic atmospheric control counters. The production range includes all types of fruits and vegetables purchased from local producers and imported from the following countries: Syria, Slovenia, Spain, Turkey, Hungary, Austria, Belgium, Denmark, France, Germany, Macedonia, Holland, Greece, Poland, Italy. Products are distributed directly by companies to retail network and Horeca from those 4 judets. It is one of the most important merchants of these products from the Eastern region of Romania.

7. Turanto Trading Company

Address : Str. Baltagului, nr. 19 Piatra-Neamt, Judet Neamt, Romania
Tel./Fax : +4.0233233401
Tel./Fax : +4.0233233408
E-mail : office@turanto.ro

Field of activity : Import and distribution of fresh fruits and vegetables.

Description : the company imports and distributes mainly fresh fruits. The production range includes all types of domestic and exotic fruits. Products are distributed within Neamn judet to HORECA and retail network.

8. Farcas Company

Address : Str Ion Anestin, nr. 3, bl. 91 A1, sc. 1, ap. 47, Craiova
Tel./Fax : 0040 351 172 368

Field of activity : Import and distribution of fresh fruits and vegetables

Description : A company with private capital founded din 2008. At present it's one of the most important merchants of fresh fruits and vegetables from Oltenia zone. The company offers all basic fruits and vegetables: apples, pears, grapes, tomatoes, cucumbers, onion, potatoes, etc. Products are purchased locally and imported. Company clients are small wholesalers and independent retailers. It is an ascending company.

9. Abbara trading Co

Address : Str. Barsei nr. 2, Voluntari, judetul Ilfov, Romania
Tel. : +4021 352 94 42
Fax : +4021 352 94 42
E-mail : office@abbara.ro

Field of activity : Import and distribution of fresh fruits and vegetables

Description : Private capital company, 12 years operating on the fresh fruit and vegetables market from Romania. Products are imported from Europe, Asia, South Africa, as well as purchased in Romania. It owns a warehouse with refrigerators with a storing capacity of 1300 sq. m. Products are distributed throughout the entire territory of Romania. Distribution companies are its clients – around 50 companies, hypermarket and supermarket networks, such as Auchan, Cora, Interex, Kaufland, La Fourmi, Mega Image, Minimax, Plus Discount, Real.

10. Sachiri RO

Address : Sos. Colentina 58 Bucharest, Romania
Tel./Fax: +40212401519

Field of activity : Import and distribution of fresh fruits and vegetables

Frozen vegetables and fruits

1. Agroalim distribution

Address : Calea Vitan, nr. 242, Corp C17, Sector 3, Bucharest, Romania
Tel. : +4021 200 63 00
Fax : +4021 200 63 01
E-mail : office@agroalim.ro

Field of activity : Import and distribution of frozen products

Description : Is a national leader distributing frozen products. Owns the biggest refrigerating warehouse from Romania, within which was created a company for freezing fruits and vegetables (Frigorifer, Tulcea). With its won distribution network in Romania which includes storing spaces, delivery cars, etc. (13 refrigerating warehouses) with a total sorting capacity of around 25000 tonnes of frozen products. The company offers its services to local and foreign producers in distributing frozen products throughout Romania, storing frozen products, marketing support to promote brands.

2. Impex Bock

Address : Str. 9 Mai nr.3, Arad, Romania
Tel. : +40 257281177
Fax : +40 257210211

Field of activity : Food distribution

Description : A Romanian-German company founded in 1994, importing and distributing premium food products. Company portfolio includes frozen products, quality products, well known international brands. With its headquarters in Arad it coordinates the entire import and distribution activity at the national level. The distribution network covers 38 judets, over 80 towns and over 1200 clients. The entire distribution activity is coordinated by 5 distribution centers: Arad, Bucharest, Brasov, Iasi and Constanta. Logistics include 50 vehicles (refrigerating tracks, microbuses and cars) and aprox. 800 refrigerating cases, placed in clients' offices.

3. Macromex

Address :Strada Mihai Eminescu, Nr. 27, Bucharest, Sector 1
Tel. :+40212066900
Fax :+40212066999

Field of activity :Import and distribution of frozen products

Description : The company is specialised in selling refrigerated and frozen products. It's production range includes frozen vegetables and fruits, frozen meat, frozen fish. It imports frozen products: packed and in bulk, with subsequent packaging under own Gatrononimia brand. Products are distributed in store chains. On frozen vegetables segment this company is one of market leaders.

4. Legofruct

Address : Dumbravita, judet Timis , Romania
Tel.: :+40 256244296
Fax :+40 256369001
E-mail : office@legofruct.ro

Main field of activity : Production and distribution of frozen vegetables and fruits

Description : One of the 2 biggest producers of frozen fruits and vegetables on Romanian market. The raw material used is of domestic origin and imported (can be a buyer for fresh fruits and vegetables). Products are sold through an own distribution network, covering the entire territory of Romania. Production range includes frozen fruits and vegetables, vegetable mixes, etc..

5. Nordic import export

Address : Calea Vitan, nr. 240A, sector 3 Bucharest, Romania
Tel. : +40213464557
Fax : +40213464556

Field of activity : Import and distribution of food products

Description : One of the biggest importers and distributors of food products from Romania. Its portfolio includes products for direct consumption and intermediary products (semi-finished, raw materials) for productive sector (confectionary, pastry, etc.). It's one of the important players in selling frozen fruits and vegetables. With its own logistics in Bucharest it serves HORECA clients, traditional retailers and store chains. Distribution at the national level is made through zone distributors.

ANNEX 2 IMPORT STATISTICS

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
08061090							
Fresh grapes (excl.table grapes)							
	Total import	**143.37**	**269.76**	**1199.81**	**608.4**	**838.1**	**1727.1**
	Argentina	0.6			1.1		
	Brazil	4.74			3.1		
	Lebanon	0.19			0		
	Macedonia	6.71		24.72	37.1		102.7
	Republic of Moldova	28.94	3.03	37.62	140.6	18.3	117.9
	Serbia			0.02			0.2
	South Africa	0.61			1.8		
	Turkey	4.03	0.2	26.81	23.2	0.8	79.7
	Ukraine			7.01			18.7
	Total EXTRA-EUR27	**45.82**	**3.23**	**96.18**	**206.9**	**19.1**	**319.2**
	Greece	58.74	135.45	693.24	296.9	426.9	1132.2
	Hungary		122.73	27.66		368.8	11.6
	Italy	36.99	8.35	364.95	98.8	23.3	248.4
	Holland			0.22			0.1
	Spain	1.82		17.56	5.8		15.6
	Total INTRA-EUR27	**97.55**	**266.53**	**1103.63**	**401.5**	**819**	**1407.9**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
08061010 **Fresh table grapes**							
	Total import	**4273.6**	**5378.5**	**12986.07**	**17693**	**18576**	**17357**
	Antigua and Barbuda	1.49	3.66		4	11.3	
	Argentina	22.68	48.76	13.32	68.6	109.7	36.7
	Australia	1.68			4		
	Brazil	5.99	4.99		13.7	13	
	Chile	101.56	179.89	5.71	284.6	432.1	18.7
	China	0.02			0.1		
	Ecuador		1.97			4.7	
	Egypt	0.95	7.22	27.61	0.5	17.8	52.5
	India		16.54	4.74		45.3	15.9
	Israel	1.03			0.6		
	Jordan	5.06			15.6		
	Lebanon	4.35	25.52	62.97	10.4	77.1	175.2
	Macedonia	130.18	122.83	332.1	697.5	1185.4	1592.3
	Moldova	64.31	48.2	70.9	276.2	213.4	218
	Montenegro			3.44			8.4
	Morocco	0.58			2.9		
	Namibia	2.19	6.55		5.5	14.1	
	Panama		1.52			4.9	
	Peru	1.62	5.84		9.6	13.5	
	Saudi Arabia	0.48	2.68		2.2	6.9	
	Serbia			4.63			15.4
	South Africa	147.71	330.06	80.41	369.7	715.6	80.8
	Syrian Arab Republic	1.82	15.25	0.3	5.4	58	0.6
	Turkey	1801.17	1200.17	1497.56	8157.6	4916	3385.5
	Ukraine			6.75			18
	Zimbabwe		1.43			4.5	
	Total EXTRA-EUR27	**2294.9**	**2023.1**	**2110.44**	**9928.7**	**7843.3**	**5618**
	Belgium			123.72			68.6
	Czech Republic			1.16			0.7
	France	0.32		30.32	0.7		17
	Germany			509.06			483.6
	Greece	1053.57	1130.37	3123.83	5292.7	5106.2	4497
	Hungary		9.9	11.66		48.5	8.2
	Italy	871.01	2166.61	4566.43	2256.2	5479.9	4936.9
	Malta			7.64			4.6
	Netherlands		0.25	1294.89		0.8	730.9
	Poland			10.2			27.3
	Slovenia		3.93	77		14.7	142.7
	Spain	53.82	44.36	1119.72	214.4	82.3	821.5
	Total INTRA-EUR27	**1978.7**	**3355.4**	**10875.63**	**7764**	**10732**	**11739**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
08071100 Fresh watermelons							
	Total import	**700.21**	**830.56**	**2361.7**	**6389.1**	**7034.4**	**14284.4**
	Albania		1.13			24.2	
	Azerbaijan			1.95			18
	Bosnia and Herzegovina		0.05	1.5		1.6	29.3
	Brazil	10.94	7.8	0.21	32.9	29.6	1.2
	Chile	0.19			0.6		
	Costa Rica	5.89	11.96		25.7	24.8	
	Dominican Republic		0.21			0.2	
	Ecuador	15.12	5.24		47.1	14.3	
	Egypt	55.36	17.76	28.43	403.8	185.9	150.4
	Guatemala	0.98	0.06		3.9	0.2	
	Honduras	2.92			7.2		
	Iran		3.51			39.5	
	Israel	0.05			0.5		
	Jordan	128.41	145.23	215.38	1295	1363.6	1617
	Macedonia	23.17	22.89	103.85	228.7	634.1	1150.8
	Mexico	0.07	0.01		0.3	0	
	Panama	3.31	16.85		11.5	33.3	
	Peru	0.26			2.9		
	Serbia			123.75			1796.5
	Syrian Arab Republic	3.6	5.13		36.7	56.6	
	Turkey	246.8	167.13	335.13	2366.9	1836	2562.8
	Ukraine			14.08			80
	Countries and territories not specified	8.37	9.12		190.6	234	
	Total EXTRA-EUR27	**505.44**	**414.08**	**824.28**	**4654.3**	**4477.9**	**7406**
	Belgium			0.69			0.9
	Bulgaria			13.37			131.5
	Czech Republic			21.42			25.3
	France			1.21			2.7
	Germany			24.4			53.1
	Greece	187.77	347.51	867.8	1670.4	2329.3	4782
	Hungary	0.06		258.06	0.5		1206.7
	Italy	1.71	52.1	181.61	26.5	199.6	378.5
	Netherlands			114.94			157.8
	Poland			1.48			10
	Slovenia			3.48			5.2
	Spain	5.23	16.87	48.96	37.4	27.6	124.7
	Total INTRA-EUR27	**194.77**	**416.48**	**1537.42**	**1734.8**	**2556.5**	**6878.4**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
08071900 **Fresh melons (excl.watermelons)**							
	Total import	**393.05**	**472.04**	**1470.69**	**3096.2**	**2854.1**	**4631**
	Brazil	39.27	42.07	0.6	85.5	97.6	1.8
	Chile	0.19			0.6		
	Costa Rica	8.01	26.67		19.6	40	
	Dominican Republic		0.06			0.3	
	Ecuador	0.32	0.37		0.9	0.6	
	Egypt	1.57	1.38		9.1	10.1	
	Honduras	1.96	13.31		3.5	21.9	
	Israel	2.05	0.11		9.9	1	
	Jordan	2.08	1	2.54	19.7	8.5	20.5
	Korea ,Republic of	0.02			0		
	Macedonia	0.59	0.73	0.29	4.9	8.7	2.8
	Mexico	0.02			0.1		
	Morocco	0.27	2.43		1.6	2.7	
	Panama	2.78	6.28		6.1	14.3	
	Serbia			0.27			4.5
	Turkey	313.43	253.17	416.53	2861.2	2397.6	3351.5
	Venezuela	0.25			0.7		
	Vietnam		0.22			0.5	
	Zimbabwe	0.06			0.2		
	Countries and territories not specified	0.4	1.85		5	61.8	
	Total EXTRA-EUR27	**373.27**	**349.65**	**420.23**	**3028.6**	**2665.6**	**3381.1**
	Austria			7.74			3.1
	Belgium			4.35			18
	Czech Republic			0.58			0.5
	France	0.03	0.95	0.53	0.1	0.7	0.2
	Germany			30.13			33
	Greece		27.85	87.96		39.7	199.2
	Hungary			12.87			26.1
	Italy	6.8	78.62	451.51	31.4	100.7	418.1
	Netherlands			374.16			427.6
	Portugal		0.03			0	
	Slovenia			2.85			5.1
	Spain	12.95	14.94	77.78	36.1	47.4	119
	Total INTRA-EUR27	**19.78**	**122.39**	**1050.46**	**67.6**	**188.5**	**1249.9**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
080810 **Fresh apples**							
	Total import	**11333.2**	**12158**	**22271.04**	**85985**	**78331**	**53991.3**
	Argentina	26.78	42.48	15.28	118.9	142.7	21.2
	Bosnia and Herzegovina		1.18			10.7	
	Brazil	1.45	2.36		3.3	14	
	Chile	62.29	67.35	59.43	207.5	299.9	82.4
	China	32.17	35.22	30.73	86.7	134.4	47.5
	Costa Rica	0.47			0.7		
	Croatia		4.06			17.7	
	India	0.1			0.3		
	Iran	2.23			9.7		
	Israel	0.01			0		
	Lebanon	0.73			0.2		
	Macedonia	15.58	872.93	1493.3	80.5	9428	7252.9
	Moldova	1898.9	1677.61	1299.27	25103.6	15811.5	7043.2
	New Zealand	18.76	0.34		73.9	2	
	Nicaragua		0.58			1.7	
	Panama	0.23			0.3		
	Serbia			59.03			264.2
	Serbia and Montenegro	13.29			155.2		
	South Africa	4.73	1.74		18.8	8.3	
	Switzerland		4.73			17.5	
	Syrian Arab Republic		0.23	4.08		1	7.8
	Turkey	89.92	72.79	106.27	388.3	411.9	218.3
	Countries and territories not specified	39.76	220.89		427.8	2270.5	
	Total EXTRA-EUR27	**2207.4**	**3004.5**	**3067.39**	**26676**	**28572**	**14937.5**
	Austria	609.1	1192.77	2248.87	2967.2	6952.1	3698.5
	Belgium	151.39	122.07	306.14	728.1	512.5	513.8
	Bulgaria			36.03			258.1
	Czech Republic	2.18		127.93	8.2		430.3
	France	85.48	122.74	25.22	324.7	507.8	28.1
	Germany	212.15	126.47	535.77	902.2	512.6	1014.8
	Greece	156.44	184.35	945.12	823.3	971	1835.8
	Hungary	937.44	1376.31	3287.28	7200.6	9564.9	6886.3
	Ireland			0.53			0.9
	Italy	1211.2	2820.82	6104.78	4899.5	10794.2	10506.6
	Netherlands	778.36	331.75	1524.26	3301.8	1500	1809.1
	Poland	4915.56	2599.57	3348.75	37843.9	17112.7	10525.6
	Portugal			2.6			16.4
	Slovenia	39.76	27.35	348.35	195.6	203.9	1138.7
	Spain	26.72	249.56	362.02	114.2	1127.8	390.8
	Total INTRA-EUR27	**9125.78**	**9153.8**	**19203.65**	**59309**	**49760**	**39053.8**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
080820 **Freshe pears and quinces**							
	Total import	**1598.07**	**2930.9**	**6623.22**	**6133.5**	**9795.7**	**10933**
	Antigua and Barbuda	0.56	0.51		2.7	2.1	
	Argentina	105.09	23.27		402.8	80.6	
	Chile	38.6	17.14		128.7	57.5	
	China	159.35	123.27	195.16	567.9	442.8	445.6
	Colombia	0.41	0.41		0.2	0.3	
	Costa Rica		0.34			1.4	
	Côte d'Ivoire	0.18			0.9		
	Guatemala	0.01			0		
	Israel		0.04			0	
	Japan	1.13			0.9		
	Jordan	3.95			19		
	Lebanon	2.73	3.46		9.3	10.3	
	Macedonia		0.03			0.3	
	Saudi Arabia	0.36	0.72		1.4	0.6	
	Serbia			4.62			16.6
	South Africa	49.99	8.21	17.17	155.1	30.7	22.5
	Switzerland		0.08			0.4	
	Syrian Arab Republic	0.09			0.3		
	Turkey	671.41	272.58	622.71	2783.1	1359.8	1808
	United States	0.3	0.45		1	1.7	
	Countries and territories not specified	1.27	0.52		9	3.5	
	Total EXTRA-EUR27	**1035.43**	**451.03**	**839.66**	**4082.3**	**1992**	**2292.7**
	Austria		0.54	9.64		2.7	17.7
	Belgium	10.46	7.57	206.63	24.7	29.2	357.4
	Bulgaria			0.52			1.9
	Czech Republic			60.58			61.6
	France	2.75	15.47	3.8	9.7	71	5.6
	Germany	0.37	17.85	180.69	1.8	84	198.1
	Greece	19.58	133.16	424.69	91.2	553.5	770.7
	Hungary	94.73	2.85	104.51	498.6	14.2	120
	Italy	302.99	1922.19	3185.89	913.2	5642	4542.4
	Netherlands	102.27	155.4	1249.92	386.6	613.6	1897.3
	Poland	0.42	19.74	6.71	2.2	88.2	23.7
	Portugal			35.82			84.1
	Slovenia		8.58	66.74		38.7	153.9
	Spain	29.07	196.48	247.42	123.2	666.6	405.9
	Total INTRA-EUR27	**562.64**	**2479.8**	**5783.56**	**2051.2**	**7803.7**	**8640.3**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
08091000 **Fresh apricots**							
	Total import	**528.6**	**629.51**	**1509.04**	**2148.4**	**2191.9**	**2421.9**
	Australia	0.02	0.01		0	0	
	Chile	0.24	0.62		0.7	0.1	
	Egypt	0.47			1.9		
	Jordan	0.26			1.1		
	Lebanon	0.26			0.1		
	Macedonia		0.14			1.8	
	New Zealand	0.1	0.44		0.1	0.6	
	Saudi Arabia	0.23			1		
	Serbia			8.95			28
	South Africa	0.64	1.57	0.08	1.1	2.3	0.2
	Syrian Arab Republic	1.5	1.73		6.3	7.3	
	Turkey	184.66	242.66	434.89	774.9	958.6	751.1
	Countries and territories not specified	3.25	14.94		19.5	47.8	
	Total EXTRA-EUR27	**191.63**	**262.11**	**443.92**	**806.7**	**1018.5**	**779.3**
	Bulgaria			12.92			19
	France	1.01	0.61		4	1	
	Germany			8.96			14
	Greece	322.5	257.63	862.82	1287.4	957.5	1483.4
	Hungary		1.76	0.44		11.5	0.8
	Italy		36.82	107.8		77.6	78.8
	Netherlands			21.77			3.4
	Poland			3.64			2
	Slovenia			9.12			12.8
	Spain	13.46	70.58	37.65	50.3	125.8	28.4
	Total INTRA-EUR27	**336.97**	**367.4**	**1065.12**	**1341.7**	**1173.4**	**1642.6**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
080920 Fresh cherries							
	Total import	**47.94**	**108.73**	**439.5**	**184.5**	**235**	**379.9**
	Argentina	0.6	1.45		0.5	1.2	
	Australia	0.61	0.52		0.5	0.5	
	Chile	0.77	2.48	6.21	1.7	1.6	0.7
	Lebanon	0.4			0.1		
	Moldova	2.84	1.98		19.9	17	
	New Zealand	0.23			0.2		
	Norway		0.01			0	
	Serbia			47.93			154.9
	Serbia and Montenegro	0.7			1.9		
	Syrian Arab Republic		0.26	16.96		0.9	19
	Turkey	31.54	11.32	83.16	111.2	41.9	80
	United States		0.01			0	
	Countries and territories not specified	7.57	2.92		42	27.6	
	Total EXTRA-EUR27	**45.26**	**20.95**	**154.26**	**178**	**90.7**	**254.6**
	Belgium			0.79			0.2
	Bulgaria			0.66			0.7
	France	0.09		0.02	0.2		0
	Germany			10.96			5.9
	Greece	1.43	12.36	60.5	5	34.2	62.7
	Hungary		1.02	2.9		7	1.7
	Italy	0.97	17.9	110.21	1.1	12.8	37.2
	Netherlands	0.09		92.77	0		7.6
	Poland		26.96			60.9	
	Slovenia			0.76			0.7
	Spain	0.1	29.54	5.67	0.2	29.4	8.6
	Total INTRA-EUR27	**2.68**	**87.78**	**285.24**	**6.5**	**144.3**	**125.3**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
080930 **Fresh peaches and nectarines**							
	Total import	**7543.24**	**6609.4**	**17549.1**	**32505**	**28672**	**30330.9**
	Argentina	15.99	8.49		9.3	18.4	
	Australia		0.08			0.2	
	Brazil		0.02			0.1	
	Chile	19.78	20.18	0.13	34	40.8	0.2
	China	2.17			2.2		
	Egypt	22.09	6.43	21.69	27.3	23.1	15
	Israel		0.42			0.6	
	Jordan	0.32	51.71		1.5	184.4	
	Lebanon	0.52			0.2		
	Macedonia	21.74	70.34	40.38	97.2	760.4	140
	Morocco	0.63			1.3		
	Peru	0.03			0		
	Saudi Arabia	6.34	3.28		30.5	16.4	
	Serbia			933.3			3285.2
	South Africa	1.64	3.96	0.13	3.5	2.8	0.1
	Switzerland	0.27	0.3		1.4	1.2	
	Syrian Arab Republic	0.43	1.6		1.8	6.8	
	Turkey	867.36	819.16	697.15	3897.3	3410.7	1255.6
	Zimbabwe	0.04	0.08		0	0.1	
	Countries and territories not specified	588.67	518.16		2844	5872.6	
	Total EXTRA-EUR27	**1548.02**	**1504.2**	**1692.78**	**6951.5**	**10339**	**4696.1**
	Czech Republic			7.17			4.8
	Denmark			0.47			0.3
	France	0.08		144.63	0.2		130
	Germany			388.98			410.8
	Greece	5217.13	3521.55	9876.45	22508.6	13969.4	18140.9
	Hungary		1.04	34.45		3.1	45.8
	Italy	520.7	906.97	3105.74	2091	2665.9	3937.6
	Malta			0.13			0.1
	Netherlands			334.11			153.6
	Poland	0.79		0.91	3		1.6
	Slovenia			51.71			96.9
	Spain	256.52	675.58	1911.54	950.4	1694.9	2712.4
	Total INTRA-EUR27	**5995.22**	**5105.1**	**15856.3**	**25553**	**18333**	**25634.8**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
080940 Fresh prunes							
	Total import	**104.07**	**164.42**	**766.65**	**335.3**	**301.8**	**1420**
	Argentina	1.73	6.18		5.4	9.2	
	Bosnia and Herzegovina			7.29			59.8
	Chile	19.08	36.15		26.6	37.9	
	Egypt	0.12			0.1		
	Israel		0.29			0.6	
	Lebanon	0.34			0.1		
	Macedonia			11.29			77.6
	Moldova	1.03			9		
	Saudi Arabia	0.01	0.03		0	0.1	
	Serbia			61.36			492.6
	South Africa	4.83	2.26	0.07	8.6	5.2	0.1
	Switzerland	0.34			1.4		
	Syrian Arab Republic	0.4	0.61		1.7	2.6	
	Turkey	18.49	6.06	4.75	63.8	23.8	6.2
	Zimbabwe	0.12	0.39		0.3	0.8	
	Countries and territories not specified	2.22			11.1		
	Total EXTRA-EUR27	**48.71**	**51.97**	**84.76**	**128.1**	**80.2**	**636.3**
	France		0.1			0.2	
	Germany			18.41			27.7
	Greece	29.65	18.7	244.56	109.9	74.6	342.7
	Hungary		4.73	10.64		31	12.1
	Italy	10.11	65.21	183.68	29.3	81	194.2
	Netherlands		0.8	174.89		0.6	127.7
	Poland			1.16			9.1
	Slovenia			3.08			3.8
	Spain	15.6	22.91	45.47	68	34.2	66.4
	Total INTRA-EUR27	**55.36**	**112.45**	**681.89**	**207.2**	**221.6**	**783.7**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
08101000 Fresh strawberries							
	Total import	**891.27**	**1167.3**	**2753.29**	**2965**	**3479.7**	**4922.5**
	Egypt	29.19	26.35	66.52	20.7	15.5	24.2
	Israel	0.52	0.23		0.9	0.4	
	Jordan		0.01			0	
	Morocco	0.57			1.9		
	New Zealand		0.08			0.1	
	Serbia			23.42			73.1
	Serbia and Montenegro	3.27			17.6		
	Turkey	796.93	859.3	1476.37	2764.8	3004.3	4181.7
	Countries and territories not specified	0.89	14.7		4.4	76	
	Total EXTRA-EUR27	**831.37**	**900.67**	**1566.31**	**2810.3**	**3096.3**	**4279**
	Austria			3.5			2.2
	Belgium	0.01			0		
	France			0.59			0.8
	Germany		0.48	14.15		0.2	8.3
	Greece	11.38	52.23	686.6	42.1	172.3	427
	Hungary			15.94			6.4
	Italy	4.82	117.63	298.61	16.3	64.6	139
	Netherlands	3.86	23.61	136.6	6.7	17.5	23.7
	Poland	1.55	0.42		9.2	1.6	
	Portugal	0.01			0		
	Slovenia			10.32			10.2
	Spain	38.27	72.22	20.67	80.4	127.2	25.9
	Total INTRA-EUR27	**59.9**	**266.59**	**1186.98**	**154.7**	**383.4**	**643.5**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
081020 Fresh raspberries, blackberries, mulberries and their hybrides							
	Total import	**6.19**	**6.68**	**233.31**	**3.2**	**4.7**	**18.3**
	Brazil	0.04			0		
	Chile	0.36	0.15		0.3	0.1	
	Guatemala	0.1			0		
	Mexico	0.8	1.18	0.04	0.5	0.9	0
	Tanzania		0.03			0	
	Turkey			0.11			0.4
	United States	0.06	0.02		0.1	0	
	Total EXTRA-EUR27	**1.36**	**1.38**	**0.15**	**0.9**	**1**	**0.4**
	Austria	1.79			1.1		
	France			0.12			0
	Germany			0.35			0.3
	Italy		0.36	160.73		0.1	13.1
	Netherlands	1.89	3.41	71.96	0.7	2.6	4.5
	Poland	0.04			0.1		
	Spain	1.11	1.53		0.4	1	
	Total INTRA-EUR27	**4.83**	**5.3**	**233.16**	**2.3**	**3.7**	**17.9**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
081030 Fresh blue berries, currants and gooseberries							
	Total import	**1.98**	**2.85**	**0**	**1.2**	**2.5**	**0**
	Chile	0.09	0.58		0.1	0.4	
	Colombia	0.04			0		
	South Africa	0.01			0		
	Total EXTRA-EUR27	**0.14**	**0.58**		**0.1**	**0.4**	
	Netherlands	1.84	2.24		1.1	2.1	
	Spain		0.03			0	
	Total INTRA-EUR27	**1.84**	**2.27**		**1.1**	**2.1**	

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
081040 Fresh whortleberries and other fruits from the vaccinium group							
	Total import	**4.87**	**5.98**	**111.3**	**2.2**	**3**	**19.4**
	Argentina	0.14	1.02		0.1	0.7	
	Australia	0.14	0.09		0.1	0.1	
	Chile	0.37	1.16	0.01	0.2	1	0
	Colombia	0.05			0		
	Costa Rica		0.01			0	
	New Zealand	0.14	0.05		0.1	0	
	South Africa	0.02	0.02		0	0	
	United States	0.55	2.85		0.1	0.6	
	Uruguay	0.02	0.17		0	0.1	
	Countries and territories not specified	3.01			1.5		
	Total EXTRA-EUR27	**4.44**	**5.37**	**0.01**	**2.1**	**2.5**	**0**
	France			0.05			0
	Germany			8.28			12.2
	Italy		0.03	67.63		0	5
	Netherlands	0.22	0.48	35.33	0.1	0.5	2.2
	Spain	0.21	0.1		0	0	
	Total INTRA-EUR27	**0.43**	**0.61**	**111.29**	**0.1**	**0.5**	**19.4**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
07020000 **Fresh or frozen tomatoes**							
	Total import	**10946.2**	**12842**	**56184.7**	**52695**	**51429**	**71059.9**
	Argentina	0.01			0		
	Bosnia and Herzegovina			102.77			546.9
	Egypt	17.11	1.02	21.02	109.7	1.3	29.4
	Israel	2.58	11.33	64	5.4	32	76
	Jordan	229.18	589.62	904.77	1351.2	2395.3	1668.5
	Lebanon	0.31			0.1		
	Macedonia	66.36	7.78	46.16	419.9	84.7	249.2
	Moldova	150.47	5.47	11.25	753.7	45.5	19
	Montenegro			1.62			7.9
	Morocco	14.97	39.97		57.8	144.1	
	Senegal	3.23	1.79		4.6	3.4	
	Serbia			118.29			516.6
	Syrian Arab Republic	3577.02	4814.16	10114.93	17662.8	19820.9	10695.9
	Turkey	5988.66	6727.62	36204.74	28380.1	27530.5	45693.5
	Ukraine			9.89			18
	Countries and territories not specified	21.27	11.56		108.9	19.9	
	Total EXTRA-EUR27	**10071.2**	**12210**	**47599.4**	**48854**	**50078**	**59520.9**
	Austria	2.75		2.78	11		1.5
	Belgium	9.78	0.08	51.56	38.8	0.2	80
	Bulgaria			55.24			274.5
	Cyprus	0.26			0.2		
	Czech Republic			32.39			46.2
	France			39.61			56
	Germany	9		73.65	18		84.2
	Greece		13.16	175.7		25.8	281.3
	Hungary	10.99		814.5	40.7		872.7
	Italy	109.61	367.71	3778.26	401.4	668.4	3955.5
	Netherlands	131.97	48.49	854.26	230.6	96.2	634.9
	Poland	438.73	4.72	978.02	2536.4	43.3	2207.2
	Slovenia	8.49	1.6	110.97	36.7	5.8	253
	Spain	153.14	196.34	1618.3	526.5	511.6	2792
	Sweden	0.31			0.3		
	Total INTRA-EUR27	**875.03**	**632.1**	**8585.24**	**3840.6**	**1351.3**	**11539**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
07032000 **Fresh or frozen garlic**							
	Total import	**2545.86**	**3121.4**	**2367.7**	**9519.6**	**11209**	**4669.2**
	China	2538.91	3067.05	1499.18	9511.7	11055	4071
	Egypt		13.55	34.59		42.5	146.5
	Iran		21.81			69.8	
	Israel		0.4			0.1	
	Moldova		0.4			1	
	Serbia			0.01			0
	Syrian Arab Republic		3			9.6	
	Turkey	0.17	5.83		0.5	18.6	
	Total EXTRA-EUR27	**2539.08**	**3112**	**1533.78**	**9512.2**	**11197**	**4217.5**
	Austria			5.65			20
	Czech Republic	0.33		10.2	0.1		5.2
	Germany			20.21			17
	Greece			59.32			41.4
	Hungary			81.37			50.9
	Italy	6.45	1.3	15.35	7.3	0.6	8.8
	Netherlands		0.01	604.14		0	284
	Poland			35.32			22.5
	Spain		8.05	2.36		12.1	1.9
	Total INTRA-EUR27	**6.78**	**9.36**	**833.92**	**7.4**	**12.7**	**451.7**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
07031019 **Fresh or frozen onion**							
	Total import	**3356.98**	**5176.4**	**5280.55**	**37419**	**48900**	**34972.1**
	Argentina	1.26	0.17		1.1	0.7	
	Australia	0.19	0.31		0.4	1.5	
	Bosnia and Herzegovina	2.7	27.58	2.27	45	597.4	21
	China ,People's Republic of			17.79			96
	Croatia		22.1	8.07		184	44
	Egypt	451.25	771.37	917.75	3679.4	7736.1	9406.5
	Iran		0.47			5	
	Israel	0.05	0.18		0	0	
	Lebanon		3.67			36.9	
	Macedonia	15.55	22.85	19.05	77.9	367.3	210.1
	Mexico		0.34			1.5	
	Moldova		68.22	63.35		628.9	384.4
	Serbia			35.04			389
	Serbia and Montenegro	2.09			21.8		
	South Africa	0.03			0.1		
	Syrian Arab Republic	2.63	1.39		19.6	14.8	
	Turkey	263.07	606.28	1173.95	1770.4	5742.5	10013.5
	Ukraine		73.38	489.22		915.2	5538.2
	Countries and territories not specified	12.32	51.3		215.1	1120.7	
	Total EXTRA-EUR27	**751.14**	**1649.6**	**2726.49**	**5830.8**	**17353**	**26102.7**
	Austria	785.58	887.14	493.61	10680.5	8759.9	1960.6
	Belgium	22.52	7.21	43.49	210	66.5	135
	Bulgaria	4.24	25.34	4.2	41.6	113.3	59.3
	Czech Republic	0.6		73.04	3		232.7
	Denmark			1.64			0.9
	France	13.16	29.92		220	116.6	
	Germany	172.24	433.62	258.69	3691.6	3607.6	917.7
	Greece		8.04	95.78		28.4	423.9
	Hungary	35.26	98.54	21.25	547.6	916.1	56.3
	Ireland			1.02			1.2
	Italy	16.16	110.29	277.32	60	181.8	309.3
	Malta			0.7			0.8
	Netherlands	388.06	529.76	961.43	3122.9	3378.5	3006.6
	Poland	1164.68	1395.06	320.07	12998.7	14372.5	1753.8
	Portugal		0.56			2.5	
	Spain	3.31	1.35	1.82	12.7	3.7	11.3
	United Kingdom	0.03			0		
	Total INTRA-EUR27	**2605.84**	**3526.8**	**2554.06**	**31589**	**31547**	**8869.4**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
07041000 **Fresh or frozen cauliflower and broccoli**							
	Total import	**147.03**	**359.54**	**971.29**	**536.1**	**829.6**	**1224.7**
	Bosnia and Herzegovina			0.27			1.7
	Chile	0.01			0.1		
	Israel		3.38			3.1	
	Jordan	6.32	28.38	3.63	27.1	87.4	11.7
	Macedonia			0.96			8.9
	Serbia			3.5			21.8
	South Africa		0.01			0	
	Syrian Arab Republic	1.14	0.84	1.74	4.1	4.6	9.1
	Turkey	43.83	33.28	25.63	211.3	149.2	131.6
	Countries and territories not specified	0.47			6.1		
	Total EXTRA-EUR27	**51.77**	**65.89**	**35.73**	**248.7**	**244.3**	**184.8**
	Austria			0.08			0
	Belgium	1.03		0.03	1.4		0
	Czech Republic	1.21		44.99	4.8		27.1
	Denmark			1.79			1.6
	France	14.99	39.92	2.19	47.3	118.4	3.9
	Germany	8.32	61.81	78.77	12.4	85.5	54.1
	Greece	0.36	9.55	18.57	1.1	10.8	29.2
	Hungary	0.04	0.29	42.82	0.1	0.7	48.1
	Italy	39.2	147.5	480.31	129.9	281.5	544.5
	Netherlands	7.98	2.09	198.42	18.1	5.9	215
	Poland	6.83	2.9	58.49	29.1	8.4	100.7
	Slovenia			5.32			12.1
	Spain	15.3	29.59	3.78	43.2	74.1	3.6
	Total INTRA-EUR27	**95.26**	**293.65**	**935.56**	**287.4**	**585.3**	**1039.9**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
07049010 **Fresh or frozen white and redcabbage**							
	Total import	**1111.71**	**1268.4**	**1946.71**	**10918**	**11302**	**16341**
	Bosnia and Herzegovina		0.82	236.03		27.4	4556.4
	Croatia			11.39			112.6
	Egypt			0.2			0.7
	Jordan	0.05	0.54	0.31	0.2	2.5	0.6
	Kosovo			12.54			180.9
	Lebanon	0.07			0		
	Macedonia	235.43	214.39	462.32	2349.8	2952.4	5634.1
	Moldova	126.49	64.13	18.5	1024.3	387.4	176
	Serbia			106.06			1607.3
	Serbia and Montenegro	29.55			545.5		
	South Africa	0.01			0		
	Syrian Arab Republic		0.31			1.5	
	Turkey	4.79	0.2	13.82	27	2	99.8
	Countries and territories not specified	57.48	8.54		916.2	184.6	
	Total EXTRA-EUR27	**453.87**	**288.93**	**861.17**	**4863**	**3557.8**	**12368.4**
	Austria	17.18	0.8		173	10	
	Bulgaria	3.37	5.13	1.83	21	19	23
	Czech Republic			31.97			111
	France	0.01	0.14		0	0.4	
	Germany	34.74	52.24	154.19	212.1	241.8	353.7
	Greece	7.49	2.27	56.91	41	22	280.2
	Hungary	45.44	93.73	70.71	636.5	761.1	290.8
	Italy	3.6	20.15	4.56	17	88.9	18.2
	Netherlands	150.14	163.58	231.21	895.9	911	638.6
	Poland	388.06	631.9	531.74	4037.3	5648.9	2245.2
	Portugal	0.01			0		
	Spain	7.8	9.56	2.42	21.4	41.1	11.9
	Total INTRA-EUR27	**657.84**	**979.5**	**1085.54**	**6055.2**	**7744.2**	**3972.6**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
07051100 **Fresh or frozen green salad**							
	Total import	**279.85**	**453.12**	**808.24**	**444.7**	**657.2**	**997.3**
	Bosnia and Herzegovina		0.55			13.8	
	Brazil		0.11			0.2	
	Chile		0.3			0.9	
	China	0.09			0.1		
	Costa Rica	0.02			0.1		
	Egypt	2.29	1.56	3.57	2.6	1.4	3.7
	Israel	0.13	0.63		0.1	0.5	
	Macedonia			0.84			4.1
	Turkey	0.17	0.78	21.32	1.1	0.7	23.3
	Countries and territories not specified		4.5			9.2	
	Total EXTRA-EUR27	**2.7**	**8.43**	**25.73**	**4**	**26.7**	**31.1**
	Austria	0.09			0.3		
	Belgium	9.15	0.07	11.65	15.2	0.1	9.2
	Czech Republic			3.44			1.9
	Denmark		0.29			0.3	
	France	2.38	2.95	0.05	4.3	5.4	0
	Germany	24.99	7.79	9.94	30	7.2	14.9
	Greece			3.98			4.2
	Hungary	53.79	109.11	35.91	53	102	45.3
	Italy	10.26	62.71	315.4	36.3	108.1	380.1
	Netherlands	23.39	52.13	254.49	53.9	103.7	196.3
	Poland	26.64	3.38	16.21	68.2	5.1	71.9
	Slovenia			13.16			28.6
	Spain	126.46	206.26	118.28	179.5	298.6	213.8
	Total INTRA-EUR27	**277.15**	**444.69**	**782.51**	**440.7**	**630.5**	**966.2**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
07061000 **Fresh or frozen carrots and turnips**							
	Total import	**2714.06**	**3889.7**	**4908.67**	**16679**	**19550**	**25976.6**
	Egypt		0.42			2.1	
	Jordan	0.04	0.03		0.5	0.5	
	Macedonia		0.24	0.08		3	0.5
	Moldova	9.5	1.14	0.11	76.5	7.3	0.5
	Serbia			1.35			11.2
	South Africa		0.04			0	
	Syrian Arab Republic	218.15	441.23	22.13	1106.3	2277.3	210
	Turkey	2092.38	2658.03	2824.33	12531.7	13702.3	18109.4
	Countries and territories not specified	0.4	0.92		4	18.2	
	Total EXTRA-EUR27	**2320.47**	**3102.1**	**2848**	**13719**	**16011**	**18331.6**
	Austria	61.92	166.37	295.98	548.1	783.8	1247.2
	Belgium	18.89	77.79	52.99	69.4	166.8	192.3
	Czech Republic	1.95	1.04	103.65	15	8	365.5
	France		0.01			0	
	Germany	29.5	37.84	131.46	121.3	72.5	329
	Greece		53.95	45.88		125.8	147.6
	Hungary	14.4	9.84	38.34	122.8	64.8	104.4
	Italy	24.67	95.29	299.08	120.9	181.9	654
	Netherlands	86.15	92.87	608.15	483.4	367.9	2453.8
	Poland	155.19	243.9	484.88	1474.6	1752.6	2150.1
	Slovenia			0.19			1
	Spain	0.92	8.75	0.07	4.3	15.4	0.1
	Total INTRA-EUR27	**393.59**	**787.65**	**2060.67**	**2959.8**	**3539.5**	**7645**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
07070005 **Fresh or frozen cucumbers**							
	Total import	**585.05**	**943.83**	**5547.54**	**2798.2**	**5113.8**	**7590.8**
	Bosnia and Herzegovina			0.63			8.1
	Egypt	0.12			0.1		
	Jordan	3.04	11.84	71.22	17.9	60	90.4
	Lebanon	0.04			0		
	Macedonia	11.38	2.71	1.75	68.4	18	8.4
	Moldova	0.53	6.73		6.5	40	
	Serbia			0.06			0.6
	Syrian Arab Republic	46.54	94.21	277.78	218.3	558.4	358.6
	Turkey	392.9	589.04	2332.97	2009	3555	3462.7
	Total EXTRA-EUR27	**454.55**	**704.53**	**2684.41**	**2320.2**	**4231.4**	**3928.8**
	Austria		0.21	8.65		1.3	7.8
	Bulgaria			0.31			0.3
	Czech Republic			5.47			5.9
	France			26.2			29.6
	Germany			87.13			102.1
	Greece	40.11	64.85	1374.3	164.2	385.6	1896.8
	Hungary	12.42	3.1	347.56	41.5	3.5	485.9
	Italy	3.09	9.62	420.69	9.6	36.1	422.4
	Netherlands		57.08	194.25		181.4	207
	Poland	16.43		5.02	54.7		22.9
	Slovenia			12.91			22.4
	Spain	58.45	104.44	380.64	208	274.5	458.9
	Total INTRA-EUR27	**130.5**	**239.3**	**2863.13**	**478**	**882.4**	**3662**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
07070090 **Fresh or frozen gherkins**							
	Total import	**4.77**	**0.13**	**82.27**	**36.7**	**0.4**	**190.9**
	Jordan			1.89			4
	Lebanon	0.34			0.2		
	Macedonia			5.18			43.8
	Serbia			0.24			1.2
	Turkey			8.66			18.4
	Total EXTRA-EUR27	**0.34**		**15.97**	**0.2**		**67.4**
	Bulgaria			30.1			45.2
	Germany			34.02			72.7
	Greece			0.44			2.3
	Italy		0.13			0.4	
	Poland	4.43			36.5		
	Spain			1.74			3.3
	Total INTRA-EUR27	**4.43**	**0.13**	**66.3**	**36.5**	**0.4**	**123.5**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
07081000 **Fresh or frozen peas pisum sativum**							
	Total import	**10.98**	**1.82**	**140.37**	**30.4**	**1.5**	**206.1**
	Argentina	0.24			0.8		
	Colombia	0.02			0		
	Egypt	0.15	0.06		0.1	0.1	
	Guam		0.02			0	
	Guatemala	0.25	0.36	0.02	0.3	0.4	0
	Kenya	0.13	0.5		0.2	0.6	
	Lebanon	0.1			0		
	Moldova	3.02			20.2		
	Morocco		0.04			0	
	Peru		0.35			0.2	
	South Africa	0.01			0		
	Syrian Arab Republic			0.03			0.1
	Turkey	0.06			0.4		
	Zimbabwe	0.15	0.08		0.1	0.1	
	Total EXTRA-EUR27	**4.13**	**1.41**	**0.05**	**22.1**	**1.4**	**0.1**
	Austria	0.84			1		
	Belgium	1.78			2.1		
	Bulgaria			17.5			46.8
	Germany			46.44			42.3
	Greece			16.52			20
	Hungary			36.5			86.8
	Italy			2.65			0.1
	Netherlands			16.23			6.1
	Poland	4.23		4.48	5.2		3.9
	Spain		0.41			0.1	
	Total INTRA-EUR27	**6.85**	**0.41**	**140.32**	**8.3**	**0.1**	**206**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
07082000 Fresh or frozen beans (Vigna spp., Phaseolus spp.)							
	Total import	**16.7**	**37.68**	**262.59**	**70.2**	**156.6**	**243.6**
	Argentina	1.12			3.9		
	Egypt	1.62	5.08		1.7	3.6	
	Guatemala	0.01			0		
	Jordan	0.74	0.95	0.32	3.3	4	0.4
	Kenya	0.01			0		
	Lebanon	0.06			0		
	Moldova	1.96	9.37		18.3	39	
	Morocco	0.03			0		
	South Africa	0.07			0.5		
	Syrian Arab Republic		0.23	0.04		1.4	0.2
	Thailand		0.04			0	
	Turkey	1.98	0.92	0.56	8.1	3.6	1.2
	United States			15.35			36.6
	Total EXTRA-EUR27	**7.6**	**16.59**	**16.27**	**35.8**	**51.6**	**38.4**
	Germany		0.14			0.2	
	Greece		0.34	1.36		0.4	6.2
	Italy	0.01	1.64	4.26	0.1	2.1	2.5
	Netherlands	0.02		1.27	0.1		0.3
	Poland	8.85	16.9	46.08	33.5	99	105.2
	Slovenia			1.27			1.7
	Spain	0.22	2.07	192.08	0.7	3.3	89.3
	Total INTRA-EUR27	**9.1**	**21.09**	**246.32**	**34.4**	**105**	**205.2**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
07093000 **Fresh or frozen egg-plants**							
	Total import	**358.87**	**528.74**	**1236.41**	**1055**	**1141.3**	**1811.5**
	Bosnia and Herzegovina		0.04	30.05		0.8	318.8
	Jordan	29.37	68.52	26.71	84.3	132.2	52.5
	Macedonia	20.14			195.1		
	Moldova	2.85	0.64		15	6	
	Morocco	0.12			0.3		
	Serbia			6.39			68.2
	South Africa	0.01			0		
	Syrian Arab Republic	8.98	16.05	3.11	23.4	38.2	7.8
	Thailand		0.06			0	
	Turkey	115.12	93.35	97.82	257.7	207.6	221
	Countries and territories not specified	13.23			133		
	Total EXTRA-EUR27	**189.82**	**178.66**	**164.08**	**708.8**	**384.8**	**668.3**
	Austria			2.88			3.1
	Belgium	0.04		1.07	0.1		1.1
	Bulgaria	14.82			20		
	France			3.09			2.8
	Germany			47.44			55.5
	Greece	8.6	14.15	20.59	14.7	24.5	36.7
	Hungary	1.32		35.04	2.2		30.5
	Italy	33.57	133.15	494.18	85.7	305.4	557.8
	Netherlands	36.7	45.26	146.28	65.1	99.4	109.5
	Poland	6.23			10.5		
	Slovakia			0.41			1.2
	Slovenia			7.23			13.9
	Spain	67.77	157.52	314.12	147.9	327.2	331.1
	Total INTRA-EUR27	**169.05**	**350.08**	**1072.33**	**346.2**	**756.5**	**1143.2**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
07096010 **Fresh or frozen sweet pepper**							
	Total import	**2086.41**	**3173.8**	**7550.37**	**8028.2**	**9023.6**	**11595.4**
	Bosnia and Herzegovina		0.4	17.06		4.8	104.2
	Côte d'Ivoire	0.03			0.1		
	Egypt	2.86	1.38	13.78	2.2	2.6	33.4
	Israel	15.8	33.67	18.01	54.3	81.2	75.8
	Jordan	76.14	162.93	249.87	324.9	557.5	668.4
	Macedonia	1.99	0.01	35.74	7.9	0.1	155.9
	Mexico	0.01			0		
	Moldova	14.99	6.55		80.2	33.5	
	Morocco	10.61	7.06		28.7	24.1	
	Serbia			121.71			770.7
	Syrian Arab Republic	27.69	135.24	127.92	126.2	417.1	416.7
	Thailand		0.07			0	
	Turkey	1160.5	1496.49	1888.51	4259.3	4871.8	5741.5
	Ukraine	4.38		4.23	17.7		30
	Countries and territories not specified	252.16	23.48		1656.7	304.1	
	Total EXTRA-EUR27	**1567.16**	**1867.3**	**2476.83**	**6558.2**	**6296.8**	**7996.6**
	Austria	0.27		4.84	0.8		2.9
	Belgium	1.18	1.08	0.7	2.3	2.1	0.3
	Bulgaria			8.21			57.2
	Czech Republic			100.21			103.4
	France			8.29			4.5
	Germany			361.7			212.9
	Greece	58.48	90.95	483.79	175.8	214.2	476.4
	Hungary	137.59	103.78	405.46	500.8	333.6	353.8
	Italy	53.66	228.05	1525.92	150.3	552.5	1079.2
	Malta			0.33			0.2
	Netherlands	114.57	177.38	1203.68	219.8	277.7	619.2
	Poland	9.78		93.97	42.3		95.4
	Portugal		5.04			14.4	
	Slovenia			46.97			58.6
	Spain	143.72	700.27	829.47	377.9	1332.3	534.8
	Total INTRA-EUR27	**519.25**	**1306.6**	**5073.54**	**1470**	**2726.8**	**3598.8**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
071021 **Frozen podded vegetables**							
	Total import	**1824,7**	**2388,3**	**3913,01**	**2449,9**	**2873,8**	**4203,1**
	China			314,53			499,8
	Egypt	0,75	0,32		1	0,4	
	Moldova ,Republic of	109,27	63,91	4,99	228,2	107,7	7,5
	Serbia			27,1			35
	Countries and territories not specified	28,36			54,5		
	Total EXTRA-EUR27	**138,38**	**64,23**	**346,62**	**283,7**	**108,1**	**542,3**
	Austria	3,16	3,06		3,8	3,8	
	Belgium	918,72	1275,91	1874,53	1121,8	1500,7	1930
	Bulgaria	29,96	36,99	138,13	43,3	49,9	161,5
	Czech Republic			12,6			13,1
	Germany	4,31	45,6	56,62	5,8	55,5	59,9
	Greece	0,03	16,77	64,45	0	19,4	78,4
	Hungary	264,24	402,8	358,52	358,6	515,2	394,8
	Italy			0,69			2,4
	Netherlands			6,72			6,6
	Poland	394,59	541,43	1053,78	517	619,3	1013,7
	Slovakia		1,52	0,35		1,9	0,4
	Sweden	71,29			115,9		
	Total INTRA-EUR27	**1686,3**	**2324,1**	**3566,39**	**2166,2**	**2765,7**	**3660,8**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
071022 **Frozen beans**							
	Total import	**695,77**	**1208,6**	**1471,78**	**937,4**	**1530,8**	**1725**
	China	54,86			96		
	Croatia	0,23			0,3		
	Egypt	0,97	0,47	79,89	1,7	0,6	149
	Serbia			72,38			103
	Serbia and Montenegro	1,76			2,2		
	Countries and territories not specified	10,8	37,2		21,9	80	
	Total EXTRA-EUR27	**68,62**	**37,67**	**152,27**	**122,1**	**80,6**	**252**
	Belgium	321,99	584,19	755,25	401,3	729,2	879,6
	Bulgaria	17,67	29	43,16	25	40,5	54,8
	Czech Republic			29,39			34,9
	Germany	2,06	25,35	32,05	2,5	28,3	30,6
	Greece	0,03			0		
	Hungary	120,69	249,13	181,54	165,7	322	197,3
	Italy		1,54	2,47		2,1	2,7
	Netherlands			6,91			8,4
	Poland	164,71	281,68	268,74	220,8	328,1	264,7
	Total INTRA-EUR27	**627,15**	**1170,9**	**1319,51**	**815,3**	**1450,2**	**1473**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
071029 Other frozen vegetables							
	Total import	**32,73**	**13,82**	**5,93**	**48,7**	**20,7**	**5,9**
	Egypt	11,9	9,14		18,2	14	
	Syrian Arab Republic		0,08			1,2	
	Total EXTRA-EUR27	**11,9**	**9,22**		**18,2**	**15,2**	
	Belgium			4,67			4,3
	Hungary			0,63			0,7
	Italy			0,3			0,2
	Netherlands			0,33			0,7
	Poland	20,83	3,98		30,5	4,8	
	Slovakia		0,62			0,7	
	Total INTRA-EUR27	**20,83**	**4,6**	**5,93**	**30,5**	**5,5**	**5,9**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
071030 Frozen spinach, spinach from New Zeeland and orach							
	Total import	**531,99**	**801,17**	**892,54**	**733,5**	**1074,3**	**1128,9**
	Egypt	4,96	2,19		8,4	4	
	Total EXTRA-EUR27	**4,96**	**2,19**		**8,4**	**4**	
	Austria			11,58			20,2
	Belgium	392,37	526,19	639,79	524,2	707,7	812,6
	Bulgaria	3,94	2,92	4,2	9,5	5,8	4
	Czech Republic		33,87	25,59		60,5	34,5
	France	13,57	28,6	12,41	11,2	24	10,5
	Germany	6,6	30,02	38,38	21,4	49,3	63
	Hungary	28,79	42,47	48,87	36,2	51,1	59,5
	Italy		0,63	0,49		0,8	0,5
	Netherlands			2,84			4,1
	Poland	81,25	132,78	108,39	121,7	169,3	120
	Slovakia	0,51	1,5		0,9	1,8	
	Total INTRA-EUR27	**527,03**	**798,98**	**892,54**	**725,1**	**1070,3**	**1128,9**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
071040 **Frozen sweet pepper**							
	Total import	**294,69**	**412,46**	**471,11**	**334**	**435,2**	**531,5**
	China			31,11			50
	Israel		0,01			0	
	Jordan			0,15			0,3
	Moldova	32,91	3,99		55,3	6	
	Countries and territories not specified	23,75			50		
	Total EXTRA-EUR27	**56,66**	**4**	**31,26**	**105,3**	**6**	**50,3**
	Belgium	58,15	84,34	111,61	50,2	76,9	109,2
	Bulgaria	12,99	3,5	6,76	12,8	3,5	6,3
	Czech Republic		0,43	9,01		0,4	10,4
	France	45,33	44,26	7,54	36,4	31,8	5,1
	Germany	2,24	15,38	24,28	2,9	18,6	25,1
	Greece	0,04		18,24	0		20,8
	Hungary	66,46	171,37	139,72	88,8	230,6	205,9
	Italy		1,16	2,82		1,1	0,8
	Poland	52,82	87,6	63,18	37,6	66,2	48,6
	Slovakia		0,42	56,69		0,1	49
	Total INTRA-EUR27	**238,03**	**408,46**	**439,85**	**228,7**	**429,2**	**481,2**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
071080 **Other vegetables**							
	Total import	**995,82**	**1834,8**	**3489,54**	**980,1**	**1606,6**	**5577,1**
	Chile		5,33			2,4	
	China	35,28	16,28	24,14	41,6	18,8	39,3
	Croatia	0,3			0,5		
	Egypt	10,76	87,11	51,8	14,6	133	89,6
	Iran	0,01			0		
	Macedonia	41,87	110,03	106,77	84,6	183,8	180,4
	Moldova	17,74	36,17	18,12	35,8	49,9	35,7
	Serbia			12,57			13,7
	Serbia and Montenegro	0,19			0,3		
	Turkey	2,63			7,6		
	Countries and territories not specified	196,28	325,37		45,7	92,1	
	Total EXTRA-EUR27	**305,06**	**580,29**	**213,4**	**230,7**	**480**	**358,7**
	Belgium	328,21	562,2	751	308,5	507,3	699
	Bulgaria	63,8	49,47	146,44	145,2	114,9	2927,2
	Czech Republic			37,33			27,1
	France		16,07	26,06		12,4	16,6
	Germany	2,96	2,07	12,91	14,9	1,4	5,4
	Greece			144,79			112
	Hungary	38,63	53,24	250,89	50,3	70,9	202,3
	Italy	0,68	3	1128,89	0,3	2,9	540,7
	Netherlands	24,52	66,53	98,98	28,3	84,8	95,5
	Poland	217,14	385,28	673,21	195,4	265,9	588,6
	Portugal			4,6			2,8
	Slovakia		0,14	0,49		0,1	0,4
	Slovenia			0,55			0,8
	Spain	14,82			6,5		
	United Kingdom		116,54			66	
	Total INTRA-EUR27	**690,76**	**1254,5**	**3276,14**	**749,4**	**1126,6**	**5218,4**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
071090 Vegetable mixes							
	Total import	**2458,63**	**3889,8**	**4308,06**	**2870,5**	**4274,3**	**4457,8**
	China		1,84			1,4	
	Croatia	1,02			1,5		
	Egypt	3,65	2,34		5,8	3,2	
	Moldova		4,72	30,6		8,4	52,9
	Serbia			146,79			202
	Serbia and Montenegro	0,25			0,3		
	Countries and territories not specified	11,54			15,1		
	Total EXTRA-EUR27	**16,46**	**8,9**	**177,39**	**22,7**	**13**	**254,9**
	Austria			8,41			0,2
	Belgium	1122,34	1625,82	1783,34	1219,4	1744	1856,4
	Bulgaria	82,31	52,01	94,37	129,6	70,3	110,7
	Czech Republic			102,15			95,9
	France	23,53	29,77	1,52	18,3	21,8	1
	Germany	6,7	103,02	142,62	9	106,8	137,6
	Greece	0,1			0,1		
	Hungary	489,92	838,46	656,02	595,5	1020,2	637,8
	Italy	0,35		0,68	0,5		0,3
	Netherlands			5,23			15,6
	Poland	709,64	1220,48	1309,83	870,3	1287,9	1331,1
	Slovakia		4,59	4,35		5,8	4,1
	Spain	7,28	6,7	9,93	5,1	4,5	6,2
	Sweden			12,22			6
	Total INTRA-EUR27	**2442,17**	**3880,9**	**4130,67**	**2847,8**	**4261,3**	**4202,9**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
200490 **Other vegetables and vegetable mixes (prepared with vinegar)**							
	Total import	**90,13**	**446,09**	**1682,92**	**272,6**	**583,7**	**1131,6**
	China	3,02	0,62	0,09	1,7	0,5	0
	Egypt		1,52			2,8	
	Iran	0,03	0,17		0,1	0,3	
	Japan	0,35			0		
	Lebanon	1,88			2,6		
	Mexico		0,08			0	
	Moldova	0,28	27,97	1,98	0,3	59,9	2
	Peru	0,25			0,1		
	Syrian Arab Republic	0,98	0,36		2,5	1,8	
	Thailand			35,76			45,3
	Turkey	2,77	1,03	6,54	11	3,4	11,9
	United States	0,07			0,1		
	Countries and territories not specified		0,29			0,3	
	Total EXTRA-EUR27	**9,63**	**32,04**	**44,37**	**18,4**	**69**	**59,2**
	Austria			0,75			0,3
	Belgium			17,79			13,5
	Bulgaria			17,7			30,8
	Denmark			0,47			0,6
	France		0,25	7,07		0	7,9
	Germany	13,42	53,23	49,83	8,6	38	36,9
	Greece			697,65			380,2
	Hungary	15,5	10,9	373,18	34,3	6,5	224,1
	Italy	4,74	4,46	9,95	3	1,5	4,4
	Netherlands	26,99	16,06	35,17	184,4	82	55
	Poland	15,27	325,57	381,38	22,7	384,9	285,5
	Slovakia			0,47			0,5
	Spain	0,04	0,97	28,76	0	0,4	22,9
	Sweden		2,61	17,62		1,4	9,8
	United Kingdom	4,54		0,76	1,2		0
	Total INTRA-EUR27	**80,5**	**414,05**	**1638,55**	**254,2**	**514,7**	**1072,4**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
081110 Strawberries and wild strawberries							
	Total import	**53,61**	**56,35**	**94,99**	**45,5**	**43,3**	**52,8**
	Egypt	3,65	0,93		5	1,6	
	Serbia			5,93			2,2
	Countries and territories not specified	2,46	5,81		1	2,4	
	Total EXTRA-EUR27	**6,11**	**6,74**	**5,93**	**6**	**4**	**2,2**
	Belgium	24,34	14,15	18,24	14,4	9	8,7
	Bulgaria	9,6			12		
	France			0,47			0,3
	Germany		3,4			2,2	
	Hungary			31,89			21,5
	Italy			2,02			1
	Poland	13,56	32,05	36,44	13,1	28,1	19,1
	Slovakia		0,01			0	
	Total INTRA-EUR27	**47,5**	**49,61**	**89,06**	**39,5**	**39,3**	**50,6**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
081120 Raspberry, blackbarry, mulberry, their hybrides white or black, and gooseberries							
	Total import	**47,56**	**87,73**	**114,47**	**39,6**	**77,2**	**78,2**
	Moldova		0,33			0,5	
	Serbia			12,53			4,9
	Countries and territories not specified	7,95	13,11		3,5	5,2	
	Total EXTRA-EUR27	**7,95**	**13,44**	**12,53**	**3,5**	**5,7**	**4,9**
	Austria			2,45			1
	Belgium	18,46	17,24	20,79	8,1	7,3	8,3
	Bulgaria			0,2			0,2
	Czech Republic		1,31			0,9	
	Germany		0,75			0,3	
	Hungary	13,91	28,92	26,84	24,6	48,6	31,4
	Italy			0,39			0
	Netherlands		0,01			0	
	Poland	7,24	26,06	51,27	3,4	14,4	32,4
	Total INTRA-EUR27	**39,61**	**74,29**	**101,94**	**36,1**	**71,5**	**73,3**

Product group	Country	Value (thousand EURO)			Quantity(tonnes)		
		2005	2006	2007	2005	2006	2007
081190 **Other frozen fruits**							
	Total import	**257,3**	**326,08**	**617,61**	**214,7**	**237,2**	**508,8**
	China	16,45	15,81		24	24	
	Egypt	1,2			1,8		
	Moldova	13,54			40		
	Serbia			16,8			6,4
	Sri Lanka		0,01			0	
	Turkey		1,61			1	
	Countries and territories not specified	50,46	14,2		25	6,6	
	Total EXTRA-EUR27	**81,65**	**31,63**	**16,8**	**90,8**	**31,6**	**6,4**
	Austria		4,15	15,61		1,5	7,3
	Belgium	77,92	58,47	87,32	37,9	28,5	40,5
	Bulgaria			58			83,2
	France			13,47			10,4
	Germany		20,55	112,79		10,2	75,5
	Greece			55,66			69,1
	Hungary	74,98	106,84	171,62	68,8	95	172,3
	Italy			0,94			0,1
	Netherlands		0,1	37		0	13,7
	Poland	22,33	104,21	48,4	16,9	70,4	30,3
	Spain	0,42			0,3		
	United Kingdom		0,13			0	
	Total INTRA-EUR27	**175,65**	**294,45**	**600,81**	**123,9**	**205,6**	**502,4**