French beans: increasingly fine segmentation

With European imports approaching an annual 200 000 tonnes, French beans display strong growth. EU imports have increased threefold in a decade and are still on the up and up. The development of this market is of course the result of the emergence rocketing growth of Moroccan exports as these alone form nearly 60% of EU imports. The trend has also hit traditional exporting sources that have gradually found themselves marginalised for reasons of lack of competitiveness. However, beyond the question of the change in the supply sources for the European market, finer market segmentation is observed with a broadening of the range of produce available. Fine filet beans form most of market supply, followed by Bobby and then very fine filet. Trade is divided into two broad categories of produce—loose and pre-packed beans.

Most of the volume traded in Europe consists of loose beans. Segmentation is according to the types of packing used by the various shipping sources. Morocco ships fine and Bobby beans in wooden crates containing around 5 kg. Depending on the brands, the boxes are covered with synthetic netting stapled to the side or with a central cardboard separation for better alignment of the pods and thus more attractive presentation. The more distant export sources (Senegal, Burkina Faso, Egypt, etc.) favour cardboard packaging generally containing 4 kg of produce. These may be of the tray or telescopic type, with or without the parallel alignment of pods. Finally, Kenya, often used as the reference for green beans, uses telescopic boxes whose capacity varies according to the destination market. Capacities can be 2 or 2.2 kg for northern European markets (e.g. the Netherlands and Belgium) and 2.7 kg for the French market, the leading consumer. Fine filet and Bobby beans are generally in 4 or 5-kg packages whereas very fine filet beans are preferably delivered in smaller packs.

This already broad supply range applies only to produce picked and simply packed before shipment. French bean market segmentation is increasing considerably with a growing range of pre-packaged products responding to more compartmentalised demand resulting from the changing ways of life and purchasing of Europeans. Long reserved for the catering sector and retailers specialising in fruit and vegetables, pre-packaged beans are gradually gaining other distribution channels and especially supermarkets and superstores. Depending on the market, a broad range of products is available with differences not only in the packaging but also in the type of produce. Three categories can be noted: whole beans simply packaged, generally in bags, topped and topped and tailed beans in bags or punnets. Here again, Kenya has acquired an image of specialist in pre-packaged beans and the quantities exported have increased strongly for several years. The proportion of pre-packaged beans now exceeds that of all the loose beans shipped from Kenya. Senegal and Madagascar have also taken this direction but to a lesser degree.

While whole and topped beans are intended more for the British market, topped and tailed beans in punnets have resolutely conquered continental European markets. The types most commonly distributed are 250 and 500 g film-covered punnets. These are generally packed in boxes: 12 x 250 g and 6, 8 and 10 x 500 g. This is a trade base that can be broadened. Fine or very fine filet beans can be packaged in 150 and 200 g punnets (box of 8 to 24 punnets) for the northern European markets. In addition to these references, operators can supply special packaging as required by importers and distributors. Larger packaging for supermarket chains is not unusual, such as 45 x 150 g punnets. This flexibility has been gained gradually by export structures and enables them not only to remain present on the European market in the face of increasing competition but also to develop products with greater value-added.

Very fine French beans - Morocco
Wooden crate (5 kg) with central separation and synthetic netting

Very fine French beans - Kenya - Topped and tailed beans in punnets (250 g)

by Pierre Gerbaud

Very fine French beans - Kenya
Telescopic cardboard (2.7 kg)

Very fine French beans - Kenya
Telescopic cardboard (2.7 kg)

Mangetout peas: a growing business

Less known and less purchased than French beans, mangetout peas (snowpeas, edible-podded peas) are increasingly present on European market stalls. EU imports are still modest but have almost doubled in the last decade, reaching 26 600 tonnes in 2008. This total is slightly overestimated as the figure includes garden peas and other types of pea. Basing calculations on sources specialising in mangetout peas, European imports are probably some 20 000 to 23 000 tonnes, a significant figure. The main suppliers of the European market are as follows, starting with the largest: Kenya (12 800 tonnes), Guatemala (3 900 tonnes), Zambia (2 000 tonnes), Egypt (1 400 tonnes), Peru and Zimbabwe (1 300 tonnes) and finally Morocco (1 000 tonnes). China, India and Madagascar are also exporters but of much smaller volumes (less than 500 tonnes). Mangetout peas are sold mainly on the restaurant market but, like pre-packaged beans, are gradually being more widely distributed. They are sold topped or tailed or untrimmed, with a preference for the former. Packaging is similar to that used for French beans, with produce delivered loose and also packaged in punnets. A smaller number of references is used: a 2 kg box for loose produce (topped and tailed or not) and 250 g punnets. Larger packaging units for loose pods are used only in Morocco. It is also one of the rare suppliers of the European market to ship non topped and tailed pods with a smaller commercial value. Topped and tailed pods in punnets come in several specific forms such as the 150 g and 200 g punnets that tend to be shipped to the northern European markets. Boxes contain from 8 to 24 punnets but here again operators can adjust packing to customer demand. The mangetout pea market seems to be more speculative than that of French beans, with substantial variations in price according to supply and more fluctuating demand.

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Mangetout peas - Kenya
Punnets (250 g)

Mangetout peas - Kenya
Loose in box (2 kg)

Mangetout peas - Kenya
Punnets (150 g)