June 1992

A.E. Ext. 92-16

NEW YORK STATE FRESH MARKET APPLE EXPORT SURVEY: RESULTS FROM PACKERS/SHIPPERS AND GROWERS

by

Peter Fredericks
and
Enrique E. Figueroa

Department of Agricultural Economics
New York State College of Agriculture and Life Sciences
A Statuatory College of the State University
Cornell University, Ithaca, NY 14853-7801

ACKNOWLEDGEMENTS

The authors would like to thank the New York State Legislature for providing the funding for this project and the New York State Department of Economic Development for administering the project's appropriation. At Cornell, The Center for International Studies (CIS) and The Department of Agricultural Economics provided assistance as well.

We would also like to acknowledge the support and assistance of the New York apple industry trade associations; The Western New York Apple Growers Association, and The New York and New England Apple Institute. Finally, a special thank you to the New York apple growers and packer/shippers who completed and returned our survey. This study would not have been possible without their participation.

The New York State Center For International Marketing (CIM) at Cornell University, was formed in 1991 to marshal the resources and expertise of Cornell toward the promotion of international marketing opportunities for New York State products and businesses. One of CIM's initial mandates was to examine the current level of export activity of a New York produced agricultural commodity, while also evaluating export market opportunities for this product. Fresh market apples were the chosen agricultural commodity for this first year CIM review, a item that some New York apple growers and packer/shippers have periodically sold in foreign countries in previous years.

Purpose and Background

One objective of CIM was to catalogue the current degree of export activity among New York State apple packer/shippers and growers, as well as gain a better understanding of industry interest in apple exporting. Two industry surveys -- one for packer/shippers, the other for apple growers -- were distributed in November 1991. Survey questions asked for instance, the types and quantities of apples participants grew and or packed, if they had exported before, to what countries they had exported, and some pros and cons associated with exporting.

The mailing list for the apple grower survey was the New York State Department of Agriculture and Markets, state-wide Apple Market Order mailing list. The packer/shipper mailing list, came respectively from the two New York apple industry trade associations; Western New York Apple Growers Association and New York and New England Apple Institute.

The remainder of this report will summarize first the results of the packer/shipper survey, followed by the results of the grower survey.

PACKER/SHIPPER SURVEY RESULTS

Response Rate

Thirty-eight packer/shippers from across the state were mailed surveys, with seventeen returning them for a response rate of 45 percent. For all packer/shippers that received a survey, an attempt was made to contact them by phone to encourage them to complete and return the survey and inquire if they had any questions. Although, we are pleased with the responses received, we are aware of some packer/shippers active in export sales that did not return surveys. As a result, the number of responses for some survey questions is quite small. None- the- less, we believe the returned surveys provide a portrayal of current industry export marketing practices.

Apple Varieties[1]

Table 1 summarizes the top five apple varieties packed by respondents during the past marketing year. Both mean (average)

[1] Due to the proprietary nature of labels under which apples are sold, we have not reported the results of survey question 1; asking participants to "list the labels or brand names under which your apples are sold".

and median values are given for each variety, for in some cases, particularly large packs by one or a few firms, skews the average much higher than the median.

Table 1: Top Five Fresh Market Apple Varieties: Average Annual Pack Per Respondent

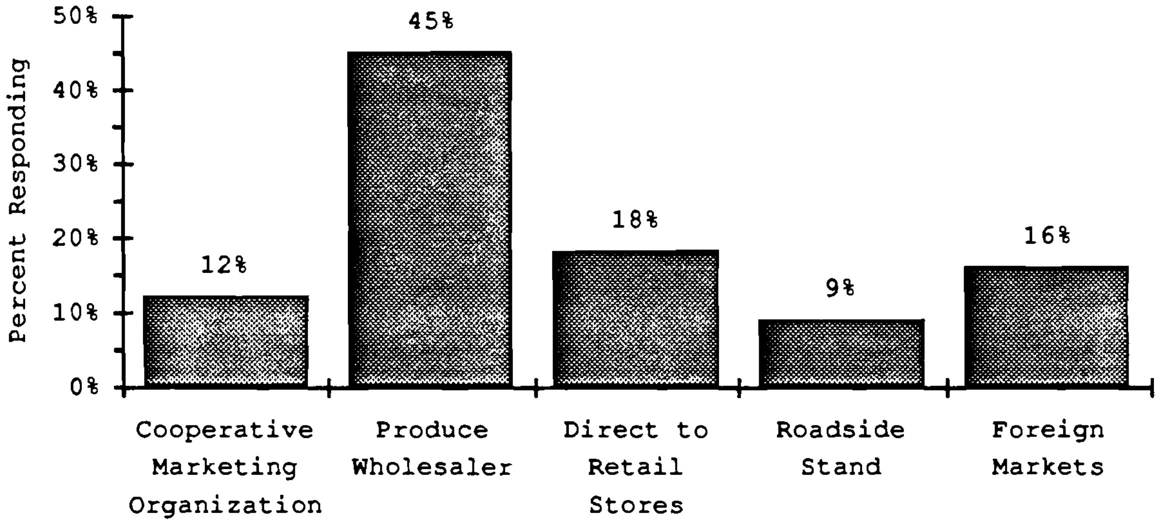
Rank & Variety	No. of Respondents Packing This Variety	Average Pack in Bushels	Median Pack in Bushels
1) McIntosh	16	68,917	27,000
2) Red Delicious	15	18,042	14,000
3) Idared	7	14,757	12,680
4) Empire	13	14,227	13,000
5) Rome	12	12,164	4,000

For the packer/shippers responding to the survey, McIntosh are by far the variety packed in the greatest quantity. There is not however, much difference between the average packs for the number 2, 3, and 4 varieties, (Red Delicious, Idared, and Empire) particularly when looking at the *median* pack quantity for these varieties.

Sales Outlets

The preferred sales outlet among participants are produce wholesalers who collectively handle approximately 45 percent of all fresh market apples packed by respondents (Figure 1). The percentage sold directly to retail stores (18 percent) is relatively low in light of the trend by supermarkets to purchase more produce direct, thereby avoiding the intermediary market channel. Sixteen percent of the fresh market apple pack for these packer/shippers is typically sold in foreign markets. When asked "what percent of annual fresh market pack would you allocate to foreign markets, if foreign market sales conditions were favorable and offered above average returns", the average response was a considerably larger 37 percent with a median value of 27 percent.

Figure 1: Sales Channels for Fresh Market Apples



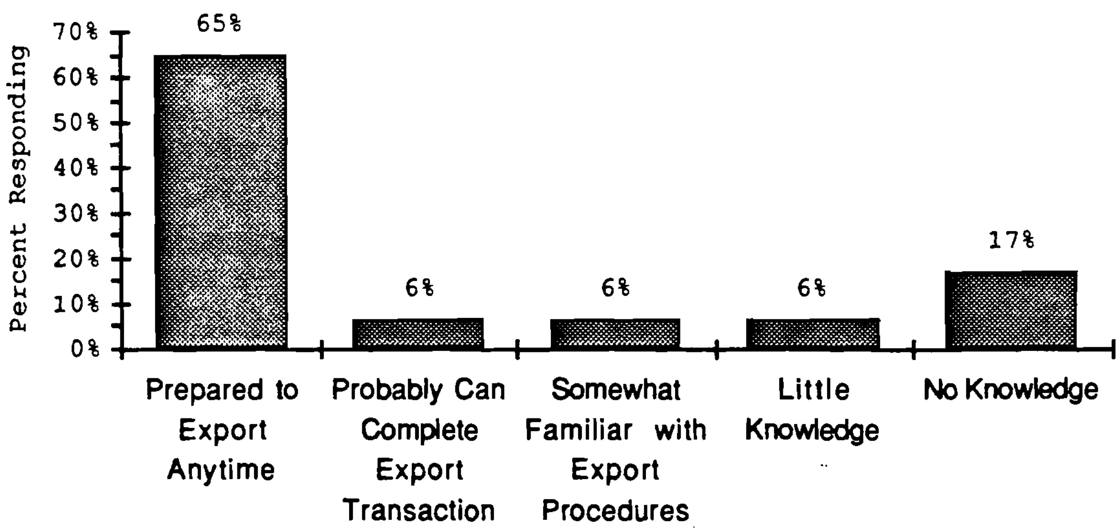
Prior Export Experience

Of all survey respondents, 81 percent reported having previously sold apples outside the U.S. Eighty-three percent of these participants were "very satisfied" with their foreign sales experiences and were "actively seeking new foreign sales opportunities". The remaining 17 percent who had exported indicated they were "satisfied with their export experience, but were not actively seeking foreign sales opportunities because of a lack of apple supply".

For the four respondents (19 percent) that had not previously exported apples, three of the four indicated they would like to "investigate export markets", while only one reported having no interest in exporting.

When asked to indicate their level of familiarity with export procedures (e.g. transportation arrangements, insurance, financing, phytosanitary regulations, export licenses etc.) almost two-thirds of respondents indicated they were "prepared to enter an export transaction at any time as long as they had a supply of apples and the terms of trade were acceptable". Figure 2 summarizes respondents' assessment of their proficiency regarding the export process. In short, there appears to be a considerable degree of export experience among industry packer/shippers, as well as a healthy degree of interest in investigating additional export opportunities among both respondents that have and have not previously exported.

Figure 2: Familarity with Export Procedures



Export Destinations

Western Europe is the principal export destination for New York apples, with one country, England, the destination for almost one-third (31 percent) of all apples reportedly shipped by participants. In total, apples have been shipped to thirteen different countries as reported by respondents. Perhaps surprising however, are the relatively few and infrequent export shipments to Western Hemisphere countries (e.g. Mexico, Caribbean countries, Canada etc.) given the comparatively closer proximity to these markets.

Table 2 lists the top foreign markets for New York apples during the past five years, as ranked by respondents on total volume of apples sold per country basis. Countries marked with an asterisk (*), were export destinations in the Fall of 1991.

Table 2: Top Export Destinations for New York Apples

Country	No. of Times Cited	% of All Responses
England*	12	31%
Norway*	6	14
Scotland*	4	10
Sweden*	3	8
Canada*	2	5
Costa Rica*	2	5
Germany*	2	5
France*	2	5
Finland*	1	3
Ireland	1	3
Holland	1	3
Iceland	1	3
Trinidad*	1	3
Other Caribbean Islands	1	2
		100%

Preferred Export Varieties

Of the numerous apple varieties grown in New York, three varieties (Empire, Red Delicious, and McIntosh) stand apart as the most frequently requested and exported varieties. Of significance perhaps for the New York apple industry is that Empire apples are the number one exported variety, and apparently have been well received and accepted in the various export markets. Table 3 lists the top five export varieties and the reported "typical shipment size" per variety for each respondent exporting that apple type. All responses are included because the variance in the figures reported indicates that respondents may have interpreted this question differently.

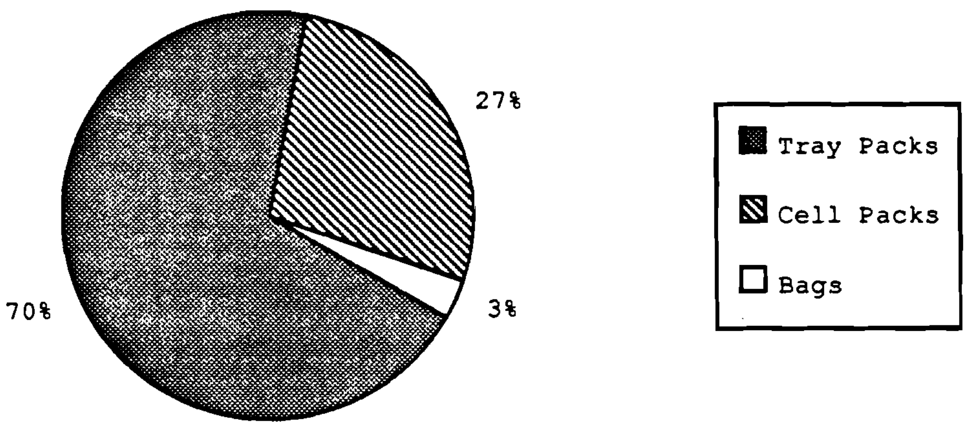
Table 3: Preferred Export Varieties; Average Shipment Per Variety

Rank & Variety	No. of Times Cited	Shipment in Bushels for Each Respondent Exporting the Variety
1) Empire	10	(3,000, 840, 1,000, 1,250, 980, 1000, 960, 25,000, 840, 85,000)
2) Red Delicious	9	(5,000, 840, 1,000, 1,250, 980, 980, 35,000, 840, 50,000)
3) McIntosh	6	(1,000, 60,000, 1,000 840, 16,000, 12,000)
5) Rome	4	(10,000, 490, 38,000 40,000)
4) Golden Delicious	3	(4,000, 960, 30,000)

<u>Export Packaging and Apple Sizes</u>

By far, the preferred package for apples sold in export markets are tray packs, requested over two-thirds of the time (Figure 3). Cell packs and bags are other packaging sometimes requested, with fresh market apples reportedly not exported in bulk containers.

Figure 3: Preferred Packaging For Exports



Small to medium size apples are requested most often by foreign buyers. Domestic shipments tend to be larger size apples and therefore the export market serves as a complimentary outlet for smaller apples. Table 4 lists in order of preference, the five most requested apple sizes. This ranking represents the combined ranking of all survey participants.

Table 4: Preferred Apple Sizes

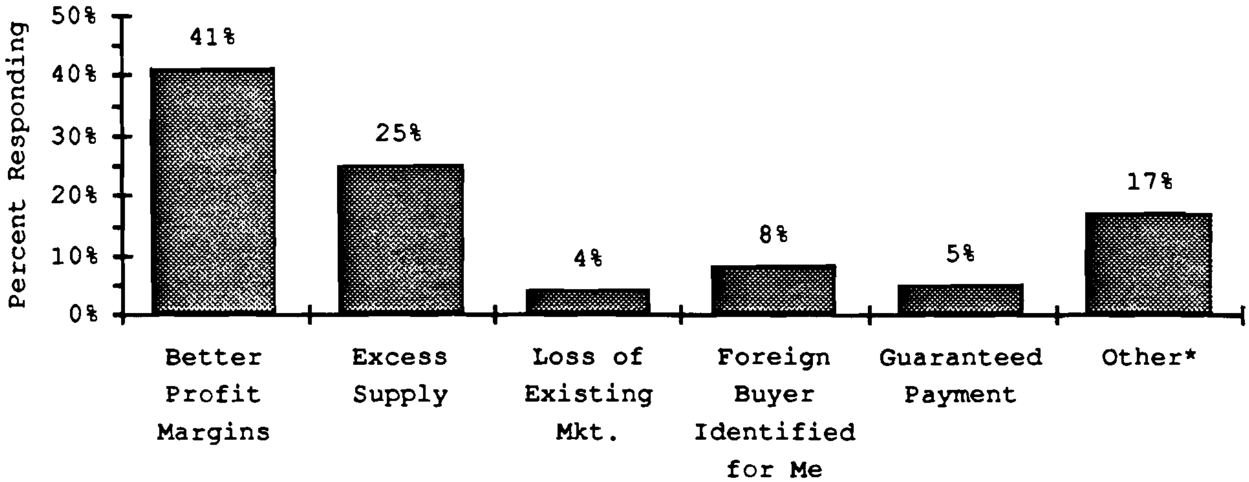
Rank and Size		Mean Score*
1) 125 count	--	1.6
2) 113 count	--	2.3
3) 138 count	--	3.1
4) 100 count	--	3.5
5) 88 count	--	4.6

* Numbers refer to average score given by respondents to various apple sizes, on a scale of 1 to 9 with 1 equaling the most requested sizes and 9 the least requested sizes.

Attraction of Foreign Market Sales

Better profit margins on apple sales in foreign markets than were obtainable through domestic market sales is the number one reason for pursuing export sales (Figure 4).

Figure 4: Reasons For Pursuing Foreign Market Apple Sales



(*"Other category" responses included: "poor domestic market conditions", "opportunity for sales of sizes not used in domestic markets", "increased international demand", "better volume movement at one time", and "demand for smaller size apples".)

Export Barriers

In spite of the attractions of selling fresh market apples in foreign countries, numerous barriers or complications sometimes arise that can dissuade marketers from pursuing foreign sales. Table 5 summarizes responses of all survey participants in ranking hypothetical barriers or difficulties typically associated with exporting. Factors were rated on a scale from 1 to 8 with 1 equaling the greatest barrier and 8 the least complicated barrier.

Table 5: Ranking of Export Barriers

Mean Ranking of Barrier	Factors Encountered in Exporting
2.6	Increased risk, especially risk of non-payment
3.4	Lack of information, e.g. how to find foreign buyers/market opportunities
4.4	Foreign government regulations, e.g. tariffs, licenses, quality regulations
5.3	Difficulty in obtaining trade financing and or export insurance
5.6	Lack of time on your part to pursue export market opportunities
5.7	Do not produce enough apples on your own to fill export orders
6.5	Little awareness among foreign buyers of apple varieties you are offering, hesitation to accept your apples

(Additional comments relating to "export barriers" offered by participants were: "lack of a centralized export control body", "difficulties sometimes encountered in making transportation arrangements", and "lack of consistent apple quality").

Significantly, export complications seem to be concentrated on the technical aspects of exporting, and not on the "acceptability" or "awareness" level of New York apples. Therefore, developing better business connections with foreign buyers and importers and formalizing export procedures should help address the areas of greatest concern. Foreign marketing programs and promotional efforts should recognize these concerns.

Marketing Functions

Over two-thirds of respondents do not currently pack under the New York State Seal of Quality program and almost three-quarters of do not think the Seal of Quality program should be expanded to include apples shipped to export markets (Table 6).

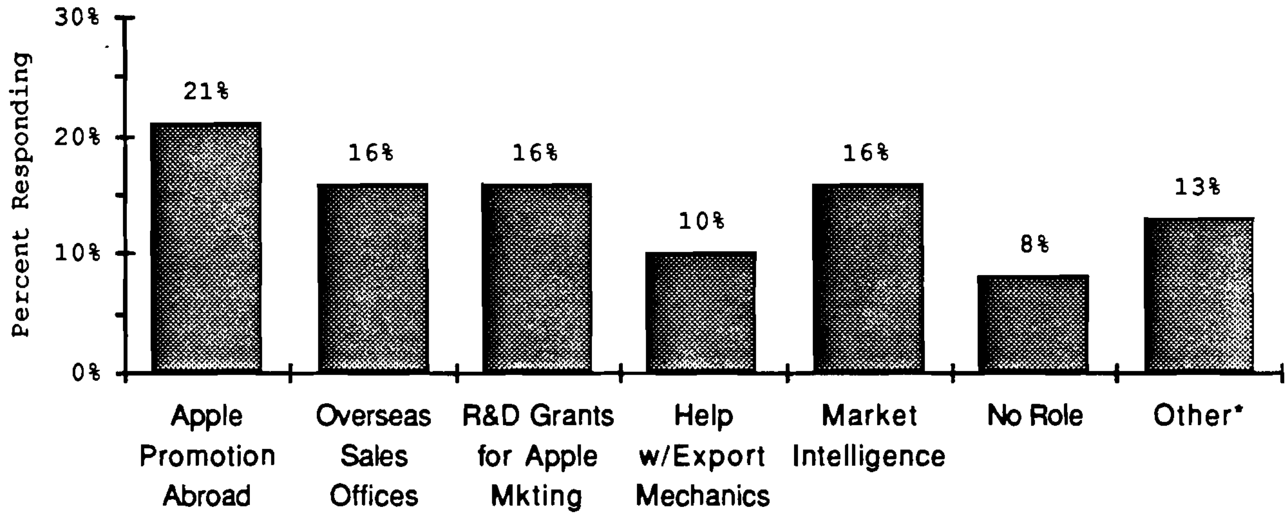
Table 6: New York State Seal of Quality Program

Issue	% Yes	% No
Do you pack under the Seal of Quality label	27%	73%
Should the Seal of Quality program apply to exported apples	31%	69%

In terms of product merchandising assistance (e.g. point of purchase displays, promotion posters, apple handling tips) few (16 percent) respondents have provided such assistance or materials to foreign buyers.

Figure 5 summarizes survey participants reactions toward possible roles New York State government could play in attempting to increase the presence and success of New York State apples in foreign countries. In some cases, the state is presently involved in some of these activities and respondents therefore support these efforts and encourage additional assistance.

Figure 5: The Role of State Goverment in Facilitating Apple Exports



(*"Other suggestions" given by respondents were: "contribute funding for paid apple promotion programs", "help growers by providing grants or low interest loans to improve apple quality and quantity", "play more role in domestic sales promotion, but not international sales", "allow for the creation of a new apple export association for purposes of promoting and encouraging apple exports; this association could be funded through the existing apple marketing order and would be separate from the current industry associations that should focus their promotion efforts on domestic markets".

A final question asked participants what role if any should the two industry trade associations (Western New York Apple

Growers Association, and The New York and New England Apple Institute) have in increasing export sales. Many different suggestions were offered which are grouped into the following common topics. (not in order of importance)

1) Provide promotion and merchandising support and or materials geared toward foreign buyers and consumers that can be placed in foreign supermarkets.

2) Assist with market intelligence, e.g. gather foreign market information, foreign prices, apple supply information in other countries, sponsor trade missions or trade shows for New York packer/shippers and invite foreign buyers to New York so they can become familiar with New York operations and apple varieties, etc.

3) Track the percentage of fresh apples sold abroad, and if the percentage reaches some preset level, then provide merchandising support for New York apples in specified foreign markets.

4) Study the affect of exporting a large portion of "extra fancy" grade apples and which leaves lower quality apples for domestic markets.

5) Allow packer/shippers to allocate a portion of their marketing assessment to promote their specific brands with their own foreign customers.

6) Marketing efforts and expenditures should be concentrated on domestic sales efforts rather than international sales.

International marketing promotions would be too expensive given the current limited promotion budgets of the trade associations.

Summary Points

I. The quantity of fresh market apples represented by Table 1, is relatively small when compared with the total 1991 New York Fresh Market Apple Utilization statistics reported by New York State Department of Agriculture and Markets. Reasons for may include: (1) Only five apple varieties are represented by these figures when there are in fact, numerous additional varieties grown commercially in New York. (2) The survey respondents may represent the smaller packer/shippers in the state. (3) Only about half of all commercial fresh market apple packer/shippers located in New York participated in this study. (4) The New York State Department of Agriculture and Markets figures are utilization figures rather than shipment figures.

II. New York apple packer/shippers that have previously exported (81 percent of this survey's respondents) were pleased with their export transactions and are actively seeking new foreign sales opportunities. There was also a high degree of interest among respondents that had not exported, in investigating foreign sales opportunities. Additionally, packer/shippers appear prepared to commit a significant percentage of their annual pack (mean 37 percent, median 27) for export sales if foreign market conditions are favorable.

III. There is a role for both state government and existing apple industry trade associations to provide financial support, information resources through New York State offices in foreign countries, coordination capabilities, and marketing and promotion expertise to further New York apple export opportunities. All marketing efforts should be done in close coordination with one another to eliminate program duplication and make the most of limited budgetary resources.

Marketing New York apples in foreign countries does not necessarily require large promotion expenditures, but involves developing relationships with foreign buyers and importers and enabling foreign consumers to become familiar with the quality apples grown in New York.

IV. New York's own Empire variety apple is currently the most frequently exported variety from the state and has been well received among foreign buyers.

GROWER SURVEY RESULTS

Response Rate

Slightly more than 700 surveys were mailed to apple growers across New York. After three weeks, each grower also received a post-card, encouraging them to complete and return the survey. One hundred twenty-two surveys were returned, however, only 88 surveys contained complete, useable information. The remainder did not provide enough information, contained written comments, or were returned saying that the quantity of apples they grew was too small to be of any useful information.

In light of the number of marketing and export specific questions in the survey, topics that perhaps, growers are not familiar enough with to address (respondents indicated that 55 percent of the fresh market apples they produced were sold either through a packer/shipper or through a cooperative marketing organization, thereby eliminating much of growers daily contact with market issues) the lower response to this survey is perhaps, not surprising. In fact, only 27 percent of respondents reported selling fresh market apples under their own labels. The remaining 73 percent were sold under the label of their shipper or marketing organization.

Apple Varieties

Table 7 summarizes the top 10 apple varieties grown by respondents, on an annual sales per variety basis. Again, both mean and median values are given for each variety, because in some cases particularly large production by a few growers, skews the mean higher then the median[2].

Table 7: Top Ten Apple Varieties: Average Annual Sales Per Respondent*

Rank and Variety	Average Annual Sales in Bushels	Median Sales in Bushels
1) McIntosh	6,343	1,500
2) Rome	4,283	1,450
3) Red Delicious	3,388	1,000
4) Empire	3,325	1,200
5) Idared	2,928	933
6) Mutsu	1,891	600
7) Jonamac	1,756	800
8) Cortland	1,702	1,000
9) Spartan	1,514	400
10) Golden Delicious	1,291	500

* Average annual sales figures does not include volume figures reported by one particularly large grower. For comparison, these numbers are contained in a separate Table 7A.

Table 7A contains the top 10 apple varieties for one particularly large grower.

[2] Due to the proprietary nature of shipping labels and brand names, we again have not reported the results to grower survey questions 1A and 1B, asking for the "labels or brand names under which your apples are sold".

Table 7A: Top Ten Apple Varieties and Sales Volume for One Grower

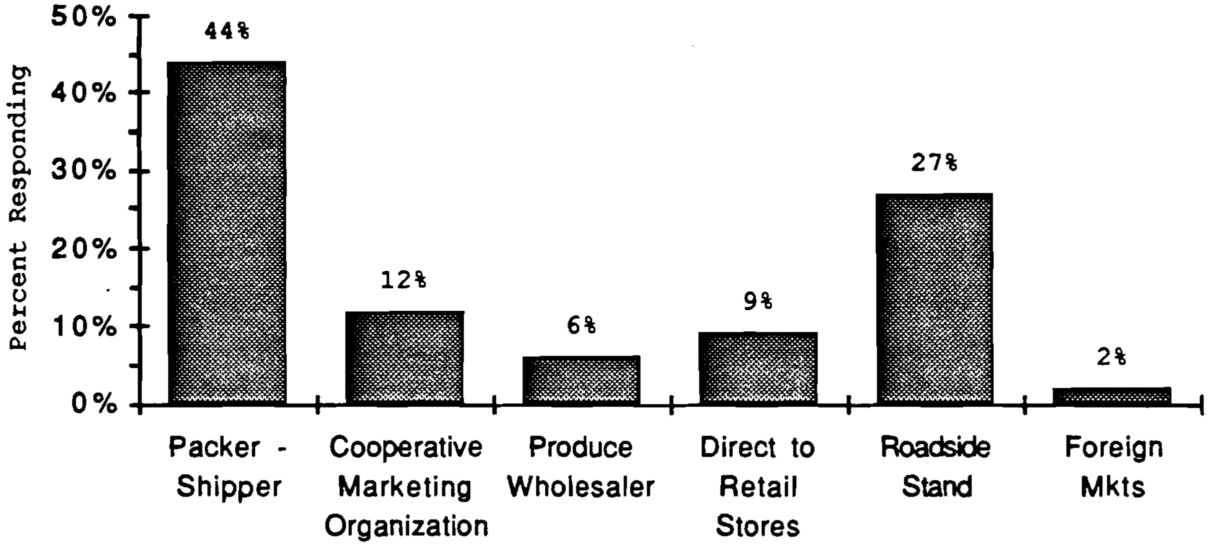
Rank and Variety	**Actual** Reported Sales in Bushels
1) Red Delicious	75,000
2) Rome	70,000
3) Empire	60,000
4) McIntosh	25,000
5) Cortland	20,000
6) Golden Delicious	20,000
7) Jonamac	18,000
8) Spartan	15,000
9) Paula Red	12,000
10) Idared	10,000

The top five apple varieties respondents reported growing are the same as the top five varieties packer/shippers reported packing (see Table 1), although the order of varieties 2 - 5 is somewhat different. Some New York packer/shippers pack apples from neighboring states (e.g. Pennsylvania, New England) which could contribute to the different ranking between varieties packed and varieties grown.

Sales Outlets

On average, sixty-two percent of responding growers' annual pack is sold as fresh market apples. Packer/shippers constitute the largest sales outlet (44 percent), with direct sales to consumers via roadside markets accounting for the second largest market outlet at 27 percent (Figure 6).

Figure 6: Sales Outlets for Growers' Apples



Grower Exporting Experience

Opposite of what was found in the packer/shipper survey, only 12 percent of all growers have reportedly sold apples in markets outside the U.S. For these few respondents their export destinations were essentially identical to packer/shipper destinations, with the exception of one grower who listed a shipment to Brazil in 1990. Table 8 lists the top five export destinations according to grower participants.

Table 8: Top Export Destinations For Growers

Rank and Country	No. of Times Cited
1) England*	8
2) Scandinavian countries*	2
3) Canada	2
4) Caribbean countries*	2
5) Iceland	1

*Export destinations in 1991.

Table 9 lists the top five apple varieties that growers most frequently export.

Table 9: Exported Apple Varieties by Growers

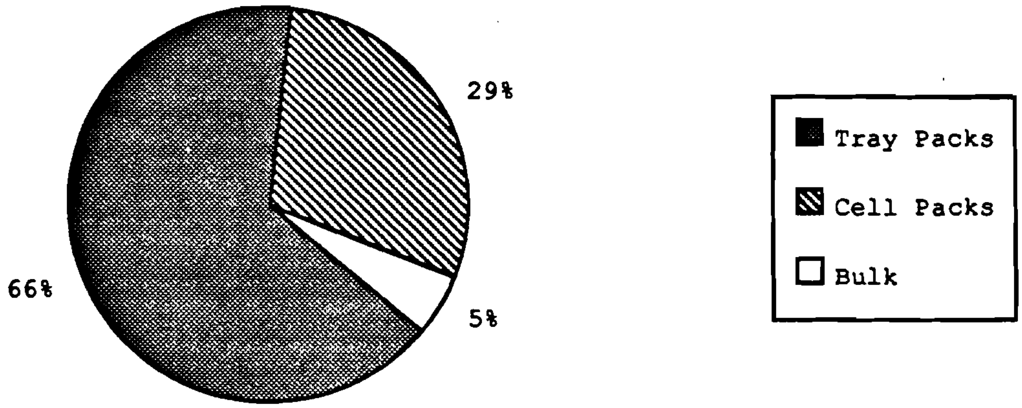
Rank & Variety	No. of Times Cited	Average Shipment in Bushels	Median Shipment in Bushels
1) Red Delicious	5	4,300	4,500
2) Empire	4	7,350	7,000
3) Golden Delicious	2	2,500	2,500
4) McIntosh	1	1,000	1,000
5) Paula Red	1	1,000	1,000

Four of the five varieties (Red Delicious, Goldent Delicious Empire and McIntosh) are also among the top five most commonly exported varieties as reported by packer/shipper respondents (see Table 3). Fresh market Golden Delicious and Paula Red apples are grown primarily in Western New York.

Export Packs and Apple Size

The export packaging of choice were again tray packs, utilized two-thirds of the time (Figure 7). However, two differences between the respective survey respondents are that bags were not used by growers while they were used by packer/shippers, and a small percentage of apples were shipped bulk by growers while no apples were reportedly shipped bulk by packer/shippers (see Figure 3 for packer/shipper packaging breakdown).

Figure 7: Preferred Export Packaging



As with the packer/shipper respondents (see Table 4), small to medium size apples are the preferred export apple size for foreign market sales.(Table 10).

Table 10: Preferred Apple Sizes

Rank and Size		Mean Scores*
1) 113 count	--	1.8
2) 125 count	--	2.3
3) smaller than 150 count,	(163's)	3.0
4) 100 count	--	4.2
5) 138 count	--	4.6

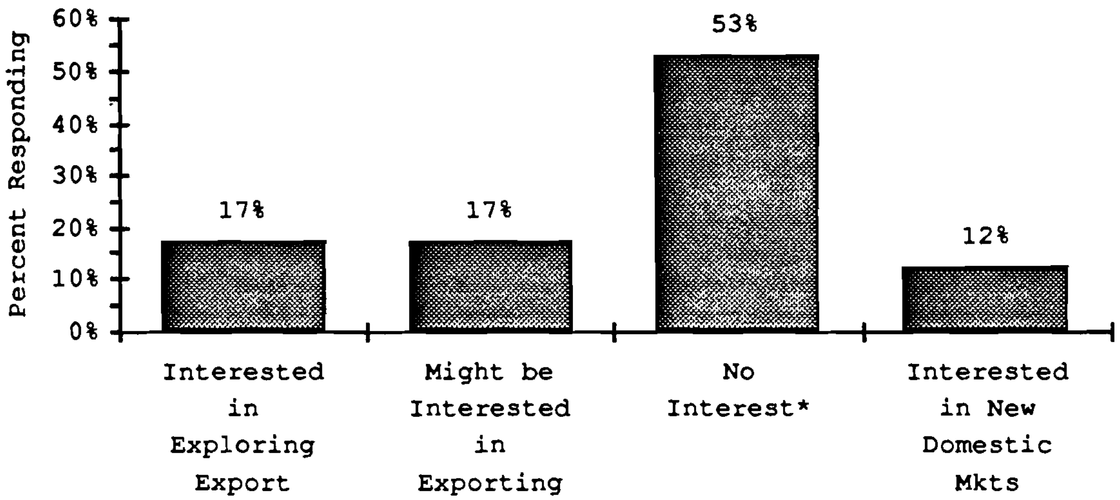
* Numbers refer to average score given by respondents to various apple sizes, on a scale of 1 to 9 with 1 equaling the most requested sizes and 9 the least requested sizes.

Grower Interest in Exporting

Over half of the grower respondents are not interested in exporting or even exploring foreign market opportunities (Figure

8), compared to 83 percent of packer/shippers respondents who noted they were satisfied with their foreign sales experiences and were actively seeking new export opportunities.

Figure 8: Level of Grower Interest in Exporting



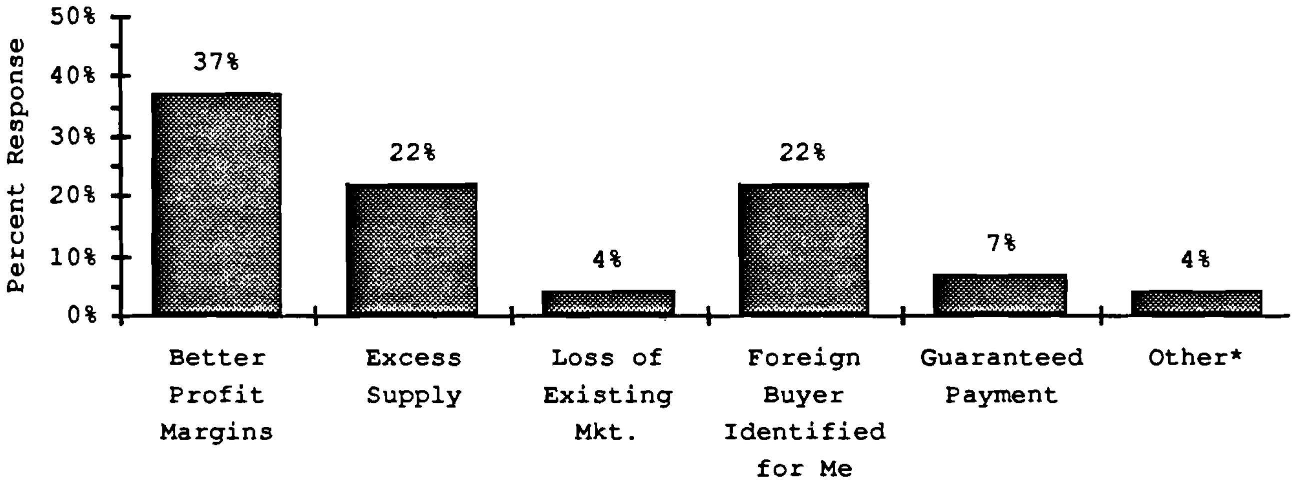
(* Respondents comments as to why they were not interested in exporting included: "quantity I produce is too small to fill export orders on a regular basis", "do not grow the right varieties for exporting", "there are good domestic market opportunities that are less complicated than foreign sale opportunities", "all our apples are sold through a packer or shipper so we do not get involved in where our apples are finally sold".)

In spite of the reported low level of grower interest in pursuing exports, respondents indicated that if foreign sales conditions were favorable and offered above average returns, overall, they would be willing to allocate 22 percent of their fresh market crop for sale in export markets.

Attraction of Export Sales

Superior returns typically achievable through foreign market sales was again the number one reason for pursuing export sales among growers that have export experience (Figure 9).

Figure 9: Reasons For Pursuing Foreign Market Apple Sales

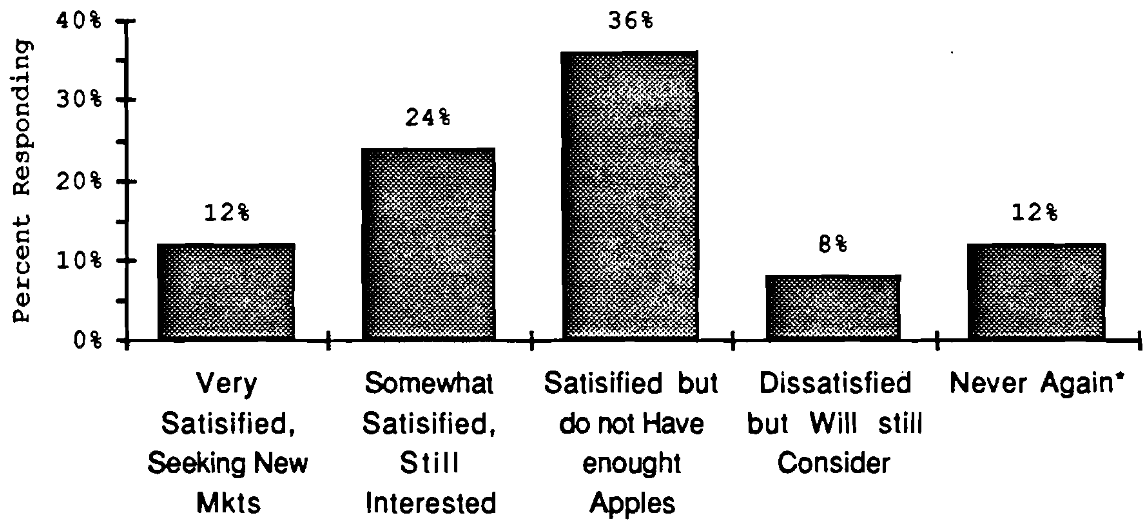


(* "Other" comments were: "foresee a long-term need to identify new market opportunities".)

"Excess apple supply" and "foreign buyer identified for me, thus making the export transaction easy" were other important factors for growers pursuing exporting. Overall, while the results differ slightly between the two surveys (see Figure 4 for packer/shipper results) the pattern, in terms of factor importance, is identical.

Perhaps a telling factor why more growers have not independently experimented with exporting apples is found in an evaluation of growers' foreign sales experiences. Over one-third of respondents indicated that they were satisfied with their export sales, but were not actively seeking new sales because they themselves typically did not produce enough apples to fill export orders (Figure 10).

Figure 10: Grower Satisisfaction with Exporting



(* Reasons stated for replying "never again" were :"lost money in previous export transaction, buyer was not bonded", "shipment was rejected when reached foreign destination", "process is too complicated").

Export Barriers for Growers With and Without Export Experience

Table 11 ranks hypothetical complications or barriers frequently associated with export sales. Respondents were asked to rank these factors on a scale from 1 to 8, with 1 equaling the greatest barrier and the 8 the least troublesome barrier encountered by growers that have exported, or assumed to be the least/most complicated barrier among growers that have not exported.

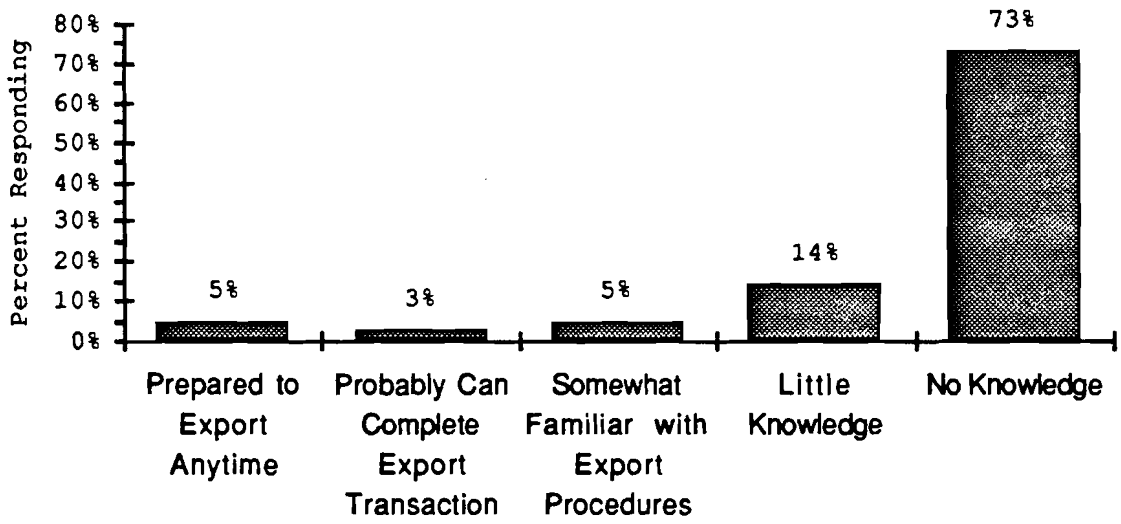
Table 11: Ranking of Export Barriers

Mean Ranking of Barrier	Factors Encountered in Exporting
2.3	Do not produce enough apples on your own to fill export orders
2.9	Lack of information, e.g. how to find foreign buyers/market opportunities
3.6	Foreign government regulations, e.g. tariffs, licenses, quality regulations
3.7	Lack of time on your part to pursue export market opportunities
4.9	Increased risk, especially risk of non-payment
5.2	Export process is too complex for return provided
5.4	Difficulty in obtaining trade financing and/or export insurance
6.1	Little awareness among foreign buyers of apple varieties you are offering, hesitation to accept your apples

When compared with the packer/shipper responses (Table 5) the ranking of "export complications" are quite different. The packer/shipper responses likely reflect more accurately market conditions, because these respondents have been selling in foreign markets more regularly and have more experience in export sales. For growers, export complications seem to be associated more with not having enough apples to fill export orders than with the more technical aspects of exporting.

When asked to evaluate their level of familiarity/comfort with procedures encountered when exporting (e.g. export licenses, transportation, financing, insurance) almost three-quarters of respondents replied having "no knowledge" of export procedures (Figure 11). In fact, grower responses are almost completely opposite of the packer/shipper responses where 65 percent indicated a high degree of familiarity/understanding of export procedures (see Figure 2).

Figure 11: Familarity with Export Procedures



Marketing Functions

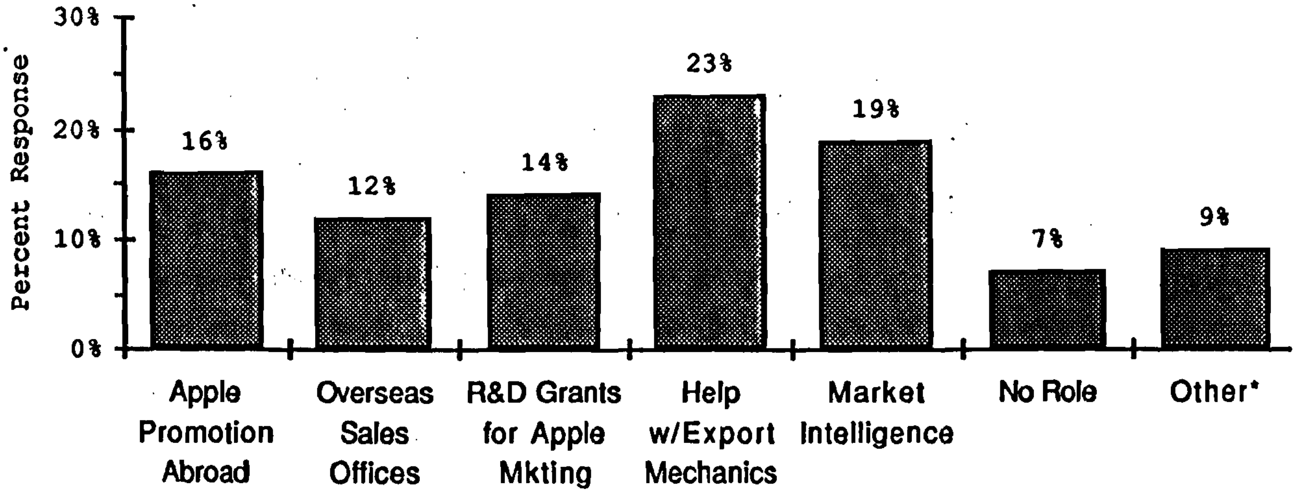
Over three-quarters of respondents do not sell apples under the New York Seal of Quality program, a figure similar to that reported by packer/shippers (see Table 6). Conversely, almost three-quarters of grower respondents think the Seal of Quality should apply to packages of exported apples. This is opposite of the collective packer/shipper response (31 percent felt it should apply) who are the ones actually doing most of the apple exporting (Table 12). This divergent perception of the Seal of Quality is a particularly interesting result of this study.

Table 12: New York State Seal of Quality Program

Issue	% Yes	% No
Do you sell apples under the Seal of Quality label	13%	84%
Should the Seal of Quality program apply to exported apples	72%	28%

Figure 12 summarizes growers' reactions toward possible roles New York State government could play in facilitating increased sales of New York apples in foreign markets.

Figure 12: State Goverment's Role in Facilitating Exports



(* Other suggestions included: "any state promotion money should be spent in New York State or other domestic markets", "could help 'grease-the-skids' but keep out of our operations", "Seal of Quality program should be abandoned and money used for generic export promotion in U.S. and abroad", "use staff and expertise of New York State development offices in foreign countries to follow sales leads and promote New York apples".

A final question asked growers what role should the apple industry trade associations have in facilitating apple exports. The following are their responses.

1) The associations should work together and in conjunction with state government to promote New York apples. Specifically, sponsor trade missions for New York growers to various foreign markets, and also arrange visits of foreign buyers to New York grower facilities.

2) Help with coordination between growers and packer/shippers to set standards for exporting high quality apples to foreign markets.

3) Use existing varietal information and merchandising materials to educate retailers in foreign markets about New York apple varieties and apple qualities.

4) Use contacts and association member meetings to improve communication among industry members and help coordinate/consolidate grower shipments to meet size requirements of export tenders.

5) Focus marketing/promotion programs around the Empire apple so that promotional efforts are not fragmented over a number of varieties, and so that a New York identity is built around this strong variety.

Summary Points

I. Although New York's apple growers are not overly interested in pursuing export sales themselves (Figure 8, 53 percent had no interest in exporting), there is a least a underlying awareness that export market opportunities do exist among growers. More importantly, growers did indicate that if export sales conditions were particularly favorable, they would be willing to allocate a substantial portion of their fresh market pack for export markets (22 percent) with the actual sales transactions likely left to their packer/shippers or marketers. Additionally, the apple varieties New York growers are producing in the greatest quantities (Table 7) are the apple varieties being exported in the greatest volume (Table 3).

II. The principal frustration among growers in regards to export market sales is not having enough apples by themselves on a regular basis to fill export orders. When growers have an excess apple supply, and potentially would be interested in export markets (and the price premiums often achieved through export sales) most do not know how to find buyers on short notice nor how to complete an export transaction. These issues could perhaps be addressed by creating a central export clearing house where export orders were taken and pre-set arrangements made with interested growers to collectively fill such orders on an "as-can" basis.

III. The New York State Seal of Quality label is not being used by a large portion of both growers and packer/shippers. Additionally, there are differing opinions between growers and shippers as to whether this program would be a helpful marketing tool for apples sold in foreign markets.

IV. Growers stated several ways in which state government and the industry trade associations could, in their view, play a more active role in facilitating export sales of New York apples.

OTHER AGRICULTURAL ECONOMICS EXTENSION PUBLICATIONS

No. 92-09	Dairy Farm Business Summary Central New York and Central Plain Regions 1991	Wayne A. Knoblauch Linda D. Putnam George Allhusen June C. Grabemeyer James A. Hilson
No. 92-10	Employee Training Practices on Large New York Dairy Farms	Thomas R. Maloney
No. 92-11	Dairy Farm Business Summary Southeastern New York Region 1991	Stuart F. Smith Linda D. Putnam Alan S. White Gerald J. Skoda Stephen E. Hadcock Larry R. Hulle
No. 92-12	Dairy Farm Business Summary Western Plateau Region 1991	George L. Casler Andrew N. Dufresne Joan S. Petzen Michael L. Stratton Linda D. Putnam
No. 92-13	Dairy Farm Business Summary Eastern Plateau Region 1991	Robert A. Milligan Linda D. Putnam Carl Crispell Gerald A. LeClar A. Edward Staehr
No. 92-14	Dairy Farm Business Summary Northern Hudson Region 1991	Stuart F. Smith Linda D. Putnam Cathy S. Wickswat W. Christopher Skellie Thomas J. Gallagher
No. 92-15	Bibliography of Horticultural Product Marketing and Related Topics	Enrique Figueroa