

FRUITROP

English edition

CLOSE-UP: THE FRUIT MARKETS IN EASTERN EUROPE

French beans from Senegal:
review of the 2009-10 season

The European banana market:
there are no seasons any more

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Along with private jets and imported apples, Nutella will soon be on lists of external signs of wealth. *Soon to be classified as 'junk food' by the European Commission, consumption should be strongly limited. The good consciences and pockets of consumers, or rather diet deviants, should be addressed. The famous pot will be marked 'beware, danger, causes obesity'. Nutella is accused of dietary shame and also environmental sins. Rich in sugar and palm oil, it upsets our children's diets and steamrollers biodiversity in Asia and elsewhere. The task remains of setting the right price level to put off housewives under 50 years old and thus divert large and small from this delight. The anti-tobacco policy has shown the way. The price of tobacco has tripled in 30 years and consumption has halved from 7 to 3 g of tobacco per person per day. Nutella spread currently costs 5 euros per kilo and addicts are going to have to fork out 15 euros. This means that a piece of bread with a proud 20 g coating of Nutella will cost 30 centimes, the same price as a cup of coffee served by Georges Clooney. **Fruitrop** feels for Nutella enthusiasts, some of whom are also among our faithful readers. Risking banishment, we can divulge an exclusive piece of information: it seems that the Ambassador has had some put in his Rochers. Shhh! The nutritional goodie-goodies and environmentalists are listening.*

Denis Loeillet



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FRUITROP

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Cover photograph: Credit © European Union, 2010

Avocado

June 2010

Operators had to handle a surprise under-supply situation. Deliveries from South Africa and Peru, the main sources, were very small during the first half of the month as a result of dock strikes. Shipments from Kenya increased but remained moderate. In this context prices of 'Hass' rose quickly—an unusual occurrence at this time of the year—and the market for green avocados became balanced. The situation was satisfactory during the second half of the month. Shipments from Peru returned to a very strong level while the recovery in shipments from South Africa was gradual as ships were delayed. As a result, prices just fell gradually. The monthly average price was much higher than average in contrast with the situation during the same period in 2009 when the market was seriously over-supplied.

■ Slightly larger entry to the US market for Peruvian avocados... The report by Dr Mark Hodde, entomologist at University of California, confirmed the conclusion of the Peruvian phytosanitary service (SENASA) with regard to the absence of *Stenoma catenifer* in export avocado orchards. *Stenoma catenifer* is one of the quarantine pests mentioned in the protocol of access to the United States market. This is the first victory for Peruvian avocado exporters. SENASA and APHIS in the United States are continuing joint research to determine the conditions under which 'Hass' avocado does not carry fruit flies, another quarantine pest mentioned in the protocol.

reports that the barriers could be removed in 2011.

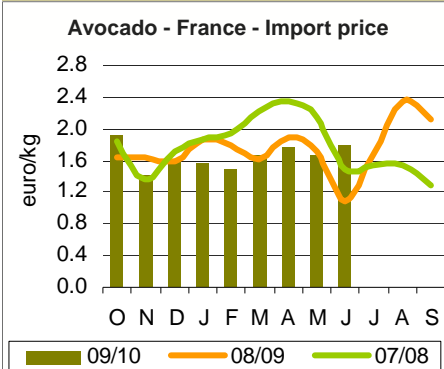
Source: Andina

■ Chilean avocado: substantial production decrease confirmed. The 2010-11 harvest forecast by SIMFRUIT (Systema de Inteligencia de Mercado) confirms a strong decrease in production in comparison with that of the last season and already mentioned in FruiTrop. The natural alternate bearing phenomenon could reduce shipments by about 30% after the record 194 000 t reached in 2008-09. The frost that hit the country in mid-July could aggravate the deficit. This season, the Comité de Palta is to launch an advertising campaign aimed at making 'Hass' better known on the large German market where the green varieties are dominant and consumption still very limited at about 160 g person per year in comparison with an average of nearly 500 g in EU-15. The 2010-11 season should also be occasion for the launching of shipments to the Colombian market which opened its gates at the beginning of the year.

Sources : SENASA, ReeferTrends

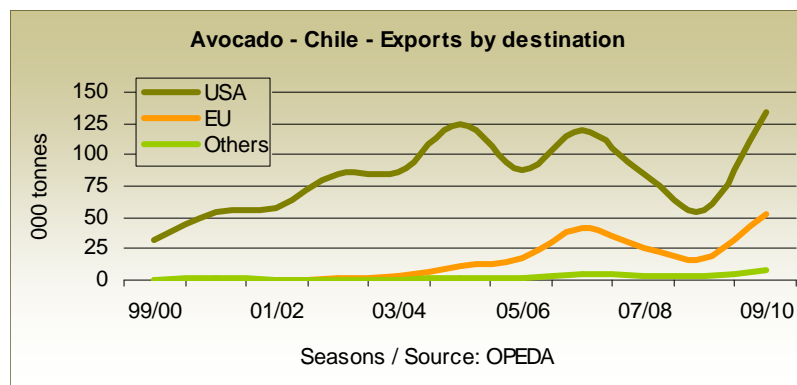
■ ...and the Chinese market targeted. Trade links between Peru and China are continuing to become stronger after the signing of a bilateral free trade agreement in March. The sanitary authorities in both countries are currently working on the drafting of sanitary protocols to allow access to the Chinese market for Peruvian avocados and asparagus. The Andina press agency

Sources: ReeferTrends, SIMFRUIT, CIRAD



PRICE	Varieties	Average monthly price euro/box	Comparison with the last 2 years
	Green	4.50-5.00	+ 1%
Hass	7.25-7.75	+ 41%	

VOLUMES	Varieties	Comparison	
		previous month	last 2 years average
Green		↘↘	- 10%
Hass		↗	- 15%



VOLUMES	Source	Comparison		Observations	Cumulated total / cumulated average for last 2 years
		previous month	average for last 2 years		
	South Africa	=	- 13%	'Hass' season peaked but serious deficits at the beginning of the month because of South African dock strikes.	- 14%
	Peru	=↘	- 14%	Volumes of 'Hass' more moderate than forecast during the first fortnight (strike at the port of Callao) and slowing of the green avocado season.	+ 21%
	Kenya	↘	- 8%	Decrease in shipments of 'Fuerte' and gradual strengthening of the 'Hass' season with moderate volumes.	- 7%

Banana

June 2010

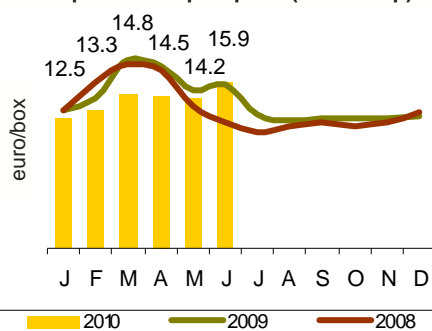
Performance was satisfactory even though the market became more difficult during the second half of the month. Demand was still brisk at the beginning of the month but started to show signs of weakness after 10 days. The season's fruits had not been very competitive as the harvest was late but now started to become present in shops in France and southern Europe, where the weather became warm. In addition, the beginning of a slight strengthening of the euro against the dollar was not good for prices in certain Eastern European markets that are not in the euro zone. However, fairly moderate supply tempered the fall in prices. Arrivals of West Indian bananas returned to an average level as export potential had returned to normal in Guadeloupe. Volumes from Africa were more moderate and returned to average, with shipments from Côte d'Ivoire still large but less so than before and a continuing very marked deficit in quantities from Cameroon. Finally above all, supply of dollar bananas remained very small. Ecuador was still strongly present in the EU but Colombian exports continued to display a deficit of some 15% while production in Costa Rica seemed to have been affected by problems of yield.

The price for the month was thus slightly higher than average throughout the EU. In contrast, the Russian market collapsed, in particular as a result of an influx of spot batches.

EUROPE — ALDI IMPORT PRICE

June 2010 euro/box	Comparison	
	previous month	average for last 2 years
15.86	+ 11%	+ 15%

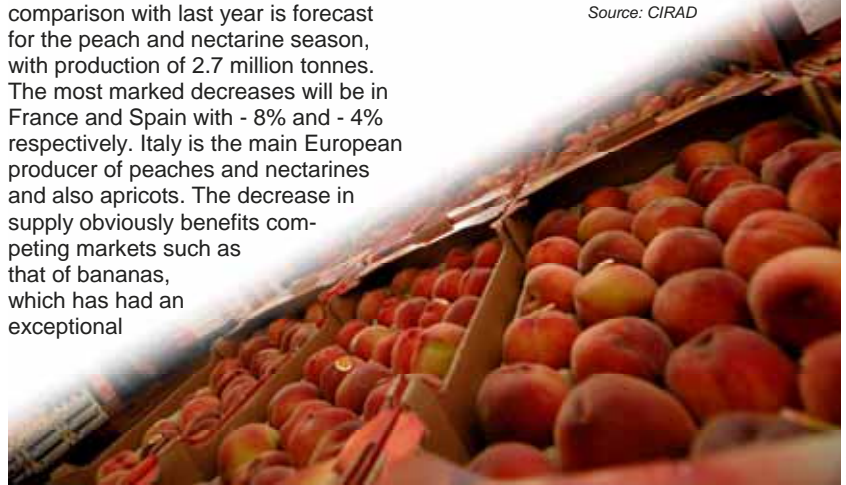
Europe - Aldi import price (GlobalGap)



■ Europech revises downwards its forecasts of European peach, nectarine and apricot production. At less than half a million tonnes, the apricot harvest will be 8% down on that of 2009, that is to say 100 000 tonnes less than in 2006. France and Spain have announced large falls in production of 27% and 29% respectively. A 3% decrease in comparison with last year is forecast for the peach and nectarine season, with production of 2.7 million tonnes. The most marked decreases will be in France and Spain with - 8% and - 4% respectively. Italy is the main European producer of peaches and nectarines and also apricots. The decrease in supply obviously benefits competing markets such as that of bananas, which has had an exceptional

spring (see the article in this issue). However, the strongest impact was and will be (in the spring and coming up in the summer) the distribution of supply throughout the season. Indeed, after serious dips in supply in the early part of the season, analysts fear production peaks and the telescoping of different production zones from mid-July onwards.

Source: CIRAD



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Peach and nectarine — Evolution of production in the main European countries

Tonnes	2006	2007	2008	2009	Forecast at June 2010	Trend
Spain	667 519	625 228	717 621	723 125	695 421	- 4%
Italy	1 528 300	1 482 256	1 421 910	1 477 540	1 442 762	- 2%
France	396 900	356 943	281 595	341 579	315 815	- 8%
Greece	282 100	334 300	342 400	269 800	265 000	- 2%
Total	2 874 819	2 798 727	2 763 526	2 812 044	2 718 998	- 3%

Source: Europech

Apricot — Evolution of production in the main European countries

Tonnes	2006	2007	2008	2009	Forecast at June 2010	Trend
Spain	133 883	53 626	91 868	86 843	61 712	- 29%
Italy	221 700	214 573	208 766	216 510	227 960	+ 5%
France	178 500	124 770	81 009	188 104	137 866	- 27%
Greece	59 600	75 000	75 000	52 100	70 400	+ 35%
Total	593 683	467 969	456 643	543 557	497 938	- 8%

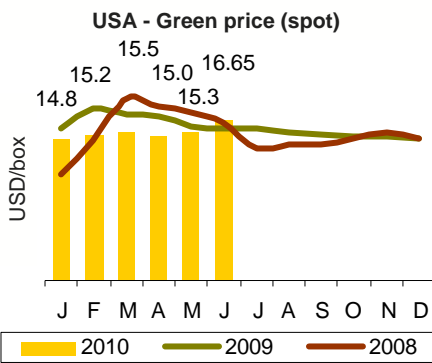
Source: Europech

EUROPE — RETAIL PRICE

Country	June 2010		Comparison	
	type	euro/kg	June 2009	average for last 3 years
France	normal	1.60	+ 5%	+ 8%
	special offer	1.37	+ 2%	+ 3%
Germany	normal	1.28	+ 6%	+ 5%
	discount	1.09	+ 7%	+ 4%
UK (£/kg)	packed	1.27	- 1%	+ 15%
	loose	1.00	+ 3%	+ 25%
Spain	plátano	1.71	+ 2%	- 3%
	banano	1.41	+ 1%	- 4%

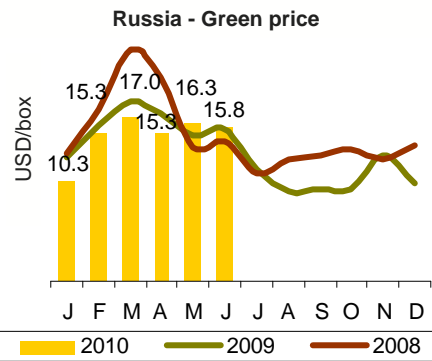
Banana

UNITED STATES



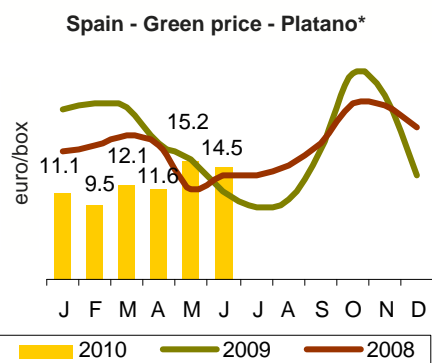
USA — IMPORT PRICE		
June 2010 USD/box	Comparison	
	previous month	average for last 2 years
16.65	+ 9%	+ 3%

RUSSIA



RUSSIA — IMPORT PRICE		
June 2010 USD/box	Comparison	
	previous month	average for last 2 years
15.82	- 3%	+ 5%

CANARIES



CANARIES — IMPORT PRICE*		
June 2010 euro/box	Comparison	
	previous month	average for last 2 years
14.46	- 5%	+ 16%

* 18.5 kg box equivalent

■ Spring 2010 marks the end of the moderation of retail prices of fresh fruits. According to INSEE, the price of a set selection of fruits in France increased by 13% from April to May 2010, that is to say 16.4 index points. This is the strongest month to month increase since June 2003. The shortage of the season's fruits weighed heavily on the price of the selection. 2009 and early 2010 were fairly good for French consumers after the marked inflation in 2007 and 2008. However, the very strong variability of fruit prices should not lead to imagining the disconnection of the trend in the consumption index for all goods and services and that of fruits. Since 1998, the price index of fruits has risen from 100 to 120 (the average for 2009), mirroring precisely the trend of the overall index.

Source: CIRAD

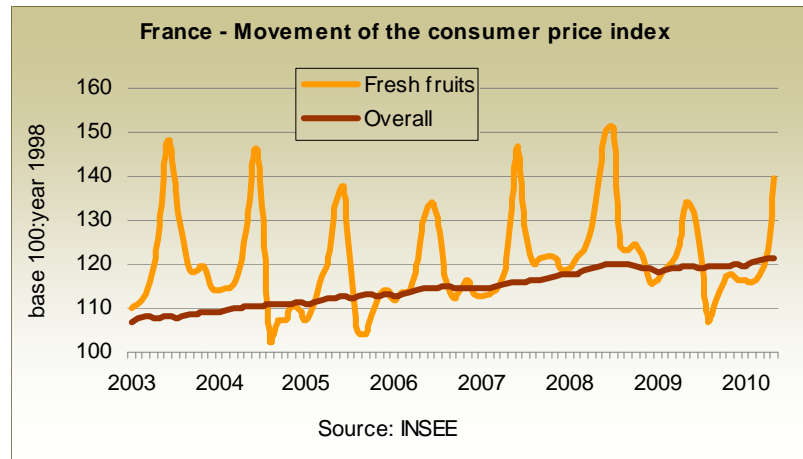
■ Côte d'Ivoire has a new operator in the banana sector. Guadeloupien investors associated with an Ivorian businessman are reported to be setting up a project covering some 500 hectares in the Tiassalé region, with the possibility

of a 500-hectare extension. A company, SIAPA, Société Ivoirio-Antillaise Production Agricole, is said to have been founded. These investors are welcome in the deteriorated local economic context. The Tiassalé region is in the north-west of the country on the Bandama, 120 km from the port of Abidjan, and accounts for about 25% of Ivorian exports. Côte d'Ivoire shipped 229 000 tonnes of bananas to the EU in 2009.

Source: CIRAD



© Régis Domergue



Source: INSEE

EUROPE — IMPORTED VOLUMES — June 2010			
Origine	Comparison		
	May 2010	June 2009	cumulated total 2010 compared to 2009
French West Indies	=↗	+ 12%	+ 13%
Cameroon/Ghana	↘	- 34%	+ 2%
Surinam	=↗	- 12%	+ 25%
Canaries	=↗	+ 13%	+ 12%
Dollar:		na	na
Ecuador	=	+ 12%	- 3%
Colombia	↘	- 18%	- 2%
Costa Rica	na	na	na



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possible condition – anywhere in the world.



Orange

June 2010

The market remained distinctly under-supplied. The season for 'Navel' from South Africa started late as a result of logistic problems, late ripening and exporters' caution as the euro:rand exchange rate was very unfavourable. As a result, most of the supply still consisted of 'Valencia' from Spain as volumes of 'Maroc Late' were also limited. However, remaining volumes of 'Valencia' at production were also limited as a result of a production deficit in the Community of Valencia. Prices therefore continued to rise at the beginning of the month, reaching a ceiling at close to EUR 1 per kg.



times per kilo and oranges 25 centimes, an increase of about 9 centimes. Production is reported to be down by 22% and 10% for oranges and easy peelers respectively. The decrease was much more limited for exports, especially to the EU markets (- 6% according to an estimate to be confirmed).

Source: El Pais

■ Two new reefer lines between Morocco and the South of France. CMA-CGM is to run a new weekly container (40' and 45') transport service between Agadir, Casablanca and the South of France (Marseille and Port Vendres) in November. The initiative is receiving EU financial support within the framework of the Marco Polo Vegetis programme. It is expected that 40 000 tonnes of citrus, tomatoes and other market garden produce will be carried during the 2010-11 season. Another link between Morocco and France (Agadir-Port Vendres) will also be run by the Moroccan company IMTC thanks to the same support programme. According to EURO-STAT, Morocco exported more than 900 000 tonnes of fruit and vegetables to the EU in 2009 including some 500 000 tonnes to France.

Source: ReeferTrends

■ 2009-10 Spanish citrus season: very positive results! According to the inter-branch association INTERCITRUS, the average season price paid to producers was some 30% higher than that of the previous season. Easy peelers are reported to have earned 33 cen-

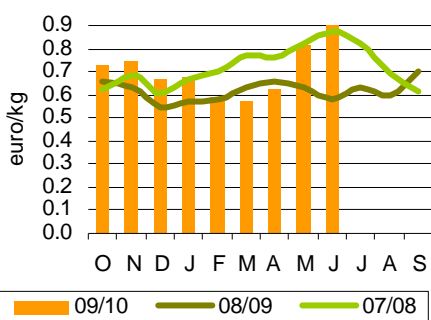
■ Greening still gaining ground in Mexico. Greening is still spreading northwards rapidly in Mexico. Detected for the first time in the extreme south-east of the country in mid-2009, the bacterial disease was identified at the end of the year in the states of Nayarit and Jalisco in the centre of the west coast. Infected trees were found at the beginning of July in Sinaloa, the most northerly state, 2 500 km from the point of entry and about 1 500 km from California with its large citrus areas. The alert is becoming national in scale in the United States, where the disease first appeared in 2005 in Florida. At the instigation of the Florida Citrus Mutual grower organisation, a draft law aimed at using part of the customs dues levied on imported fresh and processed citrus has been put to Congress.

Sources: Sagarpa, Florida Citrus Mutual



photos © Régis Domergue

Orange - France - Import price



PRICE	Type	Average monthly price euro/box 15 kg	Comparison with average for last 2 years
	Dessert oranges	14.70	+ 19%
Juice oranges	13.65	+ 35%	

VOLUMES	Type	Comparison	
		previous month	average for last 2 years
Dessert oranges	↘	- 49%	
Juice oranges	↘	- 2%	

VOLUMES	Varieties by source	Comparison		Observations	Cumulated total / cumulated average for last 2 years
		previous month	average for last 2 years		
Navel from South Africa	↗	- 49%	Very limited supply until the very end of the month because of the dock strike, late ripening and an unfavourable euro:rand exchange rate.	- 49%	
Valencia Late from Spain	↘	+ 2%	Shipments to the French market still average in spite of more limited production and the early slowing of the season.	+ 17%	
Maroc Late from Morocco	↘↘	- 48%	End of the season. Arrivals still very limited in the EU because of the weak export potential and the priority awarded to the Russian market.	- 61%	

Grapefruit

June 2010

Under-supply still serious. The very last batches from the northern hemisphere were sold at the beginning of the month and shipments from the southern hemisphere remained very limited during the first fortnight. Supply from Argentina was still distinctly short, with a very small harvest as a result of drought. In addition, shipments from South Africa got under way late, from mid-month, as the dock strike had affected shipments in mid-May. As a result, prices reached levels rarely observed at this time of the year and then decreased as arrivals increased in the second half of the month.

■ 2010-11 citrus harvest less abundant than forecast in the Community of Valencia. The recovery of Spanish citrus production expected in the 2010-11 season as a result of the natural alternate bearing phenomenon will probably be more limited than expected. Although flowering has been excellent, the strong swings in temperature in the region in May and June caused a great deal of fruit drop. The easy peeler and early and late 'Navel' harvests should be moderate. AVA-ASAJA, the growers' union, expects production to be similar to that of 2009-10, that is to say about 3.2 million tonnes. INTERCITRUS confirms that the harvest of early varieties will be moderate but thinks that it is too soon to predict that of the later varieties. About 50% of the area under oranges and 80% of that devoted to easy peelers are in the Community of Valencia. The

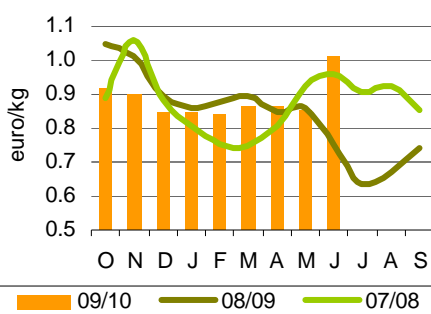
situation seems fairly similar in the Murcia region, specialised in lemons. The harvest was particularly limited in 2009-10 and professionals expect only a modest increase.

Sources: AVA-ASAJA, professionals



© Eric Imbert

Grapefruit - France - Import price



Spain — Citrus area by province

Hectares	Orange	Easy peelers	Lemon	Grapefruit
Total Spain	165 103	122 554	43 264	1 190
Comunidad Valenciana	79 520	96 581	10 563	525
Alicante	16 000	7 026	10 521	11
Castellon	6 192	36 588	10	-
Valencia	57 329	52 966	32	-
Murcia	14 865	4 439	26 069	477
Andalucia	66 627	10 249	6 066	188
Sevilla	29 243	1 993	83	11
Huelva	14 253	5 481	84	-
Almeria	5 879	1 113	2 443	-
Cordoba	9 828	843	-	477
Cataluña	2 234	11 104	37	-
Islas Baleares	1 007	142	422	-

Source: MAPA, 2007

PRICE	Type	Average monthly price euro/box 17 kg box eq.	Comparison with average for last 2 years
	Tropical type	17.00	+ 18%

VOLUMES	Type	Comparison	
		previous month	average for last 2 years
Tropical type	↗	- 26 %	

VOLUMES	Source	Comparison		Observations	Cumulated total / cumulated average for last 2 years
		previous month	average for last 2 years		
South Africa	↗↗	- 21%	Increase in volumes hindered by the South African dock strike. Arrivals very limited until Week 24.	- 36%	
Argentina	↗	- 57%	Shipments to all destinations very limited. Weak export potential.	- 57%	

Pineapple

June 2010

The situation was particularly tense on the pineapple market in June. Supply of 'Sweet' from Costa Rica was large while demand switched gradually to the season's fruits. In spite of promotion operations and prices sinking throughout the month, operators found it difficult to clear their stocks. Several sales were carried over from one week to the next and large stocks formed and were offered at extremely low prices for clearance. Sales in the last two weeks seemed brisker even though prices were very low. The weather was fine at the end of the month and an increasing number of quality problems were reported in stocks—still hanging around—and this clearly did not improve market conditions.

Supply was very limited on the 'Smooth Cayenne' market. The improvement in fruit colour during the month resulted in better sales for fruits from Côte d'Ivoire, most of which were sold via small promotion operations in supermarkets.

The air pineapple market was under-supplied throughout the month although this affected neither prices nor demand, both of which remained relatively stable. As regards quality, supply from Cameroon and Benin was very uneven, with fruits ripening rapidly. Sales of 'Sugarloaf' pineapples were very difficult. Supply from Benin was too large and of poor quality throughout the month. Although they were available at EUR 1.80 to 2.00 per kg, most of the batches were sold at the lower end of this price bracket.

Sales were very slow for 'Victoria' pineapples and demand soon switched to the season's fruits. The market was thus fairly sluggish and sales were quiet.

■ The United States is still an eldorado for producers of fresh pineapple. Whereas EU imports shrank by 5% in 2009 (see **FruiTrop** 176), they stabilised in the USA, demonstrating the strength of this market. But there was a better surprise to come. American imports leapt by 24% to 275 000 tonnes in the first four months of 2010. Costa Rican shipments increased by 27%, capturing 82% of the market. The second and third largest suppliers—Mexico and Honduras—also stepped up the pressure with 20 and 21% growth respectively. Only shipments from Ecuador stabilised (+ 1%). European



trade was less flamboyant. It is true that the market is also recovering but not enough to wipe out the pitiful performance in 2009: + 5% for the period January to April 2010 in comparison with 2009. Costa Rica took the lion's share once again, increasing deliveries by 16% while the three outsiders (Ecuador, Côte d'Ivoire and Ghana) lost ground in disturbing proportions, with Côte d'Ivoire losing 26% for example. In contrast, Panama and Cameroon followed the upward movements with + 12 and + 36% respectively.

Source: CIRAD

Pineapple — United States — Imports						
Tonnes	January to April				Trend	Market shares
	2007	2008	2009	2010		
Total, incl.	225 434	234 164	222 231	274 780	+ 24%	100%
Costa Rica	181 698	184 637	177 432	224 924	+ 27%	82%
Mexico	12 336	18 057	18 534	22 198	+ 20%	8%
Honduras	7 068	9 752	8 311	10 056	+ 21%	4%
Ecuador	12 001	7 584	8 100	8 202	+ 1%	3%
Panama	2 118	3 326	2 612	5 670	+ 117%	2%
Guatemala	10 074	10 650	7 042	3 254	- 54%	1%

Source: US customs

Pineapple — European Union — Imports						
Tonnes	January to April				Trend	Market shares
	2007	2008	2009	2010		
Total extra-EU, including	261 008	281 851	292 591	306 679	+ 5%	100 %
Costa Rica	168 012	193 233	206 681	239 807	+ 16%	78%
Ecuador	17 839	13 587	21 176	17 471	- 17%	6%
Côte d'Ivoire	25 968	23 830	19 014	14 124	- 26%	5%
Ghana	13 202	12 633	11 209	10 714	- 4%	3%
Panama	12 126	13 946	9 360	10 465	+ 12%	3%
Cameroon	3 233	4 756	4 863	6 594	+ 36%	2%
Honduras	8 382	6 201	9 665	3 795	- 61%	1%

Source: EUROSTAT

PINEAPPLE — IMPORT PRICE IN FRANCE — MAIN ORIGINS						
Weeks 2010		22	23	24	25	26
By air (euro/kg)						
Smooth Cayenne	Benin	1.80-1.90	1.80-1.90	1.80-1.90	1.80-1.90	1.80-1.90
	Cameroon	1.70-1.90	1.70-1.90	1.70-1.90	1.70-1.90	1.70-1.90
	Ghana	1.75-1.85	1.75-1.85	1.75-1.85	1.75-1.85	1.75-1.85
Victoria	Réunion	3.50-4.00	3.50-3.80	3.00-3.50	3.00-3.50	3.00-3.50
	Mauritius	3.00-3.30	3.00-3.10	2.80-3.10	2.80-3.10	2.80-3.10
By sea (euro/box)						
Smooth Cayenne	Côte d'Ivoire	4.00-6.00	5.00-7.00	5.50-6.50	5.00-6.50	5.00-7.00
Sweet	Côte d'Ivoire	5.50-8.00	5.500-8.00	4.50-7.50	4.50-7.50	4.50-7.50
	Cameroon	5.50-8.00	5.500-8.00	4.50-7.50	4.50-7.50	4.50-7.50
	Ghana	5.50-8.00	5.500-8.00	4.50-7.50	4.50-7.50	4.50-7.50
	Costa Rica	5.00-6.50	5.00-6.00	4.50-5.50	4.00-5.00	4.50-6.00

Photos © Régis Domergue

PINEAPPLE — IMPORT PRICE

Weeks 22 to 26	Min	Max
By air (euro/kg)		
Smooth Cayenne	1.70	1.90
Victoria	2.80	4.00
By sea (euro/box)		
Smooth Cayenne	4.00	7.00
Sweet	4.00	8.00

EUROPE

Mango

June 2010

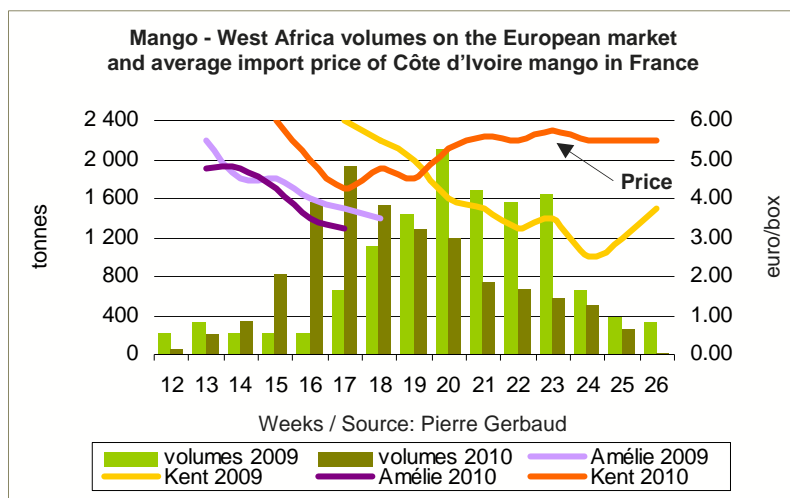
The increasing scarcity of mangoes on the European market in June meant that market conditions were good overall for the produce available. The decrease in arrivals favoured the maintaining of firm prices while demand tended to shift to the season's fruits that were available in large quantities at often attractive prices. The market gradually split into two distinct parts according to fruit variety. The prices of 'Tommy Atkins' from Brazil focused on the northern European markets dipped distinctly in the second half of the month under the combined effect of a sharp, short-lived increase in volumes and mediocre fruit quality. The price of Brazilian mangoes fell faster and more strongly on the Dutch and German markets. Meanwhile, the supply of 'Kent' and 'Keitt' dwindled, allowing more fluid sales at distinctly higher prices. This varietal dichotomy took shape throughout Europe, with the prices of West African mangoes higher everywhere. As supply did not meet demand, complementary batches from Puerto Rico and the Dominican Republic ('Keitt') partially compensated the chronic market under-supply. The first arrivals of 'Kent' from Mexico and Senegal at the end of the month took over from the West African sources as their season came to an end.

■ **Mango: success again for West Africa.** The West African mango export season finished in June on a particularly optimistic note. It has been years since the season's results have been so satisfactory. Although the figures are provisional, the picture is positive and contrasts with the performances in recent years. This year, the rapid ending of the Peruvian season coincided with an earlier start of exports from the various West African sources (Côte d'Ivoire, Mali and Burkina Faso). Market conditions were satisfactory right from the start of the season and prices were high. Although the last batches of 'Amélie' sold at low prices as a result of competition from West African 'Kent', only a limited volume was concerned. Good fruit quality and a

better distribution of volumes in time formed the basis for the firm prices observed throughout the season. The volumes received in Europe to the end of June approached 11 500 t against 12 800 t in the same period in 2010. It is unlikely that the thousand tonnes less exported this year was responsible for the improvement of selling conditions. It resulted more from the fact that shipments increased more rapidly and earlier than in previous seasons. This success was accompanied by a marked decrease in fungal problems at the end of the season. The only poor feature was the number of batches in which fruit fly larvae were present. This is a recurrent and uncomfortable problem for these sources.



Source: Pierre Gerbaud



MANGO — ARRIVAL ESTIMATES						
Tonnes						
Weeks 2010	22	23	24	25	26	
By air						
Brazil	10	10	10	-	-	
Mali	30	20	15	-	-	
Burkina Faso	20	25	20	-	-	
Senegal	-	-	20	40	30	
Mexico	-	30	30	35	20	
By sea						
Brazil	1 280	1 650	2 770	1 300	1 120	
Mali	420	280	260	200	22	
Burkina Faso	150	110	130	-	-	
Côte d'Ivoire	110	176	110	70	-	

MANGO — IMPORT PRICE ON THE FRENCH MARKET — Euro								
Weeks 2010		22	23	24	25	26	June 2010 average	June 2009 average
By air (kg)								
Mali	Kent	3.50-3.80	3.50-4.00	3.00-4.00	-	-	3.30-3.90	2.45-3.15
Burkina Faso	Kent	3.00	3.50-4.00	3.00-4.00	-	-	3.15-3.65	2.75-3.00
Côte d'Ivoire	Kent	4.00	3.00-4.00	3.00-4.00	-	-	3.30-4.00	2.50-3.80
Mexico	Kent	-	-	3.50-6.00	4.00-5.00	4.00-5.00	3.80-5.30	4.65-5.00
Senegal	Kent	-	-	-	3.80-5.00	3.50-4.50	3.65-4.75	3.15-3.50
By sea (box)								
Brazil	Tommy Atkins	5.50-6.00	5.00-5.50	4.50-5.50	4.00-4.50	3.00-3.75	4.40-5.05	2.40-3.40
Côte d'Ivoire	Kent/Keitt	5.00-6.00	5.50-6.00	5.00-6.00	5.00-6.00	5.00-6.00	5.10-6.00	2.50-3.85
Mali	Kent/Keitt	5.50-6.50	5.50-6.00	5.00-6.00	5.00-6.00	5.00-5.50	5.20-6.00	3.00-4.10
Mexico	Kent	-	-	-	-	6.00-6.50	6.00-6.50	-
Senegal	Kent	-	-	-	-	5.00-6.00	5.00-6.00	-

Sea freight

June 2010

At 52c/cbft the TCE average for the first six months of 2010 is marginally above the figure for the corresponding period in 2009 – but still the second lowest in the past decade. Any expectations of a recovery in the reefer charter market at the end of last year have proved to be unrealistic not least because the average figure has been achieved because of continued demolition activity and aggressive lay-up strategies by the major operators. In fact had it not been for two exceptional circumstances (the Chilean earthquake in February and the Transnet strike in May in South Africa, both of which absorbed a number of Spot units) this figure would undoubtedly have been lower than last year. As ever, the 52c/cbft average tells only a part of the story – the actual average yield across the fleet is, and probably by some distance, markedly lower once lay time is factored in to the calculation. Even the top-end tonnage was not immune to the malaise. The supply of capacity over the period was always sufficient to meet demand – at no time did operators hold leverage over charterers. There is a case to suggest that for a time in April and May rates were determined more by force of argument and goodwill than any economic rules of supply and demand! June started badly and got worse for reefer owners and operators as it progressed: Tropical Storm Agatha destroyed large swathes of banana production in Guatemala while the eruption of Ecuadorian volcano Tungurahua caused ash to fall extensively on plantations in the nearby banana-producing region. The Ecuadorian exit price stayed high and the trading markets in the Mediterranean remained weak – the combination stifled chartering activity. With South African citrus exporters reverting to containers following the end of the Transnet strike and no resolution to Russia's six month ban on US poultry imports, a 'manageable' 4-5 units prompt at the Canal at the beginning of the month turned into an unmanageable 20 by the start of July. It could be a long, uncomfortable summer in the doldrums for the reefer industry.



■ Litchi: varied supply in June. Litchi supplies to the European market were varied in June. Thailand was still the main source with a few batches shipped by air at the beginning of the month and sold at around EUR 6.00-7.00 per kg, mainly in the Netherlands. Meanwhile, litchis shipped by sea from the same source changed hands at around EUR 4.00-5.00 per kg in the first half of the month before dropping to EUR 3.00-4.00 per kg in subsequent weeks. Selling prices differed little from one European market to another. Mexican shipments by boat also arrived on the European market throughout the month. Fruit quality was satisfactory and they sold steadily in the Netherlands, Belgium and France at EUR 2.50-3.00 per kg with a few peaks of up to EUR 3.50 per kg. Supply was completed by a few batches of Chinese litchis (EUR 2.50 per kg), sold in particular on the Belgian market. The first batches

from Israel were released for sale at the end of the month, priced at EUR 3.50 to 4.25 per kg according to the European market concerned. The Israeli season seems to have been early this year as it did not start until mid-July in 2009. Demand for litchi is limited at this time of year when seasonal fruits form the bulk of sales.

Source: Pierre Gerbaud

■ First pineapple harvest on the Pacific coast of Costa Rica. At the end of June, the Colombian multinational corporation Banacol harvested the first pineapples grown at Puntarenas on Costa Rica's Pacific coast. Pineapple production in Costa Rica is currently concentrated on the Atlantic side of the country. Even though production costs are higher because irrigation is necessary, the hotter, more stable Pacific coast climate enables better flowering and hence a more even harvest.

Source: ReeferTrends

Maersk Ecubex line			
Ports	Arrival	Departure	Time (days)
Guayaquil (Ecuador)	Sunday	Monday	-
Balboa (Panama)	Thursday	Thursday	3
Rotterdam (Netherlands)	Tuesday	Tuesday	15
Bremerhaven (Germany)	Wednesday	Thursday	16
St Petersburg, PLP (Russia)	Sunday	Sunday	20
St Petersburg (Russia)	Sunday	Monday	20

■ Maersk inaugurate a direct Ecuador-Russia line. The Danish carrier Maersk has decided to run a direct link from Guayaquil to St Petersburg. The line is called Ecubex and will be routed via



Balboa, Rotterdam and Bremerhaven to arrive in St Petersburg after 20 days at sea. An unusual feature is that there will be no stopover in a Baltic port. The service will use ice class ships and will be the first trans-oceanic service between Russia and Latin America.

Source: CIRAD

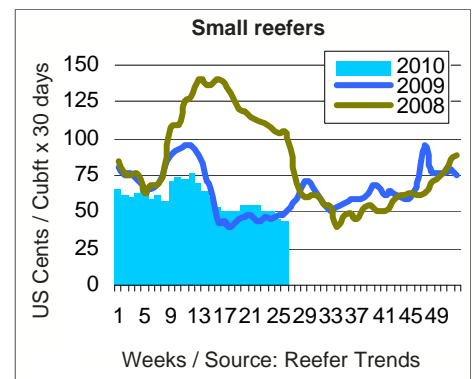
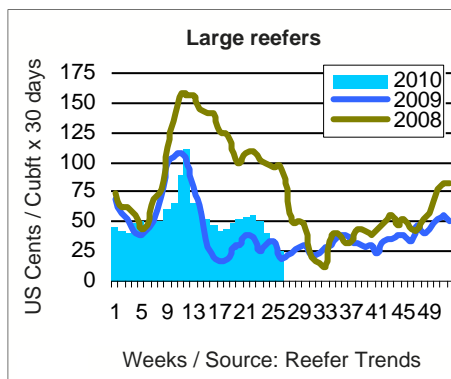
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MONTHLY SPOT AVERAGE

US\$/cubic foot x 30 days	Large reefers	Small reefers
June 2010	38	45
June 2009	24	47
June 2008	94	101



French beans from Senegal

Review of the 2009-10 season

Supply from Senegal was determinant once again in the recent counter-season period (December 2009 to March 2010). Shipments by sea continued to increase. However, weather problems such as drought and heat waves made the beans late and affected their quality. The quality of arriving produce still varied considerably according to brand. It would seem that the work upstream and the procedures used vary considerably from one company to another. The source would benefit from a uniformisation of cultural practices.

The French bean season in Senegal starts later and later. Shipments by sea have started in January for

two years or more whereas they used to begin around 15 December. This shift is enabling a source like Egypt, with its greenhouse production, to affirm itself as an alternative to supplies from Senegal.

However, the situation is still not very clear on the market for very fine beans. After deciding to halt filet bean production for reasons of profitability and yield, several Senegalese operators seem to have changed their minds. Competing supply—mainly from Burkina Faso—has not yet achieved production and quality levels that would allow it to context Senegal's position in a certain segment. Indeed, Senegal currently has an intermediate position in France and ships large volumes, which is not the case of Burkina Faso and Kenya, and the prices are somewhat lower than those of Kenyan beans. However, Burkina Faso is gaining ground but produce quality must become steadier

before it can start to truly bother Senegal.

A dip in supply after several years of increase

Whereas the European market had grown by 15% from 2005 to 2009, it shrank by 6% from 2008 to 2009, dropping from 197 000 tonnes to about 185 000 tonnes.

Shipments from the two leading export countries, Morocco and Kenya, fell by 9 and 6% respectively from 2008 to 2009. In contrast, exports from Egypt and Senegal, the third and fourth largest suppliers of the EU, both increased by 13%. Although Senegalese exports are concentrated on the December to March counter-season only, beans are harvested in Egypt almost all the year round. Greenhouse production is used to handle questions of climate and water supply, but costs are higher than for open field crops.

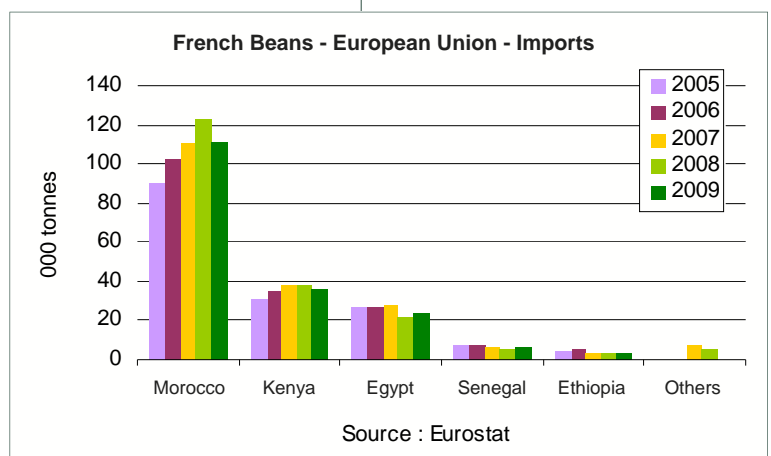
In spite of a recent fall in volume, Morocco is still by far the leading supplier of the

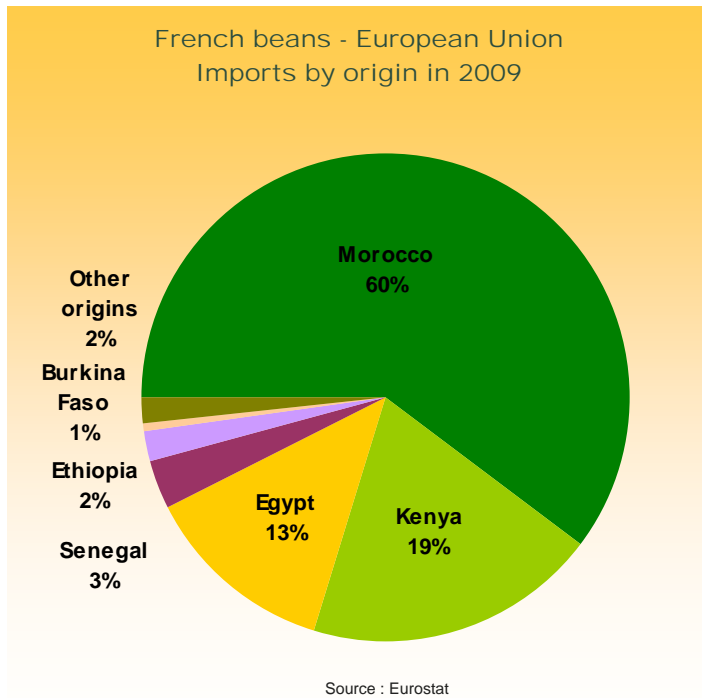


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European market, with a 60% share. Only Egypt has gained ground with an increase from 11 to 13%. The situation is unchanged for Kenya and Senegal, with market shares of 19 and 3% respectively.

Flow trends were monitored throughout the season on three markets: France, Belgium and Italy. France is the only market on which both filet and Bobby beans can be found. The two others are more specialised in Bobby beans.





France

This is the filet bean market. High-quality batches fetch good prices, not leaving much room for poor produce. Four sources supplied the French market regularly with filet beans during the season.

Sales were fairly steady overall. However, prices often fluctuated according to brand.

Batches from Kenya are still the absolute reference on the filet bean market. Average wholesale prices varied from EUR 3.20 to 3.55 per kg with a few higher peaks (from EUR 4.05 to 4.10 per kg). Shipments were smaller (probably a 25% fall) but this source has been the steadiest in terms of quality in spite of a few concerns related to rust. The batches from Kenya sold at much higher prices than those of its main competitors. Prices were a little higher in Weeks 6, 7 and 9 when supply was very small. The average reached EUR 4.00 per kg. Handling logistics was the main problem for Kenyan export. As Air France cancelled one of its cargo services to Kenya, the

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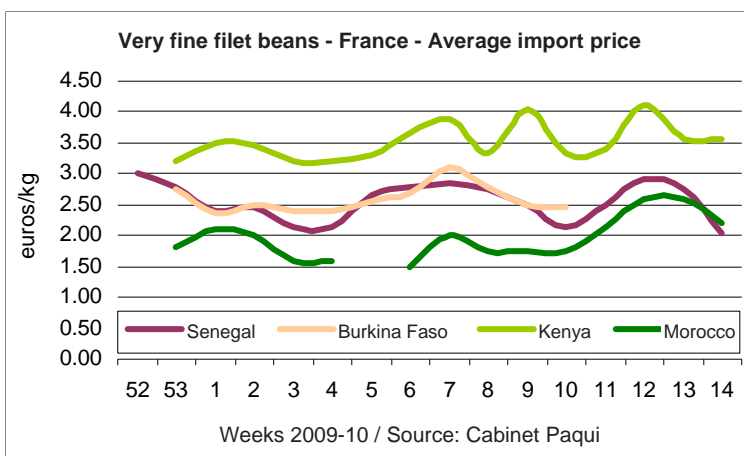
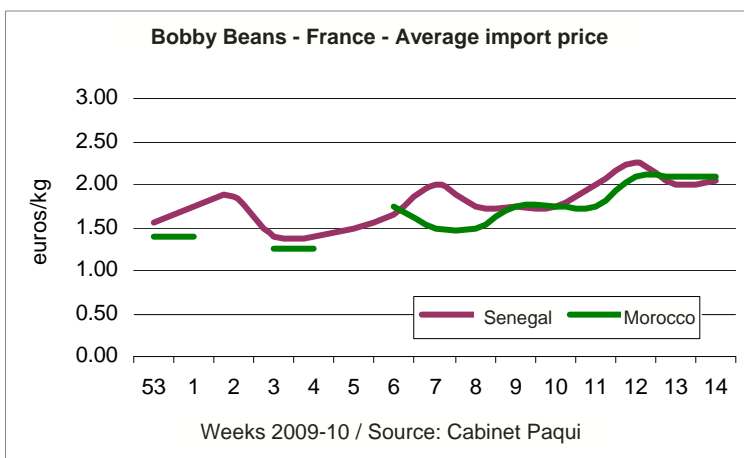
Seed supply in counter-season French bean producer countries seems to have been strongly disturbed in recent months. Production in the United States by one of the large seed groups has been affected by the serious disease bacterial wilt of bean, caused by *Pseudomonas syringae* pv *phaseolicola* or *Curtobacterium flaccumfaciens*. Contamination by the bacterium causes wilt and no crop. More serious still, the bacterium is seed-borne and remains present in the soil and can therefore infect new sowings. There is no real treatment for this wilt. Some methods limit spread but do not eradicate the disease.



© Hubert de Bon

Producer countries quickly prohibited the import of seed of the varieties proposed by the seed company in question. The bacterium was first reported in the USA in July 2009. In order to protect the large bean crops in the country, the Kenyan authorities forbade the import of seed from the United States from September 2009 onwards. Growers had to change their supply sources. Local seed production and the availability of uncontaminated stocks have seemingly allowed producer countries to continue to grow beans with no loss of harvest quantity.

Pierre Gerbaud

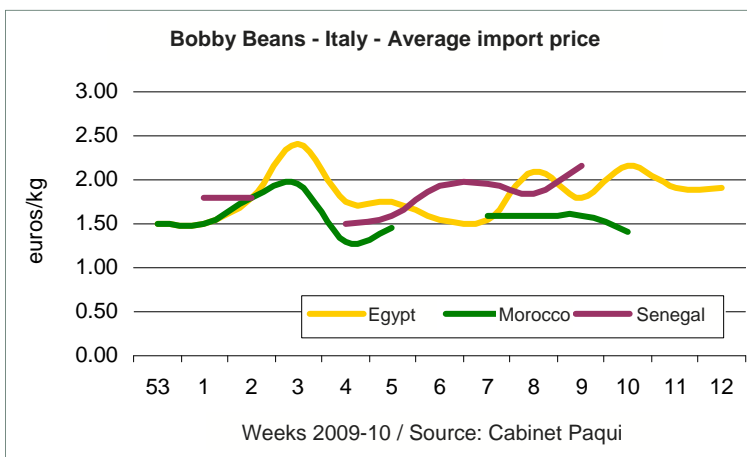
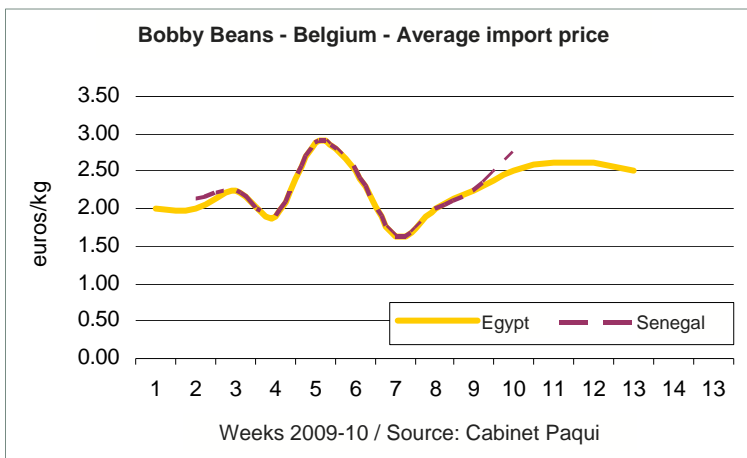


produce had to be carried on passenger flights, with consequent uncertainty as regards the reception of the goods as the space awarded to freight depends on the number of passengers on each flight.

Exports from Burkina Faso are slow to increase as supply volumes are limited and fewer and fewer operators are interested in French beans. Although these operators are generally capable of producing high-quality beans, problems of logistics (and especially breaks in the cold chain) have a negative impact on the general quality of the produce sold. The criticisms are always the same—the produce is fragile, deteriorates quickly and has a short shelf-life. Indeed, the batches received have often suffered from fairly broad temperature variations that shorten selling life, forcing operators to sell off their stocks. The Burkina Faso season was very irregular, with average prices at between EUR 2.35 and 2.70 per kg. Operators did not know what the quality of the produce would be from one week to the next. This prevented batches from Burkina Faso from profiting from good market conditions when supply was smaller and prices higher. The best sales were in Weeks 6 and 7 when market supply was small.

The first batches in containers from Senegal arrived in the first week of 2010. Volumes were not sufficient for shipments by sea at the end

Photos © Régis Domergue



of 2009 and all sales were of produce shipped by air. Exports by air from Senegal now form less than 25% of the country's total French bean exports.

Evaluating the Senegalese season is always somewhat difficult as there is no distinction between goods shipped by air or by sea in the prices reported. And more than for other sources involved in the filet market, certain brands stand out as quality references that make it possible to raise or at least attenuate the average of the low prices sometimes observed. Thus, as in preceding seasons, the prices differences between brands were fairly large in the same week—some produce could be twice the price of other brands! But overall the average price was between EUR 2.10 and 2.50 per kg, with a few peaks when market supply was shorter.

Supply from Morocco was very irregular during the counter-season period. Heavy rain and flooding affected quality and produce was frequently sold at low prices on a market that remained very fussy. A few brands succeeded in maintaining decent prices but the volumes were too limited for there to be a positive impact on the development of the season.

Senegal and Morocco were present on the Bobby market in France. Most batches were re-exported to neighbouring markets. It should also be noted that batches sold as Bobby beans were often batches of beans labelled as filet but that were downgraded for reasons of large pod size.

Belgium

With a slow start to the Senegalese season and more irregular quality, the produce no longer stands out from Egyptian produce, grown under glass and now of better quality.

Egypt is gaining increasing importance on this market while Senegal, which used to reign over the counter-season, is losing more and more ground. In previous seasons, the arrival of batches by sea from Senegal marked the end of the Egyptian season. The greenhouse produce grown in Egypt was considered to be too expensive for quality equivalent to that of Senegalese beans. The situation has since changed considerably as, apart from the



Mangetout peas making progress



European mangetout pea (snowpea) imports were smaller in 2009 than in 2008. EU statistics indicate a fall of about 2 000 tonnes, that is to say 10% less. Kenya and Guatemala, the two leading suppliers of the European market, have kept their positions although there have been some changes. Kenyan exports decreased by about 2 000 tonnes while those from Guatemala gained 550 tonnes. These conjunctural changes have not resulted in fundamental changes in market domination by the two sources. The other producer countries remained at much the same levels as in 2008, often increasing their shipments by a few tens or hundreds of tonnes. Only Zambia displayed a decrease of 800 tonnes, taking it to the sixth position among EU suppliers after being in third position in 2008. The main reasons were disturbances in production and transport conditions.

The overall decrease in the quantities released on the market does not seem to have reduced distributors' interest in peas, whose democratisation is continuing. It is true that mangetout are a favourite of restaurants and high-quality greengrocers and they are used increasingly in mixed salads. Increasing quantities are also found in supermarkets, loose in 2 kg boxes or in smaller punnets. They add diversification to French bean producer countries like Kenya or have become a specialised activity in other sources such as Guatemala.

Kenya can export both French beans and mangetout peas throughout the year. Shipments might only be disturbed by bad weather or occasional pest pressure, resulting in temporary decreases in volume. Guatemala seems to have a more clearly defined export season that generally runs from the end of November/beginning of December to mid-June although the season can start and end a little earlier or later. The Zimbabwean export period is from June to October-November. The prices most commonly observed on the French market in 2009 were around EUR 4.50 per kg (Kenya), EUR 4.20 per kg (Zimbabwe) and EUR 5.00 (Guatemala). These prices occasionally increased by EUR 0.50 to 1.00 per kg during periods when supply did not match demand. These prices depend of course on cost and freight prices on departure from the various sources. They may vary further along the chain according to demand. Disturbances to supply during festive periods may sometimes result in significant price rises. Although demand for mangetout peas peaks during the Christmas period and at Easter, it seems to be growing outside these periods, marketing wider distribution and better perception by consumers.

Pierre Gerbaud



© Pierre Gerbaud

improved quality of Egyptian production, a growing number of operators in Belgium are switching from sea shipments with their recurrent quality problems to air shipments that are more expensive but that sell better.

Sales proceeded well overall except in Weeks 4, 7 and 8 when demand was somewhat lacklustre. Prices were similar for produce from both sources, with the averages ranging from EUR 2.00 to 2.50 per kg. The Senegalese season on the Belgian market ended in Week 10, allowing batches from Egypt to continue to sell well.

Italy

The start of the Senegalese season was fairly difficult on the Italian market. Overall, produce from all sources displayed problems of quality, with increasing criticism of Moroccan produce.

Italian operators are wondering whether it is worth working with Senegal as the quality problems reported for nearly two years do not seem to have been solved.

The arrival of Senegal did not force out and complicate sales of produce from other sources, as used to happen in the past. Quite the opposite, it would seem that Senegal suffered from the availability of the Egyptian greenhouse crop.

The distinction between Senegal and Egypt during the season was based on the quality of the batches available. The quality of Egyptian produce grown in greenhouses is now more regular while Senegalese exports often suffer during sea transport as the beans tend to evolve rapidly. The presence of poorer quality batches from Morocco was not good for sales of Bobby beans from competing sources either.

Italian operators halted their Senegalese imports in Week 10, preferring to opt for Egyptian supplies whose quantity and quality were more regular ■

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The European banana market

There are no seasons any more

The first half of 2010 was one of the roughest rides of the last ten years. Continuing along the deplorable basis of the end of the 2009, week after week the European banana market has had a string of poor performances since the beginning of the year. Prices were disastrous for the first four months of

2010. There had not been a worse January since 2000. The German import price (Aldi reference price) climbed laboriously to EUR 0.67 per kg in comparison with EUR 0.71 per kg in January 2007, 2008 and 2009. The music was the same on the banana market until mid-May. The January to April average reached EUR0.75 per kg, that is to say 12% lower than in 2008 and 2009. The return of production in Costa Rica and the high potential in Colombia and West Africa contributed to swelling world supply and destabilising all the markets. The EU was

unable to count on its tariff-based import regime to prevent markets from falling. This is clear proof that the protective or at least regulatory effect of a customs tariff at EUR 148 per tonne is pretty weak in the face of peaking world supply.

The banana market has become very good at changing everything. The pattern of the banana situation in 2010 has considerably upset the existing order which holds that the market should be buoyant from January to April and then enter a long lethargic summer period.

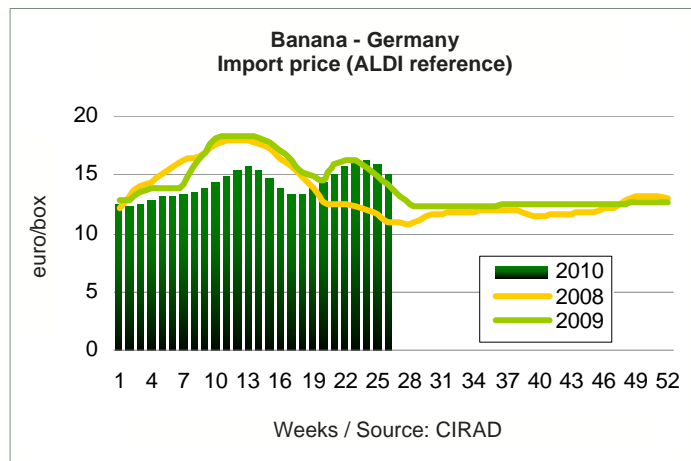
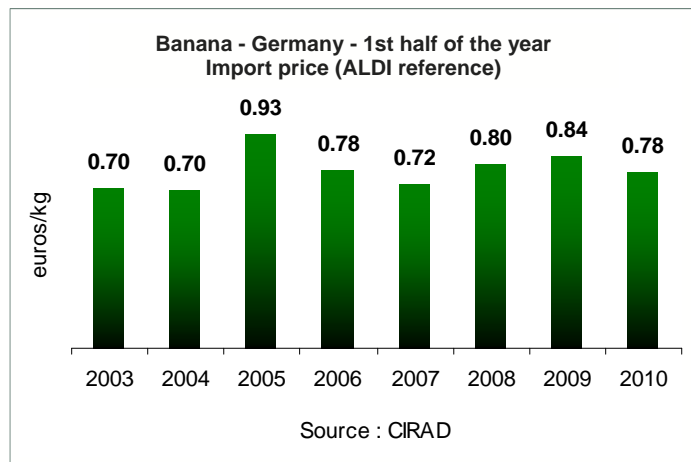


Sky-high market

Somewhat resigned, operators expected a catastrophic year. But this did not allow for unusual weather conditions that—as always—resulted in a drastic change in the situation. Everybody was affected in turn, starting with the competing fruit sectors—floods in Morocco and Spain at the beginning of the year and then in Poland in the spring, late and even lost production and cold wet weather throughout Europe, etc. Finally, banana supply was cut, with cold weather at the be-

ginning of the year reducing production in Colombia, volcanic ash in Guadeloupe and then the same, plus cold weather, in Ecuador, a tropical storm in Guatemala, etc. The strong fall of the euro against the US dollar calmed the enthusiasm of the most modest operators. Their outlay increased automatically (purchase of fruit, freight and customs dues) while their returns became more and more meagre.

Smaller supply, increased risk, less competition and cold, wet weather combined



Partage de pratiques innovantes : l'Institut Technique de la Banane s'ouvre aux autres filières

Le 7 avril 2010, l'Institut Technique de la Banane affirme son ouverture aux autres filières avec la création de l'Institut Technique Tropical (IT²). Revenons sur cette (r)évolution.



■ Pour garantir le succès du Plan Banane Durable, la filière Banane a créé fin 2008 son propre institut technique (ITBAN), à l'interface entre la recherche et les planteurs. De nombreuses problématiques techniques et environnementales étant communes aux différentes filières agricoles de Guadeloupe et Martinique, c'est en toute logique que l'ITBAN s'est ouvert aux filières de diversification. Ainsi, 2 ans après sa création, l'Institut Technique de la Banane devient l'Institut Technique Tropical (IT²).

■ L'IT² s'organise désormais en deux sections : Banane et Diversification. Cette dernière regroupe les filières maraîchère et vivrière, l'ananas, le melon et l'arboriculture. L'échange avec les Centres Techniques de la Canne et du Sucre (CTCS) et les filières d'élevage est aussi renforcé. « Le développement de nos îles ne peut se penser qu'en synergie inter-filières et inter-régions ultrapériphériques, en mutualisant les moyens humains et financiers et en construisant une coopération étroite avec la recherche agronomique publique », explique David Dural, Directeur de l'IT².

LA PAROLE À 2 STRUCTURES DE DIVERSIFICATION

Charles Cyrille, Président du Conseil d'administration de la SOCOPMA, Coopérative maraîchère et vivrière de Martinique



Que pensez-vous de l'ouverture de l'ITBAN aux autres filières ?

« Je suis convaincu de l'intérêt d'un institut régional multi-filières. Nous partageons le même climat et les mêmes sols, il est donc pertinent de mutualiser la recherche. Nous n'avons pas hésité un seul instant lorsqu'Eric de Lucy, Président de l'UGPBAN, nous a proposé cette opportunité. »

Quelles sont vos principales attentes ?

« Le flétrissement bactérien de la tomate qui réduit les rendements, ou encore la lutte contre les larves d'insectes causant des crevasses dans les tubercules font partie de nos priorités. Par ailleurs, nos producteurs de bananes « plantain » doivent se préparer avec nos amis de la banane « dessert » à l'arrivée de la cercosporiose noire, champignon extrêmement néfaste pour les plantations : un exemple concret de problématique commune où l'IT² prend tout son sens. »

Radgi Bellone, Président de l'IGUAFHOR, Interprofession Guadeloupéenne des Fruits, des Légumes et de l'Horticulture



Quels bénéfices voyez-vous à votre intégration à l'IT² ?

« J'y vois 2 avantages : un partage de savoir-faire technique sur nos pratiques culturales communes (enherbement, gestion de la fertilité des sols, etc.), mais aussi la possibilité de bénéficier de l'expérience et du réseau de la filière Banane pour nous structurer, et ce en vue de mieux répondre aux besoins du marché intérieur voire du marché à l'export. »

Quels sont vos besoins immédiats ?

« La sélection variétale est fondamentale. En effet, le climat tropical humide de nos îles ne convient pas à certaines variétés de fruits et légumes. Nous aimerions que la recherche se mobilise pour développer des variétés adaptées à la forte chaleur, capables de produire toute l'année et moins sensibles aux maladies. D'autre part, nous avons des besoins en termes de techniques comme la culture sous abri. Toutes ces avancées concourent vers un bénéfice commun : une agriculture durable. »



UNION DES GROUPEMENTS DE PRODUCTEURS DE BANANES DE GUADELOUPE ET MARTINIQUE

Ces logos attestent de l'origine et de la qualité d'une production agricole cultivée dans des régions éloignées de l'Union européenne, appelées régions ultrapériphériques.

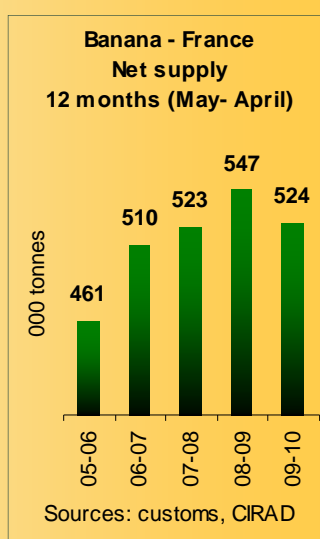
Ils garantissent le respect des réglementations sociales et environnementales en vigueur dans l'Union européenne.



Supply: EU holding up while France marks time

Only the figures for supply during the first four months of the year are known at the time of writing. The balance is slightly positive for extra-community imports by EU-27 at 2% up on 2009, an additional 37 000 tonnes. Ecuador is the only producer country to have strongly reduced shipments to the EU, with a decrease of 12%, that is to say 65 000 tonnes less than in 2009. Costa Rica and Panama are recovering their positions little by little. ACP sources achieved the finest scores. The Dominican Republic pulverised pre-hurricane records and if the trend continues until the end of the year shipments to the EU should total at least 260 000 tonnes. African sources are also exporting strongly. Cameroon (+ 13%) and Côte d'Ivoire (+ 7%) completed a magnificent quarter and reduced shipments in April. The quantities shipped from Ghana (+ 42%) and Surinam (+ 47%) rocketed in the first four months of the year.

In contrast with the situation in recent years, the French market did worse than the EU market. Net French market supply shrank by 10% during the four-month period, with the decrease being as much as 34% in April! Guadeloupe, which was unable to ship fruits for 11 weeks (weeks 10 to 20), contributed to the poor figures but did not account the phenomenon as a whole. This period of weakness cancelled out the steady expansion of the market since 2007. Net supply during the twelve months from May 2009 to April 2010 was 524 000 tonnes, in comparison with 547 000 tonnes a year earlier.



to send the banana market sky-high. Everything started in Week 19. After a low point in Week 18, the market formed for 5 or 6 weeks. This had never been seen before at a time when the market generally enters its summer slump. Right at the end of June, in Weeks 25 and 26, prices reached all-time highs with the Aldi import price at between EUR 0.80 and 0.86 per kg, that is to say EUR 15 to 16 per box.

Finally, the average (not weighted by volume) was EUR 0.78 per kg during the first half of 2010. This matches both the 2007-08-09 three-year average of EUR 0.79 per kg and the 1999-2009 average of EUR 0.77 per kg. However, the standard deviation in the first half of 2010 is one of the smallest of the decade and confirms that even if performance was very positive in the spring, the usually very high prices in March are lacking in sector accounts. This may strongly affect the performance of the year as a whole, especially as supply potential is recovering almost everywhere. Although some operators believe that the summer will be quiet, the end of the year may hold surprises, and not just good ones. We cannot hope for a catastrophe each time the market requires regulation ■

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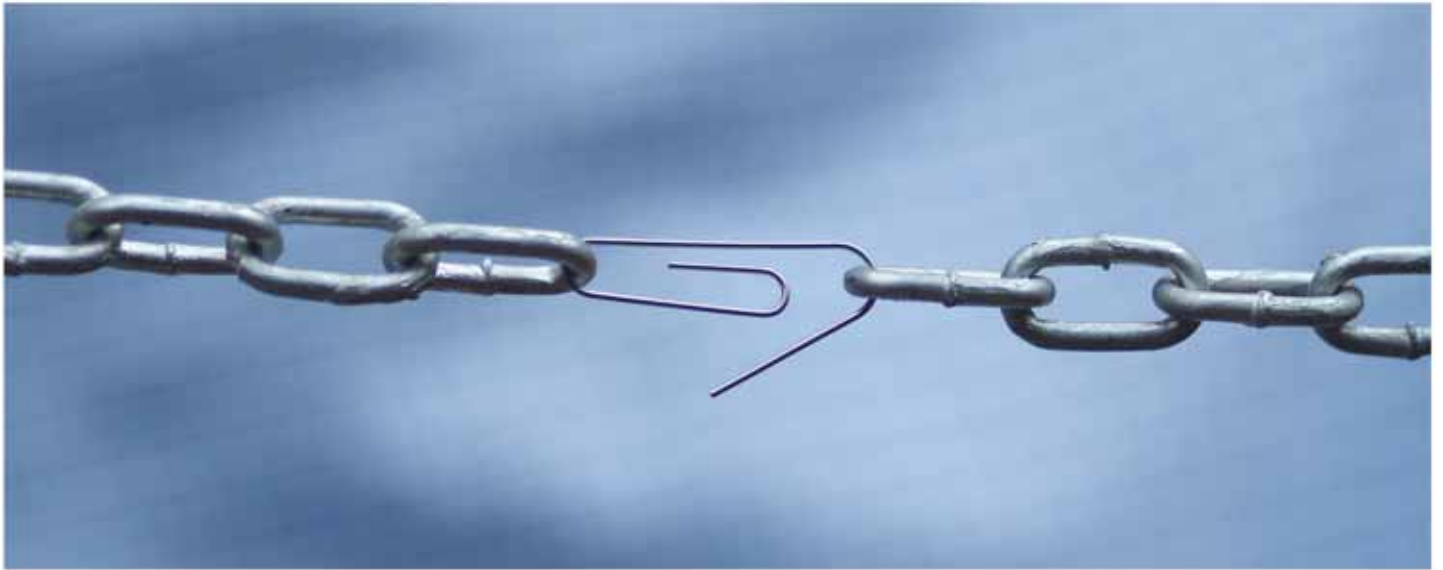


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Banana — European Union — Imports							
tonnes	January to April					Variation 2010-2009	
	2006	2007	2008	2009	2010*	%	tonnes
Total extra EU-27, incl.	1 448 601	1 605 318	1 625 636	1 559 687	1 596 364	+ 2	+ 36 676
Total MFN, incl.	1 182 802	1 326 265	1 326 163	1 259 776	1 250 438	- 1	- 9 338
Ecuador	494 476	456 745	514 294	534 647	469 857	- 12	- 64 790
Colombia	297 182	396 926	365 232	365 821	375 654	+ 3	+ 9 833
Costa Rica	253 234	306 754	295 624	258 257	293 782	+ 14	+ 35 525
Panama	87 765	107 406	98 775	53 168	60 217	+ 13	+ 7 049
Brazil	28 480	30 519	25 223	23 407	23 021	- 2	- 386
Peru	7 903	10 243	13 502	16 288	17 301	+ 6	+ 1 013
Mexico	383	212	57	5 088	4 762	- 6	- 326
Honduras	1 741	9 058	7 658	2 313	4 433	+ 92	+ 2 120
Guatemala	7 143	3 069	5 672	506	1 325	+ 162	+ 818
Total ACP	265 799	279 053	299 473	299 911	345 926	+ 15	+ 46 015
Cameroon	73 317	76 817	103 138	83 974	95 022	+ 13	+ 11 048
Dominican Rep.	43 876	66 521	46 040	66 086	88 893	+ 35	+ 22 807
Côte d'Ivoire	81 728	66 445	71 196	77 133	82 880	+ 7	+ 5 747
Belize	21 774	15 188	25 983	20 706	23 819	+ 15	+ 3 114
Surinam	12 515	13 926	21 361	14 432	21 218	+ 47	+ 6 786
Ghana	2 476	8 279	16 288	13 428	19 119	+ 42	+ 5 691
St Lucia	10 289	14 580	10 520	11 093	10 683	- 4	- 410
St Vincent	5 723	6 235	3 966	2 924	2 173	- 26	- 751
Dominica**	4 308	3 788	937	10 101	2 074	- 79	- 8 027

* provisional / ** 2009 data for Dominica are largely overestimated to the detriment of Dominican Republic / Source: EUROSTAT

Information... your weak link?



Reefer Trends is an independent news and information provider, financed exclusively by revenue from subscriptions.

First published in 2003, it provides a number of services for users along the reefer logistics chain: the Reefer Trends weekly charter market brief is the benchmark publication for the specialist reefer business – it tracks the charter market for reefer vessels, as well as fruit and banana production and market trends that influence charter market movement.

The weekly publication has close to 200 paying subscriber companies from 34 countries worldwide. The list of subscribers includes all the major reefer shipping companies and reefer box operators, the major charterers, reefer brokers, banana multi-nationals, the major banana exporters in Ecuador, Costa Rica, Panama and Colombia, terminal operators in the US and Europe, the world's leading shipping banks and broking houses

as well as trade associations, cargo interests and fruit importers on all continents. It is also circulated within the European Commission and the World Trade Organisation.

As well as the weekly Reefer Trends report it provides a separate online daily news service, covering developments in the global fruit, banana and logistics industries. The daily news is e-mailed direct to the desktops of several thousand subscribers worldwide.

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reefer trends



FRUIT MARKETS IN EASTERN EUROPE

A report by
Baptiste Montange

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Credit © European Union, 2010

In 2004, many international operators thought that the addition of eight Eastern European countries to the European Union and the resulting improved standard of living would trigger the rapid growth of imported fresh fruit markets. It is clear in 2010 that the trend for fruit imports to increase has been much weaker than forecast. **FruitROP** examines the causes of this lack of dynamism and the factors that slow imports in Eastern Europe.



The fruit markets in Eastern Europe

An eldorado that has not come up to expectations ... yet

Eastern Europe stretches from the Bohemian forests to the Urals and groups some twenty countries strongly marked by the birth of the USSR in 1922 and its dissolution in 1991. Subsequently, many of these countries, released from the soviet model sought to quickly adopt the western capitalist model and the state enterprises were privatised. Eight countries joined the European Union

in 2004: Estonia, Hungary, Latvia, Lithuania, Poland, the Czech Republic, Slovakia and Slovenia. They were followed by Bulgaria and Romania in 2007. In addition to the ten EU members, the countries with substantial weight as regards population and influence on the fruit markets in Eastern Europe are Belarus, Croatia, Russia and Ukraine. Even if only the European part of Russia is taken into

account, Eastern Europe covers a vast 6.2 million km² in comparison with Western Europe's 3.6 million. The climate is continental with hard winters and hot summers, making the central part suitable for apple growing. The population of the 14 countries totals about 300 million, with a fairly rapid improvement of the standard of living and a westernisation of consumer habits.



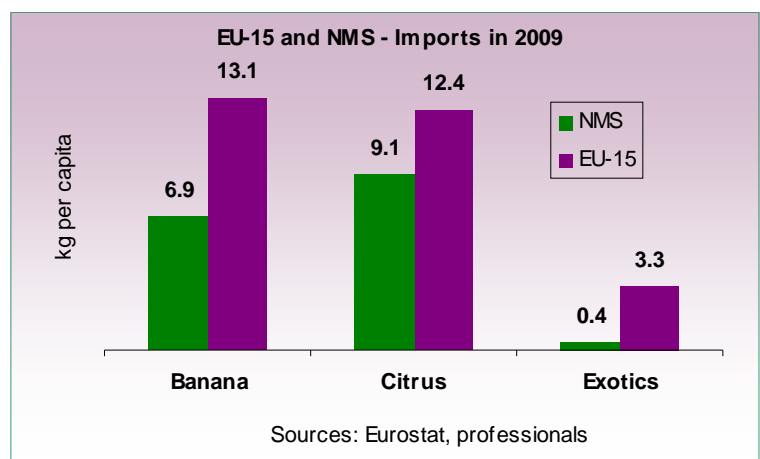
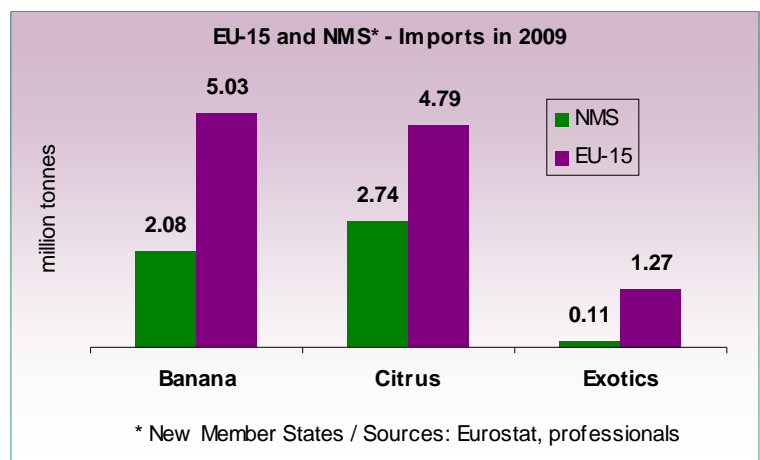
Geography little suited to direct imports

Eastern Europe has a fairly limited coastline, with access only via the Black Sea and the Baltic. The ports are therefore of moderate size in comparison with those on the Mediterranean and Atlantic coasts and the main ones are Constanza, Novorossisk and Odessa on the Black Sea and Gdansk, St Petersburg, Tallin and Ventspils on the Baltic. Novorossisk and St Petersburg, both in Russia, are the main points of entry. St Petersburg handles 80% of the fruits arriving for the Russian market but ice makes access difficult in the winter and specialised ships must be used. Romania provides good access via the port of Constanza. Although Ukraine and Poland have extensive coasts sea traffic is fairly small. Fruits for Eastern Europe arrive mainly in Rotterdam and Antwerp and are then forwarded to the various countries by road. The state of the road system is determinant is satisfactory transport of goods.

A strongly growing economy

The dissolution of the Soviet Union and the successive independence of the different Eastern European countries have changed the economy in the region. Western style consumer society became a development model, with an opening to capitalism and accelerated growth. Massive investment by Western European companies attracted by inexpensive labour led to the development of industry with excellent performance and growth rates in the 2000s have been much higher than those observed in Western Europe. The economies of most Eastern European countries are based on the manufacturing sector, contributing 34% of the GDP on average, with strong focus on the car industry and machine tools. However, the bursting of the US real estate bubble in 2008 and the effects of the world financial downturn and the resulting decrease in consumer spending hit these countries particularly hard. First, their currencies slid considerably against the euro: the Hungarian forint lost 28% between August 2008 and March 2009 and the Polish zloty lost 35% against the euro during the same period. This resulted in price increases for goods from the euro zone—the case of most imported fruits—further slowing consumption.

However that may be, the profiles of the countries in Eastern Europe and particularly those of central Europe have changed completely in





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twenty years as regards purchasing power, consumption patterns, diet and distribution channels.

Small fruit consumption

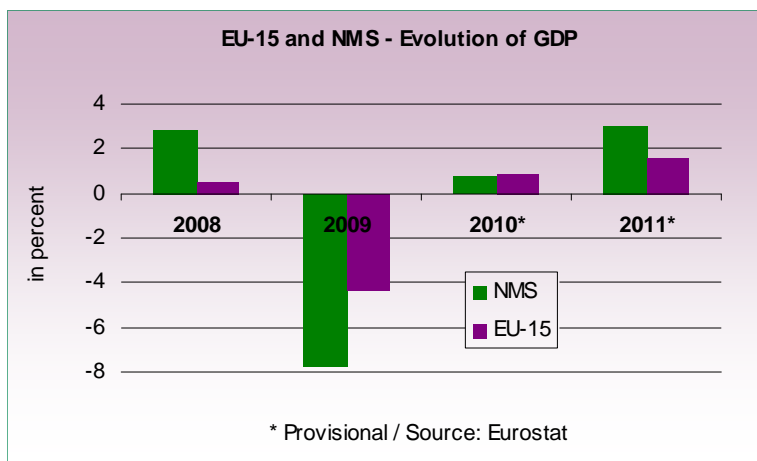
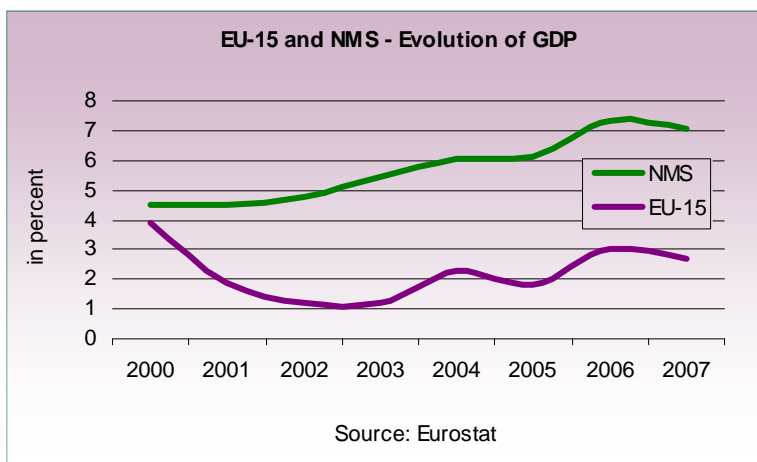
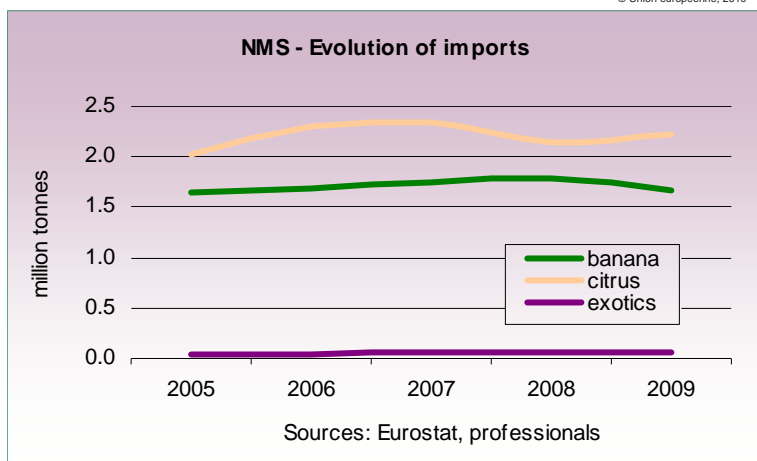
However, fruit consumption differs considerably between Eastern and Western Europe. Apparent average consumption in the east is some 54 kg per person per year (18 kg citrus and tropical fruits and 36 kg temperate fruits) in comparison with 92 kg per person per year (42 kg citrus and tropical fruits and 50 kg temperate fruits) in EU-15.

The difference in consumption is greater for citrus and tropical fruits than for temperate produce. The gap is largest for oranges at 15 kg per person per year in EU-15 and 3.5 kg in Eastern Europe where this fruit is strongly seasonal, with 60% of the volumes sold during the four winter months.

These figures show first of all that the Eastern European countries display general underconsumption of citrus and tropical fruits. Joining the EU was followed by a decrease in fruit consumption, mainly caused by the decrease in volumes of bananas, the leading imported fruit. Indeed, EU membership meant that these countries had to accept the common market organisation of bananas and this set new constraints in the form of import quotas and customs dues of EUR 75 per tonne on bananas from the South American countries that are practically the sole suppliers of Eastern Europe. Annual consumption in Poland, the leading banana importer among the new members, decreased from 7.4 kg per person per year in 1998 to 5.5 kg in 2009.

The market regulations for imports of other fruits—mainly citrus—did not change but imports have decreased too. International operators had great expectations and thought that EU membership of the Eastern countries would increase the volume of the fruit trade and consumption, in particular as a result of increased purchasing power.

The Eastern European countries nevertheless have substantial development potential. The population of 300 million means substantial scope for consumption. In addition, economic dynamism has been strong in spite of the downturn and purchasing power is increasing steadily. Finally, the large difference of fruit consumption between East and West leads to considering that there is considerable room for progress.



What slows the consumption of citrus and tropical fruits in the East?

The first factor is the low level of purchasing power in the East. Per capita GDP was EUR 10 300 in 2009 (CIA World Factbook), 57% less than EU-15 (EUR 24 000) and very variable from one country to another—EUR 4 600 in Ukraine to EUR 20 100 in Slovenia.

However, GDP in the zone increased strongly from 2000 to 2008, averaging + 5.7% per year in comparison with + 2.1% in EU-15. In spite of the impact of the downturn in 2009-10, the Eastern European countries should achieve faster growth than that of EU-15 in 2011 at an average of + 3% against + 1.4% (Eurostat estimate).

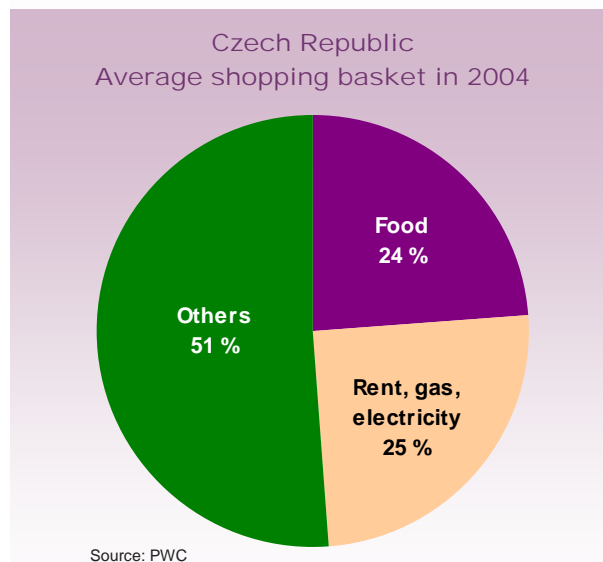
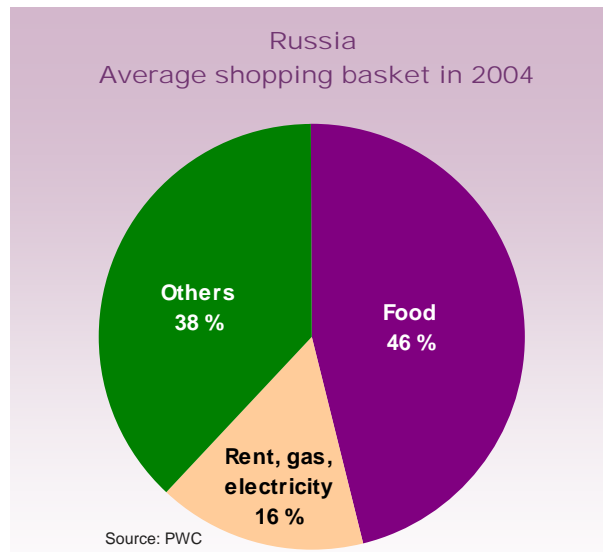
These countries form three zones as regards GDP. The 'richest' one consists of the countries more to the west, from Poland to Croatia. Per capita GDP averages some EUR 15 000, similar to that of Portugal (EUR 15 800) the poorest of the EU-15 countries. The northern zone consisting of the Baltic region and Russia has an average per capita GDP of EUR 10 800. Although it was harder hit by the downturn, it had also displayed the strongest growth prior to the slump. The southern zone runs from Belarus to Bulgaria and the per capita GDP is a third of that of EU-15.

Local fruits versus imported fruits

The standard of living of the population of a country does not necessarily explain fruit import volumes. Indeed, although they have a fairly similar GDP, the Czech Republic imports twice the quantity of fruits (26 kg per person per year) as Hungary (11.5 kg per person per year). A second factor—the production of competing fruits—should be considered. This means temperate fruits grown locally and these are in three categories: pip fruits (apples and pears), stone fruits (peaches, apricots and cherries) and berries (mainly strawberries). Pip fruits are generally cheaper and available on the market at competitive prices for about nine

Comparison Poland-Slovakia		
	Poland	Slovakia
Population	38 millions	5.5 millions
Apple production	2 500 000 t	29 700 t
processed apples	1 300 000 t	-
Stone fruit production	350 000 t	5 100 t
Berry production	270 000 t	650 t

Source: official statistics



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months, from August to April. Berries and stone fruits are cropped from May to August but their prices are usually higher. Fruit production varies considerably within Eastern Europe. Bulgarian production is only 12 kg per person per year while the figure in Hungary is about 53 kg. Apples are the main domestically grown fruit in the zone, with intensive production in central Europe. Poland is the leading producer country in Europe with an annual crop of 2.5 million tonnes. It is followed by Belarus and Hungary.

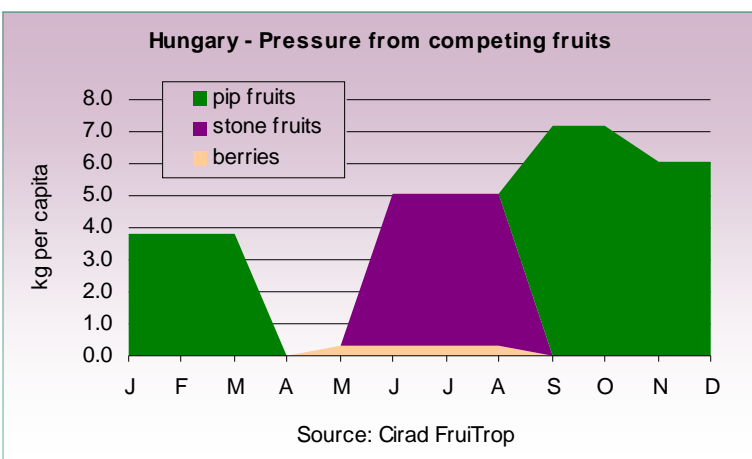
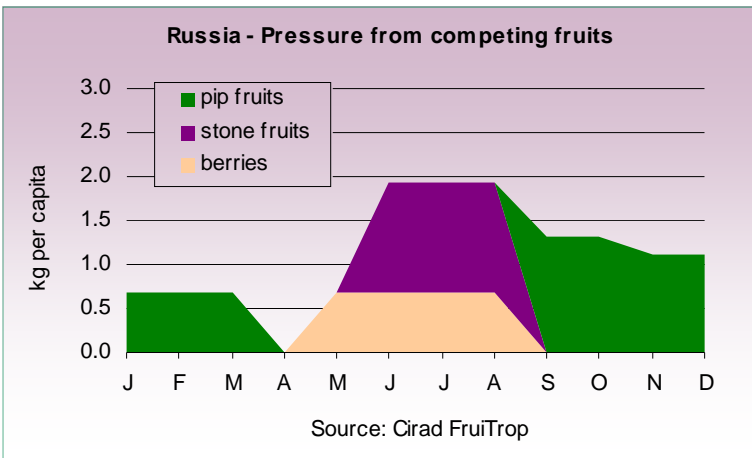
Consumption figures are for fresh fruits after deduction of the quantities processed. However, the latter should be taken into account as they form a source of cheap fruits that can be sold on the fresh fruit market if conditions are favourable.

Home and on-farm consumption is also a factor to be examined but it is difficult to estimate. It concerns vegetables above all in Eastern Europe and home-grown fruits can be ignored for most households.

Locally grown fruits have a strong effect on purchases of imported fruits. The former are more readily available and do not require complicated logistics. They also have a 'local produce' image that has been much emphasised in recent years. The most important point is that prices are much lower than those of imported fruits.

Disparity in prices and distribution modes

The retail price is the main criterion in fruit purchase decisions in Eastern European countries. The price of a fruit depends first of all on whether it is an import or domestic production. The prices of common fruits in producer countries like Poland and Hungary are much lower than those of imported produce. The average price of apples was less than 50% of that of bananas. It will thus be difficult to sell imported fruits—especially citrus and tropical fruits—in these countries, especially during harvest periods. In comparison, the prices of the main fruits (apples, bananas and oranges) purchased in Eastern European countries that depend almost entirely on imports, such as Russia and the Czech Republic, are more similar. Some tropical fruits like banana may even be cheaper than temperate fruits, as in Russia for example where bananas were 28% cheaper than apples in 2009.



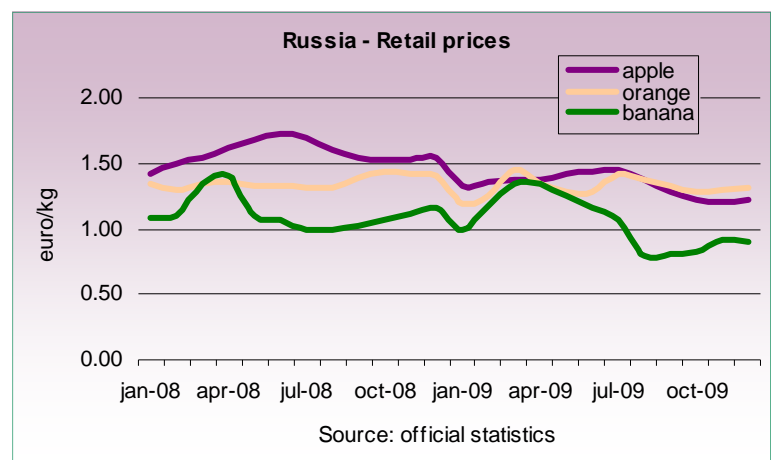
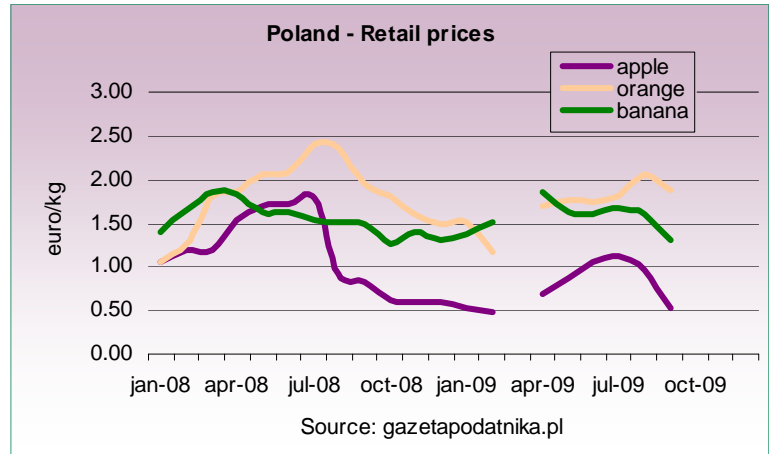
Distribution in Eastern Europe is fairly broad-ranged according to the type and size of shops.

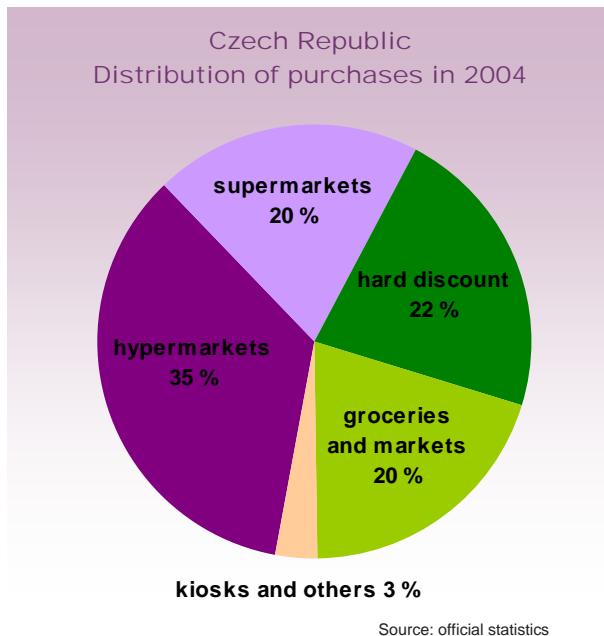
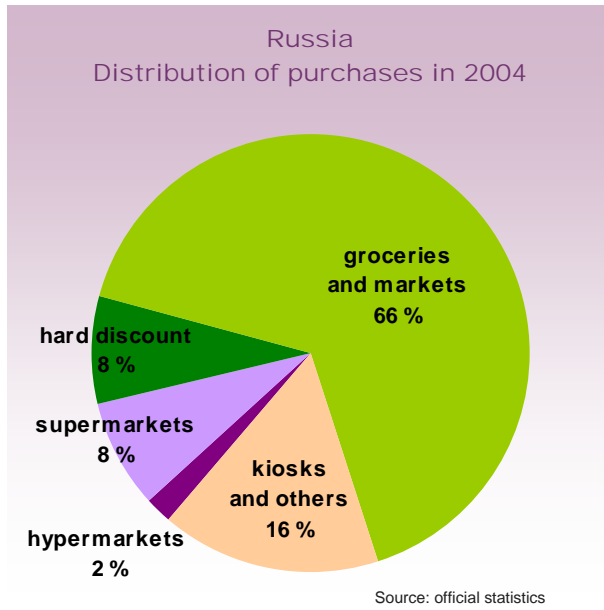
The closer the distribution system in a country to a modern western type system, the easier it will be for an exporter to penetrate the market using the supply system set up by supermarkets. With their purchase centre system, supermarkets enable importers to limit the number of clients while increasing the number of retail clients reached. Traditional markets tend to sell local produce while supermarkets cater for a category of customers more likely to be interested in imported fruits. They also have more facilities for communication and the presentation of new products through promotion operations and advertising campaigns. Retail distribution in some countries such as the Czech Republic and Hungary is very similar to the western model, dominated by large retail outlets (supermarkets, superstores and discount stores) often funded by western capital. This has modelled the habits of purchasers, most of whom shop once a week in centres at urban peripheries.

Other countries have traditional retail structures that hinder the setting up of fruit import chains. Markets and kiosks are dominant in retailing in Belarus and Ukraine and people buy food five or six times a week. Distribution is becoming westernised rapidly in Poland and Russia with the establishment of large international groups (Tesco, Lidl, Carrefour, Metro, etc.) in large urban centres. Here, there are great differences in behaviour between city-dwellers and country people as the latter have hardly changed their shopping habits.

A non-negligible 'country' risk

Failure to pay is an inherent risk in any commercial transaction. The risk is higher when a country is unstable politically and economically. The risk may be a serious obstacle to the establishment of a trade chain in a given country as the establishment of medium term prospects is impossible. Companies cannot obtain insurance cover in what are considered to be high-risk countries. Some exporting countries are not developing shipments to the Eastern European markets because of the risk of bad debts. On this point it is interesting to note the organisation of Turkish exporting companies, especially in Russia. Indeed, their family structure and strong downstream integration makes it possible to ensure payment on these markets where debt recovery is still a major problem. In spite of the efforts made for several years, corruption problems are still





seen in certain countries such as Romania, Bulgaria and Ukraine. Belarus is somewhat special with a very high 'country' risk for short and medium term investments as the regime is not democratic, making it difficult to set up a fruit import chain. Every sector must adapt its sales method in order to limit risks.

An eldorado all the same

In spite of all the obstacles resulting from low GDPs, competing fruits and the type of retail distribution, the strong economic dynamics of the Eastern European countries and the scope for increasing fresh fruit consumption make these markets excellent targets for fruit exporters in the future. However, supply should be segmented to match the specific requirements of markets that are in fact very varied. Their expectations in terms of range breadth and depth and prices must be examined very precisely. The more interesting markets have vast sales potential and moderate pressure from local fruits. This is the case of Russia which has enormous potential for increasing per capita consumption as the population is 142 million and fruits supplies—both temperate and tropical—are mainly imported as local supply is small. Retail prices for the main fruits purchased are therefore comparable and so sales of some tropical fruits such as bananas have increased rapidly. Oranges and easy peelers might be the next fruits to benefit from the Russians love of fruit.

Other markets like Belarus and Romania have large populations and considerable scope for growth but limits might be set by their low GDP and the very strong impact of locally grown fruits sold at low prices.



© Guy Bréhinier

In spite of a fairly high standard of living, certain markets have limited growth potential as their populations are small (the Baltic countries, Slovenia and Croatia).

The graph below shows which countries have the best potential for imports of tropical fruits (bananas and exotic fruits) and citrus. The vertical axis represents fruit production in the country and the higher it is the more difficult it would be to import fruits. The horizontal axis represents per capita GDP. The higher the GDP the faster the development of imports. The size of each circle represents potential consumption calculated by multiplying the population of the country by the difference between its consumption and that of EU-15. For example, the difference in consumption

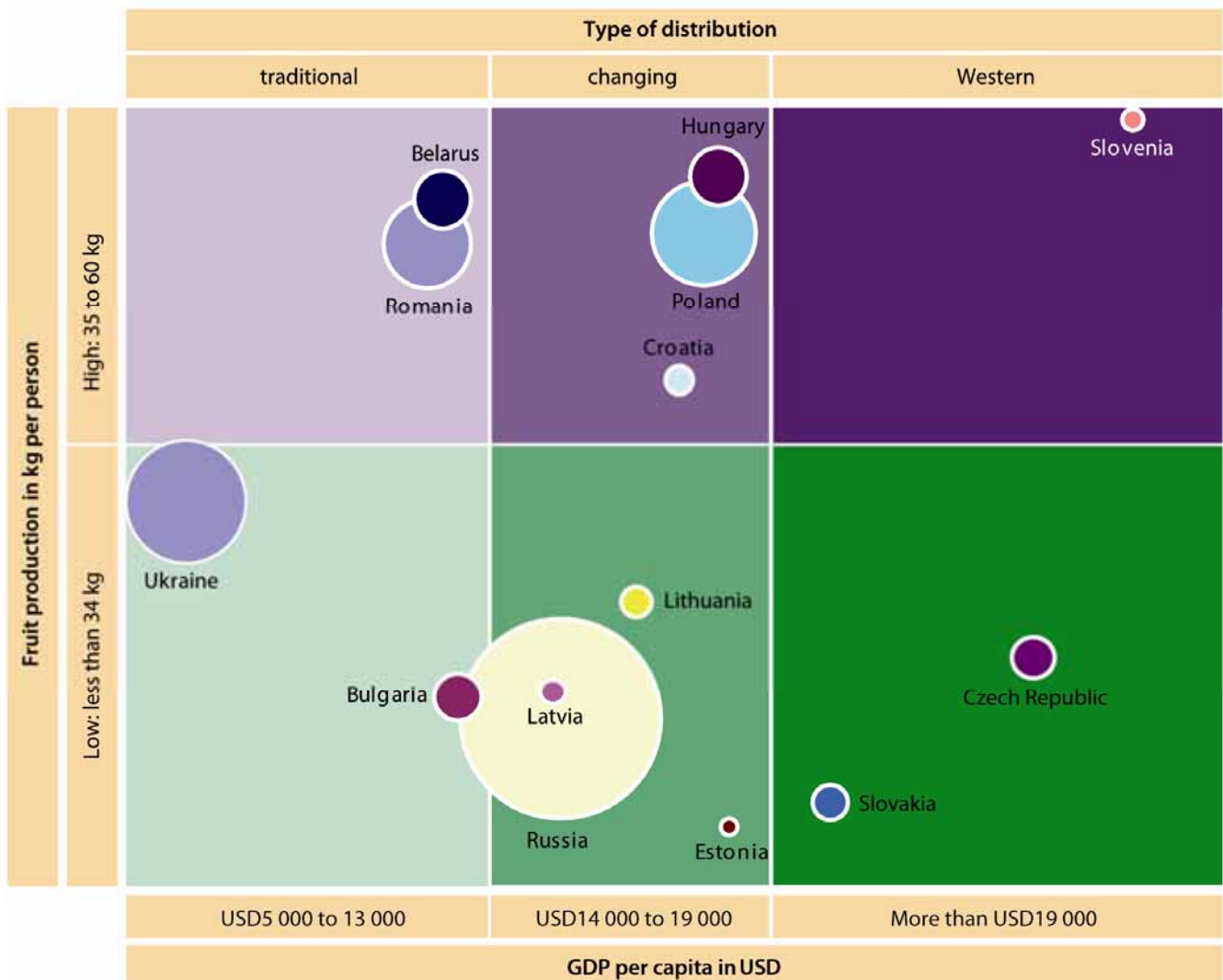
between Russia and EU-15 is 16 kg per person per year. Given its population, the scope for increase in sales in Russia is 3.6 million tonnes.

Per capita GDP is strongly correlated with the type of retail distribution. The higher the GDP, the more western the style of distribution. This also means that a high GDP makes possible a broad range of produce and with price being less of a primordial factor.

Production sources should therefore match quality, range and price to each type of market ■

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Eastern Europe - Estimated potential consumption of citrus and tropical fruits (banana and exotics) by country



Note: the size of each circle represents the potential consumption in each country. It was calculated by multiplying the population by the difference between its consumption and that of EU-15. Sources: Eurostat, official statistics / Processing: CIRAD-Fruitrop / Graphics: Chez Vincent

EASTERN EUROPE MARKET SHEETS

BALTIC

The three Baltic countries **Estonia**, **Latvia** and **Lithuania** have the same profile: a fairly small population and small fruit production for reasons of unfavourable climate. The development of supermarkets is lagging behind that in other countries as the small populations make these markets less attractive to multinationals. Exotic fruit imports per capita is smaller than the average for Eastern Europe.



The retail system consists mainly of small neighbourhood shops although supermarkets are becoming established little by little.

Population (2009): 6.8 million
Area: 175 000 km²
Capitals: Tallinn (Estonia), Riga (Latvia), Vilnius (Lithuania)
Population trend from 2000 to 2008: - 4.67‰
Per capita GDP (2009): EUR 12 000
GDP/PPP (purchasing power parity): 62.2 (base 100: EU)



Baltic countries — Advantages / Constraints		
	Positive	Negative
Internal	Distribution being modernised rapidly. Small competing fruit production.	Comparatively small population.
External	Seaboard.	

Baltic countries — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 7.77	+ 9.27	+ 10.00	+ 9.00	- 1.80	- 15.70

Baltic countries — Fruit market panorama												
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Baltic States kg/cap/year	EU-15 kg/cap/year		
			intra	extra	intra	extra						
Banana	-	-	54 483	4 045	+ 63	+ 173	13 071	+ 153	6.68	11.67	Germany France Belgium	Finland
Orange	-	-	15 539	23 401	- 59	+ 830	13 467	+ 66 525	3.75	15.01	Spain Egypt	Finland Belarus
Easy peelers	-	-	40 258	3 988	+ 77	+ 30 937	20 700	+ 548	3.46	6.20	Spain Italy	Russia
Lemon	-	-	11 250	4 199	+ 121	+ 228	5 628	+ 8 023	1.44	3.14	Netherlands Turkey Spain	Finland Russia
Grapefruit	-	-	7 714	7 554	+ 140	+ 11 315	4 583	+ 5 934	1.57	0.87	Netherlands Israel	Finland Russia
Total citrus	-	-	74 761	39 142	+ 65	+ 6 306	44 378	+ 36 710	10.22	25.21	Netherlands Spain Italy	Finland Russia
Pineapple	-	-	9 056	154	+ 263	+ 609	5 404	+ 2 139	0.56	1.90	Netherlands Belgium	Finland Russia
Mango	-	-	1 611	2	+ 22	-	1 275	+ 378	0.05	0.47	Netherlands	Russia
Avocado	-	-	2 582	-	+ 442	-	1 354	+ 698	0.18	0.76	Netherlands	Russia
Total exotics	-	-	13 249	156	+ 242	-	8 032	+ 1 072	0.79	3.13	Italy Netherlands	Russia
Kiwi	-	-	16 047	251	+ 125	-	11 744	+ 918	0.67	1.82	Netherlands Italy	Finland Russia
Apple	91 223	35 016	107 951	287	- 22	+ 1 095	81 967	- 202	12.09	20.37	Poland Netherlands	Russia
Pear	-	-	19 244	801	+ 39	+ 647	11 386	+ 139	1.27	6.41	Netherlands	Russia
Berries	14 894	-	9 137	565	+ 18	-	3 518	- 58	3.10	2.65	Poland Netherlands	Russia
Stone fruits	3 089	-	40 555	229	+ 31	-	27 330	+ 14	2.43	13.34	Spain	Finland Russia
Grapes	-	-	30 022	3 867	- 10	+ 34	18 180	+ 216	2.31	7.17	Netherlands Italy	Russia

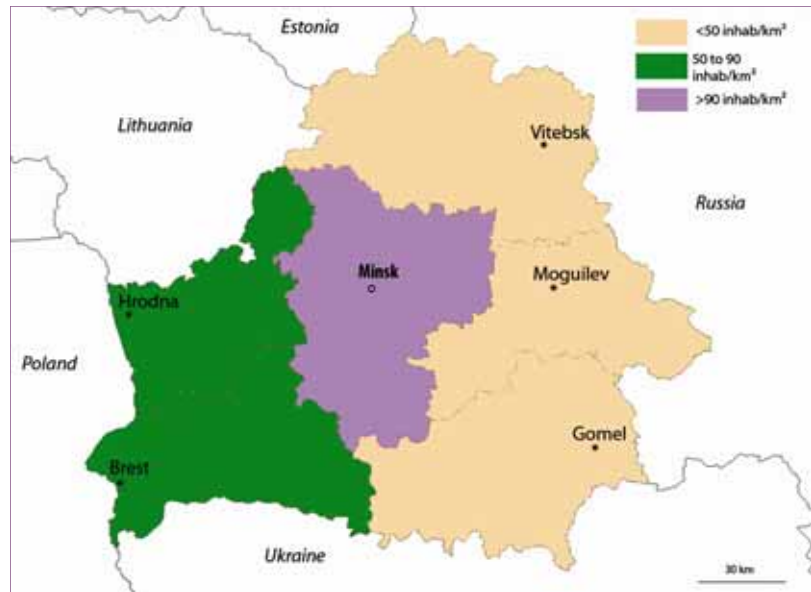
Source: EUROSTAT, FAO, professionals

BELARUS

Belarus features a low standard of living, large pip fruit production and practically no supermarkets. Sales of imported fruits are fairly unlikely to increase in the short term. The notion of price is the main criterion of choice as regards food. It is very difficult for foreign companies to set up in Belarus.



There is no modern distribution system. Practically all food purchases are in neighbourhood shops or state stores.



Population (2009): 9.5 million
Area: 200 000 km²
Capital: Minsk (1.7 million)
Population trend: + 0.4‰ in 2008
Per capita GDP (2009): EUR 8 800
GDP/PPP (purchasing power parity): 32.2 (base 100: EU)

Belarus — Advantages / Constraints		
	Positive	Negative
Internal	Average consumption potential.	Large competing fruit production. Low GDP.
External		Non-democratic state. High risk of bad debts. No seaboard.

Belarus — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 12.00	+ 2.60	+ 7.10	+ 7.30	+ 2.10	-

Belarus — Fruit market panorama											
	Production (2007-08 average) tonnes	Processing tonnes	Import		Export		Apparent consumption		Main suppliers	Main customers	
			in 2007 tonnes	Evolution 2004-07 %	in 2007 tonnes	Evolution 2004-07 %	Belarus kg/cap/year	EU-15 kg/cap/year			
Banana	-	-	28 097	+ 89.3	-	-	2.96	11.67	Ecuador	-	
Orange	-	-	53 159	+ 58.5	-	-	5.60	15.01	Morocco	-	
Easy peelers	-	-	0	-	-	-	0.00	6.20	-	-	
Lemon	-	-	7 934	+ 63.3	-	-	0.84	3.14	Turkey	-	
Grapefruit	-	-	4 675	+ 185.8	-	-	0.49	0.87	Turkey	-	
Total citrus	-	-	65 768	+ 68.1	-	-	6.92	25.21	Morocco	-	
Pineapple	-	-	1 249	+ 85.9	-	-	0.13	1.90	Côte d'Ivoire	-	
Mango	-	-	70	+ 20.7	-	-	0.01	0.47	Brazil	-	
Avocado	-	-	91	+ 203.3	-	-	0.01	0.76	Israel	-	
Total exotics	-	-	1 410	+ 103.3	-	-	0.15	3.13	Italy	-	
Kiwi	-	-	3 653	+ 70.9	-	-	0.38	1.82	-	-	
Apple	321 369	-	89 989	+ 38.1	3 672	- 50.5	42.91	20.37	Moldavia	Russia	
Pear	48 283	-	8 660	+ 132.4	30	- 71.7	5.99	6.41	Netherlands	Russia	
Berries	46 100	-	322	- 63.8	13	+ 44.4	4.89	2.65	Poland	Russia	
Stone fruits	87 040	-	14 455	- 4.8	19	- 95.0	10.68	13.34	Moldavia	Russia	
Grapes	-	-	19 129	+ 84.7	-	- 100.0	2.01	7.17	Moldavia	-	

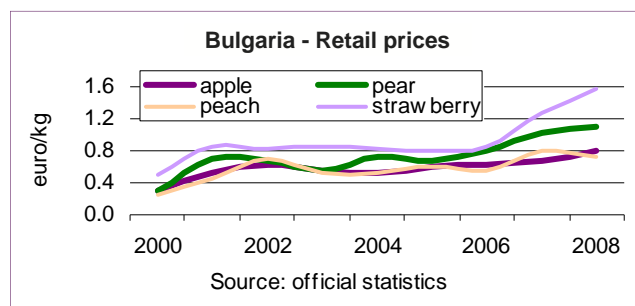
Source: EUROSTAT, FAO, professionals

BULGARIA

Bulgarian fruit production and imports are modest, running below the per capita average for Eastern Europe. Apparent consumption of fruits is therefore small, leading to considering that there is distinct scope for improvement as regards imported fruits. Supermarkets are little developed.



Population (2009): 7.2 million
Area: 111 000 km²
Capital: Sofia (1.2 million)
Population trend from 2000 to 2008: - 8.73%
Per capita GDP (2009): EUR 9 000
GDP/PPP (purchasing power parity): 41.3 (base 100: EU)



Bulgaria — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 6.60	+ 6.20	+ 6.30	+ 6.20	+ 6.00	- 5.00

Bulgaria — Advantages / Constraints		
	Positive	Negative
Internal	Small production of competing fruits.	Low GDP. Traditional distribution. Moderate scope for increased consumption.
External	Access by sea.	Ports little developed.

Bulgaria — Retail Sales distribution in 2006 — in percent				
Superstores	Supermarkets	Discount	Greengrocers, markets	Others
0.3	18.4	0.1	61.7	19.5

Bulgaria — Fruit market panorama												
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Bulgaria kg/cap/year	EU-15 kg/cap/year		
			intra	extra	intra	extra						
Banana	-	-	22 776	14 817	-	-70	276	+ 1 098	5.2	11.7	Ecuador Italy Greece	Greece Romania
Orange	-	-	11 016	7 385	- 37	+ 18	2 136	+ 9 395	2.3	15.0	Greece Turkey	Romania Lithuania
Easy peelers	-	-	9 804	9 153	+ 21	0	1 550	+ 26 626	2.4	6.2	Turkey Grece	Romania Russia
Lemon	-	-	1 694	20 505	+ 513	+ 84	3 686	+ 18 330	2.6	3.1	Turkey	Romania Lithuania
Grapefruit	-	-	842	11 528	+ 2 076	+ 109	2 269	+ 34 271	1.4	0.9	Turkey	Romania
Total citrus	-	-	23 356	48 570	+ 104	+ 64	9 641	+ 21 435	8.7	25.2	Turkey	Romania
Pineapple	-	-	625	9	-	- 98	1	- 87	0.1	1.9	Netherlands	Romania
Mango	-	-	51	0	+ 745	-	5	+ 160	0.0	0.5	Netherlands	Italy
Avocado	-	-	101	0	+ 332	-	0	-	0.0	0.8	Netherlands	-
Total exotics	-	-	777	9	+ 539	- 98	6	+ 36	0.1	1.8	-	-
Kiwi	-	-	3 983	0	0	-	2 228	+ 556	0.2	1.8	Greece	Russia
Apple	24 833	16 135	7 377	10 621	- 55	- 48	336	+ 537	3.7	20.4	Macedonia	Poland Greece
Pear	983	-	1 018	247	+ 2	- 48	10	+ 5	0.3	6.4	Greece	-
Berries	10 993	-	1 393	390	+ 770	+ 2 414	1 573	+ 3 065	1.6	2.7	Greece	Russia Greece
Stone fruits	69 373	-	2 767	2 823	- 43	+ 39	2 437	+ 521	10.1	13.3	Greece	Russia Ukraine
Grapes	15 750	-	2 038	1 120	- 14	- 82	698	+ 10 477	2.5	7.2	Greece	Lithuania

Source: EUROSTAT, FAO, professionals

CROATIA

Croatia is a small country but a large fruit producer. Thanks to its position and history, it has many trade links with the other former Yugoslav countries. Strong pressure from competing fruits and a medium GDP indicate that there is little potential for the development of imported fruits.



Modern retail distribution is fairly well developed and Konzum, a Croatian chain, dominates the market. The rest of modern retailing consists of cash & carry outlets and discount stores.

Population (2009): 4.5 million
Area: 57 000 km²
Capital: Zagreb (0.8 million)
Population trend from 2000 to 2008: - 9.53‰
Per capita GDP (2009): EUR 12 700
GDP/PPP (purchasing power parity): 67.2 (base 100: EU)

Croatia — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 4.20	+ 4.20	+ 4.70	+ 5.50	+ 2.40	- 5.80



Croatia — Advantages / Constraints		
	Positive	Negative
Internal	Medium GDP and retail distribution modernising rapidly.	Small consumption resources. Large production of competing fruits.
External	Good access by sea.	

Croatia — Fruit market panorama											
	Production (2007-08 average) tonnes	Processing tonnes	Import		Export		Apparent consumption		Main suppliers	Main customers	
			in 2007 tonnes	Evolution 2004-07 %	in 2007 tonnes	Evolution 2004-07 %	Croatia kg/cap/year	EU-15 kg/cap/year			
Banana	-	-	54 737	+ 7.5	20	- 80.4	12.16	11.67	Ecuador	Switzerland	
Orange	555	-	35 433	+ 29.9	20 465	+ 51.0	3.45	15.01	Greece	Slovenia	
Easy peelers	43 000	-	0	-	0	-	9.56	6.20	-	-	
Lemon	1 000	-	12 161	+ 2.2	56	+ 273.3	2.91	3.14	Spain	Slovenia	
Grapefruit	0	-	3 087	+ 47.2	0	-	0.69	0.87	Turkey	-	
Total citrus	44 555	-	50 681	+ 24.3	20 521	+ 51.6	16.60	25.21	Spain	Slovenia	
Pineapple	-	-	1 633	+ 171.3	0	- 100.0	0.36	1.90	Costa Rica	-	
Mango	-	-	86	+ 62.3	0	-	0.02	0.47	Brazil	-	
Avocado	-	-	53	+ 55.9	0	-	0.01	0.76	South Africa	-	
Total exotics	-	-	1 772	+ 96.5	3	- 70.0	0.39	3.13	Italy	-	
Kiwi	-	-	3 412	+ 64.1	3	- 1	0.76	1.82	-	-	
Apple	76 587	-	14 392	- 32.4	20 684	+ 617.2	15.62	20.37	Slovenia	Bosnia	
Pear	8 636	-	7 820	+ 51.7	0	- 100.0	3.66	6.41	Italy	-	
Berries	3 918	-	746	- 1.5	7	+ 16.7	1.03	2.65	Bosnia	-	
Stone fruits	86 421	-	12 877	- 4.9	163	+ 129.6	22.03	13.34	Italy	Slovenia	
Grapes	-	-	10 614	- 3.5	0	- 100.0	2.36	7.17	Italy	-	

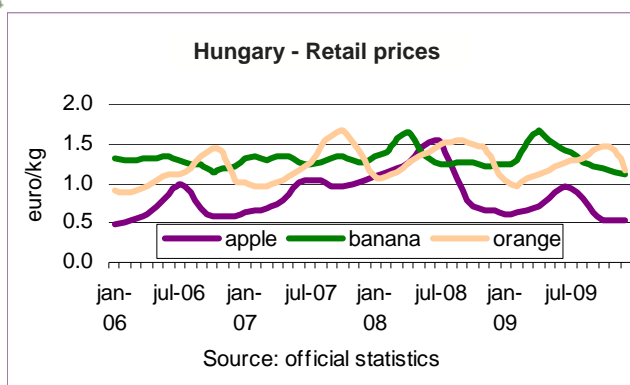
Source: EUROSTAT, FAO, professionnels

HUNGARY

Hungary is a large temperate fruit producer and a central position among the Eastern European countries. Fruit imports are difficult as the produce is more expensive than local production and not competitive. Per capita imports of citrus and bananas are among the smallest of the Eastern European countries, leading to supposing that there is considerable scope for progress. Furthermore, retailing is becoming increasingly westernised and concentrated and the standard of living is rising. Growth should be substantial in the imported fruits sector.



Population (2009): 10.0 million
Area: 93 000 km²
Capital: Budapest (1.7 million)
Population trend from 2000 to 2008: - 2.10‰
Per capita GDP (2009): EUR 13 300
GDP/PPP (purchasing power parity): 64.4 (base 100: EU)



Hungary — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 4.90	+ 3.50	+ 4.00	+ 1.00	+ 0.60	- 6.30

Hungary — Retail Sales distribution in 2007 — in percent				
Superstores	Supermarkets	Discount	Greengrocers, markets	Others
27	14	24	28	7

Hungary — Advantages / Constraints		
	Positive	Negative
Internal	Small consumption of imported fruits. Modern distribution structure.	Competing fruits at competitive prices.
External		No ports. Fruit must be carried by road.

Hungary — Fruit market panorama													
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers	
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Hungary kg/cap/year	EU-15 kg/cap/year			
			intra	extra	intra	extra							
Banana	-	-	89 145	0	+ 55	- 100	37 493	+ 23 949	5.2	11.7	Belgium Germany	Romania Slovakia	
Orange	-	-	26 728	1 034	- 8	+ 1	2 131	-	2.6	15.0	Greece Spain	Slovakia Romania	
Easy peelers	-	-	12 783	1 763	- 49	- 9	542	- 43	1.4	6.2	Spain Germany	Slovakia	
Lemon	-	-	8 076	5 660	- 25	- 15	2 306	-	1.1	3.1	Italy	Germany	
Grapefruit	-	-	1 641	3 133	+ 24	- 39	0	- 100	0.5	0.9	Turkey	-	
Total citrus	-	-	49 228	11 589	- 20	- 19	4 978	-	5.6	25.2	Spain	Slovakia	
Pineapple	-	-	3 399	6	+ 64	- 76	6	- 86	0.3	1.9	Czech Rep. France	-	
Mango	-	-	517	2	+ 6	- 70	0	- 100	0.1	0.5	Netherlands	-	
Avocado	-	-	250	0	- 17	-	0	-	0.0	0.8	Spain	-	
Total exotics	-	-	4 165	8	+ 17	- 73	6	- 93	0.4	1.8	-	-	
Kiwi	-	-	3 473	0	0	-	0	- 1	0.3	1.8	Italy	-	
Apple	553 300	191 134	8 664	130	-	-	23 085	- 51	34.8	20.4	Austria	Austria	
Pear	16 900	0	2 136	-	- 62	-	215	- 56	1.9	6.4	Netherlands	Finland	
Berries	11 889	-	1 082	183	-	-	531	- 22	1.3	2.7	Austria Netherlands	Austria	
Stone fruits	142 469	0	6 284	718	- 45	-	29 541	+ 36	12.0	13.3	Italy	Austria	
Grapes	13 850	-	4 550	59	- 52	- 89	685	- 85	1.8	7.2	Italy	Czech Rep.	

Source: EUROSTAT, FAO, professionals

POLAND



Europe's leading apple producer, Poland is also an important player in apple processing and exports. Poland is the largest importer of fruits in the eastern part of the EU and the third largest market after Russia and Ukraine. The standard of living is higher, giving the market strong potential for fruit imports. Food retailing is changing rapidly and many supermarkets are being opened (+ 15 % from 2006 to 2007).

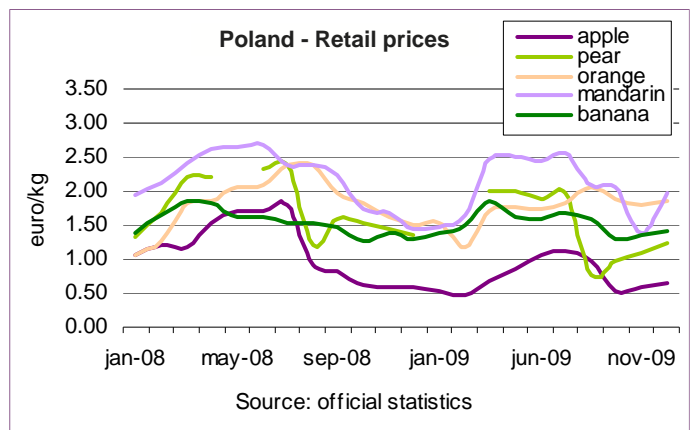
Population (2009): 38.0 million
Area: 312 000 km²
Capital: Warsaw (1.7 million)
Population trend from 2000 to 2008: - 1.56‰
Per capita GDP (2009): EUR 13 800
GDP/PPP (purchasing power parity): 56.4 (base 100: EU)



Poland — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 5.30	+ 3.60	+ 6.20	+ 6.80	+ 5.00	+ 1.70

Poland — Retail Sales distribution in 2007 — in percent				
Superstores	Supermarkets	Discount	Greengrocers, markets	Others
20	17	17	37	9

Poland — Advantages / Constraints		
	Positive	Negative
Internal	Large consumption potential. Retail distribution being modernised.	Very large production of fruits sold at low prices.
External	Seaboard. Developed ports.	

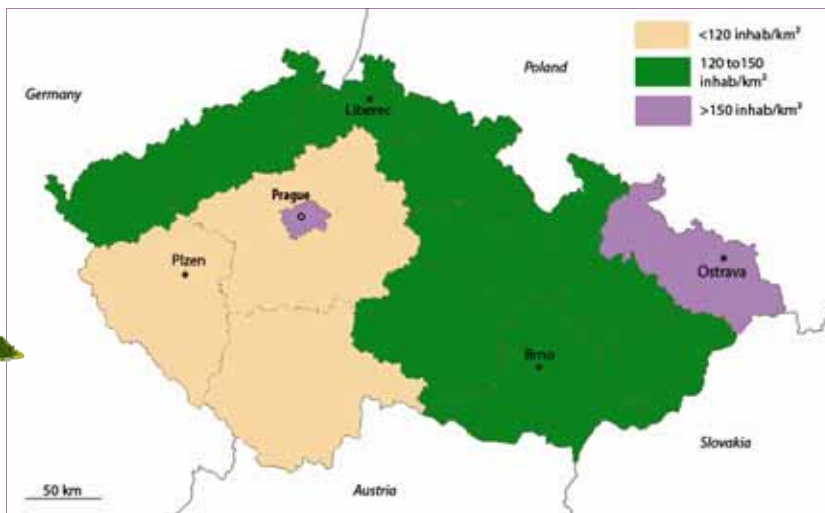


Poland — Fruit market panorama												
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Poland kg/cap/year	EU-15 kg/cap/year		
			intra	extra	intra	extra						
Banana	-	-	185 656	34 382	+ 8	- 44	10 310	- 54	5.5	11.7	Belgium Germany	Germany
Orange	-	-	116 210	1 972	+ 21	+ 53	6 338	- 7	2.9	15.0	Spain	Ukraine
Easy peelers	-	-	138 206	4 083	- 10	+ 11	22 430	+ 97	3.2	6.2	Spain	Ukraine
Lemon	-	-	82 679	21 929	+ 2	+ 9	8 410	+ 62	2.5	3.1	Spain	Ukraine
Grapefruit	-	-	32 911	10 382	+ 108	- 29	1 367	+ 251	1.1	0.9	Netherlands Germany	Belarus
Total citrus	-	-	370 006	38 366	+ 13	+ 1	38 545	+ 78	9.7	25.2	Spain	Ukraine
Pineapple	-	-	9 549	131	+ 6	- 55	2 445	- 19	0.2	1.9	Netherlands	Ukraine
Mango	-	-	1 839	4	- 28	- 32	287	+ 132	0.0	0.5	Netherlands	Ukraine
Avocado	-	-	2 114	-	+ 39	-	294	+ 302	0.0	0.8	Netherlands	Ukraine
Total exotics	-	-	13 502	135	+ 6	- 44	3 026	+ 138	0.3	1.8	-	-
Kiwi	-	-	32 995	94	0	- 1	9 739	0	0.6	1.8	Italy	Ukraine
Apple	2 567 881	1 344 000	20 923	79	- 2	- 59	747 774	+ 88	13.1	20.4	Netherlands	Russia Ukraine
Pear	66 055	0	14 496	117	+ 17	- 49	19 292	+ 485	1.6	6.4	Netherlands	Russia Ukraine
Berries	270 640	0	3 860	1 645	- 33	-	48 756	+ 1	6.0	2.7	Spain	Germany Russia
Stone fruits	353 587	0	98 730	388	+ 24	-	65 134	+ 43	10.2	13.3	Spain	Russia Ukraine
Grapes	-	-	101 891	3 781	+ 6	- 40	9 154	- 27	2.5	7.2	Italy	Ukraine

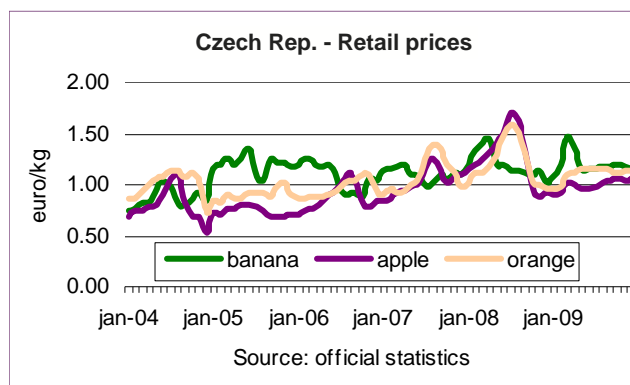
Source: EUROSTAT, FAO, professionals

CZECH REP.

The Czech market is very similar to that of Western European countries. Small fruit production and a comparatively high standard of living make it an attractive market for imported temperate and tropical fruits. Food distribution is by a fairly dense western style network of superstores and supermarkets. The Czech Republic is a centre for imported fruits re-shipped throughout Eastern Europe.



Population (2009): 10.0 million
Area: 78 000 km²
Capital: Prague (1.3 million)
Population trend from 2000 to 2008: + 2.38%
Per capita GDP (2009): EUR 18 500
GDP/PPP (purchasing power parity): 80.4 (base 100: EU)



Czech Republic — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 1.90	+ 3.60	+ 6.80	+ 6.10	+ 2.50	- 4.80

Czech Republic — Retail Sales distribution in 2007 — in percent				
Superstores	Supermarkets	Discount	Greengrocers, markets	Others
34	16	22	23	6

Czech Republic — Advantages / Constraints		
	Positive	Negative
Internal	Modern retail distribution. High GDP. Moderate fruit production.	Moderate scope for consumption. Large imports.
External		No seaboard.

Czech Republic — Fruit market panorama												
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Czech Rep. kg/cap/year	EU-15 kg/cap/year		
			intra	extra	intra	extra						
Banana	-	-	155 054	2 491	+ 39	- 58	34 698	+ 58	12.3	11.7	France Germany	Slovakia Romania
Orange	-	-	53 990	1 284	- 7	+ 89	7 988	- 15	4.7	15.0	Spain Greece	Slovakia
Easy peelers	-	-	44 587	3 175	- 27	- 25	7 981	- 13	4.0	6.2	Spain	Slovakia
Lemon	-	-	19 687	7 796	- 20	+ 149	3 944	+ 9	2.4	3.1	Spain Turkey	Slovakia
Grapefruit	-	-	10 745	3 680	+ 39	- 14	2 403	- 31	1.2	0.9	Netherlands Turkey	Slovakia
Total citrus	-	-	129 009	15 935	- 12	+ 72	22 316	- 12	12.3	25.2	Spain	Slovakia
Pineapple	-	-	10 452	1	- 3	+ 1 200	1 690	+ 4	0.9	1.9	Netherlands	Slovakia
Mango	-	-	1 920	109	- 37	+ 166	236	- 42	0.2	0.5	Netherlands	Slovakia
Avocado	-	-	489	0	- 26	-	64	+ 18	0.0	0.8	Netherlands	Slovakia
Total exotics	-	-	12 861	111	- 22	+ 683	1 989	- 6	1.1	1.8	-	-
Kiwi	-	-	14 691	47	0	- 1	1 886	0	1.3	1.8	Netherlands	Slovakia
Apple	135 438	-	60 308	-	- 24	-	46 058	- 39	15.0	20.4	Poland Italy	Germany Austria
Pear	2 708	-	9 613	1	+ 28	- 95	1 787	+ 42	1.1	6.4	Netherlands Italy	Slovakia Austria
Berries	15 349	-	8 544	75	+ 13	+ 2	389	- 10	2.4	2.7	Italy Germany	Slovakia
Stone fruits	23 361	-	44 666	962	- 3	- 3	8 730	- 6	5.9	13.3	Italy Netherlands	Slovakia
Grapes	-	-	50 279	739	+ 3	+ 27	5 042	+ 56	4.6	7.2	Italy	Slovakia

Source: EUROSTAT, FAO, professionals

ROMANIA

Romanian fruit production is very large but, unlike neighbouring countries, it is divided between stone and pip fruits and this modifies mechanisms and the sales calendar. Romania's per capita imports of citrus and tropical fruits are the lowest of the Eastern European countries.



The population is large and so potential for imported fruits is substantial, even if the low prices of local produce and the low standard of living are serious obstacles.



Population (2009): 21.5 million
Area: 239 000 km²
Capital: Bucarest (2.5 million)
Population trend from 2000 to 2008: - 2.00‰
Per capita GDP (2009): EUR 8 500
GDP/PPP (purchasing power parity): 42 (base 100: EU)

Romania — Retail				
Sales distribution in 2008 — in percent				
Superstores	Supermarkets	Discount	Greengrocers, markets	Others (+ cash & carry)
4	16	2	61	17

Romania — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 8.50	+ 4.20	+ 7.90	+ 6.30	+ 7.30	- 7.10

Romania — Advantages / Constraints		
	Positive	Negative
Internal	Large consumption potential. Moderate imports.	Large production of fruits sold at low prices.
External	Good access to the sea.	Medium risk of bad debts. It is difficult to fight corruption.

Romania — Fruit market panorama													
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers	
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Romania kg/cap/year	EU-15 kg/cap/year			
			intra	extra	intra	extra							
Banana	-	-	22 958	60 022	+ 717	328	- 61	1 511	+ 6 145	3.8	11.7	Ecuador	Bulgaria
Orange	-	-	27 538	15 701	- 38	- 63	277	+ 298	2.0	15.0	Greece	Moldavia	
Easy peelers	-	-	8 539	21 683	+ 68	- 23	232	+ 160	1.4	6.2	Turkey	Bulgaria	
Lemon	-	-	4 069	18 249	+ 422	- 45	310	+ 634	1.0	3.1	Turkey	Bulgaria	
Grapefruit	-	-	3 318	24 909	+ 460	- 6	232	+ 718	1.3	0.9	Turkey	Bulgaria	
Total citrus	-	-	43 464	80 541	+ 64	- 30	1 052	+ 459	5.7	25.2	Turkey	Bulgaria	
Pineapple	-	-	2 075	1	+ 2 210	- 100	179	+ 4 053	0.1	1.9	Netherlands	Italy	
Mango	-	-	320	0	+ 29 000	- 100	6	+ 2 650	0.0	0.5	Netherlands	-	
Avocado	-	-	356	0	+ 1 517	-	6	+ 1 450	0.0	0.8	Netherlands	-	
Total exotics	-	-	2 750	1	+ 10 909	- 100	190	+ 2 718	0.1	1.8	-	-	
Kiwi	-	-	6 217	115	0	-	46	+ 2	0.3	1.8	Greece	Moldavia	
Apple	467 193	96 402	29 429	2 509	- 41	- 91	4 759	+ 654	18.5	20.4	Poland	Italy Germany	
Pear	57 714	0	4 521	2 478	- 42	+ 24	102	+ 898	3.0	6.4	Turkey	Italy	
Berries	27 065	0	733	5 392	+ 88	-	114	- 87	1.5	2.7	Turkey	Germany	
Stone fruits	536 927	0	12 393	2 312	- 38	- 80	3 510	- 58	25.5	13.3	Greece	Moldavia	
Grapes	72 000	-	9 144	4 816	- 21	- 39	147	+ 223	4.0	7.2	Italy	Italy	

Source: EUROSTAT, FAO, professionals

RUSSIA



With a population of 142 million and continuously increasing fruit consumption, Russia is the leading market for imported fruits in terms of size and growth. Its comparatively small fruit production makes imports large, even of temperate fruits. In addition, the retail network is becoming modernised rapidly, with covered markets losing ground to supermarkets.

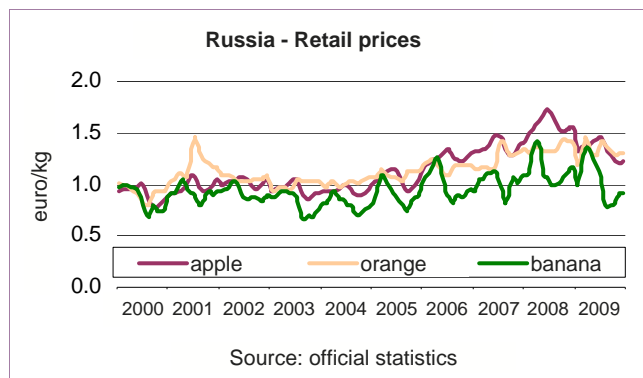
Population (2009): 142 million
Area: 17 000 000 km²
Capital: Moscow (14.4 million)
Population trend from 2000 to 2008: - 4.08%
Per capita GDP (2009): EUR 10 800
GDP/PPP (purchasing power parity): 64.4 (base 100: EU)



Russia — GDP — in percent					
2004	2005	2006	2007	2008	2009
-	+ 6.40	+ 7.70	+ 8.10	+ 5.60	- 7.00

Russia — Retail				
Sales distribution in 2010 — in percent				
Superstores	Supermarkets	Discount	Greengrocers, markets	Kiosks
12	15	21	40	12

Russia — Advantages / Constraints		
	Positive	Negative
Internal	Very large potential consumption. Small production of competing fruits.	
External	Good access by sea.	Access to ports difficult in the winter.

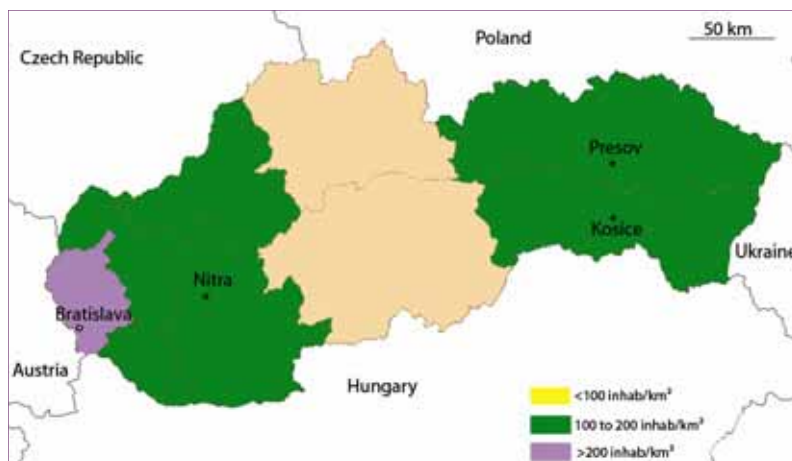


Russia — Fruit market panorama										
	Production (2007-08 average) tonnes	Processing tonnes	Import		Export		Apparent consumption		Main suppliers	Main customers
			in 2007 tonnes	Evolution 2004-07 %	in 2007 tonnes	Evolution 2004-07 %	Russia kg/cap/year	EU-15 kg/cap/year		
Banana	-	-	978 504	+ 14.0	19 008	+ 34.1	6.76	11.67	Ecuador	Kazakhstan
Orange	260	-	490 955	+ 23.1	15 511	+ 173.9	3.35	15.01	Egypt	Kazakhstan
Easy peelers	-	-	479 331	-	1 829	+ 894.0	3.36	6.20	Morocco	Kazakhstan
Lemon	-	-	203 911	+ 22.6	6 892	+ 162.7	1.39	3.14	Argentina	Kazakhstan
Grapefruit	-	-	84 174	+ 88.0	557	+ 596.3	0.59	0.87	Turkey	Kazakhstan
Total citrus	260	-	1 258 371	+ 18.6	24 789	+ 233.4	8.69	25.21	Morocco	Kazakhstan
Pineapple	-	-	33 431	+ 35.5	174	+ 176.2	0.23	1.90	Côte d'Ivoire	Georgia
Mango	-	-	4 517	+ 74.7	20	+ 566.7	0.03	0.47	Brazil	Ukraine
Avocado	-	-	4 392	+ 163.2	6	-	0.03	0.76	Israel	-
Total exotics	-	-	42 340	+ 91.1	597	+ 1 256.8	0.30	3.13	Italy	Netherlands
Kiwi	-	-	58 463	+ 55.2	597	+ 13.0	0.41	1.82	-	Netherlands
Apple	1 900 000	1 000 000	931 232	+ 32.0	3 739	+ 62.8	12.87	20.37	Poland	Kazakhstan
Pear	78 000	0	377 297	+ 46.7	2 136	+ 2 273.3	3.19	6.41	Argentina	Kazakhstan
Berries	332 300	0	23 160	+ 202.7	116	- 93.1	2.50	2.65	Poland	-
Stone fruits	532 400	0	287 143	+ 55.4	77	+ 413.3	5.77	13.34	Greece	China
Grapes	-	-	380 657	+ 47.8	460	+ 1 433.3	2.68	7.17	Turkey	Kazakhstan

Source: EUROSTAT, FAO, professionals

SLOVAKIA

Pressure from temperate fruits is among the weakest of Eastern Europe. Tropical fruit imports are thus quite large. As the population is small, potential for trade growth is fairly small.



Population (2009): 5.5 million
Area: 49 000 km²
Capital: Bratislava (0.4 million)
Population trend from 2000 to 2008: + 0.08%
Per capita GDP (2009): EUR 15 100
GDP/PPP (purchasing power parity): 72.2 (base 100: EU)



Slovakia — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 5.00	+ 6.70	+ 8.50	+ 10.60	+ 6.20	- 4.70

Slovakia — Retail Sales distribution in 2007 — in percent				
Superstores	Supermarkets	Discount	Greengrocers, markets	Others
24	24	14	34	4

Slovakia — Advantages / Constraints		
	Positive	Negative
Internal	Few competing fruits. Modern retail distribution. High GDP.	Moderate consumption potential.
External	Small risk of bad debts.	No seaboard.

Slovakia — Fruit market panorama												
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Slovakia kg/cap/year	EU-15 kg/cap/year		
			intra	extra	intra	extra						
Banana	-	-	63 733	41	+ 29	- 37	10 914	+ 25	9.6	11.7	Czech Rep. Belgium	Czech Rep
Orange	-	-	21 565	187	- 26	+ 105	2 185	- 82	3.6	15.0	Greece Czech Rep.	Hungary
Easy peelers	-	-	17 839	1 804	- 22	+ 109	2 878	- 22	3.0	6.2	Spain Czech Rep.	Hungary
Lemon	-	-	8 850	931	- 6	+ 53	1 640	- 1	1.5	3.1	Czech Rep. Spain	Hungary
Grapefruit	-	-	4 631	326	+ 10	- 63	467	- 33	0.8	0.9	Czech Rep.	Hungary
Total citrus	-	-	52 885	3 248	- 18	+ 75	7 169	- 36	8.9	25.2	Czech Rep.	Hungary
Pineapple	-	-	4 016	17	+ 62	- 52	142	- 63	0.7	1.9	Poland	Czech Rep
Mango	-	-	445	0	- 49	-	4	- 96	0.1	0.5	Germany	-
Avocado	-	-	229	0	- 46	-	12	- 40	0.0	0.8	Netherlands	-
Total exotics	-	-	4 690	17	- 11	- 52	158	- 66	0.8	1.8	-	-
Kiwi	-	-	6 024	0	0	-	974	- 1	0.9	1.8	Germany	Hungary
Apple	29 764	-	37 255	nd	+ 12	-	11 188	- 22	10.2	20.4	Poland Czech Rep. Italy	Czech Rep.
Pear	349	-	4 326	nd	+ 22	-	743	+ 11	0.7	6.4	Netherlands	Czech Rep
Berries	656	-	7 589	0	+ 576	-	23	- 71	1.5	2.7	United Kingdom	Czech Rep.
Stone fruits	5 167	-	14 320	764	+ 45	-	2 811	- 10	3.2	13.3	Italy	Hungary
Grapes	-	-	15 439	38	+ 2	+ 2	1 378	- 52	2.6	7.2	Italy	Hungary

Source: EUROSTAT, FAO, professionals

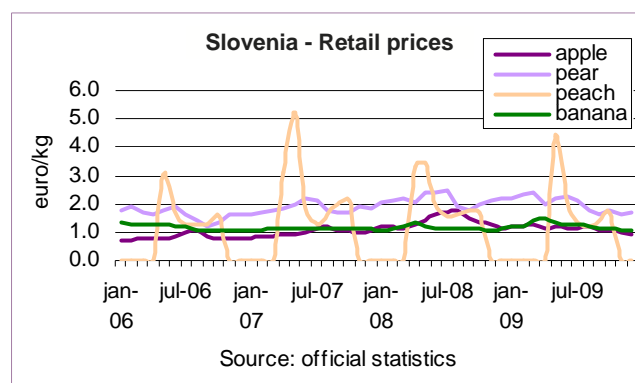
SLOVENIA

Slovenia has a population of two million and very large fruit production. It is a centre for imported citrus and tropical fruits (bananas) that are then forwarded to Central Europe (Romania and former Yugoslavia). The retail distribution network is similar to the Western European model and development is fairly saturated. The import market is large and future growth seems improbable.



Modern retailing accounts for 67% of food sales. However, the small proportion of urbanisation (51%) limits the establishment of large supermarkets.

Population (2009): 2.0 million
Area: 20 000 km ²
Capital: Ljubljana (0.3 million)
Population trend from 2000 to 2008: + 3.40‰
Per capita GDP (2009): EUR 20 000
GDP/PPP (purchasing power parity): 90.9 (base 100: EU)



Slovenia — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 4.30	+ 4.50	+ 5.80	+ 6.80	+ 3.50	- 7.80

Slovenia — Advantages / Constraints		
	Positive	Negative
Internal	High GDP. Modern retail distribution.	Strong competition from local produce Small consumption potential.
External		Limited access by sea.

Slovenia — Fruit market panorama												
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Slovenia kg/cap/year	EU-15 kg/cap/year		
			intra	extra	intra	extra						
Banana	-	-	1 192	69 872	- 83	+ 137	42 512	+ 332	14.3	11.7	Ecuador Colombia	Romania Italy
Orange	-	-	16 825	2 596	+ 20	- 43	10 571	+ 107	4.4	15.0	Greece Italy	Croatia Bosnia
Easy peelers	-	-	15 304	5 374	+ 53	- 34	12 473	+ 106	4.1	6.2	Italy Croatia	Bosnia
Lemon	-	-	5 554	3 090	+ 8	- 53	6 802	+ 11	0.9	3.1	Spain Turkey	Croatia Bosnia
Grapefruit	-	-	1 317	7 852	+ 22	+ 30	7 217	+ 25	1.0	0.9	Israel	Serbia
Total citrus	-	-	38 999	18 913	+ 31	- 12	37 064	+ 73	10.4	25.2	Italy	Bosnia
Pineapple	-	-	3 335	3	+ 42	- 87	2 078	+ 226	0.6	1.9	Italy	Croatia Bosnia
Mango	-	-	296	257	+ 8	+ 345	343	+ 273	0.1	0.5	Austria	Netherlands
Avocado	-	-	268	985	+ 94	+ 212	1 069	+ 229	0.1	0.8	Italy	Netherlands
Total exotics	160	-	3 898	1 245	+ 48	+ 157	3 489	+ 243	0.8	1.8	-	-
Kiwi	160	-	8 843	23	+ 1	-	8 833	+ 2	0.1	1.8	Italy	Serbia
Apple	108 693	-	17 434	494	+ 99	+ 465	27 370	+ 24	49.6	20.4	Austria Hungary	Bosnia Croatia
Pear	10 561	-	4 835	275	+ 7	+ 144	5 965	+ 39	4.9	6.4	Italy	Croatia Bosnia
Berries	1 817	-	1 790	141	+ 26	+ 123	548	+ 235	1.6	2.7	Italy	Croatia
Stone fruits	17 074	-	15 217	1 446	+ 25	+ 34	8 042	+ 97	12.8	13.3	Italy Netherlands	Croatia Bosnia
Grapes	-	-	9 538	793	+ 19	+ 1 239	9 010	+ 7	0.7	7.2	Italy	Bosnia Croatia

Source: EUROSTAT, FAO, professionals

UKRAINE

Ukraine has the second largest population of the Eastern European countries. Large fruit production—mainly apples—makes it a small importer. The development of an import market is difficult there as per capita GDP is low (4 600 euros) and the retail distribution network is still very traditional, with supermarkets accounting for only 10% of sales.



Population (2009): 46 million
Area: 600 000 km²
Capital: Kiev (2.8 million)
Population trend from 2000 to 2008: - 6.38‰
Per capita GDP (2009): EUR 4 600
GDP/PPP (purchasing power parity): 27.0 (base 100: EU)

Ukraine — Retail				
Sales distribution in 2002 — in percent				
Superstores	Supermarkets	Discount	Greengrocers	Markets
1	6	3	40	50

Ukraine — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 12.10	+ 2.70	+ 7.30	+ 7.90	+ 2.10	- 9.00

Ukraine — Advantages / Constraints		
	Positive	Negative
Internal	Large population. Moderate pressure from competing fruits.	Fairly traditional retail distribution. Very low GDP.
External	Extensive access by sea.	Ports little developed.

Ukraine — Fruit market panorama											
	Production (2007-08 average) tonnes	Processing tonnes	Import		Export		Apparent consumption		Main suppliers	Main customers	
			in 2007 tonnes	Evolution 2004-07 %	in 2007 tonnes	Evolution 2004-07 %	Croatia kg/cap/year	EU-15 kg/cap/year			
Banana	-	-	236 985	+ 256.3	75	+ 3 650.0	5.15	11.67	Ecuador	Lithuania	
Orange	-	-	102 707	+ 82.4	35	-	2.23	15.01	Egypt	-	
Easy peelers	-	-	140 009	-	18	-	3.04	6.20	Turkey	Russia	
Lemon	-	-	63 824	+ 74.9	5	-	1.39	3.14	Turkey	-	
Grapefruit	-	-	18 143	+ 215.4	0	-	0.39	0.87	Turkey	-	
Total citrus	-	-	324 683	+ 52.8	58	-	7.06	25.21	Turkey	-	
Pineapple	-	-	5 247	+ 440.4	0	-	0.11	1.90	Costa Rica	-	
Mango	-	-	0	-	0	-	0.00	0.47	-	-	
Avocado	-	-	598	+ 2 200.0	0	-	0.01	0.76	Israel	-	
Total exotics	-	-	5 845	+ 1 320.2	0	-	0.13	3.13	Italy	-	
Kiwi	-	-	20 294	+ 25 267.5	0	-	0.44	1.82	-	-	
Apple	737 100	20 782	167 603	+ 27 286.1	52 049	+ 4 107.7	18.08	20.37	Moldavia	Russia	
Pear	132 900	-	4 868	+ 11 773.2	981	+ 1 157.7	2.97	6.41	Moldavia	Russia	
Berries	79 000	-	222	+ 4 340.0	2	- 99.9	1.72	2.65	Spain	-	
Stone fruits	416 900	-	35 310	+ 1 765 400.0	3 981	+ 702.6	9.74	13.34	Greece	Russia	
Grapes	-	-	74 569	+ 22 428.4	483	+ 245.0	1.61	7.17	Turkey	Russia	

Source: EUROSTAT, FAO, professionals

Wholesale market prices in Europe

June 2010

					EUROPEAN UNION — IN EUROS					
					Germany	Belgium	France	Holland	UK	
AVOCADO	Air	TROPICAL	BRAZIL	Box			13.00			
	Sea	FUERTE	KENYA	Box					5.77	
			PERU	Box		5.35				
	HASS		SOUTH AFRICA	Box	6.00	5.50	5.50	6.00	5.77	
			KENYA	Box			6.50			
			PERU	Box	6.75	7.25	7.46	8.50		
			SOUTH AFRICA	Box	6.00	7.25	7.46	8.38		
	PINKERTON		SOUTH AFRICA	Box				6.38		
BANANA	Air	RED SMALL	ECUADOR	kg				4.88		
			COLOMBIA	kg		6.93	7.04			
			ECUADOR	kg				5.00		
	Sea	SMALL	ECUADOR	kg			1.75			
CARAMBOLA	Air		MALAYSIA	kg		4.59	4.64	4.15		
	Sea		MALAYSIA	kg				3.29		
COCONUT	Sea		COSTA RICA	Bag				15.50		
			COTE D'IVOIRE	Bag		12.50	10.67	7.13		
			SRI LANKA	Bag				15.00		
DATE	Sea	MEDJOOL	ISRAEL	kg	6.40	6.60	8.00	6.98		
			MEXICO	kg	9.20			8.60		
			NOT DETERMINED	TUNISIA	kg				1.77	
GINGER	Sea		BRAZIL	kg				1.85		
			CHINA	kg	1.31	1.57	1.88	1.85		
			THAILAND	kg	1.31		2.00	1.65		
GUAVA	Air		BRAZIL	kg			5.03	5.83		
			THAILAND	kg		6.63				
KUMQUAT	Air		SOUTH AFRICA	kg		5.04	5.10	4.75		
LIME	Air		MEXICO	kg			3.80			
	Sea		BRAZIL	kg	2.00	2.63	2.70	2.63	3.03	
			MEXICO	kg	2.56	2.84		2.82	2.94	
			VENEZUELA	kg				2.75		
LITCHI	Air		THAILAND	kg	8.00					
	Sea		ISRAEL	kg	4.50	3.05				
			MEXICO	kg		3.10				
MANGO	Air	KENT	MALI	kg			4.20			
			MEXICO	kg			5.80			
			SENEGAL	kg			4.20			
			NAM DOK MAI	THAILAND	kg				7.80	
			PALMER	BRAZIL	kg	3.00		3.00	4.00	

					EUROPEAN UNION — IN EUROS				
					Germany	Belgium	France	Holland	UK
MANGO	Sea	ATKINS	BRAZIL	kg	1.00		1.38	1.38	1.35
			GUATEMALA	kg				1.07	
		KEITT	BRAZIL	kg				1.50	
			MALI	kg		1.31			
		KENT	DOMINICAN REP.	kg			1.56		
			MALI	kg			1.88		
		NOT DETERMINED PALMER	COTE D'IVOIRE	kg				1.69	
BRAZIL			kg	1.00					
MANGOSTEEN	Air		INDONESIA	kg			9.00		
			THAILAND	kg		6.50		7.00	
MANIOC	Sea		COSTA RICA	kg		1.32	1.30	1.00	
MELON	Sea	GALIA WATERMELON	COLOMBIA	kg					1.30
			TUNISIA	kg			0.38		
PAPAYA	Air	FORMOSA	BRAZIL	kg				3.11	
			NOT DETERMINED	BRAZIL	kg		3.80		3.77
	Sea		BRAZIL	kg				2.13	
			ECUADOR	kg				2.13	
PASSION FRUIT	Air	NOT DETERMINED PURPLE	COLOMBIA	kg	5.00		5.40	4.63	
			KENYA	kg	5.00			4.25	
			SOUTH AFRICA	kg	6.25			4.57	
			ZIMBABWE	kg		4.94	5.50	4.44	
			YELLOW	COLOMBIA	kg	7.50	8.00		7.75
PERSIMMON	Sea		SOUTH AFRICA	kg	1.80	2.14			
			URUGUAY	kg			2.20		
PHYSALIS	Air	PREPACKED	COLOMBIA	kg			10.27	10.41	
	Sea		COLOMBIA	kg	7.92			8.95	
PINEAPPLE	Air	SMOOTH CAYENNE VICTORIA	GHANA	kg			1.98		
			MAURITIUS	Box		11.00		10.50	
			MAURITIUS	kg			3.30		
			REUNION	kg			4.50		
			SOUTH AFRICA	Box	11.00	11.00		10.50	
	Sea	MD-2	COSTA RICA	Box	5.50	6.93		6.50	8.45
			COSTA RICA	kg			0.95		
PITAHAYA	Air	RED	THAILAND	kg	5.33				
			VIET NAM	kg		6.17	9.00	6.25	
			YELLOW	ECUADOR	kg				8.50
PLANTAIN	Sea		COLOMBIA	kg				0.97	
			ECUADOR	kg			0.88		
RAMBUTAN	Air		THAILAND	kg		6.00	9.00	6.50	
SWEET POTATO	Sea		HONDURAS	kg			1.58		
			SOUTH AFRICA	kg			1.30	1.10	1.14
TAMARILLO	Air		COLOMBIA	kg		5.97		6.20	
YAM	Sea		GHANA	kg			1.35	1.23	

Note: according to grade

These prices are based on monthly information from the Market News Service, International Trade Centre UNCTAD/WTO (ITC), Geneva.
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