

French beans — African		
	Senegal	Burkina Faso
Range	core of range complement	Filet
Freight	land air sea	Regular flights
availability	Unlimited for containers, medium by air	Medium
price	High	High
frequency	Weekly	Weekly
service quality	Average	Medium
destinations	France, Belgium, Netherlands, Italy	France (Roissy-CDG)
Competitiveness	Strong for Bobby, medium for filet	Medium for filet
Productivity	Good. Land available, development potential, skilled labour for Bobby and perfectible for filet	Medium. Land available, skilled labour for filet
Production organisation	Individual growers and groups. Increasingly professionalised sector.	Individual growers and groups. Longstanding growers lacking interest in growing beans, whence the decrease in production in recent years. But production is increasing again.
Export organisation	Associations of grower-exporters and of exporters	Several grower-exporter associations
Type of market	position	Minority in France (various competitors), dominant in Belgium and the Netherlands
competitors	Morocco, Kenya and Burkina Faso in France, Morocco and Egypt in the Netherlands	Morocco, Kenya and Burkina Faso (France)
core market	Filet for France, Bobby for the Netherlands	Filet for France
range	Whole range	Filet, mainly very fine
certification	Several companies with GLOBALGAP certification	Increasing number of companies with GLOBALGAP certification
reputation	Irregular for filet (France) and good for Bobby (Netherlands, France)	Good for filet but sometimes irregular
Development potential	Volumes of Bobby, improvement of filet sorting and packing, development of the topped and tailed market ongoing with an operator	Steady filet quality
Marketing period	100% counter-season (December to end of March / beginning of April), competition from all counter-season suppliers	100% counter-season (December to end of February / mid-March)
Observations	Supplier with strong potential and stakeholders whose professionalism continues to improve. Nothing much to be added for Bobby. For filet, a need to improve harvesting and above all sorting at packing stations. Filet growers are increasingly confronted with a yield problem. Possibility for improvement of the quality of the produce shipped by better logistic structure.	Sector recovering strongly. The re-launch is slowed by freight costs that are too high to be covered by the quality of the produce as this is uneven. When quality is high, the produce sells well in comparison with that of West African competitors. Release on the market at the right moment is still a crucial problem that operators must solve.

counter-season suppliers — Advantages and constraints				
Morocco	Ethiopia	Egypt	Kenya	
Filet	Bobby	Bobby	Filet	
Bobby, flat beans (Helda)			Bobby	
Refrigerated tonnes				
	Cargo and regular flights	Regular flights	Cargo and regular flights	
	Containers and reefers	Containers and reefers		
Unlimited	Limited	Very large by sea, medium if not small by air	Average and often irregular during the counter-season	
Usually the lowest among non-European suppliers	Medium	Low for sea, medium for air	High	
Several times a week and even daily depending on the distance of the market	Weekly	Weekly	Weekly	
Medium	Good	Good, especially before the arrival of West African produce, and then more limited	Good	
	Mainly Italy	Netherlands, Belgium, France, Italy	United Kingdom, France	
France, Spain Italy, Netherlands	High for Bobby	High for Bobby	High for filet and the various peas	
Good. Land and labour available		Good. Land available, development potential, skilled labour for Bobby	Good. Land available, development potential, skilled labour for filet	
				A few large operations that incorporate outgrowers, while training them and preparing them to respect increasingly strict private standards. The chain resolutely addresses private certification and is becoming increasingly professional.
				Several operators whose size and volumes exported vary from the driving force for the other sector operators.
Market shared with several competitors in France, minority in the counter-season in Belgium and the Netherlands	Shares Italian market with several competitors	Minority in France. Shares the market with various competitors in Belgium and the Netherlands	Market shared with several competitors in France, dominant in the United Kingdom	
Senegal, Kenya and Burkina Faso (France), Morocco and Egypt (Netherlands)	Senegal, Egypt, Morocco	Morocco, Kenya and Burkina Faso (France), Morocco and Egypt (Netherlands)	Morocco, Kenya and Burkina Faso (France), Morocco and Egypt (Netherlands)	
Filet for France, Bobby for the Netherlands	Bobby for Italy	Bobby for the Netherlands, Italy and Belgium	Filet for the United Kingdom and France	
Whole range	GLOBALGAP for part of produce	GLOBALGAP for part of produce	GLOBALGAP for part of produce	
GLOBALGAP for part of produce	GLOBALGAP for part of produce	GLOBALGAP for part of produce	GLOBALGAP for most exporters. But above all many operators seek to attain the level of GLOBALGAP requirements without seeking certification, cost being a limiting factor in this.	
Quality generally lower than that of West African competitors during the counter-season period	Good for Bobby	Good for Bobby	Excellent for all produce exported—mainly filet and pre-packaged beans	
Filet quality	Regular quality and volumes of Bobby	Quality, evenness and cost when greenhouse production or produce exported by air are concerned.	Greater availability, especially on the French market during the counter-season	
All year round with a dip in August and September	100% counter-season (December to end of April). Competition on the Italian market with produce from Senegal, Morocco and Egypt.	All year round with a dip in supply from November to March-April (greenhouse production).	All the year round according to the destination country. Supply is smaller in France, for example, when competition is strong (counter-season from December to March).	
Production has increased steadily since the diversification of Moroccan exports and the development of French bean growing, mainly thanks to exports of Helda to Spain. In spite of the impressive volumes, this supplier finds it difficult to establish a true quality image for filet beans during the counter-season period when preference generally goes to produce from its competitors.	A supplier recognised and reputed for the quality of its work with Bobby. However, it is handicapped by quality concerns that, combined with the high cost of air freight, often cause importers to halt their seasons early.	Distinct improvement in quality and competitiveness. The source has been a real alternative to Senegal when the latter was less regular on markets such as Belgium and Italy.	Long the reference as the EU's leading bean supplier, Kenya has now been overtaken by Morocco thanks to the large production of Helda. It remains the reference for quality on the filet bean market that the others try to emulate. Handicapped by high freight costs, it stands out by the high quality of the produce shipped and the strong development of pre-packaged produce with high value added.	