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Foreign Agricultural Service

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Agricultural Trade Highlights

Bites & Bits

GLOBAL CONSUMER MARKET INFORMATION FOR THE U.S. FOOD AND AGRIBUSINESS COMMUNITY

JUST IN FROM TAIPEI

TAIWAN MARKET TO EXPAND FOR U.S. PRODUCTS... On February 20th, the United States and Taiwan announced a comprehensive market-opening agreement for U.S. consumer food products. The agreement includes both immediate market access and phased-in commitments and will allow immediate access for products that have been banned, such as U.S. pork, poultry, and variety meats. In addition, the agreement calls for significant immediate tariff reductions for many other U.S. consumer food products including potato products, pears, grapes, grapefruit, sunflower oil and soup. Taiwan currently is the eighth largest market for U.S. consumer food exports. In 1997, exports totaled a record US$596 million.

HISTORIC SUPERMARKET OPENING IN HONG KONG... Wellcome supermarkets opened two new stores on February 20, bringing its store tally to 220, according to ATO Hong Kong. This is the first time the chain has opened two stores in one day. The new stores feature in-store sushi and bakery operations, and U.S. produce, meat, and poultry products are prominently displayed. Supermarket sales are up by as much as 10 percent over the same time last year and industry experts indicate that consumers are eating at home more to cut expenses. Although much of this business is in the lower-end, lower-margin areas such as rice, cooking oil, and fresh produce have also been turning over at a higher rate than similar periods in the past few years.

KOREAN FOOD INDUSTRY WEIGHS IN ON CRISIS... Supermarket sales have improved while other sectors of the food industry have suffered, according to a recent roundtable discussion hosted by ATO Seoul. Korean executives gathered from all sectors of the food and beverage industry to discuss the effect of the economic crisis. Supermarkets seem to have benefitted from the downturn, as consumers eat more meals at home instead of dining out. Supermarket sales are up 20 percent, and products such as frozen pizza and ramen are in demand. Sales at discount stores are also doing well. Five star hotels and importers of luxury items, such as wine and chocolate, have been hit the hardest.

SMALL STORES SQUEEZED IN SINGAPORE... New multinational supermarket chains have entered Singapore, competing for the $1.5 billion retail food market, reports ATO Singapore. In October 1997, Royal Ahold (Dutch), NTUC FairPrice (Singaporean), and Carrefour (French) each opened new supermarkets. Increased competition has led to lower prices, better quality, and a wider range of products. Industry sources believe there is room for the new players and further store expansion. Currently, supermarkets account for 15 percent of Singapore's organized retail food sales compared with 60 percent in the United States.

Inside This Issue: Frozen Food Trade & Brazil's Northeast

Restaurants Cut Some Slack for Korean Franchises... In response to the economic crisis and sharp declines in fast food and family restaurant sales, U.S. franchises operating in Korea are considering temporarily deferring, reducing, or forgiving the royalty payments of their Korean locations until the economic situation improves, ATO Seoul reports. According to food industry sources, fast food sales in December were down 20 to 30 percent compared to the previous December. Family restaurant business was off 50 to 60 percent in December compared to December 1996.

Japanese Traders to Increase Organic Food Imports...ATO Tokyo reports that Nissho Iwai, one of Japan's largest trading companies, has obtained exclusive import rights for 80 items from Kroger and nine other North American companies. Products include juice, jam, pasta, ketchup, and salad dressing. Nissho Iwai plans to double its sales of organic products to $78 million in fiscal 1998. The company is looking to import organically grown vegetables from Asia and Latin America.

Fido Snacks in Belgium... Snacks are the fastest growing segment of the Belgian dog food market, making up 10 percent of sales, according to a recent report from Ag the Hague. While overall dog food sales are growing at 3 percent a year, dog snack sales have expanded 6 percent over the last year. The snack segment is broken into biscuits, which are used as rewards, and treats, meant for spoiling pets. Biscuits represent 98 percent of the volume, but higher-priced treats represent half of total sales. Some pet owners prefer the snacks to have a functional advantage, such as keeping the animal's digestive tract in good condition or preventing tooth plaque. Popular products include beef sticks, "munching rolls" of natural buffalo skin, and cheese snacks. Many sales are impulsive and competition is brisk in the category, so point-of-purchase marketing is important.

Trendy Products in Kansai...ATO Osaka reports that bagel shops, common in metro Tokyo for years, are now turning up in other parts of Japan. In fact, Osaka is the base for the Japanese Bagel Lovers' Society, which is devoted to the history of the bagel and famous bagel shops in the United States, complete with a home page. Consumers are enjoying bagels produced domestically and from the United States. Another popular product these days is freshly-made Belgian waffles. The waffles are sold from kiosk-type stands in areas with high foot traffic, such as malls and train stations, and are all the rage with teenagers throughout Japan.

The Year of Expansion... More Mexican consumers will have the opportunity to eat fast food in 1998 as U.S. chains look to expand their presence, according to Ag Mexico City. Domino's plans to open 90 pizza outlets during 1998, adding to the 200 stores already in operation. McDonald's International plans to open 100 new restaurant throughout Mexico, more than doubling the current number of facilities. The company will invest US $100 million in the new stores.

Supermarket Heroine Stars in Japanese Movie..."Supa Onna" or "Super Woman," the latest Japanese-language movie, is not a take-off of an American comic book hero battling super-villains in the streets of New York. Recently screened by ATO Japan's Executive Director, it is a whimsical tale about a "Supermarket Girl" caught in an on-going retail struggle: fresh-oriented products versus price-oriented products. And as fate would have it, fresh products win the day.

Tougher Times Ahead for Hong Kong Restaurants... The Federation of Hong Kong Restaurant Owners says that approximately 800 restaurants may close over the next nine months, according to ATO Hong Kong. Hong Kong has more "licensed" restaurants than any other city in the world with 10,000, although the actual number is estimated at more than 50,000. The Asian currency crisis, a significant drop in tourism, and the impact of higher interest rates on stocks and property have contributed to the decline. Fast food outlets are the one bright spot because the meals are inexpensive, drawing the lower-end, lunch-time crowd. Sales increased 11.3 percent during the first three quarters of 1997, which were the largest gains in the food service sector.

U.S. Sauce is Boss in the UAE ...Thanks to traditional tastes, changing eating habits, and a proliferation of sauce brands, ATO Dubai reports that U.S. sauces dominate the market. In 1996, U.S. sales accounted for 45 percent of total sauce imports valued at $13.6

million. Demand is bolstered by a new interest in fiery, western-style foods, such as Tex-Mex products, among the large Asian and Arab population, complementing their traditional taste for spicy foods. Red chili pepper sauce is most popular; but it is commonly found on pizzas and other items not typically associated with hot sauces in the United States.

EUROPEAN PROCESSOR LABELS GMO FOODS... Unilever plans to indicate on the labels of its food products sold in Europe if they contain genetically-altered soy or corn as ingredients, According to press reports sent in from Ag The Hague, the foods and detergents group said it decided to go ahead with the step "in the interest of consumers." So far, the European Commission has failed to gain the support of the EU member states for uniform EU rules on the labeling of genetically-modified products.

WELLCOME INTEGRATING DISTRIBUTION IN HONG KONG... Wellcome supermarkets plans to open its Fresh Food Processing Center (FFPC) in July of this year, reports ATO Hong Kong. The FFPC, as it is called by Wellcome, will integrate all fresh food processing and distribution in one single and capital intensive location. Currently, this function is spread across four different locations in the Special Administrative Region. Wellcome is positioning itself to remain the largest and perhaps most profitable food retailer in Hong Kong.

TWO ALL-LAMB PATTIES? India's first McDonald's restaurants opened during 1996 in Delhi and Mumbai, and the company has ambitious plans for 1998. The company plans to add at least 13 restaurants to its existing chain of seven stores. McDonald's, known around the world for its Big Mac, has taken special steps to assure Indian customers that its products are wholesome and prepared according to local tastes. The Big Mac has been replaced by the "Maharaja Mac," and beef patties have been replaced with lamb patties out of respect for the local Hindu population. Two color-coded menu boards are displayed in each restaurant, purple for non-vegetarians and green for vegetarian. Even the kitchens are separated, meat and non-meat products have dedicated preparation areas and the crews wear different uniforms.

-Compiled by Carmi Lyon

This information is intended for U.S. companies looking at overseas markets and does not carry the endorsement of USDA, nor does it represent the official view of USDA.

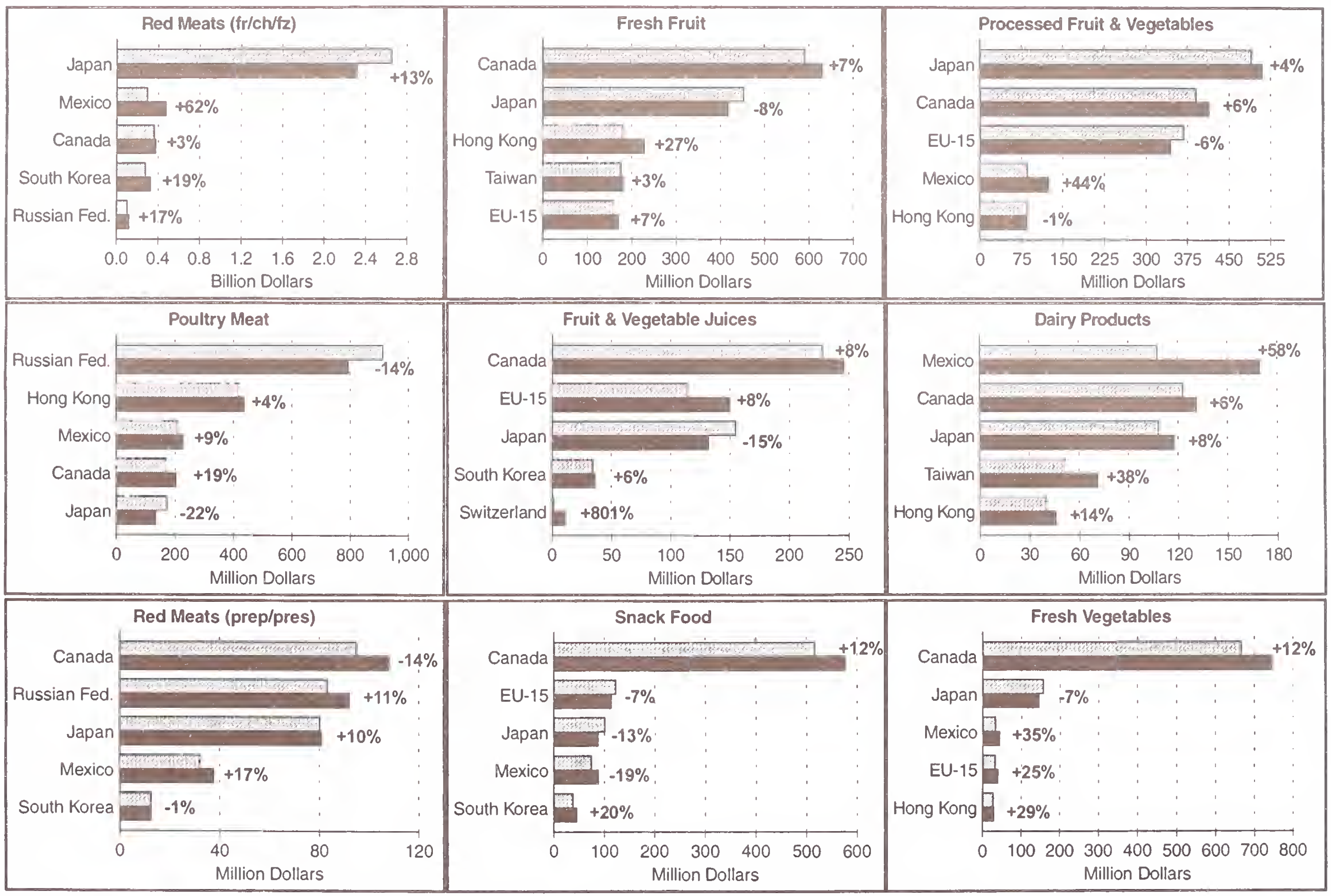
For more information of information on the reports mentioned in this column, e-mail: LyonC@fas.usda.gov, or visit the FAS homepage: www.fas.usda.gov.

Note: ATO refers to 'Agricultural Trade Office.' Offices designated as "Ag" refer to the Agricultural Affairs Office of the U.S. embassy of the listed city.

Trade Trend Top Five Markets for Selected U.S. Consumer Foods

Calendar Year Comparisons

CY 96 CY 97



Note: Percentages are computed as the change from 1996 to 1997.

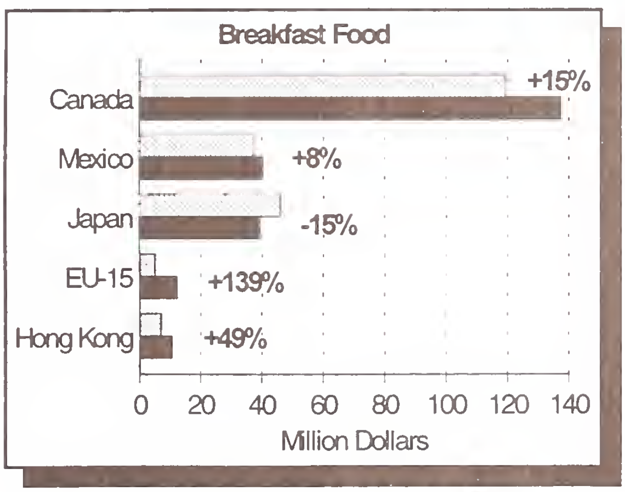
Consumer Food Trade Trends

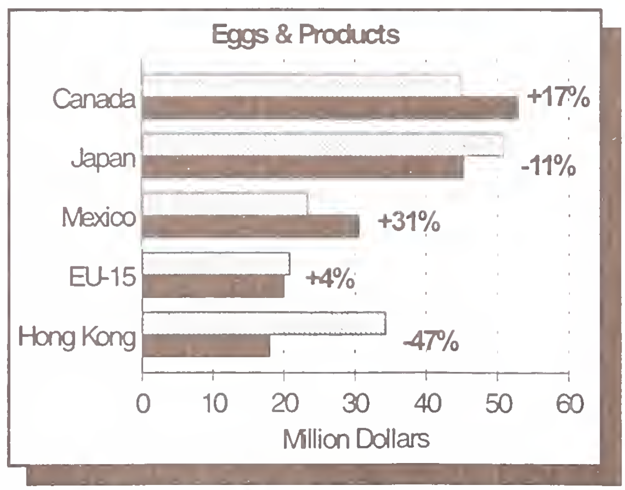
Coming In the Next Issue:
"Spotlight on the 1998 U.S. Food Export Showcase"

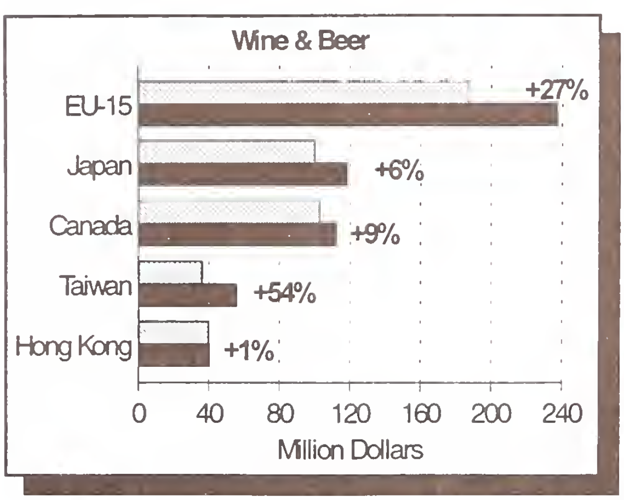
The US Food Export Showcase is a cost-effective avenue to help you succeed in the international marketplace. This year's show will take place May 3 through 5 at McCormick Place in Chicago. At the show, which is held in conjunction with the FMI International Supermarket Industry Convention and Educational Exposition, exporters can accomplish in three days what would normally require many months and thousands of dollars.

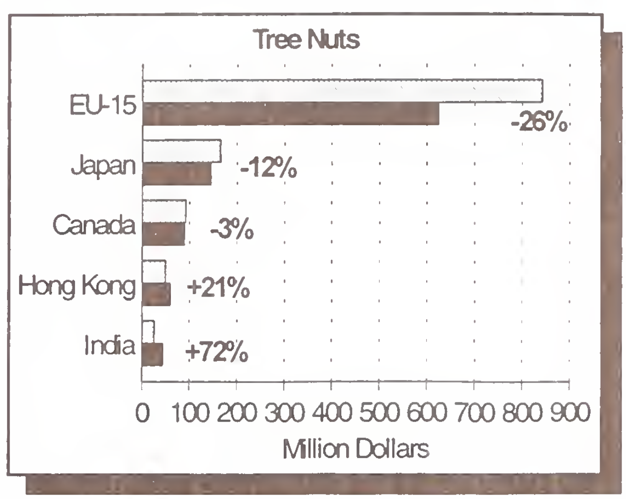
FAS staff from overseas trade offices will be leading buyer delegations and will also be available at the Showcase to assist with issues regarding exporting to their areas of the world. The National Association of State Departments of Agriculture will sponsor workshops at the show on important export-related topics, including federal programs to assist exporters, the best target countries or regions for your product, and how to do credit checks on international prospects.

For information on exhibiting, call the Convention Management Group at (703) 876-0900.









Regional Spotlight: Brazil's Northeast

The Brazilian market has come into its own in the 1990's, and the Northeastern regional economy shines as one of its major success stories. Incomes in the region are growing due to investments, newly enacted pro-business regulations, and a surge in tourism. Infrastructure improvements currently underway will improve access for imported consumer foods. U.S. exporters should consider the lucrative potential this market holds: it is geographically closer to the United States than the established consumer food markets of Sao Paulo and Rio de Janeiro, and it has traditionally been a food-deficit region.

By Robert Hoff, Agricultural Trade Officer in Sao Paulo

The Northeast in Perspective

The Brazilian Northeast, situated in the corner of Brazil which juts out into the Atlantic Ocean, is made up of nine states, all of which share Brazil's longest regional coastline. The population of the Northeast is estimated at about 45 million people; if the Northeast were a separate country, it would be the third largest in Latin America, after Brazil and Mexico. The region has three cities with populations well over a million, and eight of the nine regional capitals exceed 500,000 inhabitants.

Historically considered the economic backwater of Brazil, the region began changing in the 1980s due to the effects of public and private investment. During the 1990s, the pace of regional growth has accelerated in response to the success of the Brazilian Government's economic stabilization plan and the liberalization of the Brazilian economy.

At present, the growth rate of the Northeast outstrips that of Brazil's prosperous Center-South. Prospects for continued expansion, stimulated by low labor costs and infrastructure improvements, are bright.

Incomes in Northeast Growing Faster Than National Average

In terms of purchasing power, the per capita gross domestic product (GDP) in the Northeast was USD $2,564 in 1996, about half that of the Center-South. The Northeast grew 4.1 percent in 1996 compared with 2.9 percent for the overall Brazilian economy.

Incomes in the Northeast will most likely grow faster than in the Center-South because of increasing domestic and foreign investment; in the future, economic differences between the two regions will lessen.

The growing tourist industry has a significant effect on spending patterns in the Northeast. Most visitors come from the Center-South, Argentina, and the European Union. The number of hotels and restaurants catering to tourists is rapidly increasing. Tourists contribute significantly to economic growth in cities such as Fortaleza, Salvador, Natal, and Maceio, which all have beautiful beaches.

The Northeast is a food-deficit region which until recently had largely been taken for granted by the Brazilian food industry, concentrated in the Center-South. However, because of the growth rates in consumption of consumer food over the last few years, many of these enterprises have either installed or are contemplating the installation of processing units in the Northeast.

Bompreco Dominant Retailer in NE

The largest supermarkets in the Northeast have stores comparable in quality to those in the wealthier Center-South. The availability of imported food in major supermarkets is a recent phenomenon, and the variety is narrower that found in major cities of the Center-South.

Imported products make up only a small proportion of total supermarket sales (between 1 and 3 percent) and are usually much more expensive than their local counterparts due to shipping costs. Currently, most products are imported through agents in Sao Paulo or Rio de Janeiro and trucked up to the Northeast. As the Northeast develops its own network of importers and as the infrastructure improves, these problems may be alleviated.

In major supermarkets of the Northeast's principal cities, available products include imported fresh and dried fruits, nuts, meat and fish, wines and liquor, and a few processed food products.

Buyers in the region have indicated that consumption patterns are shifting, posing opportunities for U.S. exporters. One example is consumption of apples and pears, once consumed solely during the traditional Christmas holiday season, they are now considered a year-round treat.

The dominant supermarket chain in the region is Bompreco, the fourth largest chain in all of Brazil. Bompreco has 94 stores in the Northeast and is planning to open new stores in Sao Luis, Maranhao. U.S. items at Bompreco's newest store in Recife include baby carrots selling at $2.90 for 28 grams, Washington State pears for $.82 a pound, shelled almonds at $.60 for 400 grams, and one brand of beer at $.50 per can (all prices quoted in U.S. dollar equivalents).

The growth in tourism presents many opportunities in the hotel and restaurant industry (HRI). Importers are looking for consistent quality and good value. Currently, U.S. prime meat is being imported directly into Recife and sold to steak houses there and in other Northeastern cities. Other products with potential in the HRI sector include wines, fruits, beer, canned and frozen products.

The Brazilian Northeast: Demographic and Economic Data

State (Capital)	Per Capita GDP	1996 GDP Growth	Population (in millions)
Rio Grande do Norte (Natal)	$2,955	8.2%	2.6
Bahia (Salvador)	$2,802	3.4%	12.6
Ceara (Fortaleza)	$2,796	6.8%	6.7
Pernambuco (Recife)	$2,667	3.3%	7.4
Sergipe (Aracaju)	$2,573	4.6%	1.6
Pariaba (Joao Pessoa)	$2,385	5.6%	3.3
Alagoas (Maceio)	$2,282	3.0%	2.7
Maranhao (Sao Luis)	$1,990	7.3%	5.2
Piaui (Teresina)	$1,857	5.0%	2.7
NE Average	$2,564	4.1%	44.8

Modest U.S. Presence Despite Relative Geographic Proximity

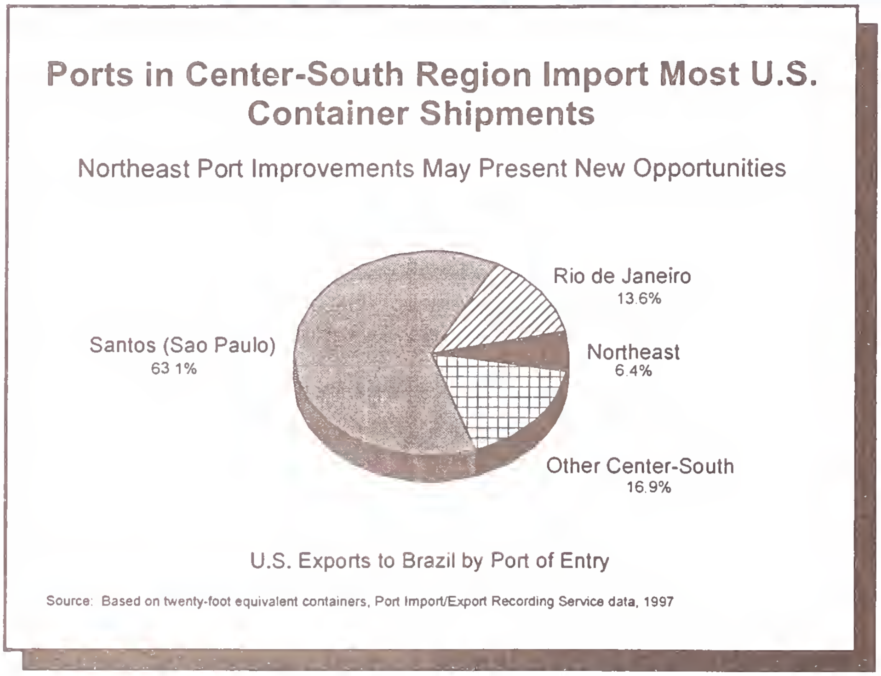
In general, competition among foreign food and beverage exporters in Northeastern Brazil is significantly less than in the principal cities of the Center-South. The major suppliers of imported products are Argentina, Chile, and the European Union. While the United States is relatively close to the Brazilian Northeast, very few U.S. products are currently available.

The current arrangements for shipping products from the U.S. West Coast have precluded some U.S. products from being more competitive in the Northeast. As an example, one buyer imports directly into Recife but still faces the high costs of shipping product across the United States to Miami, where it is loaded into containers. If product could be shipped by vessel directly from the U.S. West Coast, freight costs might be reduced enough to sell the product at a more competitive price relative to its Latin American competitors.

Transportation Upgrades Coming to Region

One of the major disadvantages that the Northeast faces is a lack of infrastructure to receive international shipments. Goods are usually imported by the established and dominant importers in the markets of the Center-South and trucked to the

Regional Spotlight: Brazil's Northeast



Northeast. Freight costs for this service are high, and are reflected in the higher prices that Northeastern consumers pay for their food.

With incomes in the Northeast growing and regional ports undergoing privatization and modernization, more vessels are beginning to call on the Northeast's principal ports of Salvador, Recife, and Fortaleza. There is, for example, a direct shipping service between Salvador and Buenos Aires, a trip which takes six to eight days and covers 3,500 miles.

In the near future, the relative economic isolation caused by a minimal transportation infrastructure, will lessen considerably. Later this year, one shipping firm operating along the East Coast of the United States may begin to call on Salvador and Recife, depending on the results of negotiations between it and the authorities of these two ports. In addition, the public and private sectors are making major investments in the construction of the port of Pecem, which will serve Fortaleza. The first phase of construction of this port will be completed later this year.

Making Contacts: EXPONOR 98

U.S. exporters interested in exploring this region further may want to consider the regional supermarket exposition, EXPONOR. EXPONOR 98 will be held June 14 through 17 in Olinda, near Recife. FAS has not yet visited or evaluated the merits of this show, but ATO Sao Paulo plans to make a recommendation following a visit to the upcoming show in Olinda.

Agents throughout the Northeast have noted that EXPONOR is the best way for U.S. exporters to acquaint themselves with Northeastern buyers. EXPONOR is held every year and rotates among the Northeast's three principal cities of Salvador, Recife, and Fortaleza. Last year 7,000 people attended EXPONOR 97 held in Salvador.

For more information on EXPONOR 98, contact:

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Supermarket Association of Pernambuco
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52010-120 Recife, PE BRAZIL

Phone: (55-11) 421-3612
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Regional Spotlight: Brazil's Northeast

Northeastern Cities at a Glance

Fortaleza, Ceara	• Ceara considered a pro-business state, efforts to reform state bureaucracy and create conditions to stimulate investment stand out. • Major infrastructure improvements underway. Port is being built 25 miles from Fortaleza, first phase ready next year; airport is being modernized. • An important tourist destination, 14 new hotels may be built by 2000. • Major food retailers: Bompreco and Pao de Acucar.
Salvador, Bahia	• Major tourist destination. Investment of $180 million has been made in a new tourist complex north of Salvador. • Diversified economy based on manufacturing, trade, and tourism. • Major food retailers: Bompreco, Superbox, and PetitPreco.
Recife, Pernambuco	• Important city for regional commerce and distribution with the most modern port, Suape. • Some fruits and meats are imported directly to Recife, then distributed throughout the Northeast. • Mars has built a confectionery processing facility in Recife, one of three plants in Brazil. • Major food retailers: Bompreco, Carrefour, Makro, and Comprebem.
Maceio, Alagoas	• Major tourist destination, especially for Brazilians from the Center-South, and active restaurant scene at beaches. • More quality hotels slated for construction in the near future. • Major food retailer: Bompreco.
Aracaju, Sergipe	• Petrobras, Brazil's petroleum monopoly has made major investments in oil • Tourism less important to this economy. • Major food retailers: G. Barbosa and Bompreco.

U.S. EXPORTS OF AGRICULTURAL, FISH & FORESTRY PRODUCTS TO BRAZIL
CY 1991 - 1997
(IN THOUSANDS OF DOLLARS)

EXPORT MARKET: BRAZIL

PRODUCT	1991	1992	1993	1994	1995	1996	1997	% CHANGE 1996-97
	CALENDAR YEARS (JAN-DEC)							
BULK AGRICULTURAL TOTAL................	167,153	79,434	114,632	326,743	196,773	306,300	255,004	-16.75
WHEAT................................	72,040	15,326	22,837	0	68,981	173,863	603	-99.65
COARSE GRAINS........................	16,208	1,171	7,247	40,047	6,292	5,004	983	-80.36
RICE.................................	66,748	2,245	1,965	63,802	10,423	3,391	2,684	-20.87
SOYBEANS.............................	6,909	55,845	0	133,797	19,774	52,473	157,942*	201.00
COTTON...............................	4,383	3,859	80,966	83,248	84,615	66,654	88,328*	32.52
TOBACCO..............................	17	19	0	19	91	935	180	-80.79
PULSES...............................	157	120	816	3,892	3,305	1,596	2,343	46.85
PEANUTS..............................	128	159	163	278	455*	383	339	-11.59
OTHER BULK COMMODITIES................	562	690	637	1,659	2,837*	2,000	1,603	-19.85
INTERMEDIATE AGRICULTURAL TOTAL.........	63,324	48,320	56,802	90,368	118,160*	95,142	117,440	23.44
WHEAT FLOUR..........................	761	0	19	9	132	67	0	-100.0
SOYBEAN MEAL.........................	0	0	0	0	5	490*	341	-30.43
SOYBEAN OIL..........................	180	0	0	469	145	0	71	-
VEGETABLE OILS (EXCL SOYBEAN OIL).....	101	1,479	2,160	4,604	2,131	1,890	12,097*	540.19
FEEDS & FODDERS (EXCL PET FOODS)......	1,929	3,096	3,474	7,780	8,699	9,951*	7,233	-27.32
LIVE ANIMALS.........................	17,009	12,518	12,339	12,415	14,179	10,598	13,358	26.04
HIDES & SKINS........................	890	193	352	941	2,445	1,777	1,654	-6.92
ANIMAL FATS..........................	10,075	4,057	7,845	16,196	14,288	2,934	407	-86.12
PLANTING SEEDS.......................	3,186	3,053	5,727	5,653	7,523	6,286	8,495*	35.14
SUGARS, SWEETENERS, & BEVERAGE BASES..	456	264	1,035	3,914	10,290	9,790	12,215*	24.77
OTHER INTERMEDIATE PRODUCTS...........	28,737	23,659	23,851	38,388	58,323	51,359	61,569*	19.88
CONSUMER-ORIENTED AGRICULTURAL TOTAL....	24,323	21,813	26,731	74,228	203,181*	170,830	160,654	-5.96
SNACK FOODS (EXCL NUTS)...............	3,848	4,306	4,248	7,564	16,231	19,059*	15,070	-20.93
BREAKFAST CEREALS & PANCAKE MIX.......	89	350	138	693	1,405	6,882*	2,987	-56.59
RED MEATS, FRESH/CHILLED/FROZEN.......	3,291	161	1,381	2,133	3,324	8,272	15,935	92.64
RED MEATS, PREPARED/PRESERVED.........	126	151	32	539	653*	523	314	-40.10
POULTRY MEAT.........................	40	0	64	668	1,223*	984	1,039	5.56
DAIRY PRODUCTS.......................	309	4,299	1,167	3,410	17,714	11,302	10,705	-5.29
EGGS & PRODUCTS......................	1,721	854	1,705	800	2,633*	2,169	1,665	-23.22
FRESH FRUIT..........................	1,724	1,431	2,417	14,794	20,879	21,433*	13,753	-35.83
FRESH VEGETABLES.....................	5	39	247	145	1,757*	989	872	-11.78
PROCESSED FRUIT & VEGETABLES..........	2,649	2,090	3,499	5,688	19,555	14,940	28,825*	92.93
FRUIT & VEGETABLE JUICES.............	60	16	121	403	2,319*	712	1,414	98.56
TREE NUTS............................	2,900	2,468	3,478	9,148	11,475	12,609*	10,344	-17.96
WINE & BEER..........................	4,759	3,712	3,789	15,475	44,971*	38,722	6,760	-82.54
NURSERY PRODUCTS & CUT FLOWERS........	3	46	34	411*	371	366	365	-0.35
PET FOODS (DOG & CAT FOOD)............	38	31	302	1,947	6,119	8,425	25,163*	198.66
OTHER CONSUMER-ORIENTED PRODUCTS......	2,759	1,860	4,109	10,413	52,552*	23,441	25,443	8.54
FOREST PRODUCTS (EXCL PULP & PAPER).....	1,655	1,340	1,523	2,489	1,956	7,878	12,169*	54.48
LOGS AND CHIPS.......................	8	56	3	10	83	235	52	-78.02
HARDWOOD LUMBER......................	65	0	35	28	60	59	83	39.72
SOFTWOOD AND TREATED LUMBER...........	30	0	0	7	25	0	0	-
PANEL PRODUCTS (INCL PLYWOOD).........	268	539	813	1,239	483	734	2,770*	277.43
OTHER VALUE-ADDED WOOD PRODUCTS.......	1,284	745	672	1,206	1,306	6,849	9,264*	35.26
FISH & SEAFOOD PRODUCTS, EDIBLE.........	456	309	320	1,409	836	1,360	4,048*	197.77
SALMON, WHOLE OR EVISCERATED..........	0	0	0	3	77	255*	3	-98.75
SALMON, CANNED.......................	0	0	0	0	3	0	0	-
CRAB & CRABMEAT......................	8	116*	0	0	8	84	77	-8.32
SURIMI (FISH PASTE)...................	0	0	0	0	0	140*	108	-22.75
ROE & URCHIN (FISH EGGS)..............	0	9	12	0	0	0	15	-
OTHER EDIBLE FISH & SEAFOOD...........	448	184	308	1,406	748	881	3,845*	336.48
AGRICULTURAL PRODUCT TOTAL	254,800	149,566	198,165	491,339	518,114	572,271	533,098	-6.85
AGRICULTURAL, FISH & FORESTRY TOTAL	256,911	151,216	200,008	495,237	520,906	581,508	549,315	-5.54

ANALYSIS BY: COMMODITY AND MARKETING PROGRAMS/FAS/USDA
SOURCE: U.S. BUREAU OF THE CENSUS TRADE DATA
NOTE: * DENOTES HIGHEST EXPORT LEVELS SINCE AT LEAST CY 1970

Frozen Food Sector Trade Summary

This issue of Agricultural Trade Highlights marks the introduction of the Frozen Food Sector trade summary. This category consists of fruit, vegetables, juices, prepared meals, bakery/breakfast food, ice cream and other frozen foods. It does not include meat except in prepared meals. In 1996, this category reached $1.1 Billion in U.S. export sales. For the January to November cumulative-to-date period comparing 1996 to 1997 exports, frozen foods rose 11-percent. Frozen potatoes, including french fries, are the largest dollar value export item with sales at $286 million in 1996.

More than fifty percent of U.S. frozen food exports go to the Pacific Rim region. The top ten markets, (Japan, Canada, EU-15, South Korea, Hong Kong, Mexico, Taiwan, Singapore, Philippines and Russia) make up 86 percent of total frozen food exports. Six out of ten of these markets are in the Pacific Rim.

The charts and graphs published for the first time in this issue of ATH will be updated throughout the year and appear in future issues of ATH. For further information or questions contact via e-mail: Tse@fas.usda.gov

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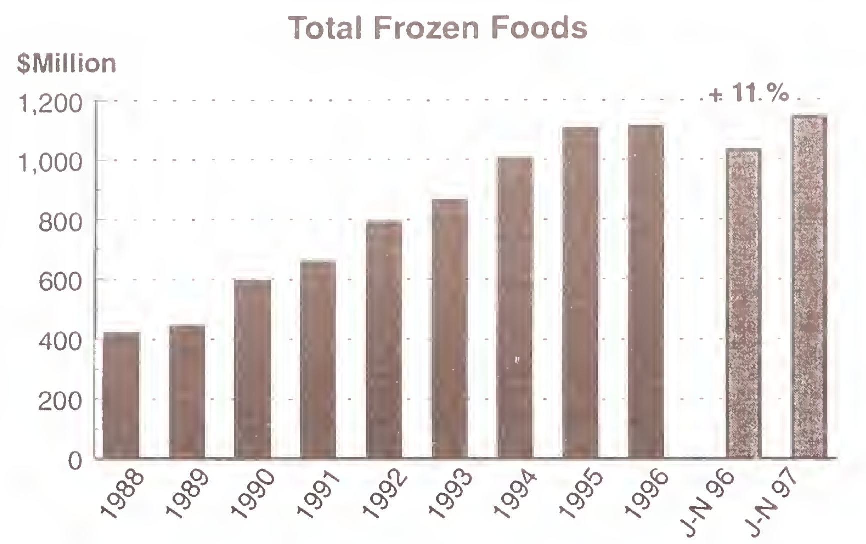
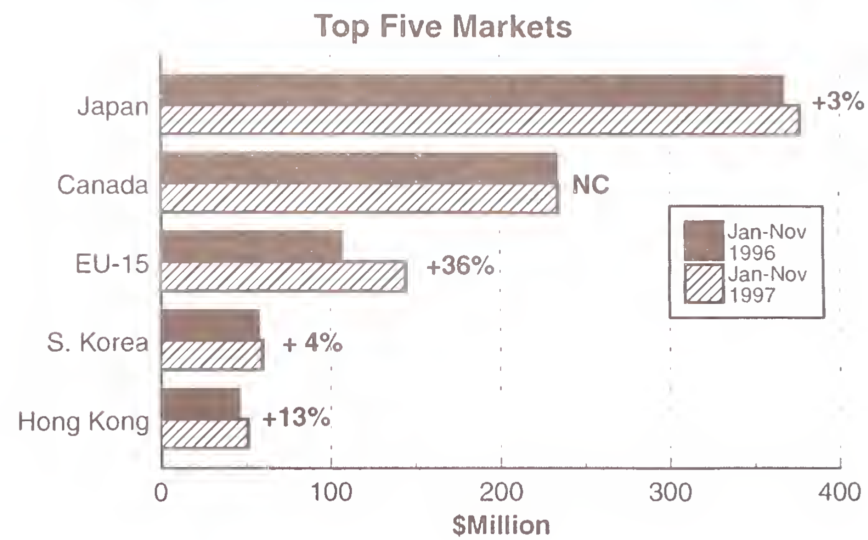
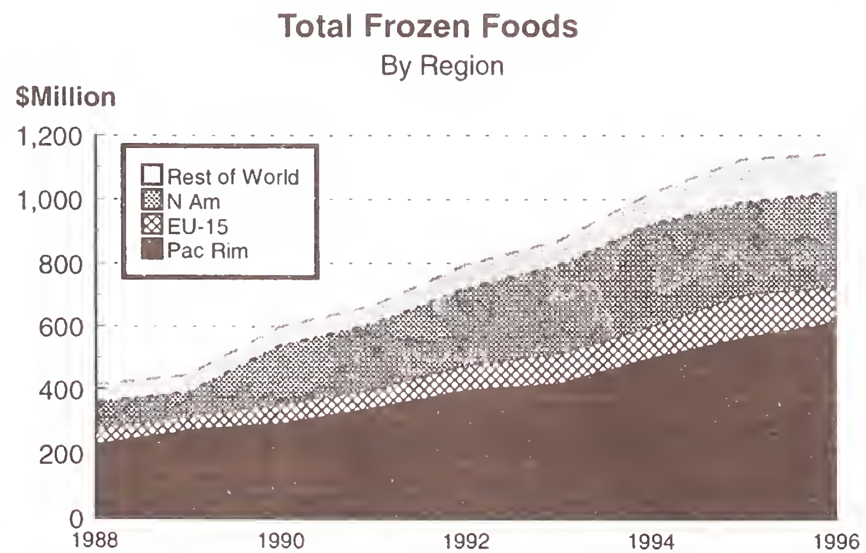
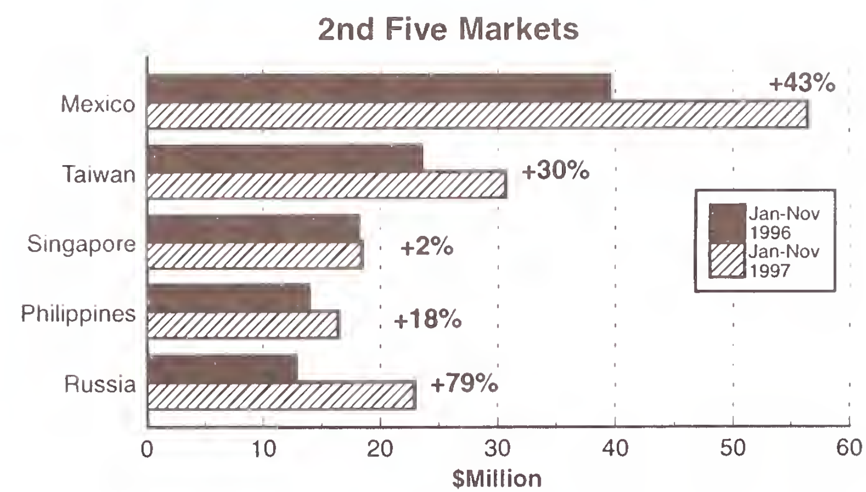




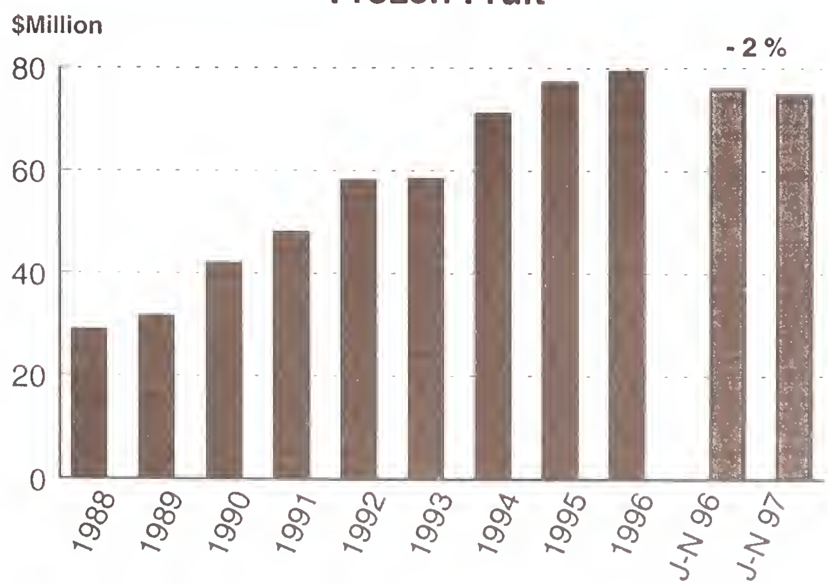




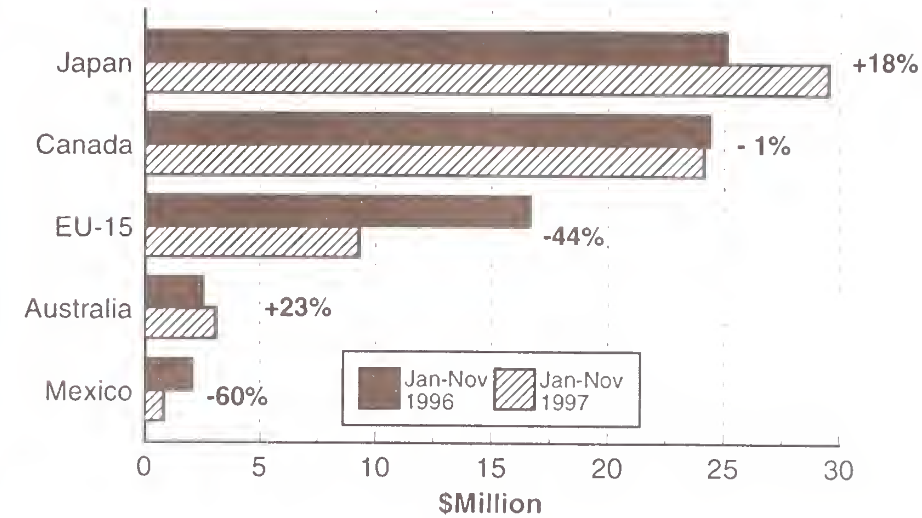
Note: "Frozen food" does not include frozen meat except for prepared meals. The frozen food category is defined using Harmonized Trade codes. The Bureau of the Census is the source of the trade data. Percentage change is based on the January through November cumulative-to-date comparison. Country rank is based on 1996 full year exports.

U.S. Exports of Frozen Fruit

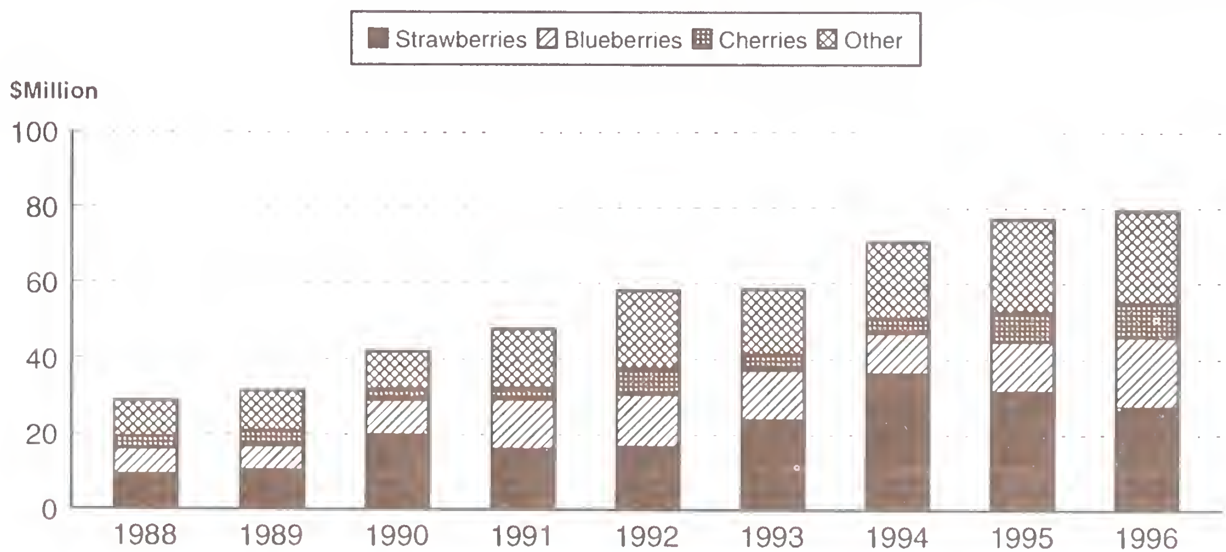
Frozen Fruit



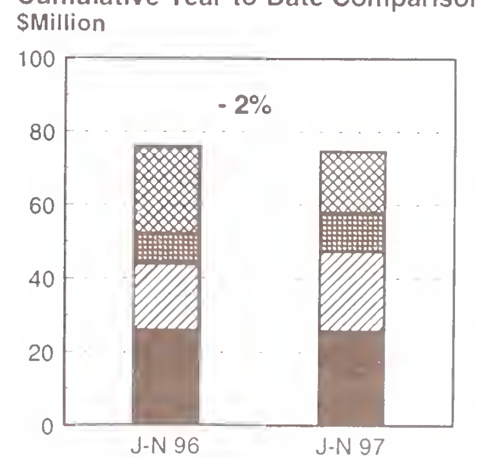
Top Five Markets



Frozen Fruit - Top Categories

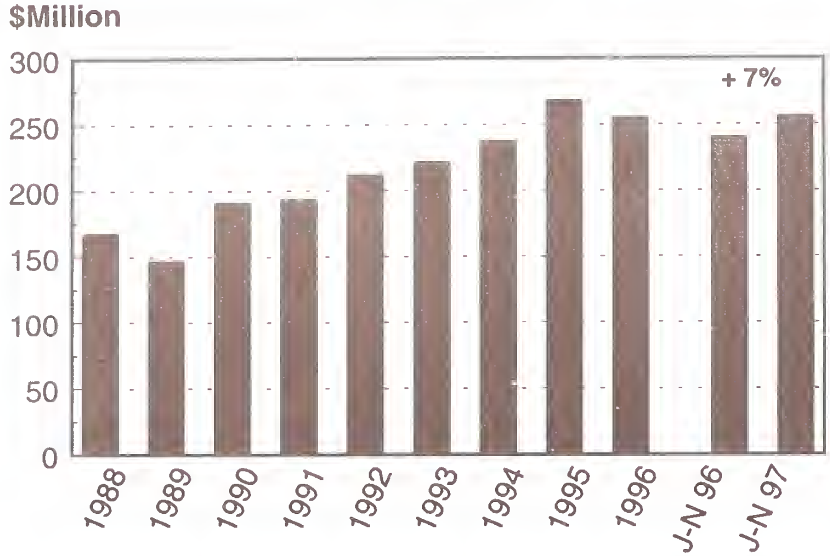


Cumulative Year-to-Date Comparison

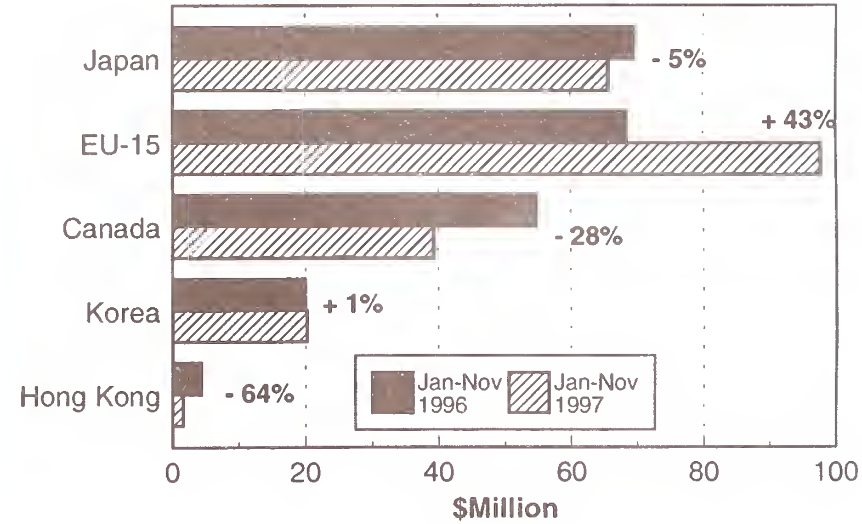


U.S. Exports of Frozen Juice

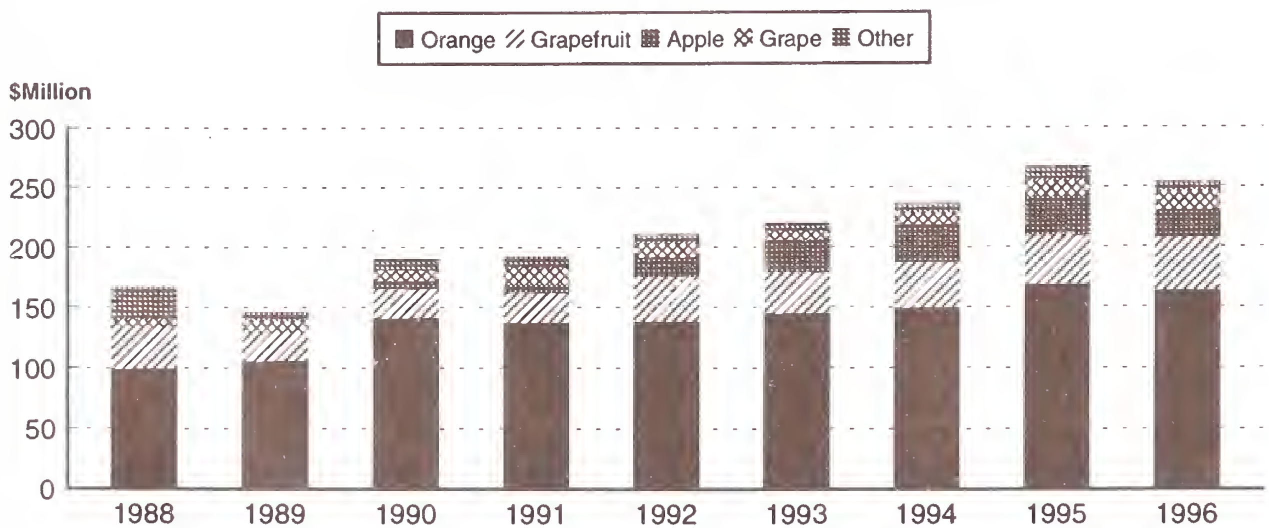
Frozen Juice



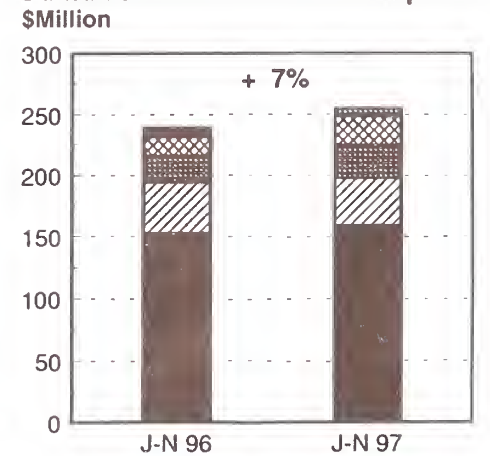
Top Five Markets



Frozen Juice - Top Categories

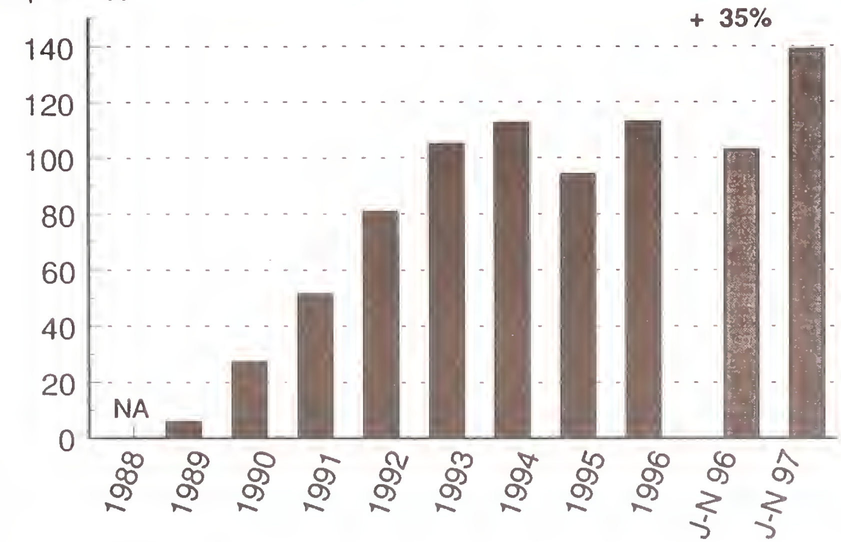


Cumulative Year-to-Date Comparison

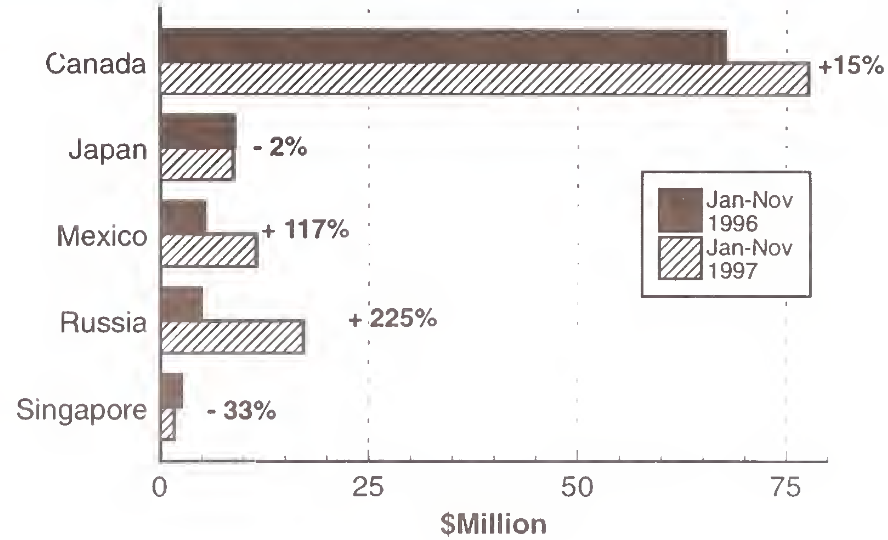


U.S. Exports of Frozen Prepared Meals

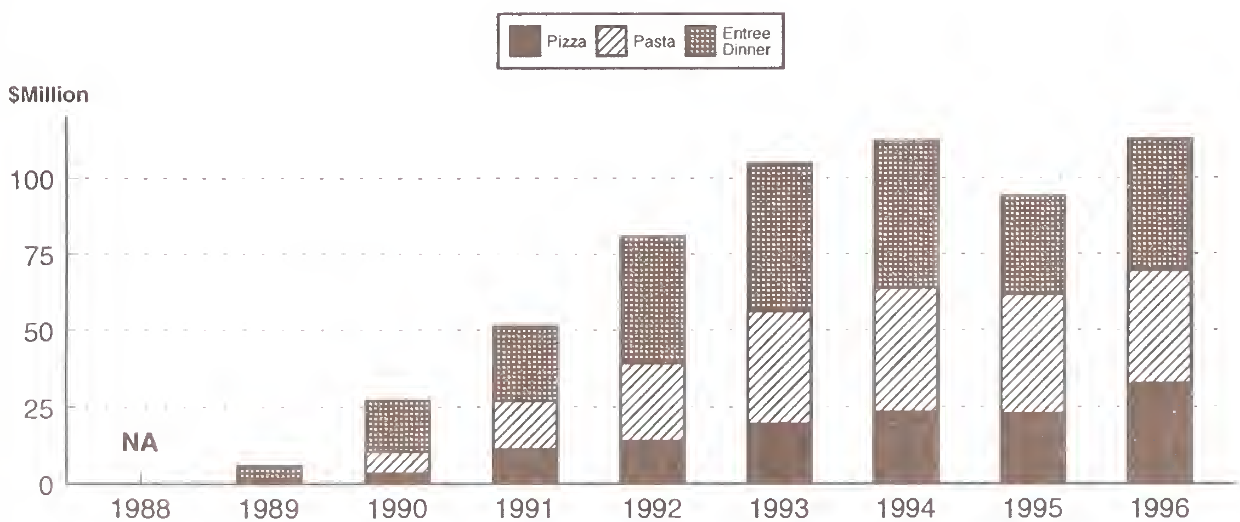
Prepared Meals

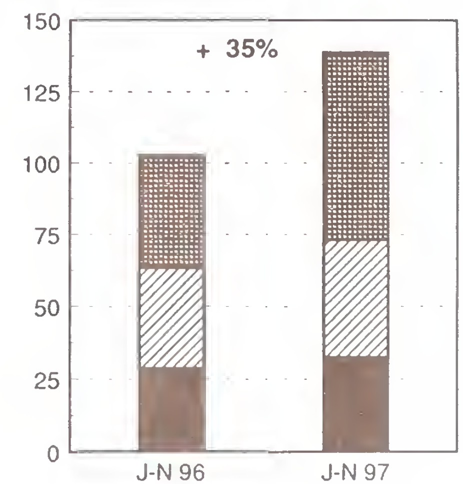


Top Five Markets



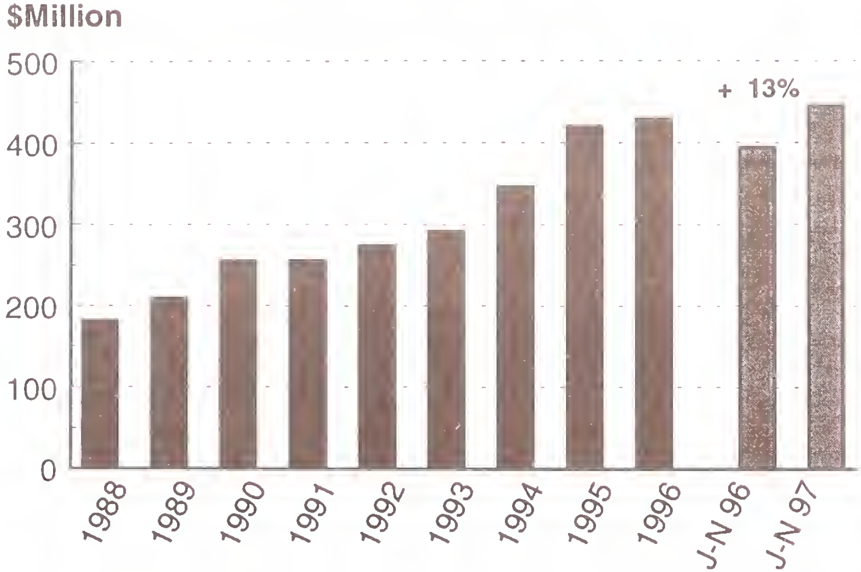
Prepared Meals - Top Categories



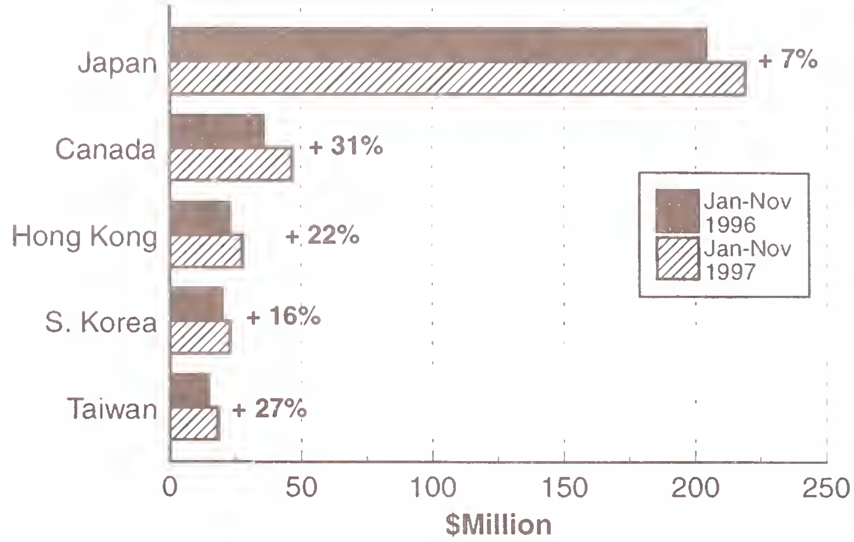


U.S. Exports of Frozen Vegetables

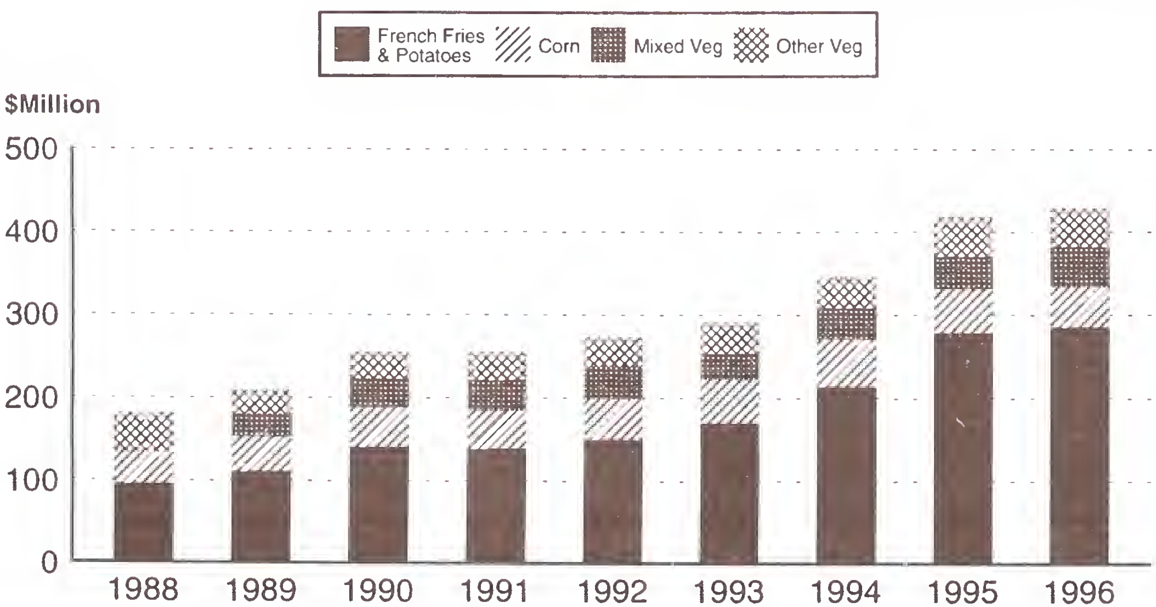
Frozen Vegetables



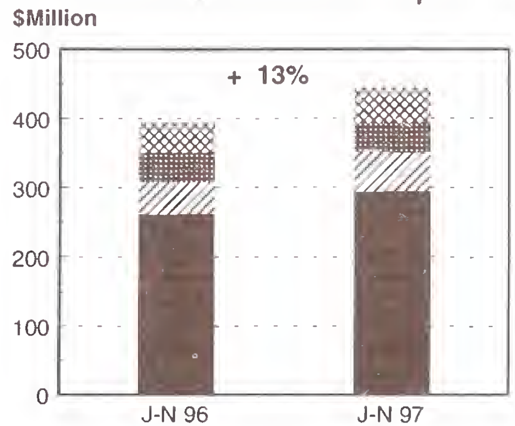
Top Five Markets



Frozen Vegetables - Top Categories

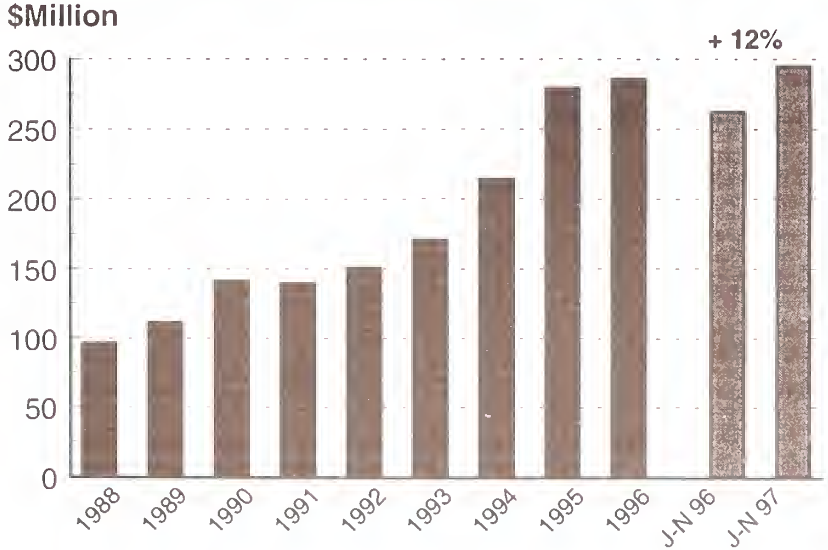


Cumulative Year-to-Date Comparison

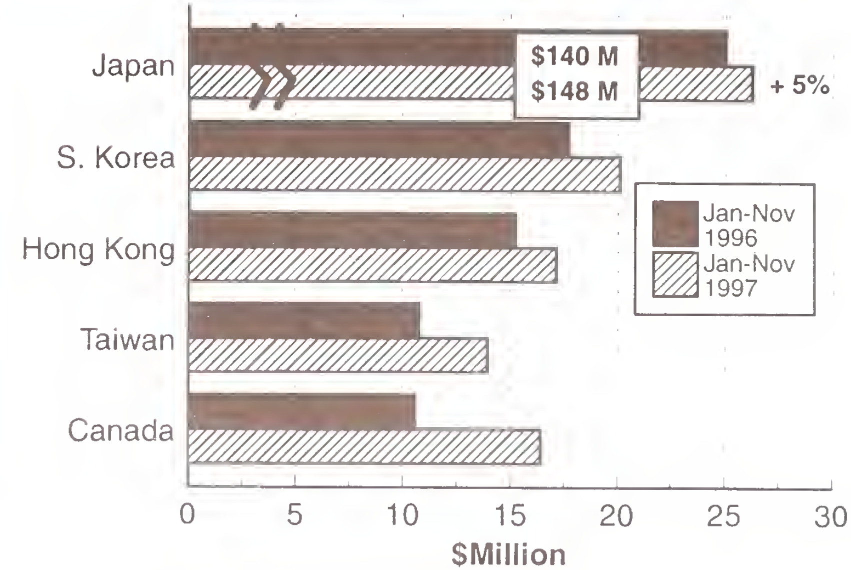


U.S. Exports of Fz Potatoes & Bakery/Breakfast Foods

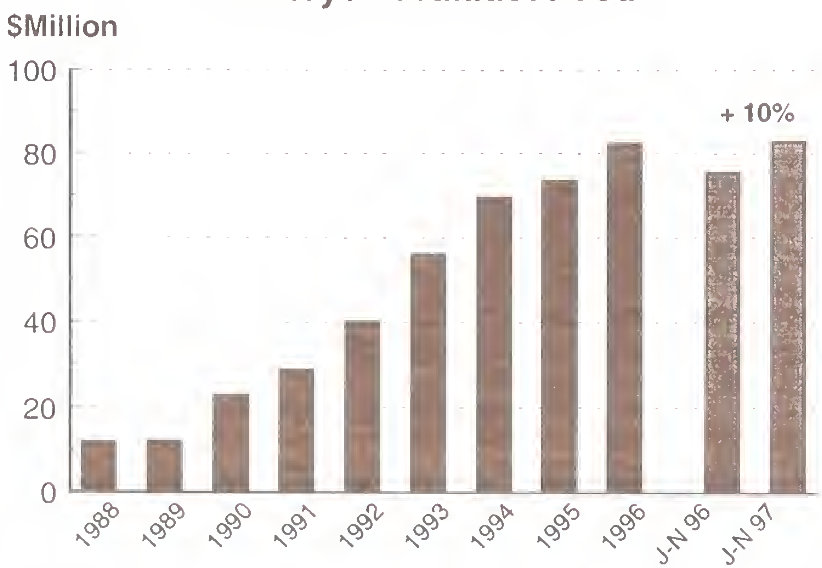
Frozen Potatoes and French Fries



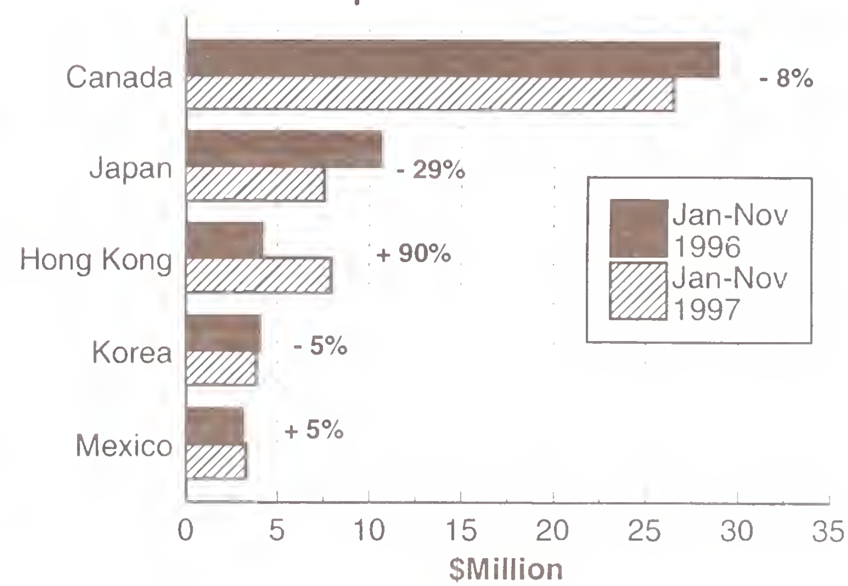
Top Five Markets



Bakery / Breakfast Food

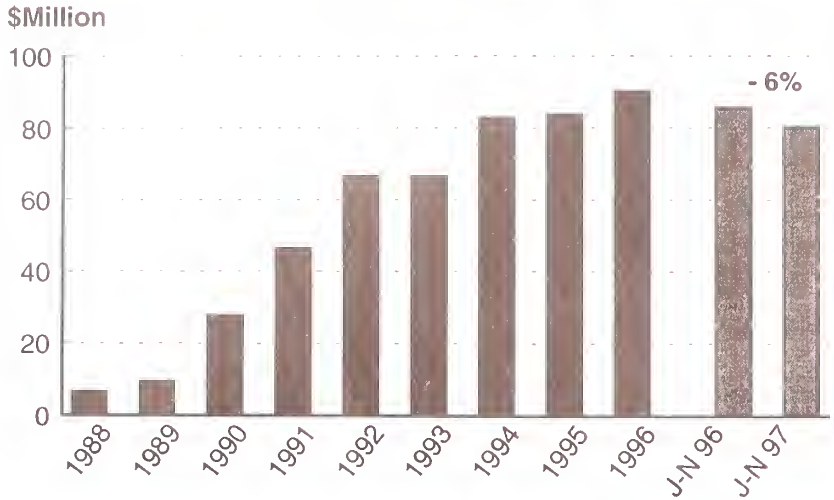


Top Five Markets

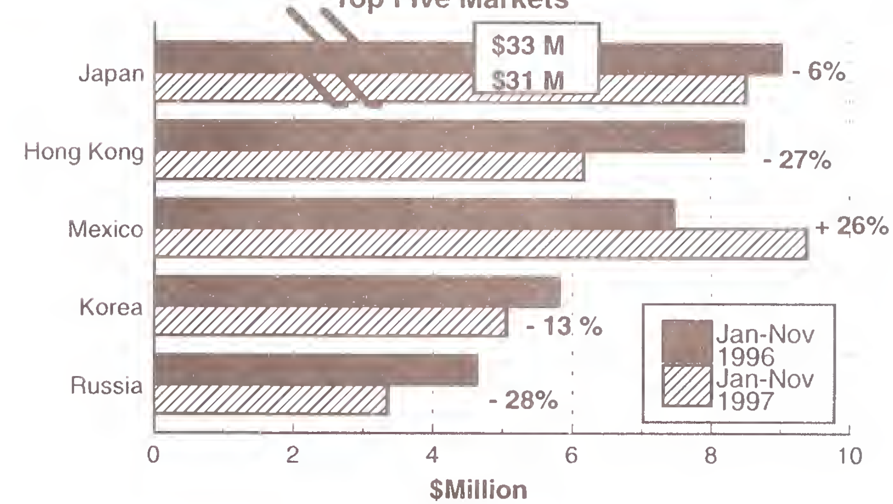


U.S. Exports of Ice Cream & Other Frozen Foods

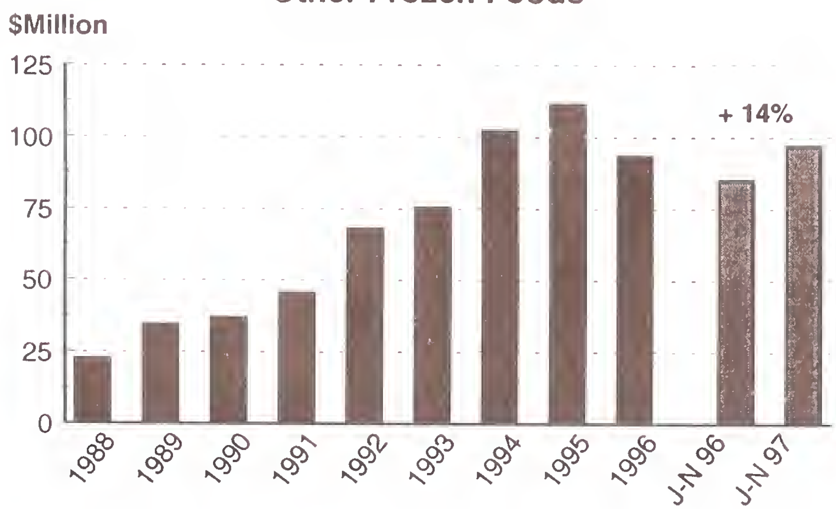
Ice Cream



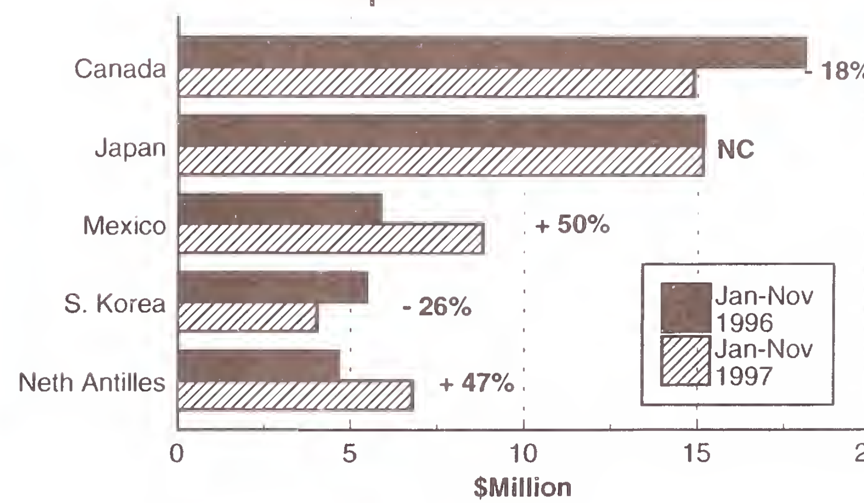
Top Five Markets



Other Frozen Foods



Top Five Markets



Global Exports of U.S. Frozen Food

Value in $1000	1990	1991	1992	1993	1994	1995	1996	Cumulative-to-Date Comparison Jan-Nov '96	Jan-Nov '97	Percent Change
Frozen Fruit										
Strawberries	19,957	16,288	16,874	24,140	36,313	31,554	27,470	26,141	25,915	-1%
Blueberries	9,345	13,192	13,912	13,269	10,683	13,399	18,613	18,003	21,607	20%
Cherries	2,940	3,056	6,973	4,142	4,154	7,698	8,903	8,259	10,666	29%
Other-fruit	9,738	15,471	20,389	16,916	20,030	24,539	24,339	23,526	16,599	-29%
TOTAL FROZEN FRUIT	$41,980	48,007	58,148	58,468	71,180	77,190	79,325	75,929	74,786	-2%
Frozen Juice										
Orange juice	141,516	137,509	138,700	144,672	149,453	168,893	163,309	153,229	159,733	4%
Apple juice	6,496	6,991	17,143	27,969	32,284	33,573	23,106	21,607	26,951	25%
Grape juice	8,731	14,010	11,830	7,361	9,626	13,228	16,381	15,646	23,417	50%
Grapefruit juice	24,403	25,161	37,078	34,662	37,807	40,695	44,209	41,934	38,922	-7%
Lemon juice	4,701	2,778	1,634	2,249	2,429	4,267	3,758	3,522	2,214	-37%
Other juice	4,934	6,265	5,611	4,093	5,248	6,845	3,693	3,513	4,240	21%
TOTAL FROZEN JUICE	$190,781	192,714	211,997	221,006	236,847	267,500	254,455	239,452	255,476	7%
Frozen Prepared Meals										
Pasta	7,134	15,779	25,476	36,684	40,458	38,852	37,016	34,588	40,653	18%
Pizza	3,569	11,337	13,925	19,458	23,342	22,856	32,615	28,889	32,574	13%
Entree dinner	16,482	24,111	41,247	48,594	48,506	32,197	43,129	39,223	65,567	67%
TOTAL FZ PREPARED MEALS	$27,186	51,228	80,648	104,737	112,305	93,906	112,760	102,700	138,794	35%
Frozen Vegetables										
Peas	5,456	5,524	7,052	7,483	7,613	12,231	10,590	9,915	8,902	-10%
Spinach	2,743	2,893	2,931	3,387	3,366	2,552	3,081	2,728	3,650	34%
French fries & potatoes	141,422	139,443	150,650	170,743	214,420	279,104	285,730	262,583	294,732	12%
Carrots	1,278	1,460	606	1,107	1,583	2,049	2,009	1,943	3,278	69%
Corn	47,515	46,299	49,149	51,953	57,443	53,015	49,629	46,312	56,834	23%
Mixed-veg	35,222	36,792	39,607	32,090	38,455	40,122	48,396	43,554	43,571	0%
Other-veg	21,535	23,080	23,610	24,968	23,605	30,924	29,902	27,602	34,182	24%
TOTAL FZ VEGETABLES	$255,170	255,492	273,605	291,732	346,485	419,997	429,337	394,637	445,148	13%
FZ BAKERY & BREAKFAST FOOD	$22,809	28,753	40,103	55,927	69,499	73,335	82,217	75,418	82,837	10%
FZ ICE CREAM	$27,681	46,261	66,533	66,512	82,781	83,736	90,233	85,567	80,218	-6%
OTHER FZ FOODS	$36,696	45,440	67,867	75,443	102,215	111,307	93,373	84,975	96,919	14%
FROZEN FOOD TOTAL	$602,303	667,894	798,901	873,824	1,021,311	1,126,971	1,141,701	1,058,677	1,174,178	11%

Note: "Frozen food" does not include frozen meat except for prepared meals. The frozen food category is defined using Harmonized Trade Codes. The Bureau of the Census is the source of U.S. trade data.

U.S. Exports of Frozen Food to Japan

Market Rank: #1

Value in $1000	1990	1991	1992	1993	1994	1995	1996	Cumulative-to-Date Comparison Jan-Nov '96	Jan-Nov '97	Percent Change
Frozen Fruit										
Strawberries	15,712	10,354	10,364	15,641	19,370	21,793	19,861	18,977	17,473	-8%
Blueberries	730	959	833	1,150	1,388	1,128	3,059	2,672	8,101	203%
Cherries	163	570	1,460	711	1,131	860	555	511	1,393	173%
Other-fruit	2,280	3,667	3,031	2,071	3,180	3,783	3,028	2,908	2,519	-13%
TOTAL FROZEN FRUIT	$18,886	15,550	15,688	19,573	25,069	27,564	26,503	25,068	29,487	18%
Frozen Juice										
Orange juice	7,997	12,394	27,922	16,029	27,035	12,888	26,979	25,879	22,843	-12%
Apple juice	3,738	2,130	10,963	19,174	19,892	24,440	16,153	15,193	17,720	17%
Grape juice	7,062	12,071	9,084	4,540	5,769	7,112	8,893	8,497	9,618	13%
Grapefruit juice	13,453	10,869	22,249	18,831	21,488	14,641	17,262	16,285	12,144	-25%
Lemon juice	2,777	1,082	962	1,485	1,329	2,816	2,149	1,939	1,424	-27%
Other juice	1,188	2,246	2,169	426	457	3,817	1,729	1,729	1,971	14%
TOTAL FROZEN JUICE	$36,215	40,792	73,350	60,486	75,971	65,714	73,165	69,522	65,720	-5%
Frozen Prepared Meals										
Pasta	422	400	313	200	1,248	1,207	1,386	1,227	594	-52%
Pizza	76	285	68	394	416	1,587	643	578	1,661	187%
Entree dinner	706	794	1,373	2,146	1,565	4,204	7,592	7,124	6,496	-9%
TOTAL FZ PREPARED MEALS	$1,204	1,479	1,755	2,740	3,229	6,998	9,622	8,929	8,751	-2%
Frozen Vegetables										
Peas	4,056	4,015	4,169	3,867	3,077	3,513	3,209	2,972	3,568	20%
Spinach	47	755	298	722	665	410	475	349	195	-44%
French fries & potatoes	81,533	90,670	90,635	95,578	112,898	133,180	151,299	140,067	147,606	5%
Carrots	281	675	473	753	1,443	1,752	1,636	1,616	1,967	22%
Corn	30,019	29,173	30,512	33,557	36,268	35,287	35,307	33,248	38,422	16%
Mixed-veg	14,938	15,045	13,591	14,209	18,378	15,095	15,651	14,768	11,751	-20%
Other-veg	7,286	10,105	9,778	9,015	8,691	10,249	11,280	10,683	15,066	41%
TOTAL FZ VEGETABLES	$138,160	150,438	149,456	157,700	181,420	199,486	218,856	203,702	218,574	7%
FZ BAKERY & BREAKFAST FOOD	$2,645	3,093	2,148	2,877	3,421	11,868	11,162	10,601	7,534	-29%
ICE CREAM	$5,900	12,929	18,371	20,750	27,670	34,940	35,136	33,070	30,970	-6%
OTHER FZ FOODS	$5,154	4,368	7,821	6,905	11,449	13,771	16,095	15,167	15,143	-0%
FROZEN FOOD TOTAL	**$208,164**	**228,650**	**268,588**	**271,031**	**328,229**	**360,341**	**390,539**	**366,059**	**376,179**	**3%**

Note: Market rank is based on 1996 full year exports. The European Union is treated as a single market for ranking purposes.

U.S. Exports of Frozen Food to Canada

Market Rank: #2

Value in $1000	1990	1991	1992	1993	1994	1995	1996	Cumulative-to-Date Comparison Jan-Nov '96	Jan-Nov '97	Percent Change
Frozen Fruit										
Strawberries	3,021	3,816	3,456	5,239	6,450	5,727	4,572	4,379	5,891	26%
Blueberries	2,255	4,003	4,965	3,388	3,445	3,773	6,496	6,442	8,082	20%
Cherries	1,067	1,325	2,603	1,399	960	1,348	1,766	1,721	2,738	37%
Other-fruit	3,955	5,554	6,683	7,967	9,065	11,746	12,238	11,803	7,405	-59%
TOTAL FROZEN FRUIT	$10,298	14,699	17,707	17,993	19,921	22,594	25,072	24,345	24,116	-1%
Frozen Juice										
Orange juice	76,391	73,287	55,594	46,792	51,087	53,396	47,425	43,432	29,942	-45%
Apple juice	2,546	4,516	3,181	2,946	2,880	4,033	3,461	3,342	3,658	9%
Grape juice	1,202	885	1,286	2,310	857	374	845	826	962	14%
Grapefruit juice	5,770	7,635	7,544	4,943	5,566	5,392	5,717	5,403	4,117	-31%
Lemon juice	1,685	1,422	489	473	387	373	761	758	310	-145%
Other juice	2,032	2,051	1,773	2,098	1,286	1,028	1,049	990	273	-263%
TOTAL FROZEN JUICE	89,626	89,796	69,866	59,562	62,062	64,596	59,258	54,751	39,262	-39%
Frozen Prepared Meals										
Pasta	6,591	15,132	23,385	32,639	34,227	35,052	32,904	30,823	37,486	18%
Pizza	1,902	8,927	10,102	15,315	18,048	18,294	26,020	22,820	25,715	11%
Entree dinner	11,561	13,956	20,428	25,279	25,461	13,933	14,628	13,935	14,458	4%
TOTAL FZ PREPARED MEALS	$20,055	38,015	53,915	73,234	77,736	67,278	73,552	67,578	77,659	13%
Frozen Vegetables										
Peas	838	612	508	1,015	1,779	3,795	4,223	3,897	3,492	-12%
Spinach	2,049	1,582	2,178	2,410	2,610	2,035	2,489	2,265	3,119	27%
French fries & potatoes	23,334	7,063	6,754	7,160	6,845	7,278	11,827	10,572	16,423	36%
Carrots	662	719	59	330	100	174	136	99	391	75%
Corn	872	495	2,225	1,530	2,927	2,747	2,822	2,732	3,481	22%
Mixed-veg	3,352	2,243	2,698	4,943	4,304	6,039	8,339	7,575	8,922	15%
Other-veg	6,449	5,921	4,975	6,818	7,035	9,538	9,564	8,613	10,884	21%
TOTAL FZ VEGETABLES	$37,555	18,636	19,398	24,206	25,601	31,606	39,401	35,752	46,711	23%
FZ BAKERY & BREAKFAST FOOD	$11,044	14,161	24,409	31,034	42,148	38,126	31,027	28,869	26,502	-9%
ICE CREAM	$1,228	1,367	1,683	1,411	986	3,401	3,944	3,835	4,952	23%
OTHER FZ FOODS	$4,009	5,449	8,129	11,159	19,647	19,649	19,858	18,090	14,881	-22%
FROZEN FOOD TOTAL	$173,815	182,123	195,108	218,599	248,102	247,250	252,112	233,220	234,083	0%

Note. Market rank is based on 1996 full year exports. The European Union is treated as a single market for ranking purposes

U.S. Exports of Frozen Food to European Union

Market Rank: #3

Value in $1000	1990	1991	1992	1993	1994	1995	1996	Jan-Nov '96	Jan-Nov '97	Percent Change
								Cumulative-to-Date Comparison		
Frozen Fruit										
Strawberries	154	250	279	418	6,690	492	210	210	282	*34%*
Blueberries	6,151	8,112	7,410	8,202	4,840	7,925	8,102	7,988	3,651	*-54%*
Cherries	987	288	1,685	671	43	3,592	3,875	3,370	2,867	*-15%*
Other-fruit	1,013	1,523	2,272	2,864	3,737	5,389	5,089	5,043	2,491	*-51%*
TOTAL FROZEN FRUIT	$8,305	10,173	11,646	12,154	15,310	17,398	17,276	16,610	9,292	*-44%*
Frozen Juice										
Orange juice	26,450	20,618	24,653	45,048	38,130	60,065	54,194	51,457	76,146	*48%*
Apple juice	0	18	139	198	160	162	302	298	318	*7%*
Grape juice	155	153	124	47	1,450	1,515	136	136	197	*45%*
Grapefruit juice	4,211	5,108	6,384	9,478	7,519	16,761	17,159	16,303	20,350	*25%*
Lemon juice	145	94	54	61	39	279	103	100	173	*73%*
Other juice	533	700	359	509	682	351	96	91	520	*471%*
TOTAL FROZEN JUICE	$31,494	26,691	31,713	55,340	47,982	79,134	71,991	68,386	97,703	*43%*
Frozen Prepared Meals										
Pasta	0	0	603	1,567	2,025	1,102	1,157	991	1,215	*23%*
Pizza	537	986	684	339	53	192	1,551	1,311	1,812	*38%*
Entree dinner	473	302	457	693	190	127	36	36	7,226	*19972%*
TOTAL FZ PREPARED MEALS	$1,009	1,288	1,744	2,598	2,268	1,421	2,743	2,338	10,252	*338%*
Frozen Vegetables										
Peas	55	121	506	39	418	1,774	251	251	0	*-100%*
Spinach	15	0	23	8	0	0	30	30	0	*-100%*
French fries & potatoes	2,033	1,842	1,811	825	11,873	21,078	4,723	4,179	7,054	*69%*
Carrots	0	0	0	0	0	0	3	3	0	*-100%*
Corn	6,783	4,514	3,322	2,791	2,132	2,032	1,206	1,120	2,048	*83%*
Mixed-veg	1,273	931	701	652	912	716	953	857	1,806	*111%*
Other-veg	619	1,983	3,879	3,719	2,446	2,584	2,171	1,807	921	*-49%*
TOTAL FZ VEGETABLES	$10.778	9,392	10,242	8,034	17,780	28,185	9,336	8,247	11,830	*43%*
FZ BAKERY & BREAKFAST FOOD	$2,234	2,555	2,089	2,428	2,942	3,111	2,701	2,468	3,180	*29%*
ICE CREAM	$6,536	10,035	21,582	13,795	11,320	6,377	4,685	4,626	3,964	*-14%*
OTHER FZ FOODS	$1,936	1,240	1,960	2,631	2,936	3,906	4,360	3,583	7,941	*122%*
FROZEN FOOD TOTAL	**$62,293**	**61,374**	**80,976**	**96,981**	**100,538**	**139,532**	**113,092**	**106,258**	**144,162**	***36%***

Note: Market rank is based on 1996 full year exports. The European Union is treated as a single market for ranking purposes.

U.S. Exports of Frozen Food to South Korea

Market Rank: #4

Value in $1000	1990	1991	1992	1993	1994	1995	1996	Cumulative-to-Date Comparison Jan-Nov '96	Jan-Nov '97	Percent Change
Frozen Fruit										
Strawberries	0	147	259	346	1,072	668	388	388	968	*60%*
Blueberries	0	0	266	0	0	53	45	45	180	*75%*
Cherries	8	7	35	61	42	65	0	0	403	*100%*
Other-fruit	77	281	277	11	283	165	156	156	581	*73%*
TOTAL FROZEN FRUIT	$85	436	837	418	1,397	951	589	589	2,131	*72%*
Frozen Juice										
Orange juice	7,930	12,565	8,904	15,805	13,760	11,433	14,762	13,295	8,451	*-57%*
Apple juice	0	0	1,932	3,588	5,956	2,812	2,176	1,959	817	*-140%*
Grape juice	0	0	743	0	391	2,151	4,622	4,479	10,581	*58%*
Grapefruit juice	0	32	0	185	234	122	159	159	146	*-9%*
Lemon juice	41	77	9	67	391	501	0	0	13	*100%*
Other juice	39	102	199	45	962	581	53	53	190	*72%*
TOTAL FROZEN JUICE	$8,009	12,777	11,787	19,691	21,695	17,600	21,772	19,945	20,197	*1%*
Frozen Prepared Meals										
Pasta	0	0	60	0	0	0	114	114	120	*5%*
Pizza	22	76	125	621	660	696	1,614	1,488	1,033	*-44%*
Entree dinner	33	235	134	125	144	5	104	43	565	*92%*
TOTAL FZ PREPARED MEALS	$55	310	319	746	804	701	1,832	1,646	1,718	*4%*
Frozen Vegetables										
Peas	113	134	137	309	166	66	210	210	126	*-67%*
Spinach	35	0	6	0	17	0	0	0	5	*100%*
French fries & potatoes	3,160	7,383	11,260	10,898	13,168	14,939	19,094	17,705	20,087	*12%*
Carrots	0	10	15	0	0	0	12	12	22	*45%*
Corn	264	400	156	230	188	393	320	276	726	*62%*
Mixed-veg	203	630	1,106	454	545	590	1,081	898	1,123	*20%*
Other-veg	196	680	199	216	531	406	575	546	622	*12%*
TOTAL FZ VEGETABLES	$3,972	9,238	12,879	12,108	14,614	16,393	21,292	19,647	22,710	*13%*
FZ BAKERY & BREAKFAST FOOD	$137	496	125	574	1,528	2,236	4,164	4,024	3,831	*-5%*
ICE CREAM	$20	133	424	1,046	2,389	3,257	6,150	5,799	5,048	*-15%*
OTHER FZ FOODS	$542	3,205	2,472	2,120	2,488	5,611	6,014	5,449	4,028	*-35%*
FROZEN FOOD TOTAL	**$12,820**	**26,594**	**28,843**	**36,702**	**44,915**	**46,749**	**61,813**	**57,099**	**59,663**	*4%*

Note: Market rank is based on 1996 full year exports. The European Union is treated as a single market for ranking purposes.

U.S. Exports of Frozen Food to Hong Kong

Market Rank: #5

Value in $1000	1990	1991	1992	1993	1994	1995	1996	Cumulative-to-Date Comparison Jan-Nov '96	Jan-Nov '97	Percent Change
Frozen Fruit										
Strawberries	9	23	30	10	57	49	37	37	34	-8%
Blueberries	0	0	0	0	7	0	0	0	7	
Cherries	259	314	571	454	761	630	620	620	1,202	94%
Other-fruit	304	982	2,971	290	237	785	601	543	452	-17%
TOTAL FROZEN FRUIT	$572	1,318	3,572	754	1,063	1,464	1,258	1,199	1696	41%
Frozen Juice										
Orange juice	5,030	4,770	4,850	3,870	3,089	5,335	3,848	3,723	1,277	-66%
Apple juice	38	39	172	202	313	170	160	160	59	-63%
Grape juice	4	0	3	0	33	0	35	35	0	-100%
Grapefruit juice	90	103	143	109	38	57	178	178	56	-69%
Lemon juice	6	9	16	16	45	12	178	178	51	-71%
Other juice	54	47	55	59	48	56	70	67	126	88%
TOTAL FROZEN JUICE	$5,221	4,969	5,239	4,256	3,567	5,629	4,469	4,341	1,569	-64%
Frozen Prepared Meals										
Pasta	0	0	0	0	4	8	0	0	0	
Pizza	76	75	76	74	127	163	114	98	151	54%
Entree dinner	450	83	191	254	309	486	552	529	587	11%
TOTAL FZ PREPARED MEALS	$526	158	267	328	440	658	666	627	738	18%
Frozen Vegetables										
Peas	0	49	144	253	143	339	235	229	164	-28%
Spinach	15	0	26	44	7	10	8	8	18	125%
French fries & potatoes	6,015	7,231	7,261	8,767	10,040	13,964	16,607	15,213	17,129	13%
Carrots	0	0	0	0	0	23	29	29	545	1779%
Corn	1,237	1,567	2,965	3,108	3,162	2,784	3,475	3,180	3,420	8%
Mixed-veg	2,887	3,000	3,125	2,046	1,687	1,090	1,984	1,792	4,732	164%
Other-veg	1,387	1,320	498	1,147	1,935	2,501	2,342	2,207	1,552	-30%
TOTAL FZ VEGETABLES	$11,542	13,167	14,020	15,364	16,974	20,711	24,680	22,659	27,560	22%
FZ BAKERY & BREAKFAST FOOD	$935	897	1,135	1,350	2,159	1,508	4,999	4,158	7,919	90%
ICE CREAM	$1,898	2,718	3,402	5,862	5,605	7,238	8,626	8,464	6,168	-27%
OTHER FZ FOODS	$6,987	8,445	8,465	10,523	10,211	10,089	4,469	3,855	5,422	41%
FROZEN FOOD TOTAL	**$27,680**	**31,672**	**36,100**	**38,437**	**40,017**	**47,296**	**49,166**	**45,303**	**51,071**	**13%**

Note: Market rank is based on 1996 full year exports. The European Union is treated as a single market for ranking purposes.

U.S. Exports of Frozen Food to Mexico

Market Rank: #6

Value in $1000	1990	1991	1992	1993	1994	1995	1996	Cumulative-to-Date Comparison Jan-Nov '96	Jan-Nov '97	Percent Change
Frozen Fruit										
Strawberries	0	285	235	172	125	266	1,255	1,255	183	-85%
Blueberries	0	0	0	6	426	10	37	37	0	-100%
Cherries	28	26	54	24	44	10	129	129	141	9%
Other-fruit	165	102	149	254	707	407	655	623	497	-20%
TOTAL FROZEN FRUIT	$193	413	438	455	1,302	693	2,076	2,044	822	-60%
Frozen Juice										
Orange juice	788	208	556	124	294	191	740	731	385	-47%
Apple juice	0	4	4	100	236	26	11	11	57	418%
Grape juice	0	58	54	27	333	0	0	0	0	
Grapefruit juice	20	0	0	51	38	289	259	238	222	-7%
Lemon juice	0	0	0	0	3	7	18	18	0	-100%
Other juice	149	23	122	53	469	227	54	38	7	-82%
TOTAL FROZEN JUICE	$957	293	736	356	1,372	740	1,082	1,037	671	-35%
Frozen Prepared Meals										
Pasta	22	97	1,051	2,040	2,300	741	38	36	81	125%
Pizza	165	302	1,266	929	1,758	432	186	171	238	39%
Entree dinner	1,410	6,552	16,642	17,515	16,133	5,707	6,763	5,085	11,156	119%
TOTAL FZ PREPARED MEALS	$1,597	6,952	18,959	20,484	20,190	6,879	6,987	5,293	11,475	117%
Frozen Vegetables										
Peas	146	321	442	862	923	816	1,007	935	922	-1%
Spinach	0	8	0	19	16	0	17	17	18	6%
French fries & potatoes	1,742	3,353	6,692	9,683	12,891	8,288	11,313	9,826	14,299	46%
Carrots	14	11	22	3	6	66	31	31	32	3%
Corn	976	1,497	2,101	1,656	1,882	1,068	473	441	1,257	185%
Mixed-veg	556	765	929	707	1,366	1,827	2,407	2,203	2,929	33%
Other-veg	528	480	718	882	1,252	1,078	1,248	1,235	2,539	106%
TOTAL FZ VEGETABLES	$3,962	6,435	10,904	13,813	18,337	13,144	16,495	14,686	21,997	50%
FZ BAKERY & BREAKFAST FOOD	$1,660	2,573	5,639	10,838	7,472	3,658	3,436	3,104	3,269	5%
ICE CREAM	$2,541	5,970	7,460	10,107	13,924	8,361	7,988	7,461	9,377	26%
OTHER FZ FOODS	$2,172	3,105	4,530	4,191	10,811	7,875	6,451	5,856	8,802	50%
FROZEN FOOD TOTAL	$13,083	25,742	48,667	60,245	73,409	41,349	44,514	39,480	56,413	43%

Note: Market rank is based on 1996 full year exports. The European Union is treated as a single market for ranking purposes.

U.S. Exports of Frozen Food to Taiwan

Market Rank: #7

Value in $1000	1990	1991	1992	1993	1994	1995	1996	Cumulative-to-Date Comparison Jan-Nov '96	Jan-Nov '97	Percent Change
Frozen Fruit										
Strawberries	0	159	0	0	0	0	25	25	6	-76%
Blueberries	0	0	17	0	0	30	73	73	125	71%
Cherries	0	14	161	336	320	192	1,147	1,147	716	-38%
Other-fruit	41	19	102	45	3	87	51	51	146	186%
TOTAL FROZEN FRUIT	$41	191	281	382	323	309	1,296	1,296	993	-23%
Frozen Juice										
Orange juice	4,269	3,605	4,579	3,275	2,938	2,688	2,134	2,098	852	-59%
Apple juice	0	79	48	48	58	475	429	279	243	-13%
Grape juice	95	358	205	264	348	1,784	926	788	1,224	55%
Grapefruit juice	16	94	165	97	153	59	33	33	62	88%
Lemon juice	32	28	26	68	29	16	140	140	130	-7%
Other juice	23	0	0	0	0	0	0	0	4	
TOTAL FROZEN JUICE	$4,435	4,164	5,022	3,752	3,525	5,021	3,661	3,337	2,515	-25%
Frozen Prepared Meals										
Pasta	32	27	0	45	0	0	0	0	5	
Pizza	91	29	131	205	41	36	47	47	73	55%
Entree dinner	11	65	95	52	57	60	59	59	337	471%
TOTAL FZ PREPARED MEALS	$134	121	226	302	98	96	106	106	415	292%
Frozen Vegetables										
Peas	89	74	288	11	28	18	161	161	0	-100%
Spinach	0	24	44	0	0	0	0	0	0	
French fries & potatoes	3,516	4,429	4,685	6,115	7,666	9,766	12,139	10,770	13,963	30%
Carrots	0	0	14	0	0	0	0	0	0	
Corn	2,370	2,481	2,235	1,782	3,827	1,622	1,174	1,080	1,394	29%
Mixed-veg	416	295	323	204	214	340	4,154	2,317	2,873	24%
Other-veg	134	0	117	37	114	61	43	43	29	-33%
TOTAL FZ VEGETABLES	$6,524	7,303	7,705	8,150	11,850	11,806	17,672	14,372	18,258	27%
FZ BAKERY & BREAKFAST FOOD	$312	423	347	456	307	485	940	844	2,057	144%
ICE CREAM	$317	637	636	712	1,786	1,365	1,707	1,664	1,696	2%
OTHER FZ FOODS	$1,421	2,520	3,112	5,230	5,723	3,359	2,328	1,866	4,619	148%
FROZEN FOOD TOTAL	**$13,184**	**15,359**	**17,330**	**18,983**	**23,610**	**22,441**	**27,709**	**23,486**	**30,553**	**30%**

Note: Market rank is based on 1996 full year exports. The European Union is treated as a single market for ranking purposes.

U.S. Exports of Frozen Food to Singapore

Market Rank: #8

Value in $1000	1990	1991	1992	1993	1994	1995	1996	Cumulative-to-Date Comparison Jan-Nov '96	Jan-Nov '97	Percent Change
Frozen Fruit										
Strawberries	33	11	13	0	4	247	10	10	0	-100%
Blueberries	0	13	19	13	7	25	0	0	3	
Cherries	138	0	0	0	14	0	0	0	18	
Other-fruit	348	763	245	112	40	77	114	114	137	20%
TOTAL FROZEN FRUIT	$519	786	277	125	66	348	124	124	157	27%
Frozen Juice										
Orange juice	1,340	1,225	1,254	1,238	737	926	594	588	146	-75%
Apple juice	0	3	347	1,148	1,881	746	161	142	2,044	1339%
Grape juice	5	55	8	3	3	9	0	0	0	
Grapefruit juice	44	33	20	32	34	59	98	91	36	-60%
Lemon juice	3	5	20	25	30	29	41	37	19	-49%
Other juice	44	50	43	106	77	73	62	48	26	-46%
TOTAL FROZEN JUICE	$1,435	1,372	1,693	2,552	2,763	1,842	956	906	2,271	151%
Frozen Prepared Meals										
Pasta	0	0	4	97	55	99	0	0	46	
Pizza	0	27	42	66	107	193	659	659	564	-14%
Entree dinner	216	72	52	212	2,617	3,526	2,150	1,882	1,103	-41%
TOTAL FZ PREPARED MEALS	$216	99	98	374	2,779	3,818	2,809	2,541	1,713	-33%
Frozen Vegetables										
Peas	68	0	194	3	4	20	0	0	25	
Spinach	24	0	0	19	0	9	0	0	0	
French fries & potatoes	3,572	3,808	4,599	5,108	6,015	10,617	7,169	6,595	7,948	21%
Carrots	19	0	0	0	0	0	0	0	143	
Corn	141	356	274	77	61	122	103	98	160	63%
Mixed-veg	512	476	1,036	834	1,226	1,999	1,486	1,432	2,322	62%
Other-veg	378	409	76	21	123	216	125	109	166	52%
TOTAL FZ VEGETABLES	$4,714	5,049	6,178	6,063	7,429	12,983	8,883	8,234	10,764	31%
FZ BAKERY & BREAKFAST FOOD	$653	980	639	571	858	710	1,554	1,419	1,114	-21%
ICE CREAM	$531	1,028	1,021	1,143	1,487	1,759	3,294	3,273	1,027	-69%
OTHER FZ FOODS	$1,681	1,828	2,138	1,545	1,322	1,652	1,693	1,575	1,316	-16%
FROZEN FOOD TOTAL	$9,750	11,142	12,045	12,375	16,705	23,112	19,312	18,072	18,362	2%

Note: Market rank is based on 1996 full year exports. The European Union is treated as a single market for ranking purposes.

U.S. Exports of Frozen Food to Philippines

Market Rank: #9

Value in $1000	1990	1991	1992	1993	1994	1995	1996	Cumulative-to-Date Comparison Jan-Nov '96	Jan-Nov '97	Percent Change
Frozen Fruit										
Strawberries	0	8	136	0	24	7	19	19	0	-100%
Blueberries	0	0	0	0	0	0	0	0	0	
Cherries	0	0	3	0	0	5	0	0	0	
Other-fruit	50	0	0	42	23	122	95	95	84	-12%
TOTAL FROZEN FRUIT	$50	8	140	42	48	134	114	114	84	-26%
Frozen Juice										
Orange juice	504	238	266	388	191	316	192	192	31	-84%
Apple juice	49	6	14	31	6	36	82	82	38	-54%
Grape juice	3	23	5	3	3	26	59	59	103	75%
Grapefruit juice	0	8	0	0	9	23	3	3	0	-100%
Lemon juice	0	0	0	0	0	75	0	0	0	
Other juice	6	48	0	0	0	0	0	0	0	
TOTAL FROZEN JUICE	$562	323	285	422	209	477	336	336	172	-49%
Frozen Prepared Meals										
Pasta	0	0	0	0	0	0	0	0	0	
Pizza	0	0	0	0	0	20	70	54	52	-4%
Entree dinner	99	428	684	74	74	56	87	87	96	10%
TOTAL FZ PREPARED MEALS	$99	428	684	74	74	76	157	141	149	6%
Frozen Vegetables										
Peas	0	20	0	0	32	20	32	32	44	38%
Spinach	0	0	0	0	0	0	0	0	0	
French fries & potatoes	2,260	3,013	3,346	4,994	7,351	9,801	10,784	10,300	13,231	28%
Carrots	0	0	12	0	0	0	0	0	0	
Corn	52	135	180	0	0	137	431	413	279	-32%
Mixed-veg	55	94	0	10	38	3	38	38	265	597%
Other-veg	10	70	0	7	4	3	17	17	51	200%
TOTAL FZ VEGETABLES	$2,377	3,332	3,538	5,011	7,426	9,963	11,303	10,801	13,871	28%
FZ BAKERY & BREAKFAST FOOD	$105	152	100	51	251	148	376	376	274	-27%
ICE CREAM	$17	28	42	73	755	507	825	695	881	27%
OTHER FZ FOODS	$771	817	685	391	847	1,533	1,469	1,422	996	-30%
FROZEN FOOD TOTAL	**$3,980**	**5,089**	**5,472**	**6,063**	**9,610**	**12,837**	**14,580**	**13,885**	**16,425**	**18%**

Note: Market rank is based on 1996 full year exports. The European Union is treated as a single market for ranking purposes.

U.S. Exports of Frozen Food to Russian Federation

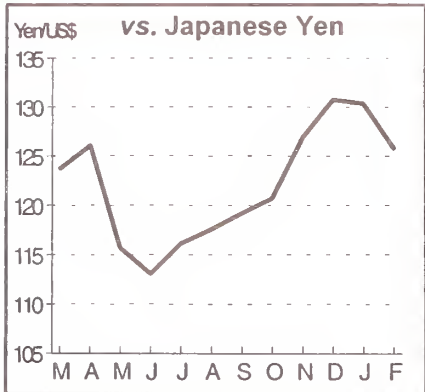
Market Rank: #10

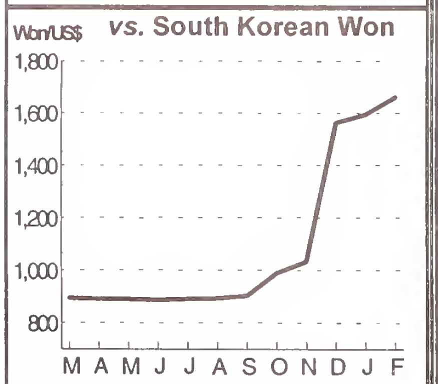
Value in $1000	1990	1991	1992	1993	1994	1995	1996	Cumulative-to-Date Comparison Jan-Nov '96	Jan-Nov '97	Percent Change
Frozen Fruit										
Strawberries	0	0	0	10	463	161	17	17	12	-29%
Blueberries	0	0	0	0	37	22	12	12	18	50%
Cherries	0	0	0	0	0	0	0	0	0	0
Other-fruit	0	0	0	3	53	78	99	99	129	30%
TOTAL FROZEN FRUIT	$0	0	0	13	552	261	128	128	159	24%
Frozen Juice										
Orange juice	0	0	0	35	132	17	9	9	8	-11%
Apple juice	0	0	0	0	5	15	6	6	0	-100%
Grape juice	0	0	0	0	0	142	0	0	0	
Grapefruit juice	0	0	0	0	0	16	0	0	0	
Lemon juice	0	0	0	0	0	0	0	0	0	
Other juice	0	0	0	0	17	0	16	3	0	-100%
TOTAL FROZEN JUICE	$0	0	0	35	154	189	31	18	8	-56%
Frozen Prepared Meals										
Pasta	0	0	0	0	199	81	124	124	5	-96%
Pizza	0	0	0	162	1,278	462	230	224	272	21%
Entree dinner	0	0	0	10	407	1,622	4,853	4,477	16,848	276%
TOTAL FZ PREPARED MEALS	$0	0	0	172	1,884	2,165	5,207	4,825	17,125	255%
Frozen Vegetables										
Peas	0	0	0	0	248	23	76	76	108	42%
Spinach	0	0	0	0	0	0	0	0	0	
French fries & potatoes	0	0	0	41	131	530	887	887	615	-31%
Carrots	0	0	0	0	0	15	13	13	7	-46%
Corn	0	0	0	15	34	58	140	125	162	30%
Mixed-veg	0	0	10	100	397	45	313	303	257	-15%
Other-veg	0	0	0	16	30	204	591	529	228	-57%
TOTAL FZ VEGETABLES	$0	0	10	171	840	876	2,019	1,932	1,377	-29%
FZ BAKERY & BREAKFAST FOOD	$0	0	17	301	567	714	312	233	477	105%
ICE CREAM	$0	0	292	1,591	6,751	6,658	5,011	4,617	3,345	-28%
OTHER FZ FOODS	$0	0	232	231	1,201	893	1,116	1,037	385	-63%
FROZEN FOOD TOTAL	$0	0	551	2,514	11,948	11,756	13,825	12,790	22,876	79%

Note: Market rank is based on 1996 full year exports. The European Union is treated as a single market for ranking purposes.

Value Of U.S. Dollar Against Major World Currencies

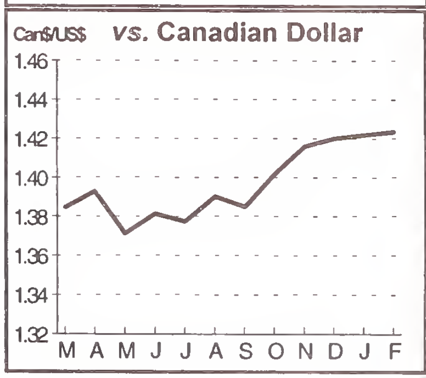
Daily Spot Quotations & Monthly Averages

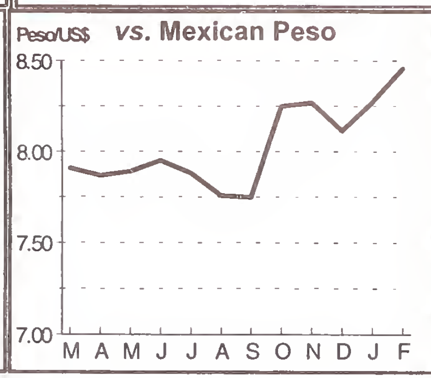


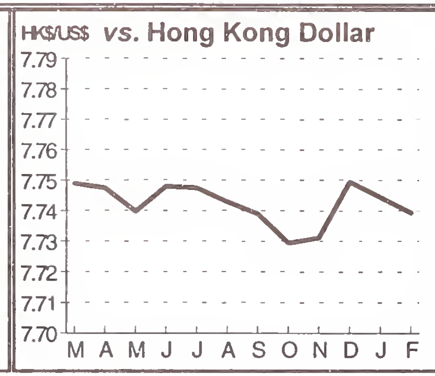


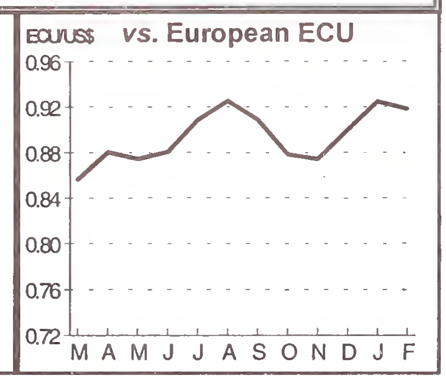
Currencies	Current Rate 2/16/98	Month Ago 1/16/98	Year Ago 2/97	% Change Year Ago 2/97
Argentine Peso	.9998	.9994	.9988	0.10
Australian Dollar	1.4952	1.5100	1.2868	16.19
Brazilian Real	1.1281	1.1198	1.0510	7.33
Canadian Dollar	1.4237	1.4133	1.3666	4.18
Hong Kong Dollar	7.7380	7.7392	7.7442	-0.08
Japanese Yen	125.81	129.16	122.15	2.99
Mexican Peso	8.4580	8.2030	7.7920	8.55
Taiwan Dollar	32.926	33.510	27.507	19.70
South Korean Won	1662.33	1608.66	862.05	92.83
European ECU	.91855	.92593	.86873	5.73
-British Pound	.6124	.6120	.6120	0.06
-French Franc	6.1200	6.330	5.6990	7.39
-German Mark	1.8253	1.8310	1.6900	8.01

NOTE: Exchange rates are daily spot quotes as of 4:00 PM Eastern Time, February 16, 1998.
Source: CMP/OA/FAS Exchange Rate Database and Wall Street Journal.









USDA Trade Show Calendar

ANTAD 1998
March 13-16, 1998
Expo Guadalajara
Guadalajara, Jalisco, Mexico

● Number of visitors: 7,629
Mexico's largest supermarket show.

Manuel Alvarez Corona, Manager
Asociacion Nacional de Tiendas de
Autoservicio y Departamentales, A.C. (ANTAD)
Homero 109, 110 floor
Col. Polanco
11560, Mexico, D.F.
Tel: 011-525 545-8803/254-1714
Fax: 011-525 203-4495

USDA Contact:
Gary Fountain
Tel: 202-720-7417
Fax: 202-690-4374
E-mail: fountain@fas.usda.go

Great American Food Show-Korea*
March 17-19, 1998
Seoul, Korea

● Number of visitors: 3,500
A trade-only solo show, organized for U.S. participants in the 7th largest market for U.S. foods.

USDA Contacts:
Philip A. Shull, Director
Agricultural Trade Office, Seoul
82 Sejong-Ro, Chongro-Ku
Seoul, Korea 110-050
Tel: 011-822-397-4297
Fax: 011-822-738-7147
E-mail: shullp@fas.usda.gov

Teresina Leslie
Tel: 202-720-9423
Fax: 202-690-4374
E-mail: leslie@fas.usda.gov

Food Ingredients Asia
April 8-10, 1998
Shanghai, China

● Number of visitors: 20,000
This is the biggest food ingredients exhibition in China.

Chris Cotton
Miller Freeman Asia Ltd.
44th floor, China Resources Building
26 Harbour Road, Hong Kong
Tel: (852) 2827-6211
Fax: (852) 2827-7831
E-mail: 100426.2661@compuserve.com

USDA Contacts:
Scott Reynolds, Director
Agricultural Trade Office, Shanghai
American Int'l PSC Center at Shanghai Center
Level 3, #331
1376 Nanjing Road West
Shanghai 200040, China
Tel: 011-86-21 6279-8622
Fax: 011-86-21 6279-8336
E-mail: atos@public.sta.net.cn

Teresina Leslie
Tel: 202-720-9423
Fax: 202-690-4374
E-mail: leslie@fas.usda.gov

Food & Hotel Asia '98
April 14-17, 1998
World Trade Centre
Singapore, Singapore

● Number of visitors: 36,000
Food &Hotel Asia is the largest show held in Southeast Asia. It attracts buyers from Malaysia, Indonesia, Thailand, and the Philippines.

Ellen Wong
Commerce Tours International, Inc.
870 Market Street, Suite 918
San Francisco, CA 94102
Tel: 415-433-3072
Fax: 415-433-2820

USDA Contact:
Teresina Leslie
Tel: 202-720-9423
Fax: 202-690-4374
E-mail: leslie@fas.usda.gov

European Seafood Exposition '98 (Tentative)

April 28-30, 1998
Heysel (Brussels) Fair Grounds
Brussels, Belgium

● Number of visitors: 11,000
Provides an excellent opportunity for US seafood exports.

ESE
5 Milk Street, PO 7437
Portland, Maine 04112-7437
Tel: 207-842-5504
Fax: 207-842-5505
E-mail: lisa@divcom.com

USDA Contact:
Maria Nemeth-Ek
Tel: 202-720-3623
Fax: 202-690-4374
E-mail: nemeth@fas.usda.gov

U.S. Food Export Showcase

May 3-5, 1998
McCormick Place
Chicago, IL

● Number of visitors: 35,400
Over the past three years the U.S. Food Export Showcase has doubled in size to serve over 450 companies.

U.S. Food Export Showcase Management
2751 Prosperity Ave., Suite 100
Fairfax, VA 22031
Tel: 703-876-0900
Fax: 703-876-0904
E-mail: lfeeley@conventionmanagement.com

USDA Contacts:
Valerie Brown
Tel: 202-720-3425
Fax: 202-690-4374
E-mail: brownvr@fas.usda.gov

Maria Nemeth-Ek
Tel: 202-720-3623
Fax: 202-690-4373
E-mail: nemeth@fas.usda.gov

CIBUS '98

May 7 -11, 1998
Parma, Italy

● Number of visitors: 120,000
CIBUS is Italy's single largest food show.

E.A. Fiere di Parma
Via Rizzi 67/a
43031 Baganzola Parma, Italy
Tel: 011-0521-9961
Fax: 011-0521-996270

USDA Contacts:
Robert Curtis, Director
American Consulate General, Milan
Via Principe Amedeo 2/10
20121 Milano, Italy
Tel: 011-39-2 290-351
Fax: 011-39-2 659-9641
E-mail: fas.milan@agora.stm.it

Gary Fountain
Tel: 202-720-7417
Fax: 202-720-4374
E-mail: fountain@fas.usda.gov

Int'l Food Ingredients & Additives

May 20-22, 1998
Tokyo, Japan
Tokyo Int'l Exhibition Center, Ariake

● Number of visitors: 20,000
IFIA Japan is the premiere ingredients and food additives event in Japan.

E.J. Krause & Associates, Inc.
7315 Wisconsin Ave., Suite 450
North Bethesda, MD 20814 USA
Tel: 301-493-5500
Fax: 301-493-5705
E-mail: poblete@ejkrause.com

USDA Contacts:
David Miller, Director
Agricultural Trade Office, Tokyo
Tokyu Tameike Bldg.
8th floor
1-1-14 Akasaka
Minato-Ku, Tokyo 107, Japan
Tel: 011 81-3 3224-5000
Fax: 011 81-3 3589-0793

Teresina Leslie
Tel: 202-720-9423
Fax: 202-690-4374
E-mail: leslie@fas.usda.gov

Taipei International Food Show*
June 11-14, 1998
Taipei, Taiwan

● Number of visitors: 62,000
A well-established show in the third largest export market for U.S. consumer foods.

USDA Contacts:
Daniel Martinez, Director
Agricultural Trade Office, Taipei
54 Nan Hai Road
Taipei, Taiwan
Tel: 011-886-2 337-6525
Fax: 011-886-2 305-7073
E-mail: ato@mail.ait.org.tw
Valerie Brown
Tel: 202-720-3425
Fax: 202-690-4374
E:mail: brownvr@fas.usda.gov

Alimentos '98
July 22-26, 1998
Bogota, Colombia

● Number of visitors:
This show is the international exhibition for the food and beverage industry and a strong push to the food sector in Colombia.

USDA Contact:
David Rosenbloom, Attache
American Embassy, Bogota
Calle 22D-BIS, No. 47-51
Apartado Aereo 3831, Colombia
Tel: 011-57-1 315-0811
Fax: 011-57-1 315-2181
E-mail: rosenbloom@fas.usda.gov

Food Ingredients South America
August 11-13, 1998
Expo Center Norte
Sao Paulo, Brazil

● Number of visitors: 5,320
This is the only specialized food ingredient show in South America.

Ms. Claudia Godoy
Miller Freeman Do Brasil Ltda
Rua Visconde De Ouro Preto
118 Sao Paulo, Brazil SP 01303-060
Tel: 55-11 259-6043
Fax: 55-11 256-1245

USDA Contacts:
Robert Hoff, Director
American Consulate General, Sao Paulo
Rua Padre Joao Manoel, 933
Sao Paulo, SP - Brazil 01411-001
Tel: 011-55-11-881-6511
Fax: 011-55-11-883-7535

Teresina Leslie
Tel: 202-720-9423
Fax: 202-690-4374
E-mail: leslie@fas.usda.gov

...Trade Show Calendar

Food & Hotel Africa '98*
August 23-26, 1998
Gallagher Estate, Johannesburg
Midrand, South Africa

● Number of visitors: 7,000
An essential gateway to the Southern African Market.

USDA Contact:
Tobitha Jones
USDA Foreign Agricultural Service
Room 4646-South Building
14th Street & independence Ave., S.W.
Washington, DC 20250-1052
Tel: 202-690-1182
Fax: 202-690-4374
E-mail: joneste@fas.usda.gov

Food & Hotel China
September 21-24, 1998
China Int'l Exhibition Centre,
Shanghai, China

●Number of visitors: 13,426
An international show attracting exhibitors from 30 countries and thousands of high quality buyers from many provinces of China.

Ellen Wong
Commerce Tours Int'l
870 Market Street, Suite 920
San Francisco, CA 94102
Tel: 415-433-3072
Fax: 415-433-2820

USDA Contact:
Teresina Leslie
Tel: 202-720-9423
Fax: 202-690-4374
E-mail: leslie@fas.usda.gov

SIAL '98
October 18-22, 1998
Paris, France

● Number of visitors: 150,000
The largest show in the world for the promotion of food and beverage products.

Francois Gros
IMEX Management, Inc.
6525 Morrison Boulevard, Suite 402
Charlotte, NC 28211 USA
Tel: 704-365-0041
Fax: 704-365-8426
E-mail: sial@imexmgt.com

USDA Contacts:
Claude Nadai
American Embassy, Paris
2, Avenue Gabriel
75382 Paris Cedex 08, France
Tel: 011-33-1 43 12 22 45
Fax: 011-33-1 43 12 26 62
E-mail: FasParis@Compuserve.com

Teresina M. Leslie
Tel: 202-720-9423
Fax: 202-690-4374
E-mail: leslie@fas.usda.gov

World Food '98
September 22-26, 1998
Moscow, Russia

● Number of visitors: 49,356
World Food attracts buyers from cities and regions throughout Russia to see more than 850 exhibitors from 50 countries.

Jeff Malley
Comtek International
43 Danbury Road
Wilton, CT 06897
Tel: 203-834-1122
Fax: 203-762-0773
E-mail: comtekexp@aol.com

USDA Contact:
Gary Fountain
Tel: 202-720-7417
Fax: 202-720-4374
E-mail: fountain@fas.usda.gov

POLAGRA '98
October 2-7, 1998
Poznan, Poland

● Number of visitors: 250,000
With a rapid growing economy and population of 40 million, Poland constitutes one of the largest and most dynamic markets in Central Europe.

Agricultural Office
American Embassy
Al Ujazdowskie 29/31
00-540 Warsaw, Poland
Tel: 011-4822-621-3926
Tel: 011-4822-628-1172

USDA Contact:
Maria Nemeth-Ek
Tel: 202-720-3623
Fax: 202-690-4374
E-mail: nemeth@fas.usda.gov

Tallin '98
October 20-22, 1998
Pirita Fairs Center
Tallin, Estonia

● Number of visitors: 15,000
Tallin Food Fair is the largest specialized food fair in the Baltic Countries.

USDA Contacts:
Jolanta Andersone
American Embassy, Riga, Latvia
Tel: 011-371-7-210-006
Fax: 011-371-7-227-390
E-mail: jolika@apollo.lv

Valerie Brown
Tel: 202-720-3425
Fax: 202-690-4374
E-mail: brown@fas.usda.gov

FOODAPEST
November 24-28, 1998
Fairgrounds
Budapest, Hungary

● Number of visitors: 20,010
One of the largest food fairs in Central Europe.

Martin Szebeni
Foodapest-Hungexpo, Albertirsai ut 10.PF44
1441 Budapest X, Hungary
Tel: 36-1 263-6000
Fax: 36-1 263-6098
E-mail: hexpo@hungry.net

USDA Contact:
Maria Nemeth-Ek
Tel: 202-720-3623
Fax: 202-690-4374
E-mail: nemeth@fas.usda.gov

Americas Food & Beverage Show & Conference
December 2-4, 1998
World Trade Center
Miami, Florida

● Number of visitors: 15,000
A new show designed to bring together producers and buyers of food products from the Americas.

USDA Contact:
Gary Fountain
Tel: 202-720-7417
Fax: 202-690-4374
E-mail: fountain@fas.usda.gov

...Trade Show Calendar

European Fine Food Fair '99
January 25-27, 1999
Maastricht, Netherlands

● Number of visitors: 4,439
A culinary show to be visited by chefs, food, beverage managers and restaurant owners.

USDA Contacts:
Laura Scandurra, Attache
American Embassy, The Hague
Lange Voorhout 102
2514 EJ The Hague
Tel: 011-31-70 365-7681
Fax: 011-31-70-365-7681

Valerie Brown
Tel: 202-720-3425
Fax: 202-690-4374
E:mail: brownvr@fas.usda.gov

Gulf Food '99*
January 31-February 3, 1999
World Trade Center
Dubai, United Arab Emirates

● Number of visitors: 9,000
Largest and best organized food show to date in the Gulf region.

USDA Contacts:
Ed Porter, Director
Agricultural Trade Office, Dubai
P.O. Box 9343
Dubai, UAE
Tel: 011-971-4-314-063
Fax: 011-971-4-314-998
E-mail: atodubai@emirates.net.uae

Gary Fountain
Tel: 202-720-7417
Fax: 202-690-4374
E-mail: fountain@fas.usda.gov

Canadian Food & Beverage Show (Tentative)
February 14-16, 1999
Toronto, Ontario

● Number of visitors: 10,500
A trade only food service show exhibiting only food and beverage products.

Canadian Restaurant and Food Services Association
Ms. Paula Lunney
Tel: 416-923-8416
Fax: 416-923-6164
E-mail: PMLunney@netcom.ca

USDA Contact:
Lyle Sebranek, Minister Counselor
American Embassy, Ottawa
100 Wellington Street, KIP 5T1
Tel: 613-238-5355
Fax: 613-233-8511
E-mail: usagr@istar..ca

Food & Hotel Indonesia '99
February 24-27, 1999
Jakarta Int'l Exhibition Center
Jakarta, Indonesia

● Number of visitors: 15,086
Supporting a population of 200 million, Indonesia, the world's fourth largest nation, accounts for almost 60% of Asia's total market base.

Ellen Wong
Commerce Tours International, Inc.
870 Market Street, Suite 918
San Francisco, CA 94102
Tel: 415-433-3072
Fax: 415-433-2820

USDA Contact:
Teresina M. Leslie
Tel: 202-720-9423
Fax: 202-690-4374
E-mail: leslie@fas.usda.gov

...Trade Show Calendar

SALIMA
Spring 1999
Prague, Czech Republic

● Number of visitors: 75,000
One of the largest food trade shows in Central Europe.

BVV, Vystaviste 1, 64700 Brno
Prague, Czech Republic
Tel: 011 4205 4115 1111
Fax: 011 4205 4115 3070

USDA Contact:
Allan Mustard, Counselor
American Embassy, Prague
Hybernska 7A
117 16 Praha 1, Czech Republic
Tel: 011-422-242-330-82
Fax: 011-422-2421-9965
E-mail: 101776.2605@compuserve.com

Alpe Adria Kulinarika
April 1999
Ljubjlana, Slovenia

● Number of visitors: 32,000
Slovenia with its port of Koper is an important trading crossroad for US food products in the southern hemisphere.

Ljubjlanski sejem, Ljubljana fair
Dunajksa 10, p.p. 58, 62226 Ljubjlana, Slovenia
Tel: 386-61 1735331
Fax: 386-61 1735232

USDA Contact:
Allen Mustard, Counselor
American Embassy, Vienna
Boltzmanngassee 16
A-1091 Vienna, Austria
Tel: 011-43-1 31-339-2249
Fax : 011-43-1 310-8208
E-mail: 101612.74@compuserve.com

Foodex Japan
March 1999
Nippon Convention Center
(Makuhari Messe)
Tokyo, Japan

● Number of visitors: 87,716
An essential and comprehensive stop for any business entering Japan's market.

Japan Management Association
3-1-22, Shibakoen Minato-Ku
Tokyo, Japan
Tel: 011-03-3434-0093
Fax: 011-03-3434-8076

USDA Contact:
Maria Nemeth-EK
Tel: 202-720-3623
Fax: 202-690-4374
E:mail: nemeth@fas.usda.gov

Great American Food Show-Korea*
March 1999
Seoul, Korea

● Number of visitors: 3,500
A trade-only solo show, organized for U.S. food companies in the 7th largest market for U.S. foods.

USDA Contacts:
Philip A. Shull, Director
Agricultural Trade Office, Seoul
82 Sejong-Ro, Chongro-Ku
Seoul, Korea 110-050
Tel: 011-822-397-4297
Fax: 011-822-738-7147
E-mail: shullp@fas.usda.gov

Teresina M. Leslie
Tel: 202-720-9423
Fax: 202-690-4374
E-mail: leslie@fas.usda.gov

HOFEX '99
May 4-7, 1999
Hong Kong Convention Center
Hong Kong, Hong Kong

● Number of visitors: 19,048
Provides an excellent opportunity for companies to meet buyers from the entire Asian region.

Hong Kong Exhibition Services
901-902, 9/F, Shiu Lam Building
23 Luard Road
Wanchai, Hong Kong
Tel: 011-2804-1500
Fax: 011-2528-3103

Zoomark '99
May 6-9, 1999
Milan, Italy

● Number of visitors: 23,000
Zoomark is the leading pet products show in Southern Europe.

Publi Euro Press srl
Via Monte Rosa 13 20149 Milan
Tel: 02-48014713
Fax: 02-48014745

USDA Contact:
Robert Curtis, Director
Agricultural Trade Office
American Consulate General, Milan
Via Principe Ameddeo 2/10
20121 Milano, Italy
Tel: 011 39 2 290351
Fax: 011 39 2 6599641
E-mail: fas.milano@agora.stm.it

U.S. Food Export Showcase
May 2-4, 1999
McCormick Place
Chicago, IL

U.S. Food Export Showcase Management
2751 Prosperity Ave., Suite 100
Fairfax, VA 22031
Tel: 703-876-0900
Fax: 703-876-0904
E-mail: Lfeeley@conventionmanagement.com

USDA Contact:
Valerie Brown
Tel: 202-720-3425
Fax: 202-690-4374
E:mail: brownvr@fas.usda.gov

SIAL Mercosur
August 1999
Buenos Aires, Argentina
Municipal Exhibition Center

● Number of visitors: 17,000

Julie Halas
IMEX Management, Incc.
6525 Morrison Boulevard, Suite 402
Charlotte, NC 28211 USA
Tel: 704-365-0041
Fax: 704-365-8426

Food Ingredients South America
August 10-12, 1999
Expo Center Norte
Sao Paulo, Brazil

● Number of visitors: 5,320
This is the only specialized food ingredient show in South America.

Ms. Claudia Godoy
Miller Freeman Do Brasil Ltda
Rua Visconde De Ouro Preto
118 Sao Paulo, SP 01303-060
Tel: 55-11 259-6043
Fax: 55-11 256-1245

Tallinn Food Show '99
November 1999
Pirita Fairs Center
Tallinn, Estonia

● Number of visitors: 18,000
Tallinn is also a "gateway" for trade with Russia (particularly St. Petersburg and Moscow) and the Ukraine.

USDA Contacts:
Jolanta Andersonne
American Embassy
Raina Blvd. 7, LV-1510
Riga, Lativa
Tel: 011-371-7-210-006
Fax: 011-371-7-227-390
E-mail:agriga@usda1.sprint.com

Valerie Brown
Tel: 202-720-3425
Fax: 202-690-4374
E:mail: brownvr@fas.usda.gov

ANUGA '99*
October 9-14, 1999
Messegalande
Cologne, Germany

● Number of visitors: 350,000
The largest show in the world for the promotion of food and beverage products.

USDA Contact:
Teresina M. Leslie
Tel: 202-720-9423
Fax: 202-690-4374
E-mail: leslie@fas.usda.gov

U.S. Food Export Showcase
May 7-9, 2000
McCormick Place
Chicago, IL

U.S. Food Export Showcase Management
2751 Prosperity Ave., Suite 100
Fairfax, VA 22031
Tel: 703-876-0900
Fax: 703-876-0904
E-mail: Lfeeley@conventionmanagement.com

USDA Contact:
Valerie Brown
Tel: 202-720-3425
Fax: 202-690-4374
E:mail: brownvr@fas.usda.gov

*USDA Sponsored Shows:

USDA is involved in all aspects of show management and provides related services, including:

Assistance in sample product shipment, rental of floor space, booth design/layout, and marketing the show to potential exhibitors (primarily via mass mailing, invitations to special events, printing show directory) and hotel reservations for show participants.

USDA staff from Washington and the local U.S. Embassy provide support to exhibitors.

USDA Endorsed Shows:

USDA recommends these as best avenues to enter prospective market for consumer-oriented foods, and provides limited services related to these shows, including:

Marketing, mailing advertising material, referral to show organizer, setting up information booth or national pavilion, pre-show promotion, invitation of potential buyers.

Recommendation is based on market potential and commitment of USDA staff in the overseas posts. USDA staff overseas provides most of the related services.

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
1400 INDEPENDENCE AVENUE, SW
WASHINGTON, DC 20250-1004

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U.S. DEPARTMENT OF COMMERCE
TECHNOLOGY ADMINISTRATION
NATIONAL TECHNICAL INFORMATION SERVICE
SPRINGFIELD, VA 22161

For questions or concerns on the data included in this publication, contact us at the address shown above.

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