

Assessment report on the Sea Buckthorn market in Europe, Russia, NIS-Countries and China

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EAN-SEABUCK project

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7. **Market trends**

Market Study - Aims



Analysis of the Sea Buckthorn market in Eastern and Western Europe, Russia, NIS Countries and China

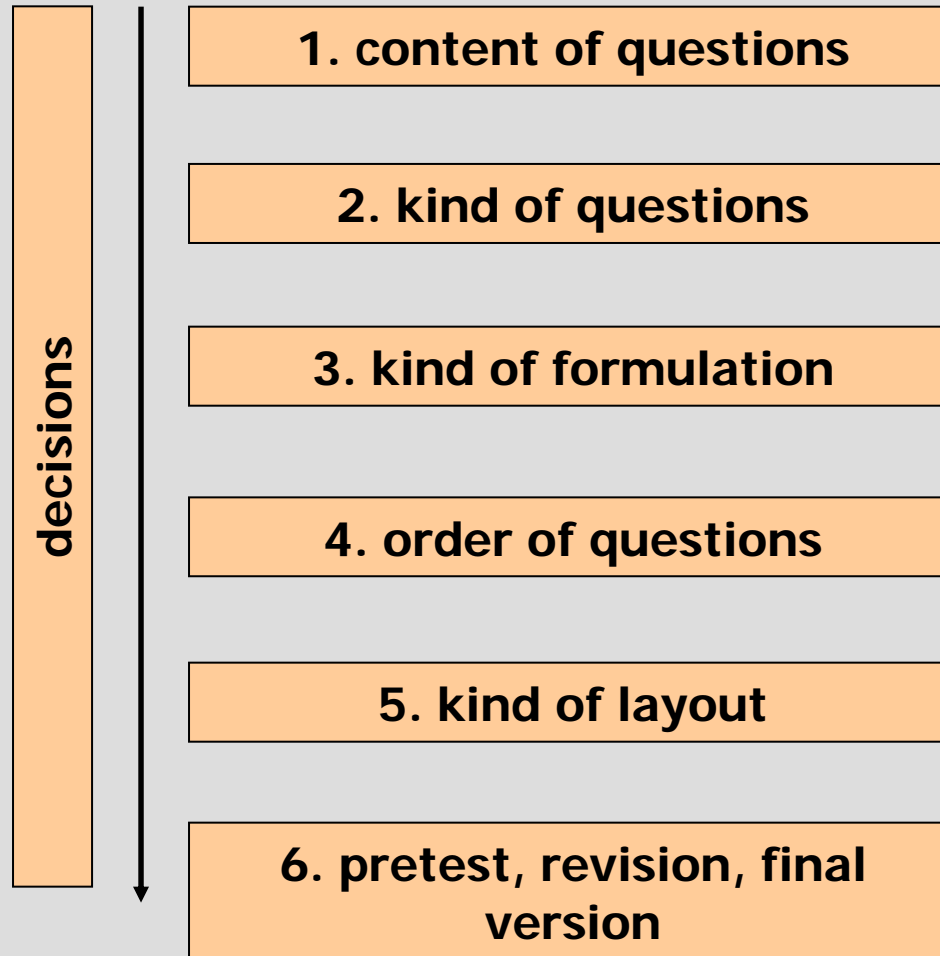
- **Sea Buckthorn cultivation area**
- **Sea Buckthorn raw materials market**
- **Sea Buckthorn half products market**
- **Sea Buckthorn final products market**
- **Market strategies of the producer**
- **Market and price trends for the next 5 years**

Market Study – Research Technology



- **Secondary market research**
 - **Databases**
 - **Internet research**
- **Primary market research**
 - **Questionnaires [[draft](#)]**
 - **Development of the questionnaire [[example](#)]**
 - **Kind of questions**
 - **Consignee groups**

Draft of questionnaires



Adapted by Prof. Dannenberg; „Effiziente Marktforschung“, 2002

[\[back\]](#)

Example for used questionnaire



Example of question types inquired in the designed questionnaire

Company name:			
Legal status	<input type="checkbox"/> commercial	<input type="checkbox"/> non-commercial	
Seabuckthorn business ?	<input type="checkbox"/> Cultivation, see point 2	<input type="checkbox"/> Processing	<input type="checkbox"/> Marketing, Distribution
Address:			
Country:			
Contact person:			
Annual turn over			
Number of staff			
Phone number:			
Fax number:			
Email:			
Homepage:			

Contact question

Control question

Personnel question

Examples for used standardised questions



Cultivation area, whole	<input type="checkbox"/> ha or <input type="checkbox"/> mu			
Cultivation area, Seabuckthorn	<input type="checkbox"/> ha or <input type="checkbox"/> mu			
Berries harvest, yearly	tonnes			
Leaves harvest, yearly	tonnes			
Genotypes of harvested berries	<input type="checkbox"/> H. r. subsp. rhamnoides	tonnes	Which other	
	<input type="checkbox"/> H. r. subsp. sinensis	tonnes		
	<input type="checkbox"/> H. r. subsp. mongolica	tonnes		
	<input type="checkbox"/> others	tonnes		
Variety of harvested berries	variety 1	tonnes		
	variety 2	tonnes		
	variety 3	tonnes		
Genotypes of harvested leaves (dried)	<input type="checkbox"/> H. r. subsp. rhamnoides	tonnes	Which other	
	<input type="checkbox"/> H. r. subsp. sinensis	tonnes		
	<input type="checkbox"/> H. r. subsp. mongolica	tonnes		
	<input type="checkbox"/> others	tonnes		
Varieties of harvested leaves (dried)	variety 1	tonnes		
	variety 2	tonnes		
	variety 3	tonnes		
Which kind of berries products you sell ?	<input type="checkbox"/> fresh berries (non frozen)		% of harvest	
	<input type="checkbox"/> frozen berries, <u>frozen harvested</u>		% of harvest	
	<input type="checkbox"/> frozen berries, <u>fresh harvested</u>		% of harvest	
	<input type="checkbox"/> dried berries		% of harvest based on fresh	
Which price you expect for the 2005 harvest for the products?	US\$/kg fresh berries	US\$/kg dried berries		
	US\$/kg frozen berries, <u>frozen harvested</u>			
	US\$/kg frozen berries, <u>fresh harvested</u>			
Which price you expect for the leaves of the 2005 harvest?	US\$/kg dried leaves			
What do you think about the price development in the next 5 years?				
Berries :	<input type="checkbox"/> decrease	<input type="checkbox"/> stagnation	<input type="checkbox"/> slow increase	<input type="checkbox"/> strong increase
Leaves :	<input type="checkbox"/> decrease	<input type="checkbox"/> stagnation	<input type="checkbox"/> slow increase	<input type="checkbox"/> strong increase

Direct questions

„Open“ questions [others]

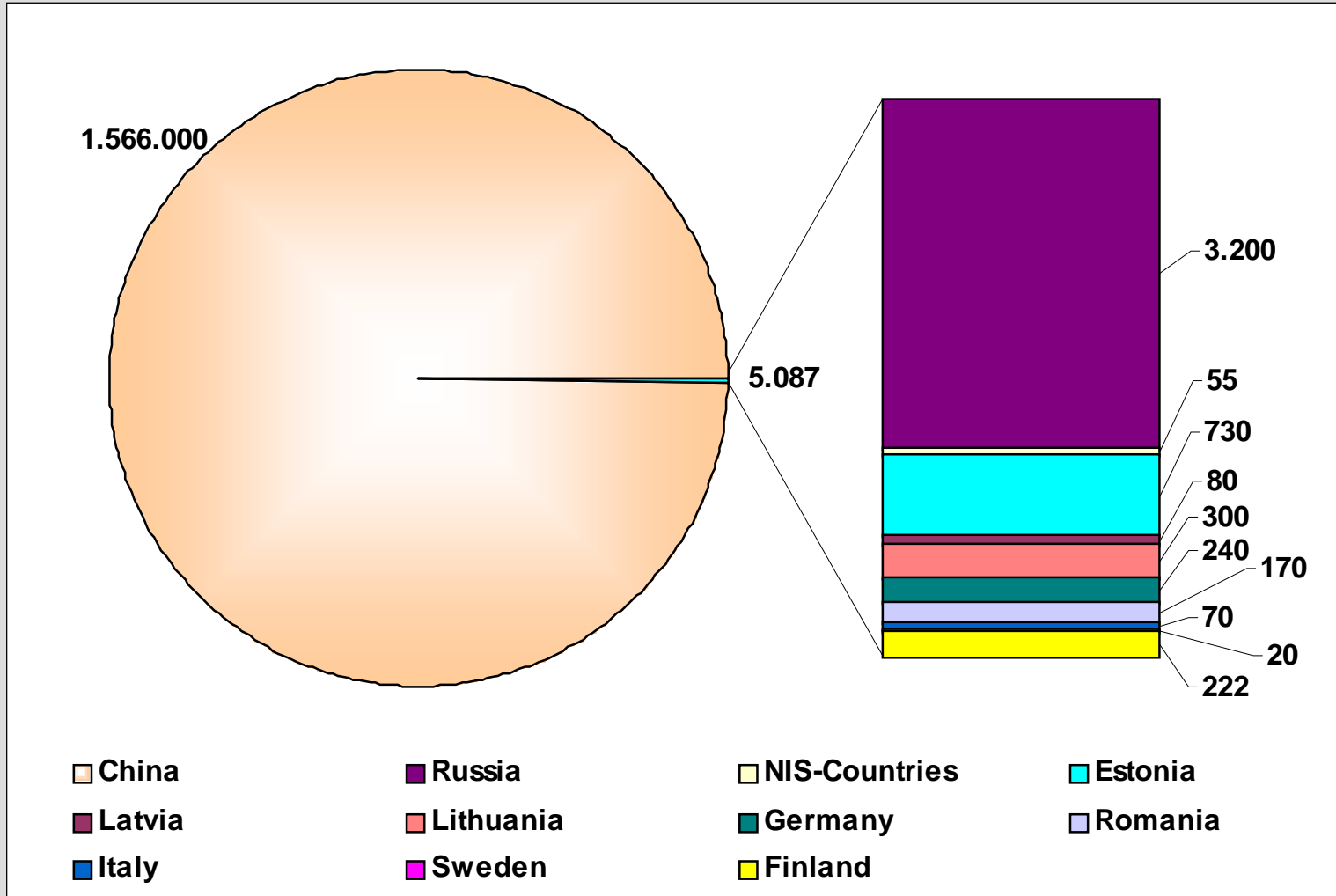
Closed questions

Questionnaire response



Country	Sent Questionnaires	Response	Response factor [%]
China	53	26	49,06
Russia	57	5	8,77
NIS-Countries	18	3	16,67
Baltic countries	15	4	26,67
Germany	17	11	64,71
Romania	2	2	100,00
Italy	1	0	0,00
Sweden	1	1	100,00
Finland	1	1	100,00
Great Britain	1	0	0,00
Czech Republic	2	0	0,00
Summary	168	53	31,55

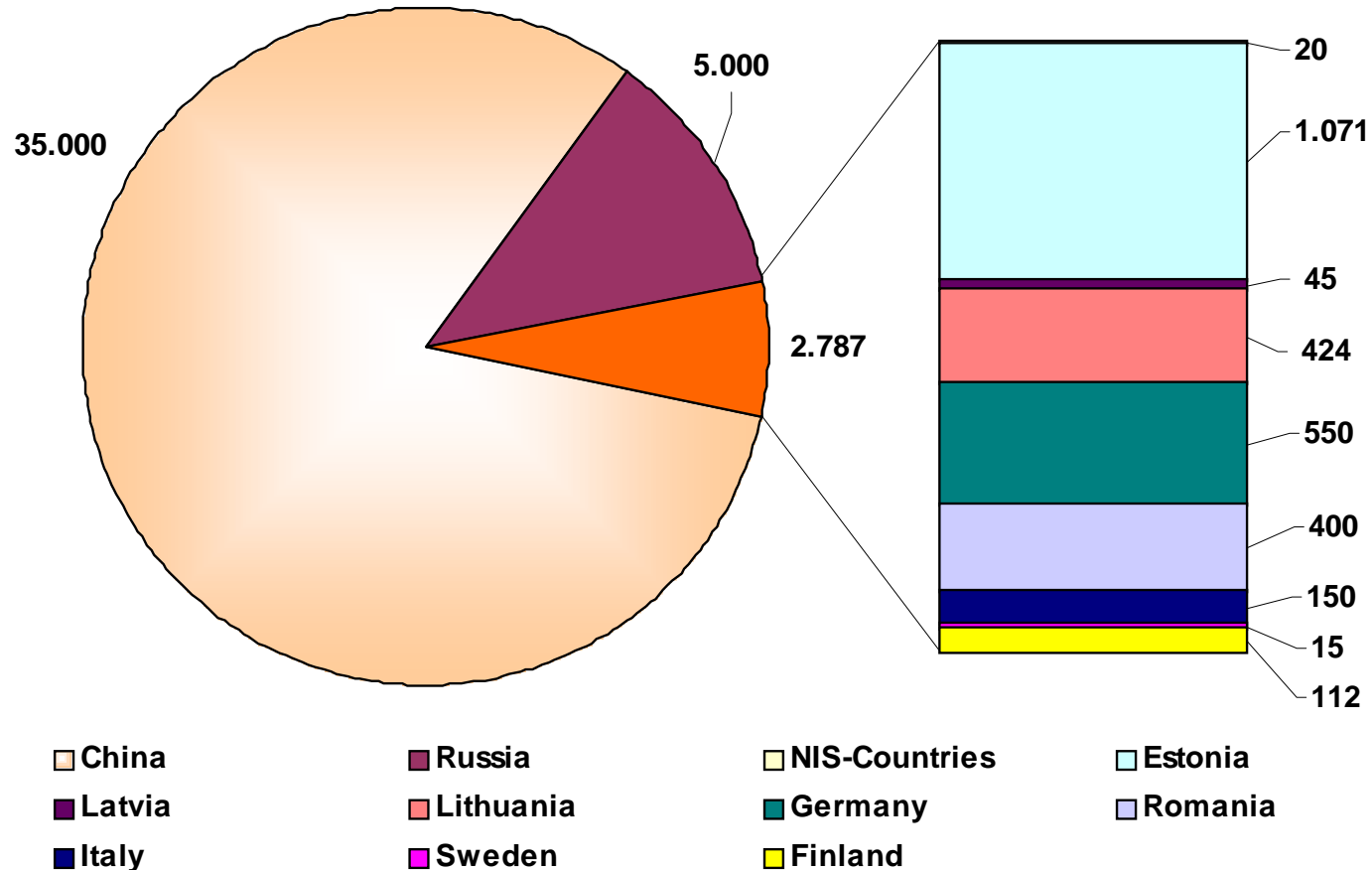
Results – Cultivated area in hectare



Results – Raw materials [Berries, Leaves]



Berries in tons

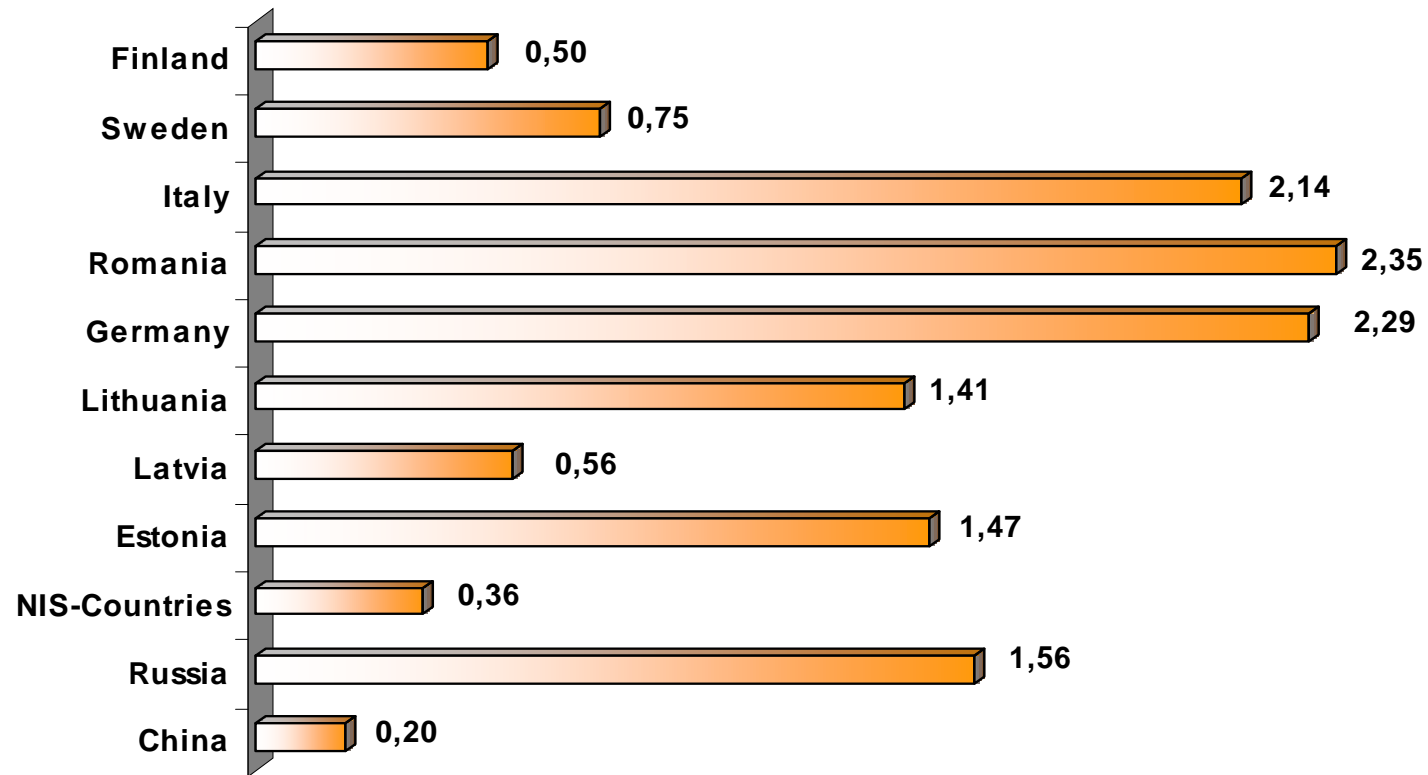


600 tons dried leaves [1.5 Mill. Euro]

Results – Area efficiency

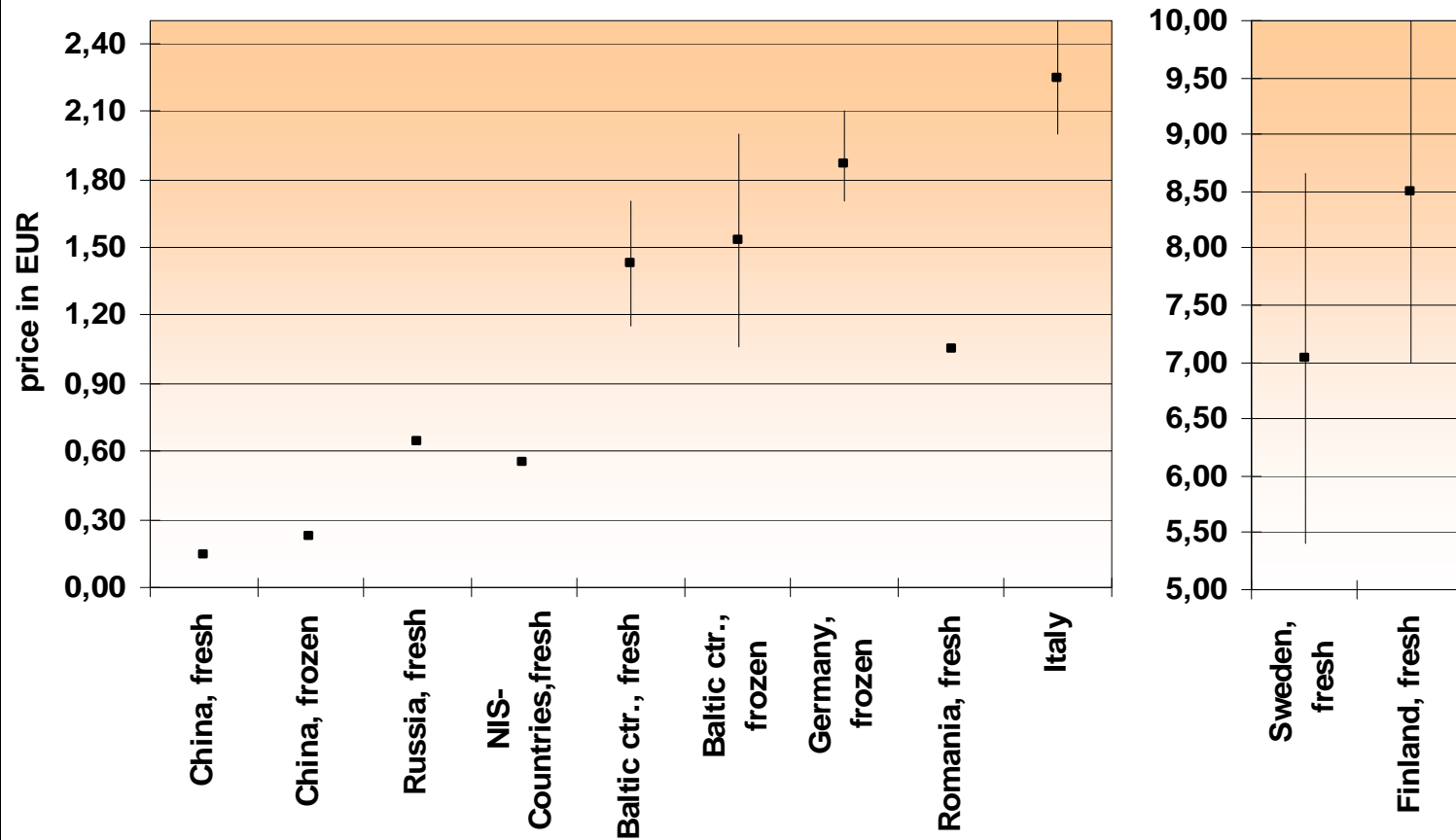


Harvest amount in tons/ha and year



Results – prices for berries in EUR/kg

1 Eur = 0,8575 U\$ [2005]



The berry market volume was app. 14 Mill EURO in 2005.
China represented about 53 %.

Results – half product market



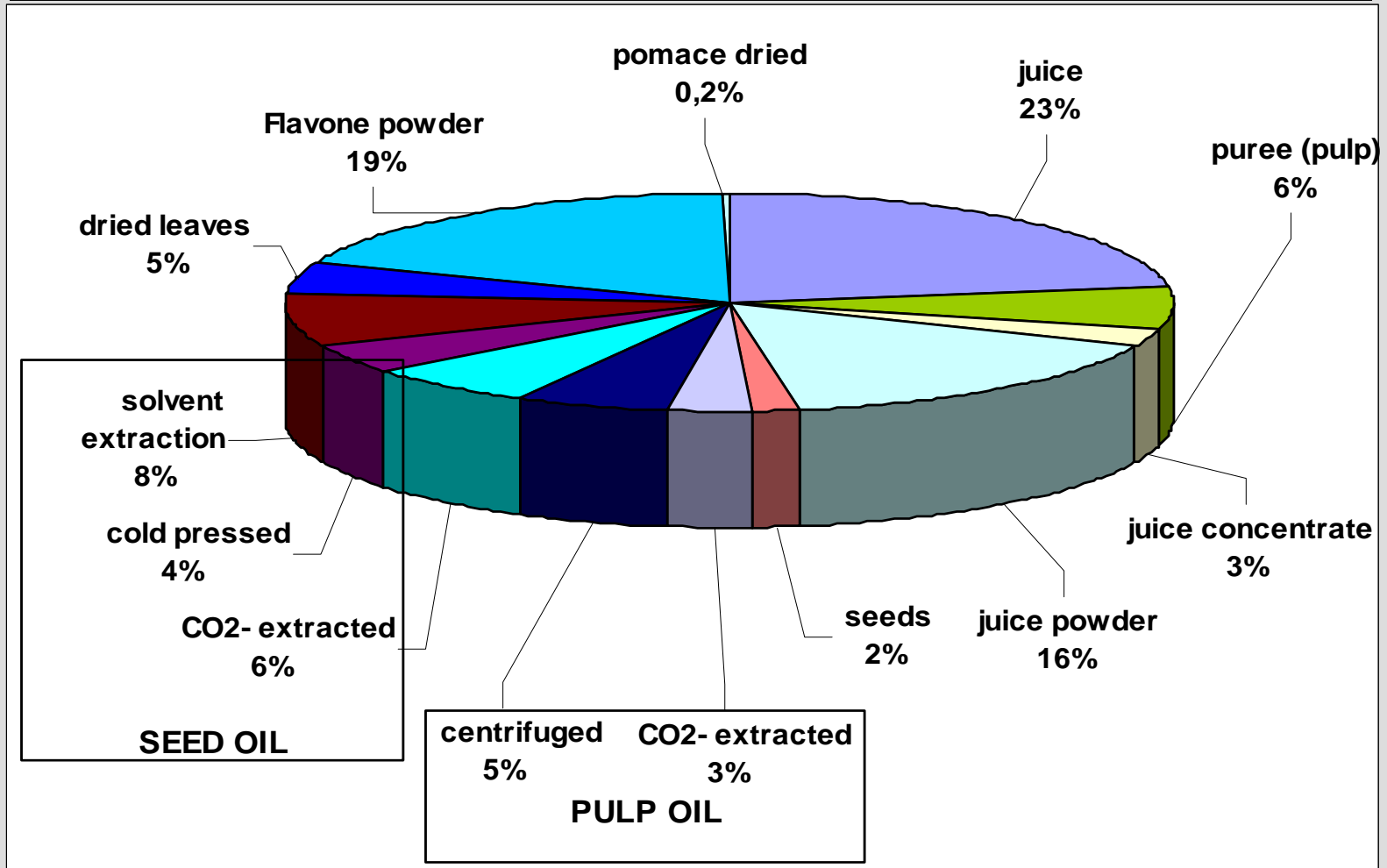
Product range of investigated countries

	Germany	Baltic Countries	China	Russia (incl. NIS)	Others
Sea Buckthorn juice	120 t	420 t	12000 t	162 t	115 t
Sea Buckthorn puree (pulp)	480 t	300 t	3000 t		35 t
Sea Buckthorn juice concentrate	13 t	10 t	300 t	50 t	8 t
Sea Buckthorn juice powder	6 t		300 t		
Sea Buckthorn puree concentrate	0,3 t				
Sea Buckthorn seeds	35 t	20 t	350 t	33 t	13 t
Sea Buckthorn dried skins	11 t	10 t		5 t	2 t
Sea Buckthorn pulp oil					
CO ₂ - extracted	1 t		20 t		5 t
centrifuged	3,5 t	10 t	34 t	70 t	2,8 t
solvent extraction				2,5 t	
Sea Buckthorn seed oil					
CO ₂ - extracted	1 t		30 t		5 t
cold pressed	0,8 t		25 t		1,7 t
solvent extraction			50 t		
Sea Buckthorn dried leaves	0,5 t	3 t	600 t		
Flavone powder			5 t		
Sea Buckthorn pomace dried	60 t	10 t	600 t		15 t

Chinese half product market



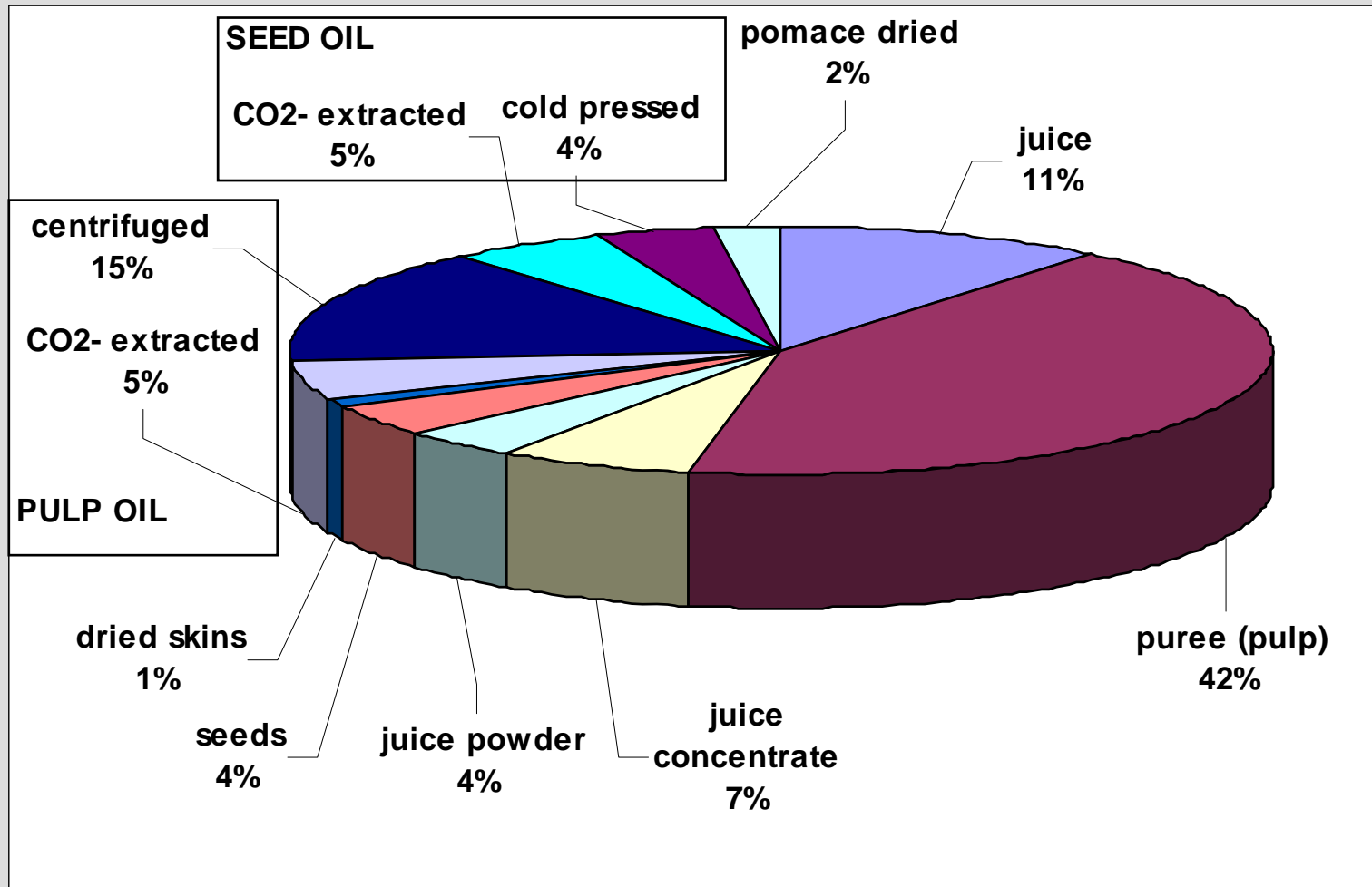
Value - percentage share



German half product market



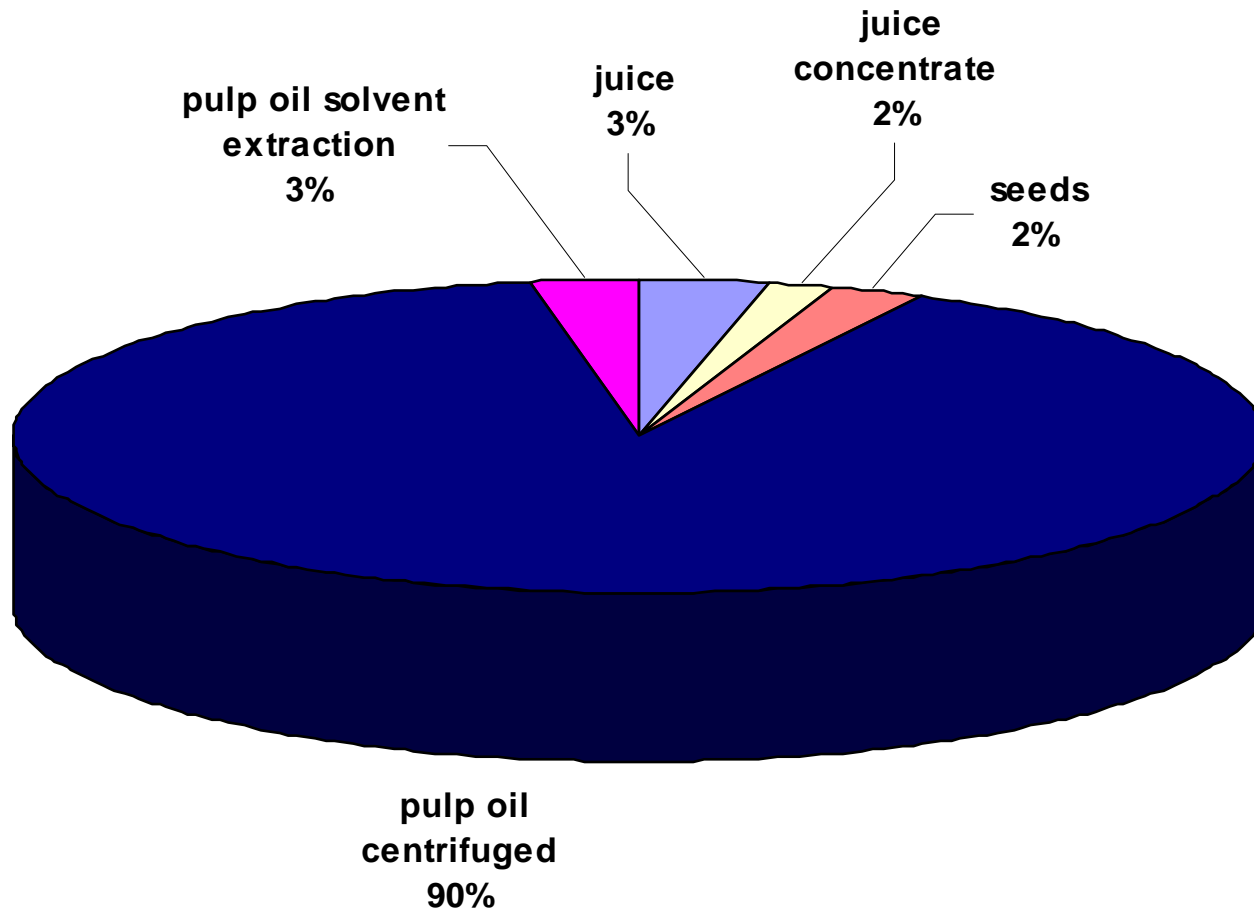
Value - percentage share



Russian half product market



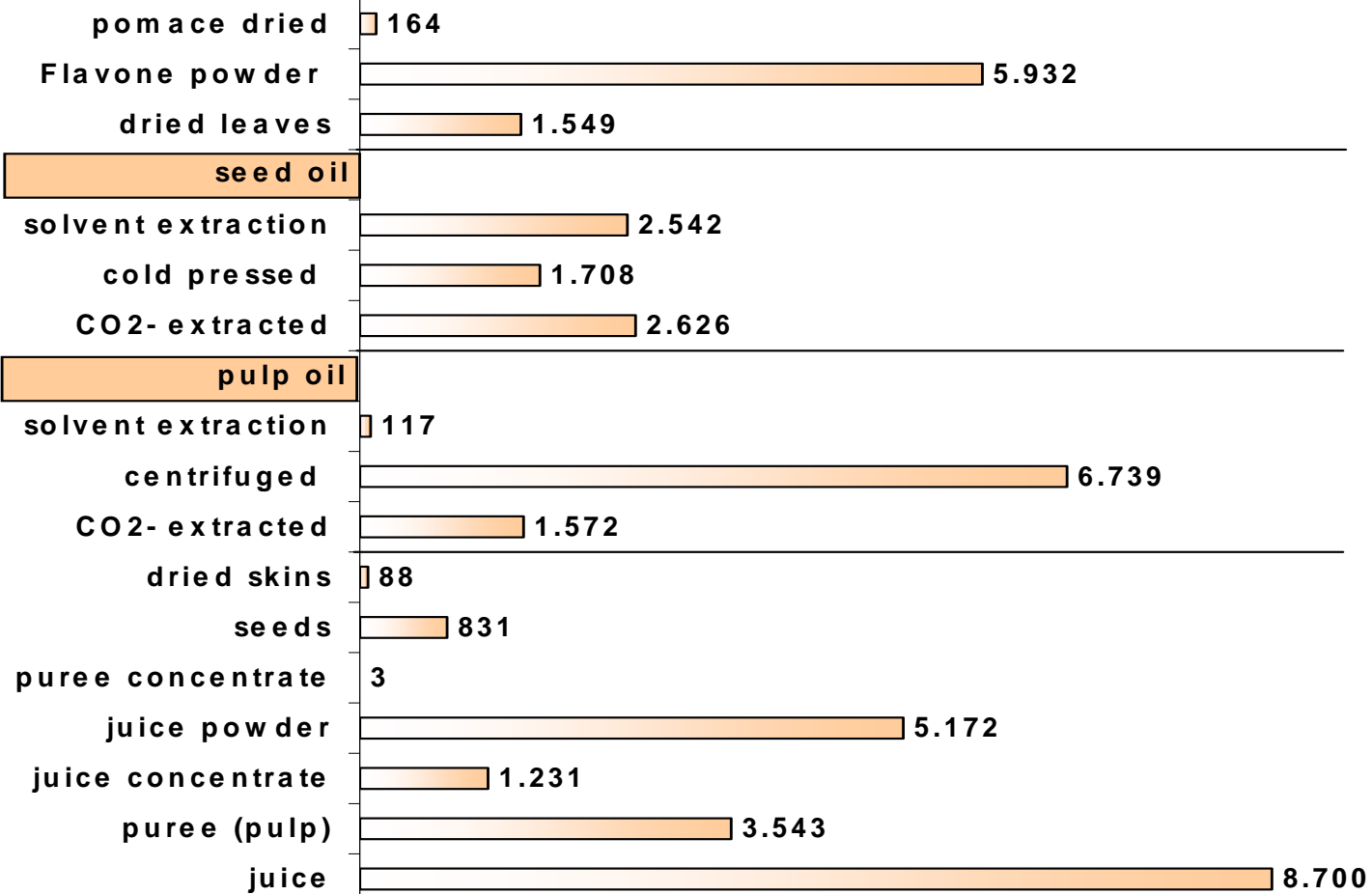
Value - percentage share



Results – half product market



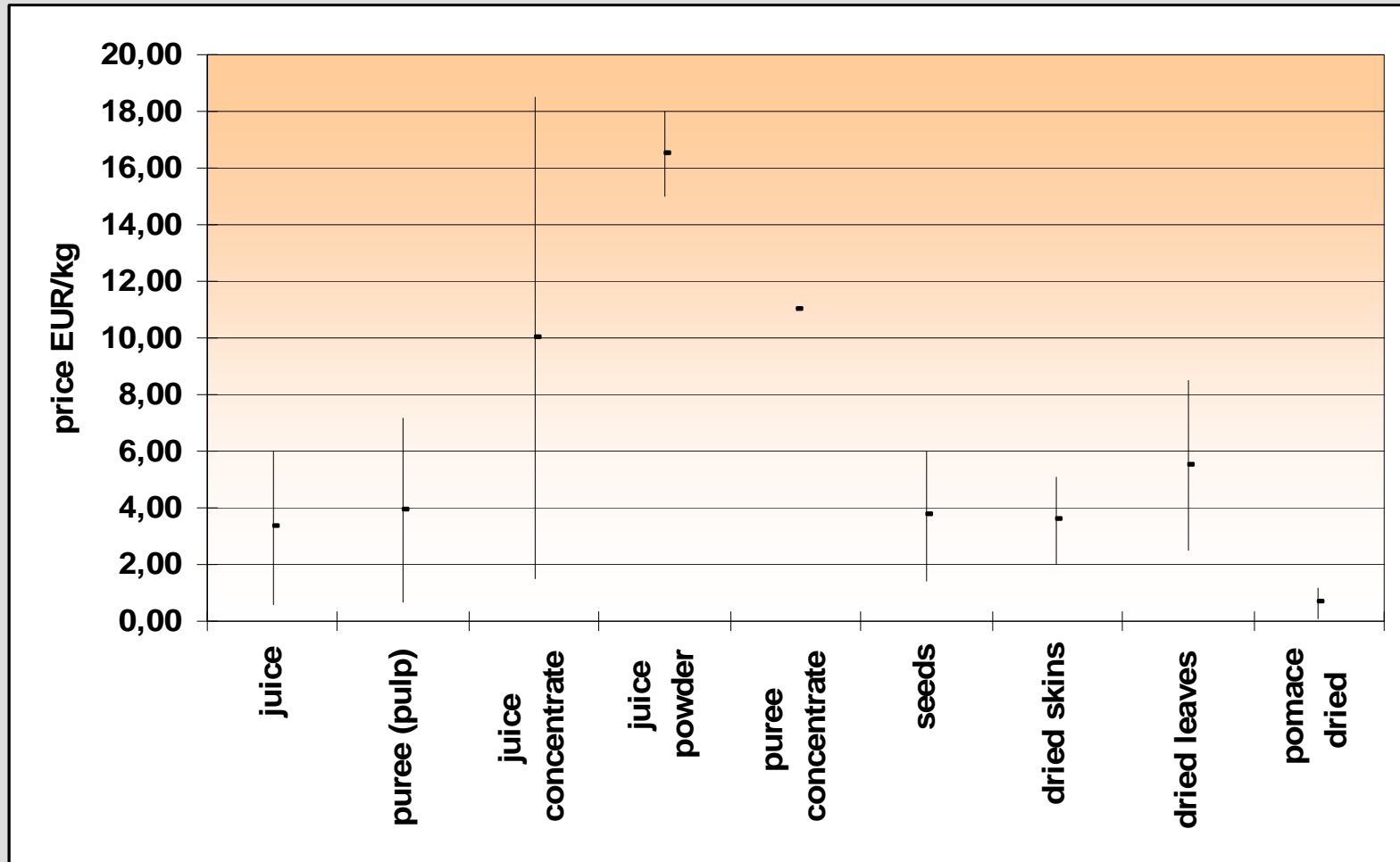
Sea Buckthorn half products, 2005 - Value in thousand Euros



Selling prices – half products



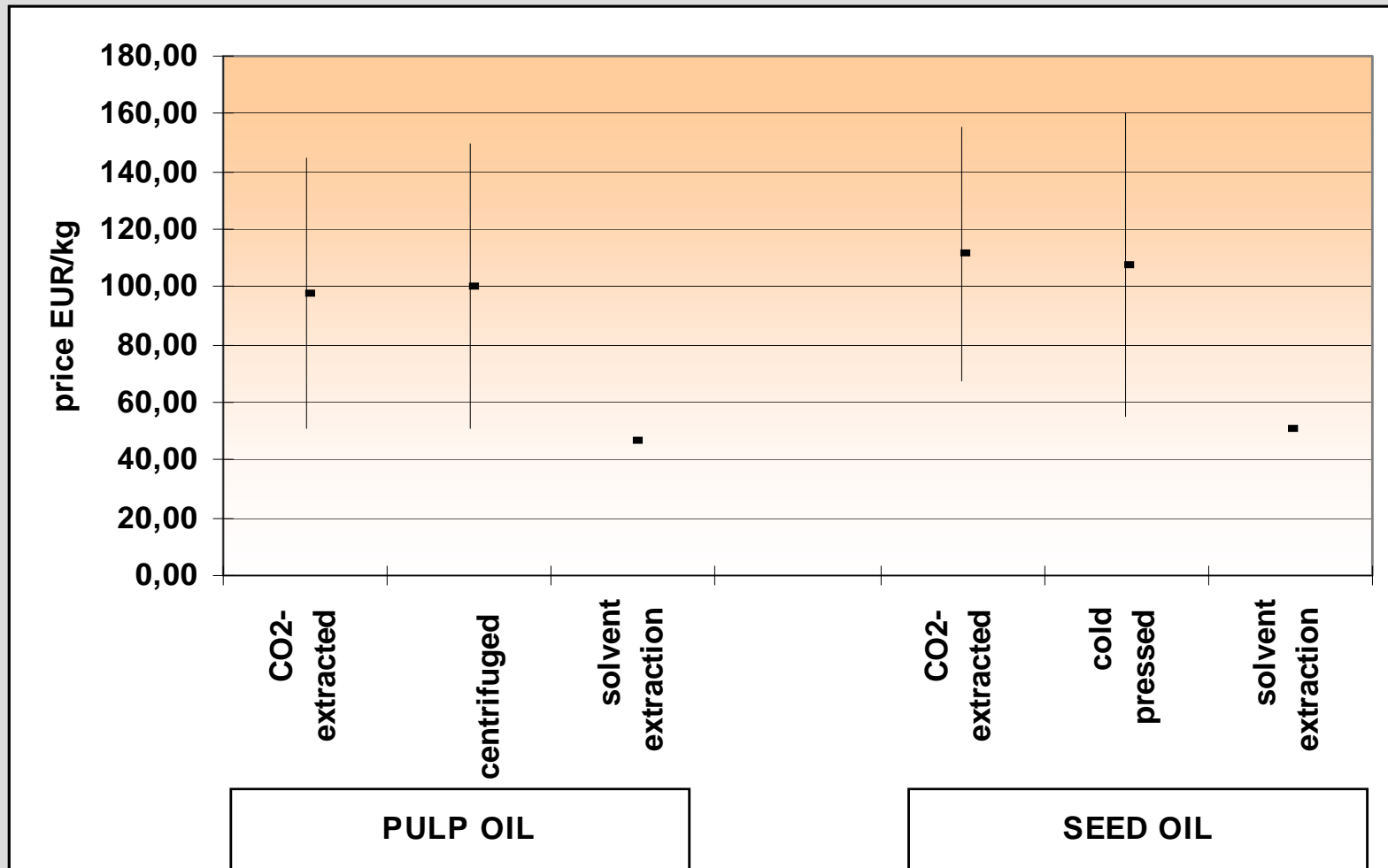
“Non oil products”



Selling prices – half products



Oil products



Results – range of final products



	Germany	Baltic Countries	China	Others
	production amount in t/a			
Seabuckthorn raw juice (100%)	71,5	215,0	900,0	50,0
Seabuckthorn nectar	535,0	200,0	700,0	800,0
Seabuckthorn wine	74,0	100,0	3,0	
Seabuckthorn vinegar	-	-	1.300,0	
Seabuckthorn blended juice	510,0	50,0	1.000,0	700,0
Seabuckthorn jam	27,8	640,0	1.300,0	25,0
Seabuckthorn jelly	10,5	-	-	
Seabuckthorn sweeties, bars	9,0	-	-	2,0
Seabuckthorn syrup	64,0	-	-	
Seabuckthorn tea				
leaves tea	-	3,0	45,0	
with dried berries	2,8	-	-	
Seabuckthorn cosmetics				
cremes	344,4	-	100,0	150,0
lotions	230,0	-	-	170,0
others	279,0	-	-	180,0
Seabuckthorn Nutraceuticals				
Flavone powder capsules	-	-	5,0	
Pulp oil capsules	0,3	2,0	6,0	2,0
Seed oil capsules	-	-	18,0	1,0
Fruit powder capsules	-	-	0,4	



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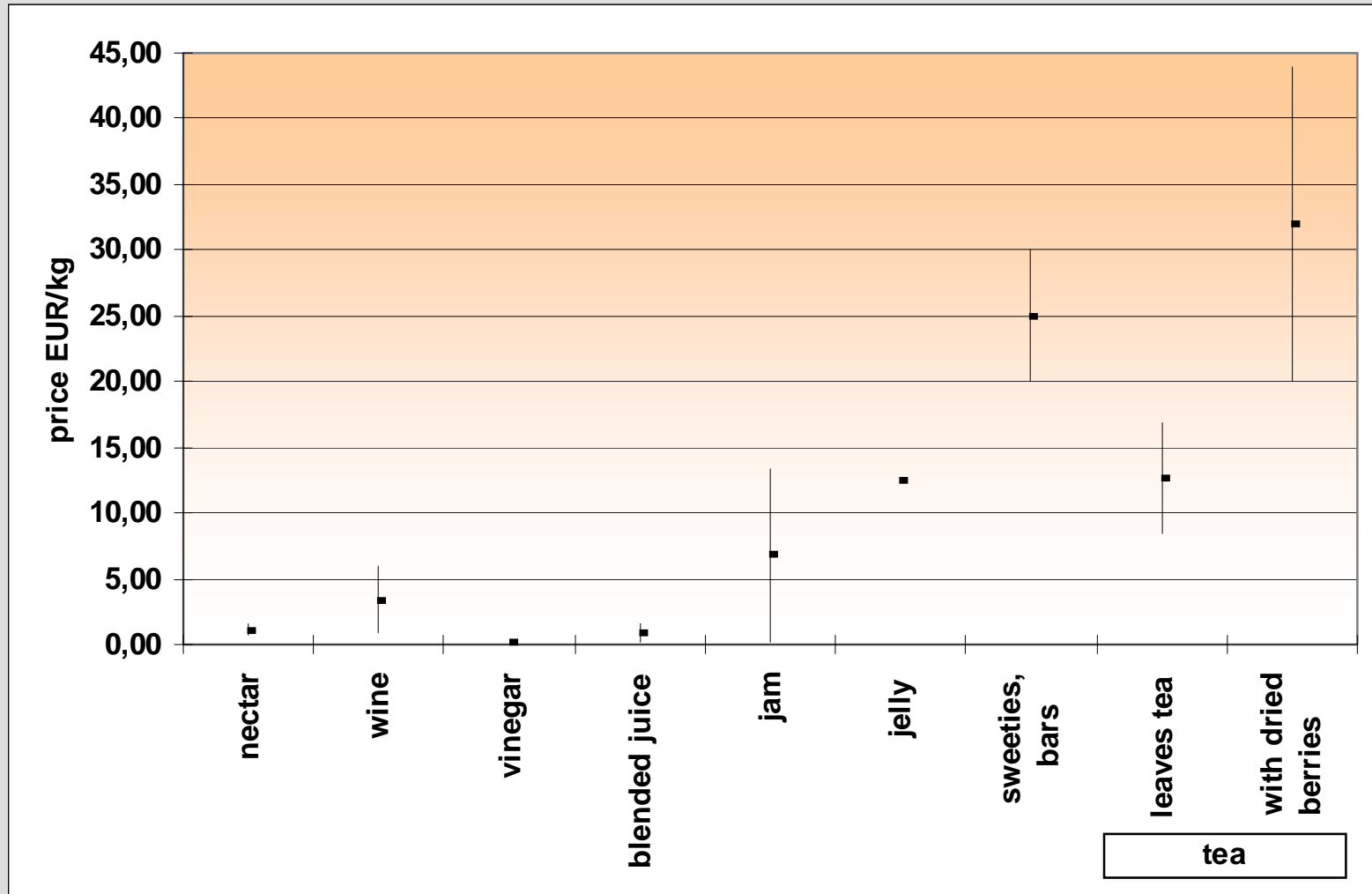
Contact: nig.magdeburg@t-online.de

Results – final products - turnover



	turnover per annum in thous. EUR
Seabuckthorn raw juice (100%)	100.451,20
Seabuckthorn nectar	3.290,20
Seabuckthorn wine	381,51
Seabuckthorn vinegar	273,00
Seabuckthorn blended juice	3.096,00
Seabuckthorn jam	2.852,58
Seabuckthorn jelly	116,03
Seabuckthorn sweeties, bars	320,00
Seabuckthorn tea	
leaves tea	788,16
black with dried berries	96,30
Seabuckthorn cosmetics	
cremes	41.659,00
lotions	21.535,00
others	32.762,50
Seabuckthorn Nutraceuticals	
Flavone powder capsules	3.390,00
Pulp oil capsules	4.061,26
Seed oil capsules	11.677,96
Fruit powder capsules	33,90
Seabuckthorn syrup	2.420,10
Summary	229.204,69


Final products - prices in EUR/kg



Market trends -prices




Producers expectation until 2010

	Sea Buckthorn berries				Sea Buckthorn half products				Sea Buckthorn final products			
	decrease	stagnation	slow increase	increase	decrease	stagnation	slow increase	increase	decrease	stagnation	slow increase	increase
Finland			<input type="checkbox"/>			<input type="checkbox"/>					<input type="checkbox"/>	
Sweden			<input type="checkbox"/>			<input type="checkbox"/>					<input type="checkbox"/>	
Italy			<input type="checkbox"/>			<input type="checkbox"/>					<input type="checkbox"/>	
Romania			<input type="checkbox"/>			<input type="checkbox"/>					<input type="checkbox"/>	
Baltic Countries		<input type="checkbox"/>				<input type="checkbox"/>					<input type="checkbox"/>	
Russia		<input type="checkbox"/>				<input type="checkbox"/>					<input type="checkbox"/>	
NIS-Countries			<input type="checkbox"/>			<input type="checkbox"/>					<input type="checkbox"/>	
Germany			<input type="checkbox"/>			<input type="checkbox"/>					<input type="checkbox"/>	
China		<input type="checkbox"/>					<input type="checkbox"/>			<input type="checkbox"/>		

Market trends – production amount



Producers expectation until 2010

	Sea Buckthorn berries				Sea Buckthorn half products				Sea Buckthorn final products			
	decrease	stagnation	slow increase	strong increase	decrease	stagnation	slow increase	strong increase	decrease	stagnation	slow increase	strong increase
Finland			<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>	
Sweden			<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>	
Italy			<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>	
Romania			<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>	
Baltic Countries		◄	<input type="checkbox"/>	►			<input type="checkbox"/>				<input type="checkbox"/>	
Russia			<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>	
NIS-Countries			<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>	
Germany			◄	<input type="checkbox"/>	►			<input type="checkbox"/>			<input type="checkbox"/>	
China		◄	<input type="checkbox"/>	►			<input type="checkbox"/>			◄	<input type="checkbox"/>	►

Recommendations



1. Development of international quality standards
2. Development of marketing strategies for small and medium sized enterprises (SME)
3. Diversification of „non oil“ products in Russia
4. Development of the Sea buckthorn cosmetic market out of Germany
5. Extraction of special Sea buckthorn components (tannins, flavonoids, vitamins)
6. Development of price strategies for better market penetration
7. Development of new market segments (nutraceuticals, functional food)

Thank you for attention!



www.eanseabuck.com



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