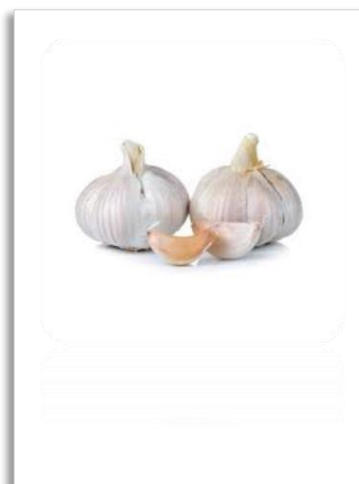


Product Focus

Garlic - HS Code 070320



Garlic (*Allium sativa*) is an herb that is grown around the world. It is related to onion, leeks, and chives. It is thought that **garlic** is native to Siberia but spread to other parts of the world over 5000 years ago. **Garlic** is most commonly used for conditions related to the heart and blood system. Garlic varieties are classified into softneck and hardneck (also known as topset) varieties.

VARIETIES

Hardneck varieties (*Allium sativum* var. *ophioscorodon*) bolt during late spring/early summer, producing a tall, flower stalk or scape. There is considerable variability in the size and number of bulbils produced by hardneck garlic. Bulbils may be used as planting stock but require 2 or more years of growth to develop into marketable bulbs.

Softneck varieties (*A. sativum* var. *sativum*) do not produce a scape. A general rule of thumb is that hardneck varieties are more winter hardy, produce larger cloves but have a shorter storage life than softneck varieties.

PESTS AND PROBLEMS

Viruses, nematodes and fungi are the most common pests that plague garlic. All can negatively affect the yields and keeping quality of garlic. For all of these, prevention is the best strategy to minimize these problems. Start with clean seedstock, avoid growing garlic in wet areas or in exactly the same spot of soil from year to year, and be gentle during harvest and curing.

OPPORTUNITIES

The global import of garlic increased by 26% in the period 2015 to 2019 from US\$2.2 billion to US\$2.7 billion. The table below highlights major importers regionally and internationally.

International Markets		Regional Markets	
✓ Indonesia	✓ Russian Federation	✓ Morocco	✓ Tunisia
✓ Brazil	✓ France	✓ Senegal	✓ Sudan
✓ United States of America	✓ Netherlands	✓ Kenya	✓ Egypt
✓ Malaysia	✓ Italy	✓ South Africa	✓ Ghana
✓ Germany	✓ United Kingdom	✓ DRC	✓ Mali
		✓ Côte d'Ivoire	✓ Angola

Source: ITC Trademap and ExportPotentialMap

Indonesia, Brazil and the United States of America are the leading importing countries of garlic.

MARKET ANALYSIS

According to UN COMTRADE - Trademap statistics, COMESA's exports of garlic to the world increased by 250% over the past five years, US\$8 million in 2015 to US\$28 million in 2019. The major export markets for COMESA include, Taipei, Russia, Brazil, Poland, Germany, Netherlands, France, Slovenia, Italy, Australia, Comoros, USA, Greece and Czech Republic, among others.

EXPORT POTENTIAL

In the past years COMESA countries who have been producing and exporting garlic include:

Country	Potential & Existing Export Markets
1. Egypt	Russia, Poland, Italy, Slovenia, Netherlands, Taipei, Ukraine, Libya, Tunisia, France, Lebanon, Australia, Turkey, South Africa, Jordan, United States of America, Germany, Belgium, Albania, Saudi Arabia, Kazakhstan, Spain, Morocco, Iraq, Bulgaria.
2. Madagascar	Comoros, France, Ukraine, Gambia, Mauritius, Pakistan, India
3. Kenya	Angola, Somalia, South Sudan, Burundi, Rwanda, Uganda, DRC, Djibouti, United Arab Emirates, Netherlands, South Africa, United Kingdom, Tanzania.
4. Ethiopia	Sudan, Somalia, Djibouti, Kenya.
5. Tunisia	Libya, Germany, Canada, Algeria, France, Italy.

Source: ITC Trademap and ExportPotentialMap

MARKET ENTRY

Certification and the need to fulfil both legal and non-legal requirements pose major obstacles to producers and exporters entering the market. As an exporter you depend a lot on the quality control of your buyer.

QUALITY

In all classes, subject to the special provisions for each class and the tolerances allowed, the bulbs must be:

- ✓ sound;
- ✓ produce affected by rotting or deterioration such as to make it unfit for consumption is excluded
- ✓ clean and practically free of any visible foreign matter
- ✓ practically free from pests
- ✓ practically free from damage caused by pests
- ✓ firm
- ✓ free of damage caused by frost or sun
- ✓ free of externally visible sprouts
- ✓ free of abnormal external moisture
- ✓ free of any foreign smell and/or taste

The development and condition of the garlic must be such as to enable them:

- ✓ to withstand transport and handling, and
- ✓ to arrive in satisfactory condition at the place of destination

Quality Tolerances

(i) Extra

Class 5 per cent by weight of bulbs not satisfying the requirements of the class, but meeting those of Class I or, exceptionally, coming within the tolerances of that class.

(ii) Class I

10 percent by weight of bulbs not satisfying the requirements of the class, but meeting those of Class II or, exceptionally, coming within the tolerances of that class. Within this tolerance not more than 1 per cent by weight of bulbs may have cloves with externally visible sprouts.

(iii) Class II

10 percent by weight of bulbs satisfying neither the requirements of the class nor the minimum requirements, with the exception of produce affected by rotting or damaged by frost or sun, or any other deterioration rendering it unfit for consumption.

In addition to this tolerance, not more than 5 per cent by weight of bulbs may have cloves with externally visible sprouts.

VENTILATION

Garlic requires particular ventilation conditions:

- ✓ Recommended ventilation conditions: air exchange rate: 25 changes/hour (airing) with continuous supply of fresh air.
- ✓ Garlic consume large quantities of oxygen due to their metabolic activity and have a tendency to self-heating, it is important to dissipate the CO₂ gas arising during respiration by appropriate ventilation measures and to ensure cooling by supplying fresh air if the cargo becomes heated.
- ✓ With chilled goods, the fresh air supply must be controlled in such a way that the CO₂ content of the circulating hold/container air does not exceed 0.4 vol.%.

PACKAGING

With the exception of dry garlic presented in strings, which may be transported in bulk (loaded directly into a transport vehicle), garlic must be packed in such a way so as to protect the produce properly. The materials used inside the package must be new, clean and of a quality such as to avoid causing any external or internal damage to the produce. The use of materials, particularly paper or stamps, bearing trade specifications is allowed provided the printing or labeling has been done with non-toxic ink or glue. Packages, or lots for produce presented in bulk, must be free of all foreign matter

PRESENTATION

Presentation Garlic must be presented as follows:

- i. Loose in the package, with cut stems, the length of the stem not to exceed:
 - ✓ 10 cm in the case of fresh and semi-dry garlic,
 - ✓ 3 cm in the case of dry garlic
- ii. In bunches by:
 - ✓ number of bulbs,
 - ✓ net weightThe stems must be evened off.
- iii. in the case of dry and semi-dry garlic only, in strings by:
 - ✓ number of bulbs, there being at least six bulbs per string
 - ✓ net weight.

In the case of presentation in bunches or strings, each package must have uniform characteristics (number of bulbs or net weight). Irrespective of the type of presentation, the stems must be cut cleanly, as must the roots in the case of dry garlic classified in the "Extra" class.

- iv. Provisions concerning marking
 - ✓ Each package must bear the following particulars, in letters grouped on the same side, legibly and indelibly marked, and visible from the outside.
 - ✓ For garlic in strings transported in bulk (loaded directly into a vehicle), these particulars must appear on a document accompanying the goods and attached in a visible position inside the transport vehicle.

PHYTOSANITARY REQUIREMENTS

Garlic to be exported to various markets must comply with the legislation on plant health.

Most destination markets require garlic to go through plant health checks before entering or moving within their countries for example EU, USA and Asia.

Exporters are encouraged to consult with their Agriculture Ministries to be issued a relevant certificate/permit.

STANDARDS

Environmental and social issues are becoming more and more important in the supply of vegetables i.e. garlic. Social and environmental certification schemes include actions aimed at sharply reducing and registering the use of pesticides, taking action to ensure the safety of employees and/or even including price guarantees.

Exporters are urged to comply with food quality and safety standards such as Global GAP, Fair Trade and Sustainable Agriculture Network:

- a) **GLOBAL G.A.P. Crops (*Global Good Agricultural Practice*)**: the standard is primarily designed to reassure consumers about how food is produced on the farm by minimising detrimental environmental impacts of farming operations, reducing the use of chemical inputs and ensuring a responsible approach to worker health and safety as well as animal welfare.
- b) **HACCP (*Hazard Analysis and Critical Control Points*)**, Requirements for the hygiene of food is laid down and states the general hygiene procedures for food at all stages of the production process from primary production to the world consumer (*"from-farm-to-fork approach"*).
- c) **Fair Trade International**: an independent, non-governmental, not-for-profit organization that promotes sustainable development and poverty alleviation and sets the Fairtrade standards. One organization (FLO-CERT) is responsible for auditing and certification of compliance against the Fairtrade standards.
- d) **Sustainable Agriculture Network - Rainforest Alliance**: network of conservation groups committed to community-based conservation initiatives and research. The certification program for SAN standards is operated by Rainforest Alliance.
- e) **BRC (British Retail Consortium) - BRCGS' Standards** guarantee the standardisation of quality, safety and operational criteria and ensure that manufacturers fulfil their legal obligations and provide protection

for the end consumer. Certification to BRCGS' Standards is now often a fundamental requirement of leading retailers, manufacturers and food service organisations.

- f) **IFS (International Food Standard)** - The IFS comprise eight different food and non-food standards, covering the processes along the supply chain. However, IFS does not specify what these processes must look like but merely provides a risk-based assessment of them. The different standards are now used by manufacturers and retailers worldwide to meet new requirements for quality, transparency and efficiency resulting from globalisation.

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