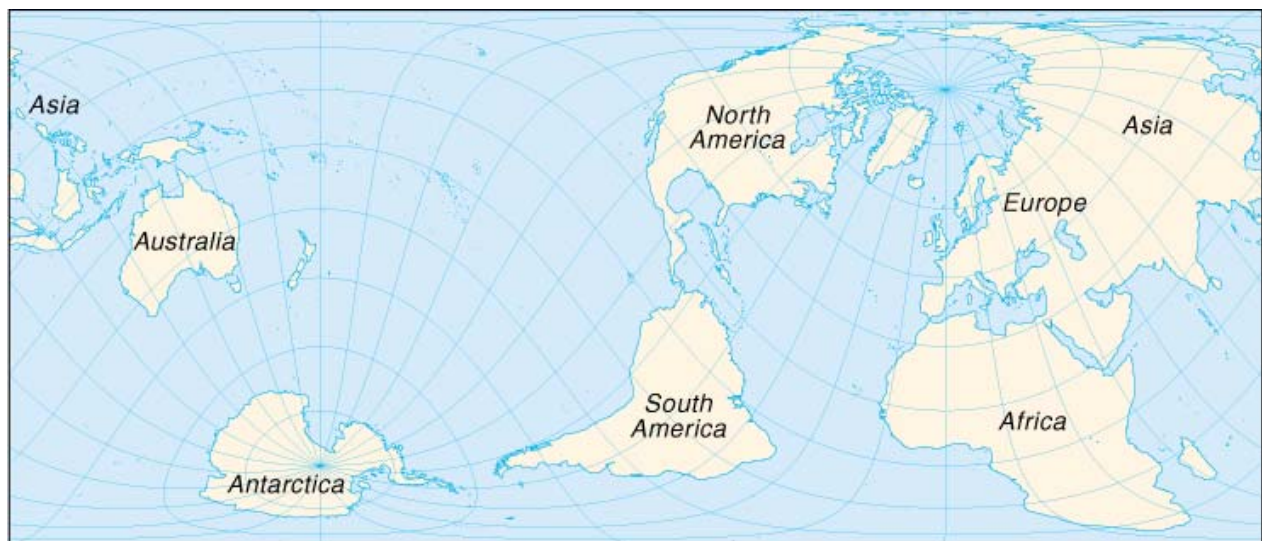

The 2002 World Market Forecasts for Imported Fresh Apples



By
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About this Series

This series was created for international firms who rely on foreign export markets for a substantial portion of their business or who might be threatened by foreign trade competition. The estimates given in this report were created using a methodology developed by and under the direct supervision of Professor Philip M. Parker, the Eli Lilly Chaired Professor of Innovation, Business and Society, at INSEAD. The methodology, relying on historical figures of economic growth and trade flows, estimates the market shares of some 150 countries for over 500 industrial or product categories. The figures should be seen as market estimates, as opposed to historical records, as these are projected for the current year of trade.

Acknowledgements

Some of the methodologies and research approaches used in this report have benefited from the R&D Committee at INSEAD, whose research support is gratefully acknowledged. Additional editorial assistance from Tiffany LaRochelle, ICON Group International, Inc., is also acknowledged.

About ICON Group Ltd.

ICON Group Ltd.'s primary mission is to assist managers with their international information needs. U.S.-owned and operated, ICON Group has field offices in Paris, Hong Kong and Lomé, Togo (West Africa). Created in 1994, ICON Group has published hundreds of multi-client databases, and global/regional market data, industry and country publications.

Global/Regional Management Studies. Summarizing over 190 countries, management studies are generally organized into regional volumes and cover key management functions. The human resource series covers minimum wages, child labor, unionization and collective bargaining. The international law series covers media control and censorship, search and seizure, and trial justice and punishment. The diversity management series covers a variety of environmental context drivers that effect global operations. These include women's rights, children's rights, discrimination/racism, and religious forces and risks. Global strategic planning studies cover economic risk assessments, political risk assessments, foreign direct investment strategy, intellectual property strategy, and export strategies. Financial management studies cover taxes and tariffs. Global marketing studies focus on target segments (e.g. seniors, children, women) and strategic marketing planning.

Country Studies. Often managers need an in-depth, yet broad and up-to-date understanding of a country's strategic market potential and situation before the first field trip or investment proposal. There are over 190 country studies available. Each study consists of analysis, statistics, forecasts, and information of relevance to managers. The studies are continually updated to insure that the reports have the most relevant information available. In addition to raw information, the reports provide relevant analyses which put a more general perspective on a country (seen in the context of relative performance vis-à-vis benchmarks).

Industry Studies. Companies are racing to become more international, if not global in their strategies. For over 2000 product/industry categories, these reports give the reader a concise summary of latent market forecasts, pro-forma financials, import competition profiles, contacts, key references and trends across 200 countries of the world. Some reports focus on a particular product and region (up to four regions per product), while others focus on a product within a particular country.

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Table of Contents

1	METHODOLOGY & EXECUTIVE SUMMARY	9
1.1	Our Approach	9
1.2	The World Market: Imported Fresh Apples in 2002	11
1.3	The World Market: Fresh Apples Export Supplies in 2002	14
2	AFRICA: FRESH APPLES IMPORTS IN 2002	16
2.1	Executive Summary	16
2.2	Algeria	18
2.3	Angola	18
2.4	Benin	19
2.5	Burundi	19
2.6	Cameroon	19
2.7	Chad	20
2.8	Comoros	20
2.9	Congo (Zaire)	20
2.10	Djibouti	21
2.11	Egypt	21
2.12	Equatorial Guinea	22
2.13	Ethiopia	22
2.14	Gabon	22
2.15	Ghana	23
2.16	Guinea	23
2.17	Guinea-Bissau	23
2.18	Ivory coast	24
2.19	Kenya	24
2.20	Liberia	24
2.21	Libya	25
2.22	Madagascar	25
2.23	Malawi	25
2.24	Mauritania	26
2.25	Mauritius	26
2.26	Morocco	26
2.27	Niger	27
2.28	Nigeria	27
2.29	Republic of Congo	27
2.30	Senegal	28
2.31	Sierra Leone	28
2.32	South Africa	28
2.33	St. Helena	29
2.34	The Gambia	29
2.35	Togo	29
2.36	Uganda	30
2.37	Zambia	30
2.38	Zimbabwe	30
3	ASIA: FRESH APPLES IMPORTS IN 2002	31
3.1	Executive Summary	31
3.2	Bangladesh	33
3.3	Brunei	34
3.4	Burma	34
3.5	Cambodia	35

3.6	China	35
3.7	Hong Kong	36
3.8	India	37
3.9	Indonesia	38
3.10	Japan	38
3.11	Laos	39
3.12	Malaysia	39
3.13	Maldives	40
3.14	Mongolia	40
3.15	Nepal	40
3.16	North Korea	41
3.17	Papua New Guinea	41
3.18	Philippines	42
3.19	Seychelles	42
3.20	Singapore	43
3.21	South Korea	43
3.22	Sri Lanka	44
3.23	Taiwan	44
3.24	Thailand	45
3.25	Vietnam	45
4	EUROPE: FRESH APPLES IMPORTS IN 2002	46
4.1	Executive Summary	46
4.2	Albania	48
4.3	Austria	49
4.4	Belgium	50
4.5	Bulgaria	51
4.6	Cyprus	51
4.7	Czech Republic	52
4.8	Denmark	52
4.9	Finland	53
4.10	France	54
4.11	Germany	55
4.12	Gibraltar	56
4.13	Greece	56
4.14	Hungary	57
4.15	Iceland	57
4.16	Ireland	58
4.17	Italy	59
4.18	Malta	60
4.19	Netherlands	61
4.20	Norway	62
4.21	Poland	63
4.22	Portugal	64
4.23	Romania	65
4.24	Russia	66
4.25	Serbia & Montenegro	67
4.26	Spain	68
4.27	Sweden	69
4.28	Switzerland	70
4.29	United Kingdom	71
5	LATIN AMERICA: FRESH APPLES IMPORTS IN 2002	72

5.1	Executive Summary	72
5.2	Argentina	74
5.3	Belize	74
5.4	Bolivia	75
5.5	Brazil	75
5.6	Chile	75
5.7	Colombia	76
5.8	Costa Rica	76
5.9	Ecuador	77
5.10	El Salvador	77
5.11	Falkland Islands	77
5.12	Guatemala	78
5.13	Guyana	78
5.14	Honduras	78
5.15	Mexico	79
5.16	Nicaragua	79
5.17	Panama	79
5.18	Paraguay	80
5.19	Peru	80
5.20	Suriname	80
5.21	Uruguay	81
5.22	Venezuela	81
6	N. AMERICA & CARIBBEAN: FRESH APPLES IMPORTS IN 2002	82
6.1	Executive Summary	82
6.2	Bahamas	84
6.3	Barbados	84
6.4	Bermuda	85
6.5	Canada	85
6.6	Cuba	86
6.7	Dominica	86
6.8	Greenland	86
6.9	Haiti	87
6.10	Jamaica	87
6.11	Netherlands Antilles	87
6.12	St. Kitts and Nevis	88
6.13	Trinidad and Tobago	88
6.14	Turks and Caicos Islands	88
6.15	United States	89
7	OCEANIA: FRESH APPLES IMPORTS IN 2002	90
7.1	Executive Summary	90
7.2	Australia	91
7.3	Fiji	92
7.4	Kiribati	92
7.5	New Caledonia	92
7.6	New Zealand	93
7.7	Solomon Islands	93
8	THE MIDDLE EAST: FRESH APPLES IMPORTS IN 2002	94
8.1	Executive Summary	94
8.2	Afghanistan	97
8.3	Bahrain	98
8.4	Iran	98

8.5	Iraq	98
8.6	Israel	99
8.7	Jordan	99
8.8	Kuwait	100
8.9	Lebanon	100
8.10	Oman	101
8.11	Pakistan	101
8.12	Qatar	102
8.13	Saudi Arabia	102
8.14	Turkey	103
8.15	United Arab Emirates	104
8.16	Yemen	104
9	DISCLAIMERS, WARRANTIES, AND USER AGREEMENT PROVISIONS	105
9.1	Disclaimers & Safe Harbor	105
9.2	ICON Group Ltd. User Agreement Provisions	106

1 METHODOLOGY & EXECUTIVE SUMMARY

1.1 OUR APPROACH

This report was created for strategic planners, international marketing executives and export managers whose primary concern is the world market for fresh apples. With the globalization of this market, managers can no longer be contented with a local view. Nor can managers be contented with out-of-date statistics that appear several years after the fact. I have developed a methodology, based on macroeconomic and trade models, to estimate the market for fresh apples for those firms serving the world via exports and foreign direct investment. It does so for the current year based on a variety of key historical indicators and econometric models.

In what follows, this report begins by summarizing the world exporter's market for fresh apples. The total level of exports on a worldwide basis is based on a model that aggregates across over 150 key country markets and projects these to the current year. From there, each country represents a percent of the world market. This market is served from a number of competitive countries of origin. Based on supply-side dynamics, market shares by country of origin are then calculated across each country market. These shares lead to a volume of import values for each country and are aggregated to regional and world totals. In doing so, we are able to obtain maximum likelihood estimates of both the value of each market and the shares that competitors (countries serving that market) are likely to receive this year. From these figures, world rankings are calculated to allow managers to prioritise markets. In this way, all the figures provided in this report are forecasts that can be combined with internal information for strategic planning purposes. Of the 150 countries considered, if a country is not reported here it is therefore estimated to have only a negligible level of trade in fresh apples (i.e. their market shares are close or equal to zero percent). "Fresh Apples" as a category is defined in this report following the definition given by the United Nations Statistics Division Classification Registry using the Standard International Trade Classification, Revision 3 (SITC, Rev. 3). The SITC code that defined "fresh apples" is 0574. For more information on this definition, please refer to the following web site:

<http://esa.un.org/unsd/cr/registry/regcs.asp?Cl=14&Lg=1&Co=057>.

This report is updated on an annual basis. To ensure that you have the most current version, please check the web site of ICON Group at www.icongrouponline.com, or call us in the USA at 858-546-4340.

Important Caveat. The figures should be seen as market estimates, as opposed to historical records, as these are forecasted for the current year of trade. More importantly, in light of the fact that unforeseeable factors might interrupt markets in achieving their reported levels, the figures should be seen as estimates of potential. For example, "mad cow" disease, foot-and-mouth disease, trade embargoes, military conflicts, acts of terrorism and other events will certainly affect the actual trade flows recorded for a variety of industry or product categories. In such

cases, the difference between the numbers given in this report and the numbers actually observed might be interpreted as the "net loss" or "net gain" due to these exogenous events affecting regular trade flows that would have occurred had these events not have taken place.

Related Reports. This report was created for the world market for fresh apples. Closely related reports published by ICON Group include the following:

- The 2002 World Market Forecasts for Imported Beans, Peas, Lentils and Other Legumes
- The 2002 World Market Forecasts for Imported Cooked Jams, Fruit Jellies, Marmalades, and Fruit Puree
- The 2002 World Market Forecasts for Imported Dried, Dehydrated and Evaporated Vegetables
- The 2002 World Market Forecasts for Imported Edible Nuts excluding Oil Nuts
- The 2002 World Market Forecasts for Imported Fresh and Chilled Potatoes excluding Sweet Potatoes
- The 2002 World Market Forecasts for Imported Fresh and Chilled Tomatoes
- The 2002 World Market Forecasts for Imported Fresh and Dried Fruit and Nuts excluding Oil Nuts
- The 2002 World Market Forecasts for Imported Fresh and Dried Grapes
- The 2002 World Market Forecasts for Imported Fresh Apples
- The 2002 World Market Forecasts for Imported Fresh, Chilled, Frozen and Preserved Vegetables, Roots, and Tubers
- The 2002 World Market Forecasts for Imported Frozen and Temporarily Preserved Vegetables
- The 2002 World Market Forecasts for Imported Oranges, Mandarins, Clementines, and Other Citrus Fruit
- The 2002 World Market Forecasts for Imported Preserved Fruit and Fruit Preparations
- The 2002 World Market Forecasts for Imported Temporarily Preserved Fruit
- The 2002 World Market Forecasts for Imported Unfermented Fruit, Grape Must and Vegetable Juices
- The 2002 World Market Forecasts for Imported Vegetables and Fruit

1.2 THE WORLD MARKET: IMPORTED FRESH APPLES IN 2002

The following tables and graphs summarize the world markets for exporters of fresh apples for the year 2002.

The World Exporters' Market for Imported Fresh Apples: 2002

Region	Rank	Value (000 US\$)	% of World	Cumulative %
Europe	1	1,951,699	65.58	65.58
Asia	2	356,094	11.97	77.55
Latin America	3	265,943	8.94	86.48
N. America & Caribbean	4	228,346	7.67	94.16
The Middle East	5	121,388	4.08	98.24
Africa	6	48,711	1.64	99.87
Oceania	7	3,762	0.13	100.00
Total		2,975,943	100.00	100.00

Source: Philip M. PARKER, Professor, INSEAD, copyright 2002, www.icongrouponline.com

The World Exporters' Market for Imported Fresh Apples: 2002

