

CLOSE-UP:
MANGO



Counter-season melon:
a few more adjustments!

Fruit juice and pulp
prices in Europe



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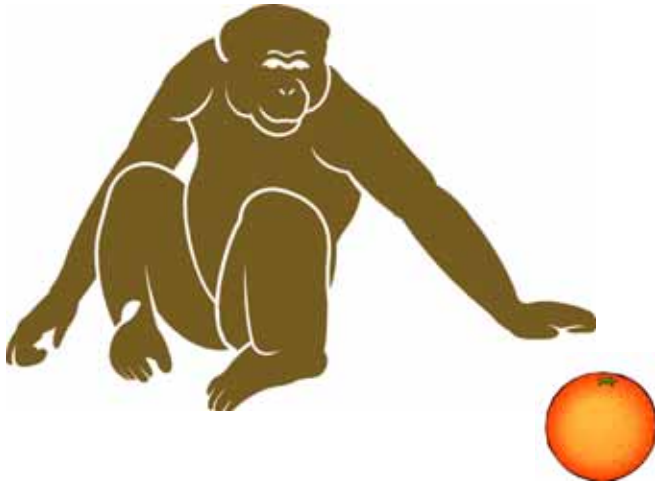
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A citrus variety with considerable commercial potential discovered by primates with no chromatographic facilities and who have probably never heard of the bases of varietal selection? The story was published recently in the South African press. Intrigued by the baboons that come down from the mountains every year to eat the fruits of one particular tree, a citrus sector professional decided to examine the characteristics of the fruit a little more closely. He noticed that the merry monkeys had detected a spontaneous mutation of 'Minneola' that is earlier and has a higher sugar content than the other clones. This is a bit destabilising for the scientific community that sometimes swallows millions of dollars or euros in breeding programmes that give no results. The singer Jean Ferrat said that woman is the future of man. Might the monkey be the future of the researcher?

Eric Imbert



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FRUITROP

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Wholesale market prices in Europe

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Cover photograph: Guy Bréhinier

Avocado

January 2011

Mixed market performance. Demand was very dull, especially in France where there were distinctly fewer promotion operations than in previous years. However, prices of 'Hass' remained high as supply was still moderate, especially of South American fruits. The Chilean season slowed early while Mexican exporters reserved practically all their goods for the USA. The shortage was not compensated by shipments from Israel, even though these were larger than average. Spanish exporters remained fairly discreet as the domestic market is good. Supply was completed by a few batches from the Dominican Republic. This favourable context did not benefit green varieties; the market was fairly amply supplied and remained sluggish. Prices remained lower than average.



■ **Avocado from Chile:** drought to follow frost? Drought in Region 5 caused by the climatic phenomenon La Niña may result in a smaller 2011 harvest than expected. Faced with a shortage of water, some farmers have apparently decided to prune their trees hard to avoid having small fruits, even if this limits production. Region 5 accounts for more than 60% of the country's orchards (Cabildo, Quillota, la Cruz and La Ligua).

Source: El Mercurio

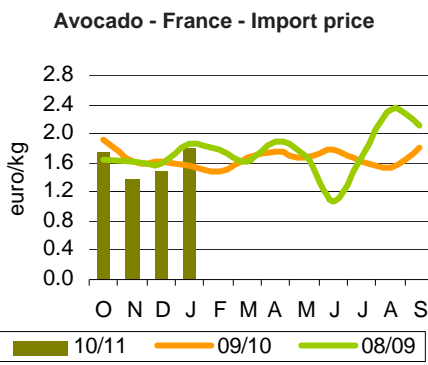
■ **US market more open to Peruvian avocado in 2011?** According to the news agency ANDINA, the director of SENASA (Peruvian national phytosanitary and quality agency) hopes that the

cold treatment quarantine requirement for entry to the US market will be lifted in 2011. A study run jointly by SENASA, APHIS (its counterpart in the United States) and PRO-HASS, the producers' association, is said to show that Peruvian 'Hass' avocado is not a fruit fly host and so no disinsectisation treatment is necessary. Although permitted since the beginning of 2010, exports of Peruvian 'Hass' avocados to the USA have been very limited so far because of producers' caution with regard to the sanitary procedure currently required.

Source: Andina

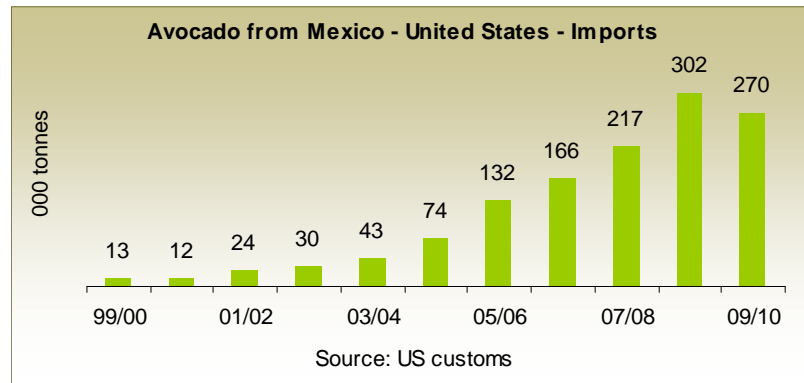
■ **United States: a marvellous market for Mexican avocado.** According to INECOL (Mexican ecology institute), the opening of the US frontiers to Michoacán avocado has generated economic rewards evaluated at two thousand million USD. The market has also allowed the creation of 25 000 jobs in agriculture and associated areas. Sales in the last two seasons were USD485 and 590 million with volumes of 270 000 and 305 000 t according to the US customs.

Source: InfoHass



PRICE	Varieties	Average monthly price euro/box	Comparison with the last 2 years
	Green	5.40-5.60	- 10%
Hass	7.50-8.00	+ 6%	

VOLUMES	Varieties	Comparison	
		previous month	last 2 years average
Green		↗	+ 26%
Hass		↘	- 12%



VOLUMES	Source	Comparison		Observations	Cumulated total / cumulated average for last 2 years
		previous month	average for last 2 years		
	Chile	↘	- 22%	Moderate volumes of 'Hass'. Slowing at the end of the month promising an early end to the season.	- 16%
	Israel	⇒↘	+ 10%	Moderate supply of green varieties and markedly above average supply of 'Hass'.	+ 19%
	Spain	⇒↘	- 5%	Large shipments of green varieties and a slight shortage of 'Hass'.	- 5%
	Mexico	↘↘	na	Supply sank from very moderate in December to zero in January (unprecedented absence of fruits from this source at this time of the year).	- 50%

Mango

January 2011

Market conditions for mango were difficult at the beginning of the year. A dip in demand after the Christmas period was felt on all the European markets while supply was growing. Brazil reached the end of the winter season with shipments down to their annual low. This was amply compensated by the increase in arrivals from Peru, the leading supplier of the European market in the coming months. The large quantities landed in December accumulated, especially because of poor sales during the Christmas period, and this weighed heavily on transactions. In addition, quality was fairly mediocre overall with end-of-season fruits from Brazil and fairly small, often immature fruits from Peru. Peruvian supply did not match the demand of retail distributors, resulting in a strong decrease in prices. Whereas the prices mentioned above were for good quality medium-sized fruits, those for small fruits (9 to 12) were much lower, starting at EUR 2.00 per box. The first half of January featured the clearing of the market, with numerous clearance sales. This meant that in mid-month the prices of quality fruits rose a little. In parallel, 'Tommy Atkins' from Brazil benefited from better market conditions (between EUR 4.00 and 5.00 per box) in the northern European countries because of the shrinking of supply. Prices continued to rise slowly in the second half of January and this was accompanied by a better balance of sizes and an improvement of quality of Peruvian fruits.

The air export market was supplied regularly in January with the gradual ending of the flow of Brazilian fruits. Produce from Peru with no direct competition gained a little in price in the second half of the month. Small complementary batches of 'Early Gold' from Réunion held a narrow market segment with high prices of around EUR 6.00 per kg, falling because the fruits were often very ripe.

MANGO — ARRIVALS (ESTIMATES) Tonnes

Weeks 2011	1	2	3	4
By air				
Brazil	60	40	5	5
Peru	50	60	60	60
By sea				
Brazil	1 300	350	530	730
Ecuador	200	110	70	70
Peru	2 380	2 970	2 050	3 100

Litchi

January 2011

January featured a considerable decrease in litchi consumption. As a result, the European market was clogged to the point of bringing prices down substantially. As in previous seasons, consumption fell greatly after the Christmas period. The phenomenon was amplified this year by the accumulation of stocks from the cargo of the second conventional ship that docked in Vlissingen (Netherlands) on 22 December and that could only be sold after Christmas when the market is less favourable for litchi. The tonnage was carried over into January when the first fruits exported in maritime containers reached Europe. Abundant supply and smaller demand caused a decrease in prices that was more or less marked from one European market to another. The situation hardly improved during the following weeks as the markets closed gradually and supply was concentrated on the French market that was incapable of handling such quantities. The prices mentioned below are indications as some transactions may have been concluded at higher levels or, above all, at lower levels. The market slump continued until the end of the month. It is true that preparations for the Chinese New Year enabled the sale of large quantities in the second half of the month but unfortunately these did

not come up to the scale of the stocks available. This celebration was more of a benefit to the distinctly larger South African fruits. These sold steadily at higher prices although the latter did weaken at the end of the period when arrivals decreased.

The Réunion export season was extended until the end of the month, an exceptional phenomenon for this source whose shipments generally stop in mid-month. The lengthening of the season and the increase in the volumes delivered had repercussions on selling prices. These took a downward turn with a board range for the various types of presentation. Destemmed fruits fetched the lowest price and bunches fetched the highest, with fruits on the branch being in an intermediate position.

LITCHI — ARRIVAL ESTIMATES Tonnes

Weeks 2011	1	2	3	4
By air				
Réunion	30	30	30	10
By sea				
Madagascar	600	2 680	1 380	-

LITCHI — IMPORT PRICE ON THE FRENCH MARKET — euro/kg

Weeks 2011	1	2	3	4	January 2011 average	January 2010 average	
By air							
Réunion	br	4.00-5.50	3.50-5.50	3.50-6.00	4.00-8.00	3.75-6.25	10-12
By sea							
Madagascar		0.50-1.10	0.40-1.10	0.50-1.00	0.50-1.00	0.50-1.05	0.70-1.05
South Africa		2.00-3.00	2.00-3.00	2.00-3.00	2.00-2.80	2.00-2.95	1.60-2.05

br: on the branch / s: sulphur treated

MANGO — IMPORT PRICE ON THE FRENCH MARKET — Euro

Weeks 2011	1	2	3	4	January 2011 average	January 2010 average	
By air (kg)							
Brazil	Kent	3.00-3.50	3.00-3.50	-	-	3.00-3.50	2.25-2.75
Peru	Kent	3.00-4.00	3.00-4.00	3.50-4.30	3.50-4.50	3.25-4.20	3.40-3.70
By sea (box)							
Brazil	Kent	3.00-4.00	3.00-4.00	-	-	3.00-4.00	2.00-2.80
Peru	Kent	3.00-4.50	3.00-4.50	3.00-5.00	3.00-5.00	3.00-4.75	2.10-3.25

Pineapple

January 2011

The first fortnight in January was marked by a sharp decrease in demand and concerns about the sale of certain fruits. Indeed, numerous stored batches from ships that had been delayed in the last week of December and had missed the New Year period hampered the release of arriving fruits and weighed heavily on a very dull market. Batches of 'Sweet' were thus sold for as little as EUR 2.00 per box! However, the situation improved rapidly since the supply of 'Sweet', especially from Costa Rica, decreased strongly while several small promotion operations planned well before were about to start. The decrease in the volumes of 'Sweet', the clearing of stored fruits and more lively demand cleared the market and pushed prices up during the second fortnight of the month.

Sales of 'Smooth Cayenne' were very difficult. In spite of a marked decrease in the volumes received, operators specialised in this variety had great difficulty in selling this fruit as export markets had lost all interest in it. The presence of 'Sweet' at low prices also complicated sales of 'Smooth Cayenne'. However, thanks to a few promotion operations, sales recovered although they were sometimes complicated by poor fruit colour.

Sales on the air market were very fluid in the first half of the month as supply was particularly slow and did not cover demand. Prices were therefore very firm. However, a decrease in demand was felt at the beginning of the second fortnight of the month while supply increased. Operators therefore tried to reduce their imports to prevent the formation of stocks. Sales of 'Sugarloaf' pineapple from Benin were comparatively stable throughout the month with prices oscillating between EUR 1.85 and EUR 2.00 per kg.

Demand for and supply of 'Victoria' pineapple decreased strongly after the Christmas period. As supply matched demand prices remained stable.

■ Pineapple: juice prices in Europe in December 2010.

Type of juice	Price (USD/t)	Origin	Observations
Frozen concentrate, 60° Brix, 'Smooth Cayenne'	2 250 fca Netherlands df	Thailand	Pineapple juice is becoming scarce. Rumours call into question the quality of recent production and the allocation for fresh sales, juice and canning is not known. The current harvest in Thailand is smaller than normal.
Aseptic concentrate, 60° Brix, 'Smooth Cayenne'	2 200 fca Netherlands df		
Single juice, 12° Brix, bulk, 'MD-2'	815 fca Netherlands	Costa Rica	
Frozen concentrate, 60° Brix, 'Perola'	2 100 fob Santos	Brazil	

Note: fca: free carrier / df: duty free / fob: free on board / Source: MNS-ITC Geneva

■ Fruits: juice and pulp prices in Europe in December 2010.

Type of juice	Price (USD/t)	Origin	Observations	
Acerola	Frozen single juice, 6-8° Brix	1 350 fob Santos	Brazil	The coming harvest may be small for reasons of bad weather. Demand is strong and juice may be scarce for the next twelve months. Prices have increased strongly.
	Frozen concentrate, 65° Brix, clear	14 300 fob Santos		
Passion fruit	Frozen concentrate, 50° Brix	4 250-4 500 fca Netherlands	Peru	In Ecuador, bad weather has affected the quality of fruits for processing. However, fruit quality has improved in recent weeks. Peruvian exports increased by more than 69% in the first half of 2010 in comparison with the same period in 2009. Prices remain high in Brazil for large stocks sold mainly on the domestic market.
	Frozen concentrate, 50° Brix	4 500-5 000 cfr Rotterdam	Ecuador	
	NFC, 11° Brix	1 300-1 350 fob Ecuador	Brazil	
	Frozen concentrate, 50° Brix	5 000-6 500 fob Santos		
	NFC, 12-14° Brix	2 200 fob Santos		
Guava	Aseptic single pulp, pink	795 fca Netherlands	South Africa	Prices are for the new harvest. They have remained stable.
	Aseptic single pulp, 9-12° Brix, pink	650-700 fob Brazil	Brazil	
	Aseptic concentrated pulp, 14-16° Brix, pink	950 fob Brazil		
	Aseptic concentrated pulp, 18-20° Brix, pink	1 050-1 100 fob Brazil		
Pomegranate	Clarified aseptic concentrated juice, 66° Brix	6 euro/kg cfr Rotterdam	Turkey	Demand small but growing strongly.
Papaya	Aseptic concentrate, 25° Brix, red	1 100-1 150 fob Brazil	Brazil	Supply is more than sufficient. Prices have fallen in the last three months.

Note: fob: free on board / fca: free carrier / cfr: cost and freight / Source: MNS-ITC Geneva

PINEAPPLE — IMPORT PRICE

EUROPE

Weeks 1 to 4	Min	Max
By air (euro/kg)		
Smooth Cayenne	1.70	1.90
Victoria	2.40	3.50
By sea (euro/box)		
Smooth Cayenne	5.00	8.50
Sweet	5.00	9.00

PINEAPPLE — IMPORT PRICE IN FRANCE — MAIN ORIGINS

Weeks 2011		1	2	3	4
By air (euro/kg)					
Smooth Cayenne	Benin	1.85-1.90	1.80-1.90	1.80-1.90	1.80-1.90
	Cameroon	1.80-1.90	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	1.75-1.80
	Côte d'Ivoire	-	1.75-1.80	1.75-1.85	1.75-1.85
Victoria	Réunion	3.30-3.50	3.30-3.50	3.30-3.50	3.30-3.50
	Mauritius	3.00-3.30	3.00-3.30	3.00-3.30	3.00-3.30
	South Africa	2.40-2.90	2.40-2.90	-	-
By sea (euro/box)					
Smooth Cayenne	Côte d'Ivoire	5.00-7.00	6.00-7.00	5.00-8.50	6.00-8.50
Sweet	Côte d'Ivoire	6.50-8.00	6.50-8.00	7.50-9.00	7.00-9.00
	Cameroon	6.50-8.00	6.50-8.00	7.50-9.00	7.00-9.00
	Ghana	6.50-8.00	6.50-8.00	7.50-9.00	7.00-9.00
	Costa Rica	5.00-7.00	6.50-7.50	7.00-8.00	7.50-9.00

Banana

January 2011

Operators will remember January 2011 as having been an exceptional month. However, demand was fairly slow, especially in Germany and France where promotion operations were few and far between. Supply was very small with almost all supplier countries displaying an export deficit. Firstly, supply of dollar bananas was even smaller than in 2010. However, even though they fell, the volumes from Colombia remained fairly substantial. But poor weather continued to affect production in Ecuador and Costa Rica, and shipments were distinctly smaller than average. Furthermore, production loss following hurricane Tomas continued to weigh on exports from the French West Indies, with volumes running at 25% less than those of 2010. Finally, the deficit in African bananas increased, with shrinking volumes from Côte d'Ivoire and Ghana and shipments from Cameroon still very small. In this context, prices increased rapidly on all the world markets, reaching record levels at the end of the month in the EU, the USA and Russia.

■ Banana: purée prices in Europe in December 2010.

Type of juice	Price (USD/t)	Origin	Observations
Aseptic purée, 22° Brix	650-660 fca Netherlands customs zero-rated	Ecuador	Demand for fresh fruits still weighs on supply. Good demand from producers of smoothies and baby foods.
	660-680 fca Netherlands	Costa Rica	

Note: fca: free carrier / Source: MNS-ITC Geneva

■ The Ecuadorean government steps in to help small growers. 'The new banana law is with you'. This is the almost mystical slogan aired by the Ecuadorean Ministry of Agriculture to correct the balance between producers and exporters. The law ensures the respect of a minimum price at the upstream end of the sector (USD5.50 per 41.5 lb box until the end of 2011) with the obligatory use of a sales contract. Growers must first register with the Ministry of Agriculture. Ecuador has 240 000 hectares of banana plantations and 12 000 producers according to official statistics.

Source: Reefer Trends

■ 2010: a black year for the Canary Island banana sector. Production reached a historic high at 431 000 tonnes in 2010 after 364 000 tonnes in 2009 and the 365 000 t shipped to mainland Spain was 38 000 t more than the volume sold in 2009. However, returns fell from EUR 275 million to 245 million, that is to say a decrease of 18 centimes per kg! This poor performance resulted from the loss of 40 000 t for reasons of weather conditions and above all from particularly difficult market conditions leading to the withdrawal of 35 000 t of fruits. ASPROCAN blames the effects of the dismantling of common market organisation of bananas and the decrease in consumption resulting from the economic downturn. In consequence, the association would like to diversify markets with shipments to other EU countries (Germany, Portugal and Belgium) and to Algeria.

Sources: Reefer Trends, Canarias7

■ The Russian JFC Group wishes to invest in Venezuela. JFC Group has recently signed a letter of intent concerning the joint operation with the Corporación Venezolana de Alimentos of 20 000 hectares of banana plantations south of lake Maracaibo. A leading stakeholder in Russia with an estimated 40% market share, JFC Groups already operates nearly 3 000 ha in Ecuador and 350 ha in Costa Rica.

Sources: Reefer Trends, Notas Agropecuarias Venezuela

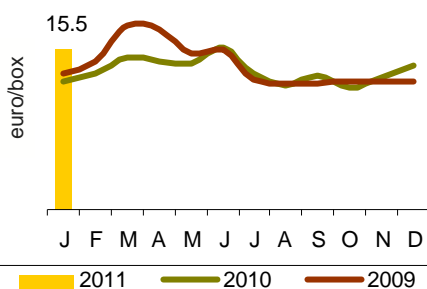


© Charles de Wolf

EUROPE — ALDI IMPORT PRICE

January 2011 euro/box	Comparison	
	previous month	average for last 2 years
15.50	+ 11%	+ 21%

Europe - Aldi import price (GlobalGap)



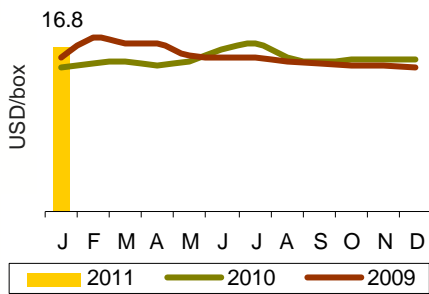
EUROPE — RETAIL PRICE

Country	January 2011		Comparison	
	type	euro/kg	December 2010	average for last 3 years
France	normal	1.50	+ 3%	+ 12%
	special offer	1.25	+ 6%	+ 6%
Germany	normal	1.21	+ 1%	+ 6%
	discount	1.02	+ 1%	+ 8%
UK (£/kg)	packed	1.20	+ 2%	+ 5%
	loose	0.85	+ 6%	- 3%
Spain	plátano	1.76	+ 3%	- 7%
	banano	1.34	+ 1%	- 6%

Banana

UNITED STATES

USA - Green price (spot)

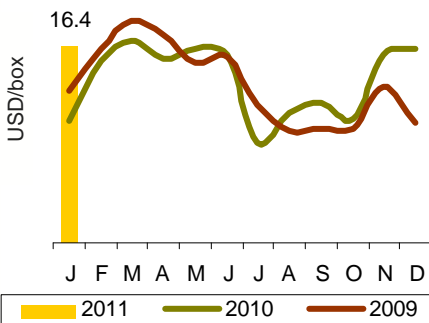


USA — IMPORT PRICE

January 2011 USD/box	Comparison	
	previous month	average for last 2 years
16.80	+8%	+ 10%

RUSSIA

Russia - Green price

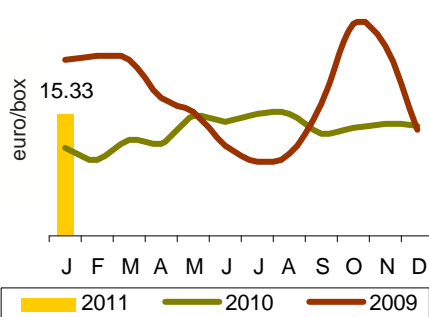


RUSSIA — IMPORT PRICE

January 2011 USD/box	Comparison	
	previous month	average for last 2 years
16.40	+ 1%	+ 42%

CANARIES

Spain - Green price - Platanos*



CANARIES — IMPORT PRICE*

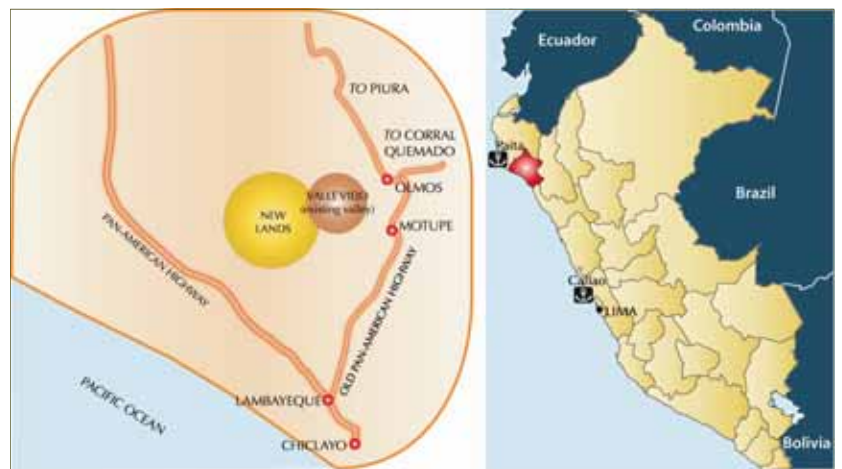
January 2011 euro/box	Comparison	
	previous month	average for last 2 years
15.30	+ 10%	- 8%

* 18.5 kg box equivalent

■ A new irrigated perimeter open to investors in Peru. The growth of Peruvian export agriculture seems to be continuing. A vast irrigated perimeter totalling 38 000 ha of virgin land has been created in the north of the country in the Lambayeque region (near the town of Olmos) by the Brazilian group Odebrecht. The perimeter consists of 250-ha to 1 000-ha units and is supplied with water from the river Huacabamba conveyed by a 20-km tunnel from the western to the eastern slopes of the Andes. It is about

200 km from the port of Paita. Auctioning will be started very soon. Exports of Peruvian agricultural produce have tripled in recent years and were worth 3 billion dollars in 2010. This success is based to a great extent on climatic advantages (a hot, dry climate), the presence of good quality water from the Andes and cheap labour. These features mean that Peru is very competitive on the counter-season markets in the northern hemisphere.

Source: www.H2Olmos.com



■ European imports of banana in 2010.

Banana - EU-27						
Imports from January to December 2010 (provisional)						
Tonnes	2007	2008	2009	2010	Average 2007-2009	Variation 2010/2009
Extra-EU	4 691 225	4 883 757	4 544 920	4 491 494	4 706 634	- 1%
MFN	3 848 046	3 962 760	3 564 681	3 455 317	3 791 829	- 3%
ACP, of which	843 179	920 997	980 238	1 036 177	914 805	+ 6%
ACP Africa	441 864	535 103	512 154	510 633	496 374	0%
ACP others	401 315	385 893	468 085	525 544	418 431	+ 12%

Note: 2010 figures provisional, data lacking for certain member states and certain months.
Source: EUROSTAT customs code 8 030 019

EUROPE — IMPORTED VOLUMES — JANUARY 2011

Origin	Comparison		
	December 2010	January 2010	cumulated total 2011 compared to 2010
French West Indies	↘	- 25%	- 25%
Cameroon/Ghana	↘	- 14%	- 14%
Surinam	↘↘	- 41%	- 41%
Canaries	=↗	+ 7%	+ 7%
Dollar:			
Ecuador	=↘	- 1%	- 1%
Colombia*	↘	+ 12%	+ 12%
Costa Rica	↘	- 10%	- 10%

* total all destinations

OPPORTUNITY TO ACQUIRE FARMLAND WITH WATER RIGHTS IN PERU

38,000 hectares of premium undeveloped fertile agricultural land will be sold in lots of 250, 500 and 1,000 hectares with water rights at a public auction. Successful bidders will acquire the land with irrigation infrastructure that allows pressurized water. Lots will have access to public road networks, ports and to the national electricity grid.

OLMOS IRRIGATION PROJECT



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TO DIVERSIFY OFFER IN
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ODEBRECHT

Orange

January 2011

The market continued to be difficult. Substantial volumes of Spanish 'Naveline' remained to be sold at the production stage because of the large harvests. In addition, the frost that hit the Community of Valencia in December encouraged producers to sell their 'Salustiana' rapidly. With only average demand in the EU, import prices remained very low for both of these varieties. Under these difficult conditions, 'Washington' blood oranges and 'Salustiana' from Morocco were rare on the community market, especially as serious floods caused production losses. Supply of 'Maltese' from Tunisia remained very limited with the season starting late as a result of political problems and yet another dock strike in Marseilles.



■ **Brazilian orange juice:** agreements and disagreements. Might the merger announced in 2010 of two sector giants, Citrusuco and Citrovita be compromised? After the CADE (the Brazilian antitrust agency) in October, the EU announced in January an investigation into the consequences of such a merger. Whereas the Brazilian authorities fear the harmful effects on small growers, whose numbers have fallen drastically in recent years, Brussels is more concerned about the retail price of the fruit juice most sold in Europe. Furthermore, the setting up of Consecitrus, a body representing citrus producers (Associtrus) and the juice industry (CitrusBR) seems to be increasingly difficult. The two parties have still not succeeded in agreeing on a joint road map and above all on a mechanism for setting the prices paid to growers. Flavio Vega, the CEO of Cutrale, nonetheless pointed out that the sector did not lack common enemies: unfavourable exchange rates, increasing competition from apple juice, increasing production costs and European customs tariffs.

■ A 2011 season full of challenges for the South African citrus sector. This is the view of South African professionals after a very positive 2010 season. The first estimates seem to show that the harvest should be similar to last year's, with good 'Valencia' and grapefruit crops making up for a probable deficit in 'Navel'. However, the context should be much more competitive. Firstly, the European market should be markedly less open and Mediterranean production is distinctly larger than in 2010, especially for lemon and late oranges. Secondly, the Argentinian lemon harvest should return to a solid level after a strong shortfall in 2010. In a report published at the end of December, USDA forecasted an increase of some 25%. Finally, production costs are rising, in particular because of higher energy prices (oil and electricity) while the rand is still strong against the currencies of the main export markets.

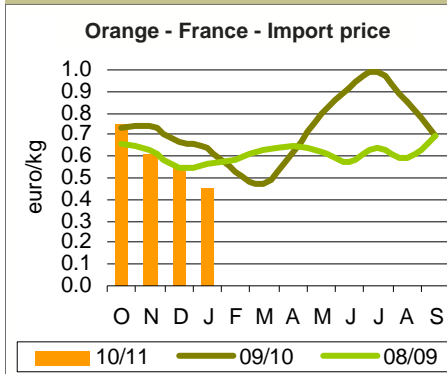
Sources: Reefer Trends, CGA, USDA

■ **Orange variety of the month: 'Maltese'.** This high-quality well-coloured orange is grown almost only in the Cape Bon region of Tunisia, where conditions bring out its full potential. It is medium-sized and slightly oval. The soft peel is slightly grainy and easy to remove. The tender, juicy flesh is little coloured for a blood orange. The flavour is particularly pleasant with sweetness balanced by a good level of acidity.



Source: CIRAD-Fruitrop

Source: FoodNews



PRICE	Type	Average monthly price euro/box 15 kg	Comparison with average for last 2 years
	Dessert oranges	8.00-8.50	- 12%
Juice oranges	8.00-8.50	na	

VOLUMES	Type	Comparison	
		previous month	average for last 2 years
Dessert oranges		↗	+ 4%
Juice oranges		↗	na

VOLUMES	Varieties by source	Comparison		Observations	Cumulated total / cumulated average for last 2 years
		previous month	average for last 2 years		
	Naveline from Spain	↗	- 3%	Large volumes to be sold at the production stage. Substantial shipments in the second half of the month.	+ 3%
	Salustiana from Spain	↗↗	na	Peak season. Volumes moderate but above average as the fruits had to be sold rapidly after the December frosts.	na
	Maltese from Tunisia	↗	- 56%	Very late start to the season because of political events and a strike at the port of Marseilles.	- 56%

Easy peelers

January 2011

The market was difficult. The already strong pressure of Spanish supply increased because of the large volumes of 'Nules' and 'Clemenvilla' still available at the production stage and the need to sell these varieties rapidly as the fruits were fragile after the December frosts. Prices remained rock bottom for both of these varieties and the 'Clemenvilla' season ended early as the fruits had become too fragile. This difficult context penalised other sources of supply. Shipments of 'Nour' from Morocco were limited because of the low prices offered by buyers and production losses resulting from floods. The 'Minneola' season in Israel was also short. Only the last limited volumes of Corsican clementines and the high-quality varieties such as 'Or' from Israel and 'Nadorcott' from Spain shipped from mid-January onwards sold well as the fruits were of good quality.



touched with hardly 1 to 2.5% of the fruits displaying slight damage.

Source: USDA

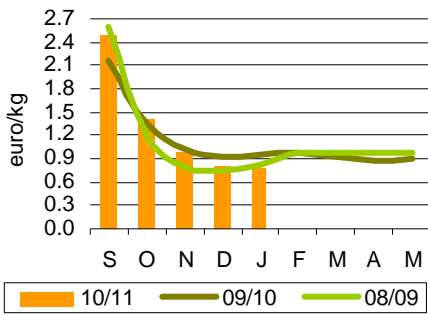
■ Easy peeler variety of the month: 'Nadorcott'. This natural hybrid of 'Murcott' originated in Morocco. The fruits are medium-sized to small and

easy to peel, like clementines. The shape is irregular and slightly flat, like 'Murcott'. They ripen late and are seedless. The pulp is soft and melting with a large proportion of juice and acids, giving it a clearly characteristic taste.



Source: CIRAD

Easy peelers - France - Import price

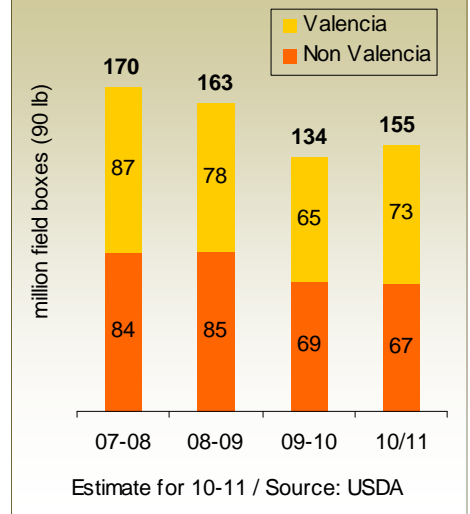


■ Moroccans living abroad form the new driving force behind the country's foreign trade. Abdellatif Maazouz, Morocco's Minister of Foreign Trade, considers that Moroccan traders living abroad should favour and promote national products and produce. For this, the government will help to identify operations (wholesalers, supermarkets, self-service stores) run by Moroccans who might participate in the initiative and put them in contact with potential suppliers. It will contribute the fitting out of Moroccan sections in their outlets and in communication concerning products. The French market is one of the main targets of the project.

Sources: MAP, Morocco

■ Early and mid-season oranges hit by frost in Florida. According to the USDA report published on 18 January, 10 to 15% of early and midseason oranges displayed damage ranging from minor to serious at the centre of the fruit. However, damage was noted on less than 3% of the late fruits that form more than 50% of production. Similarly, grapefruit was practically un-

Orange - Florida - Production by varietal group



PRICE	Varieties	Average monthly price euro/kg	Comparison with average for last 2 years
	Clementine	0.79	- 10%
Hybrids	0.75	- 15%	

VOLUMES	Varieties	Comparison	
		previous month	average for last 2 years
Clementine	↘	+ 22%	
Hybrids	↗	- 28%	

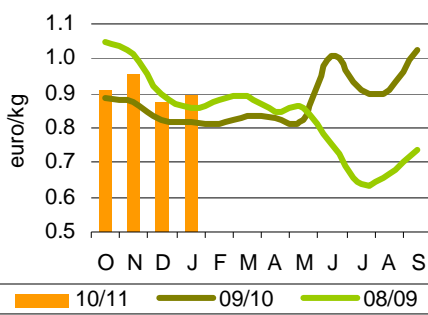
VOLUMES	Varieties by source	Comparison		Observations	Cumulated total / cumulated average for last 2 years
		previous month	average for last 2 years		
Clementine from Spain	↘	+ 47%	Very large volumes because of the quantities of 'Nules' to be sold rapidly for reasons of frost.	+ 9%	
Clementine from Morocco	↗	- 23%	Volumes of 'Nour' clementine very limited in the EU (difficult market, production losses caused by floods).	- 28%	
Clementine from Corsica	↘↘	- 38%	Early decrease in volumes and end of the season in the first half of the month because production was small.	- 18%	
Clemenvilla from Spain	↗	- 9%	Volumes only average. Harvest smaller than that of the preceding season and smaller than average.	- 5%	

Grapefruit

January 2011

The maintaining of moderate supply allowed the market to remain balanced. The revival of demand after the strong seasonal dip in sales during the Christmas period was not as strong as in other years. However, supplies remained short. Only small volumes were shipped from Florida because of importers' caution in the face of high prices (insufficient good-sized fruits). Likewise, Israeli exporters limited their shipments in the light of the stocks available while their Turkish counterparts favoured the Eastern European markets more than ever. Prices this remained fairly high and stocks were cleared to a considerable extent.

Grapefruit - France - Import price



■ Citrus: juice prices in Europe in December 2010.

Type of juice	Price (USD/t)	Origin	Observations	
Orange	FCOJ, 66° Brix, bulk	2 300-2 350 fob Santos	Poor weather has affected fruit quality and yields in Brazil. Producer prices are high. NFC is rare but the price has not increased as much as that of FCOJ. Consumption is still falling in the USA.	
	FCOJ, 66° Brix,	2 500-2 600 fca Netherlands dup		
	NFC	600-759 fob Santos		
	NFC	400 euro/t		Spain
	NFC	480-500 euro/t cfr Northern Europe		Greece
Grapefruit	Frozen concentrate, 58° Brix, red	2 100 cfr Netherlands dup	The harvest forecast for white grapefruit in Florida has been revised downwards and size will be smaller. Stability for coloured varieties but size will also be smaller. Prices are recovering. Demand is increasing only because of the growing use of grapefruit juice in blends.	
	Frozen concentrate, 58° Brix, pink	2 100 fca Rotterdam		
	Frozen concentrate, 58° Brix, white	2 000 fca Rotterdam		
	Frozen concentrate, 58° Brix, red	1 900-1 950 fob Cuba	Cuba	
	Frozen concentrate, 58° Brix, white	2 000 fob Cuba		
	Frozen concentrate, 58° Brix, coloured	2 150-2 200 fca Netherlands	Mexico	
Lemon	Frozen concentrate, cloudy, 400 gpl	4 500-4 550 fca Rotterdam	Argentina	
	Frozen concentrate, cloudy, 500 gpl	5 300-5 350 fob Buenos Aires		
	Frozen concentrate, cloudy, 400 gpl	3 300-3 400 euro/t ddp Northern Europe	Spain	
Lime	Frozen concentrate, cloudy, 400 gpl, 8% pulp	2 300 fob Santos	Brazil	
	Frozen concentrate, clear, 400 gpl, 8% pulp	3 300 fob Santos		

Note: fob: free on board / fca: free carrier / cfr: cost and freight / dup: duty unpaid / ddp: delivered duty paid / Source: MNS-ITC Geneva

PRICE	Type	Average monthly price euro/box 17 kg box eq.	Comparison with average for last 2 years
	Tropical	16.00-16.50	+ 5%
Mediterranean	11.50-12.00	+ 10%	

VOLUMES	Type	Comparison	
		previous month	average for last 2 years
Tropical	=	- 11%	
Mediterranean	=	- 9%	

VOLUMES	Source	Comparison		Observations	Cumulated total / cumulated average for last 2 years
		previous month	average for last 2 years		
Florida	=	- 11%	Supply still moderate. The December frosts did not affect grapefruit but importers were cautious and medium-sized and large fruits were in short supply.	+ 5%	
Israel	=↗	- 30%	Very moderate supply, especially in the first half of the month (stocks available at import stage in Europe).	+ 15%	
Turkey	=↗	- 9%	Very active exports but mainly to Russia and the eastern part of the EU. Supply deficit in Western Europe.	- 15%	

Freight

January 2011

Although the TCE average for the month of January 2011 was only 10c/cbft higher than January 2010 the 55c/cbft recorded masks a more successful month for operators than the year-ago corresponding figure. At the end of January 2010 there were almost 20 vessels Spot at Cristobal with several units already having accumulated significant lay time. This year there was no accumulation: vessels were fixed away quickly, the result principally of the combination of a 'reasonable' Ecuadorian exit price and historically strong transatlantic banana markets. The other critical factor in the equation is the reduction in supply of tonnage: this has partly been caused by an attractive demolition market, which claimed 46 units in 2011 (17.7m cbft), and partly by some owners and operators choosing not to reactivate units in cold lay-up. The US, EU, Med and Russian banana markets all enjoyed a strong start to the year, buoyed by good demand and a shortage of fruit from Colombia, Costa Rica and Martinique. In Europe the benchmark Aldi price finished January on a historical high while in the US Dole declared force majeure and a US\$1.46 per box surcharge. The other majors followed suit. The temporary rise in export volumes from Ecuador combined with a fair reefer market meant that Med banana charterers should have recouped some of the losses made over the past two years. The markets are forecast to remain short of bananas until mid March at the earliest: if the forecast is accurate there is every reason to believe that banana pricing will continue to drive towards ever higher levels as historically market values tend to peak at about the same time. How much higher and how quickly the market responds will be, in part, a reflection of how well eastern European markets are recovering from the global economic crisis. In 2010 Ukrainian banana import volumes for example were down 30% from the record volume established in 2007 – in absolute terms down 5.4m boxes year-on-year! Increasing competition from containerisation aside, the other major threat to the viability of the reefer sector is the escalat-

ing cost of oil. Rising bunker prices are wiping out the incremental weekly box rate rises achieved by operators. And while the high price will be a significant factor in the number of older, fuel-inefficient vessels being demolished this year, there has been an interesting side-effect: unless there is a compelling reason for one of the reefer fleet's smaller units to cross the Atlantic it is highly likely that it will not. With such high fuel costs it makes no commercial sense to ballast to Cristobal for a banana cargo on speculation as current box rate fixtures would yield disproportionately lower TCE returns because of the vessel size/fuel consumption/fruit stowage ratio. Fortunately there has

been enough fish and citrus activity in the Med and eastern Atlantic seaboard for this not to be a problem for the major operator of this segment, Hamburg Reefer Chartering. The higher the oil price rises the greater the likelihood that this polarisation will become entrenched. This will inevitably have implications for all the stakeholders in the reefer business – most immediately it makes the smaller segment more vulnerable: the smaller vessels will not only have a smaller pond from which to fish but they also have to battle with operators of larger tonnage for what may be a smaller overall catch, especially if the lines continue to build capacity and steal market share.

■ Mango: juice and purée prices in Europe in December 2010.

Type of juice	Price (USD/t)	Origin	Observations
Aseptic concentrate, 28° Brix, 'Totapuri'	1 750-1 850 cfr Rotterdam	India	Overall demand is increasing. Indian production prices are still very high. Strong demand on the domestic market and in the Middle East encourage producers to maintain these prices and not match the lower prices of fruits from South American sources which do not have an alternative to the 'Alphonso' variety. The Brazilian 'Tommy Atkins' harvest was close to normal but nonetheless down by 20%. The 'Palmer' harvest should be better.
Aseptic purée, 14° Brix, 'Totapuri'	1 100-1 150 cfr Rotterdam		
Aseptic purée, 17° Brix, 'Alphonso'	1 550-1 600 cfr Rotterdam		
Aseptic concentrate, 28-30° Brix, 'Palmer'	1 380-1 400 fob Santos	Brazil	
Aseptic concentrate, 28-30° Brix, 'Tommy Atkins'	1 400 fob Santos		
Aseptic, ss, 14-16° Brix, 'Tommy Atkins'	925-950 fob Santos		
Aseptic concentrate, 28° Brix, 'Tommy Atkins'	1 425-1 450 fca Netherlands	Mexico	

Note: cfr: cost and freight / fob: free on board / fca: free carrier / Source: MNS-ITC Geneva

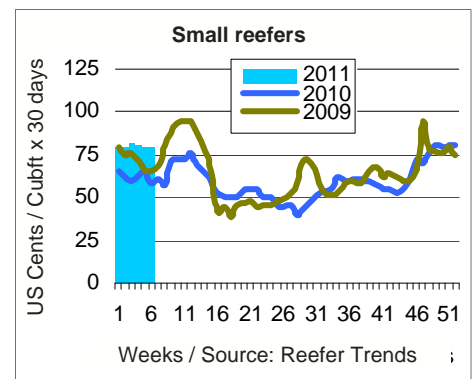
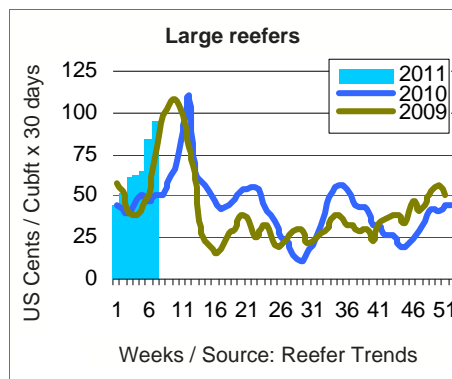
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MONTHLY SPOT AVERAGE

US\$/cubic foot x 30 days	Large reefers	Small reefers
January 2011	55	81
January 2010	45	63
January 2009	52	73





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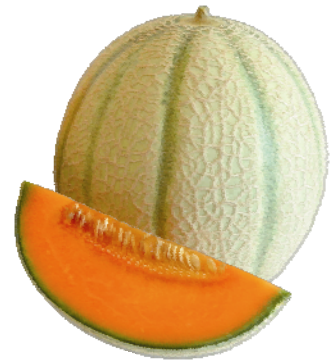
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Counter-season melon

A few more adjustments!



The difficulties experienced in entering or standing out on the European winter market since 2008 were confirmed in 2010, especially for the Latin American sources but also the French West Indies. Fruits from Mediterranean sources held up, with the possible exception of Israel, while Senegal continued its growth.

Imports from extra-community sources dipped strongly again in 2010, reaching hardly more than 260 000 t (- 21% in comparison with 2009), whereas they had still reached more than 366 000 t in 2007, giving a decrease of nearly 100 000 t over a period of two or three years. The decrease was marked above all in Brazil at 101 900 t (-41% against 2009), which still shipped 190 000 t in 2007 and 2008. Without recovering to its 2006 level (70 500 t), Costa Rica achieved 50 000 t, 25% more than in 2009. Decreases of 9% for Honduras (20 900 t) and 19% for Panama (10 700 t) were also observed in 2010.

Mediterranean sources also weakened a little in 2010, not only because the market is now mature but also because of bad weather affecting production potential. However, shipments from Morocco to the European Union decreased by only 4% (52 800 t), a similar figure to those of the two previous years. Likewise, community imports from Turkey decreased by 9% (6 200 t) but remained similar to those of the preceding years. However, Israeli exports decreased markedly once again

to 3 700 t (- 18%) because of both conjunctural and structural factors as the source has difficulty in emerging on the European market in the face of American and Mediterranean competition.

Senegal confirmed its progress by practically doubling 2009 volumes, especially as Spanish operators have set up there. Shipments from the West Indies were limited at the beginning of 2010 by the eruption of the Soufrière volcano in Montserrat and later by heavy rains that hit the whole of the zone in the autumn (hurricane Tomas).

Large supplies at the beginning of the 2009-10 season but total volumes limited

The 2009-10 season was rich in events, especially as regards weather. Volumes were comparatively large at the beginning of the season with the marked presence of melons from Mediterranean sources in the autumn and at the end of the year, together with West Indian fruits. Imports from Morocco were fairly large at the end of 2009, with new, large operators during the period: 2 800 t from September to December according to the French customs. Shipments from Senegal were also large at 172 t from September to December in comparison with 74 t in 2008 and 112 t in 2007 ac-

cording to the French customs.

However, Morocco was also present early in 2010 with the season starting in mid-February in the Dahkla area. However, the start was very laborious as demand was particularly mediocre because of continued cold weather in consumption zones in March. Nevertheless, the production shortfall in the other regions (Agadir, Marrakesh and the West Indies) made it possible to limit problems in the sale of the fruits.

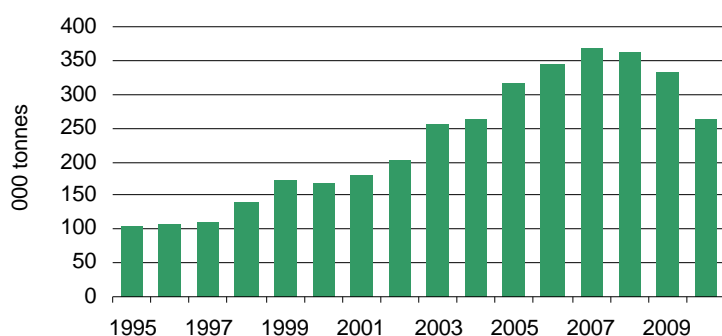
Indeed, production in the French West Indies was strongly affected by poor weather conditions and above all by the rain of volcanic ash caused on 11 February by the eruption of the Soufrière Hills volcano in Montserrat, a British posses-



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Melon - EU-27 - Extra EU imports



Source: European customs

Melon — EU-27 — Extra EU imports

tonnes	2008	2009*	2010*	Comparison 2010/2009
Brazil	193 025	173 423	101 937	- 41%
Costa Rica	50 969	43 176	54 052	+ 25%
Morocco	56 545	55 310	52 882	- 4%
Honduras	17 380	23 171	20 987	- 9%
Panama	20 128	13 222	10 757	- 19%
Turkey	7 841	6 832	6 226	- 9%
Israel	4 073	4 606	3 761	- 18%
Senegal	2 571	3 319	5 063	+ 53%
Total	361 920	331 314	262 793	- 21%

* provisional figures / Source: Eurostat

sion 80 km north of Guadeloupe, limiting volumes until Easter. Shipments from the Dominican Republic were also reduced with only 414 t imported to France in 2009-10 against 688 t in 2008-09 and 1 224 t in 2007-08. April was thus a light month with a slightly better trend resulting from increased demand, the decrease in potential and the cumulated lateness in the Almeria area in Spain.

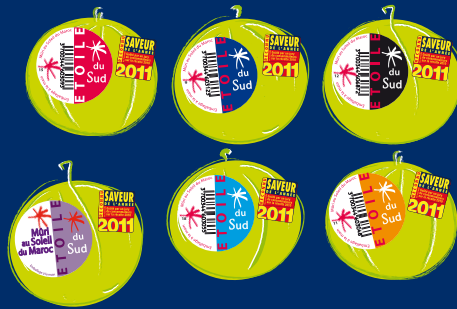
Shipments from Morocco then suddenly increased from Weeks 16 to 17, with 2 600 t to 3 800 t per week transiting via the Saint-Charles wholesale market. However, the transition to Spanish production was fairly smooth even though the latter made up for some of its lateness. Moroccan production peaked in Weeks 19 and 20 (4 500 t per week at Saint-Charles wholesale market), but then supply decreased rapidly and the season ended at the beginning of June.

An inexorable decrease in export potential in Latin American and Caribbean sources

The 2009-10 was therefore difficult once again for most operators in the Caribbean and also for those in Latin America. The restructuring and withdrawals that started in preceding years were confirmed. The large multinationals established in Brazil or Costa Rica continued to leave these production zones where increased labour costs and the falling dollar are making increasing inroads on returns. This trend should have concerned above all the American market, the main outlet for these large groups, especially as part of the production potential has been taken over by local export enterprises. However, operators tend to report a further overall decrease in exports to Europe at the beginning of the 2010-11 season. However, it seems that although the decrease has not finished, it has led to the better selling of produce.

Nevertheless, operators are faced with difficulties and are increasingly targeting emerging countries such as the Middle East and Russia or should even refocus on the Latin American markets like Brazil where consumption is increasing. Likewise, given the increase in supply in Africa, export potential is decreasing in the French West Indies and the Dominican republic, with operators recently working with these sources withdrawing each year. European community imports from the Dominican Republic thus decreased further in 2010 to 544 t against 785 t in 2009 and 1 284 t in 2008. However, businesses present are still on the alert for export opportunities and are continuing operations that have been undertaken to make the produc-

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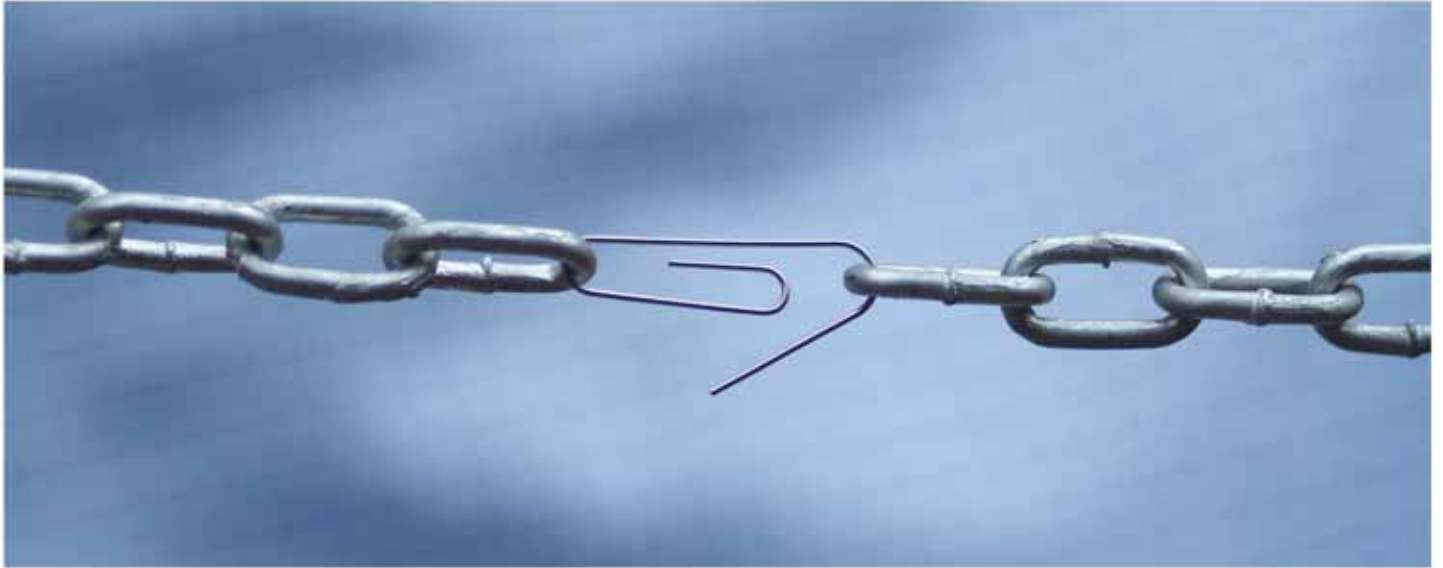
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reefer trends

tion of yellow Charentais melon profitable. Thus the request by the Association interprofessionnelle du melon de Guadeloupe (AIMG) for a PGI voted in October 2009 was finally published in the French Official Journal.

Potential for Charentais stabilising in Africa?

The decrease in potential can be attributed in part to the relocation of production, which started a few years ago in Morocco and is now deployed in Senegal. However it would seem that the growth of production, at least as regards Charentais melon, has now reached a mature phase in Morocco, with export potential now oscillating between 52 000 and 55 000 t, including production in the extreme southern part of the country. Areas would appear to have stabilised at some 350 to 400 ha in the Dahkla zone and 1 500 to 1 600 ha in the other production zones (Agadir + Marrakesh), that is to say a total of more or less 2 000 ha. Production of other varieties and for markets other than France could develop. Likewise, the areas devoted to yellow Charentais in Senegal are stable for the moment. However, they might increase as new operators start up. The potential could increase further for varieties such as 'Piel de Sapó' intended more for the Spanish market.

A chaotic start to the 2010-11 season, but stable production perhaps?

In spite of this stabilisation of cultivated areas, the 2010-11 season started (again) in a context of ample market supply as a result of the lateness of the summer crops in Europe, not finishing until October. Market penetration was thus very laborious for fruits from all sources

(Morocco, Brazil) in October. Furthermore, the French market was very disturbed in mid-October by the demonstrations against the reform of the pension system (Week 42) Stocks formed, especially as consumption is small at that time of the year and the cold, wet weather was particularly unfavourable. Prices therefore fell considerably (to less than a euro per kilo at import stage at the end of the month) in an attempt to unclutter the market, but import volumes from Morocco were substantial and the market remained encumbered.

Shipments then decreased because of Eid Al-Adha and this finally allowed operators to clear stocks and enabled other sources such as Honduras, the French West Indies and Senegal to start their seasons more peacefully. The market remained comparatively unencumbered because of the very gradual increase in shipments from these sources. An increase in production was slowed by heavy autumn rains that delayed sowing or reduced the potential of certain production areas such as Martinique, swept by hurricane Tomas in October.

December was fairly chaotic for all sources, with upstream logistic problems involving both air and road transport, and downstream logistic problems caused by heavy snowfall. Operators report that Christmas sales were 30% to 40% down. Prices therefore remained fairly high. They fell right at the end of the month to clear the nonetheless limited batches that it had not been possible to ship earlier.

January was also a very light month because of torrential rain in Guadeloupe at the end of the year, resulting in a 25 to 30% fall in production. Supply should nonetheless increase in early February with an increase in volumes from the French West Indies and the resumption of shipments from Senegal. It should then increase in mid-February with the first melons from earliest production zones in southern Morocco. The potential in Charentais should be stable overall, including the very early market that has tended to develop in recent years but which is finally a niche market.

Some operators would even like the later staggering of their production to prolong the season until May. The first batches are expected in mid-March in Agadir and at the end of March in the Marrakesh area. The Spanish season is already running two weeks late after the various cold spells during the winter. Fruits from Brazil and Central America should also be strongly present on the European market until May. The potential should not be excessive and sales will depend above all on the weather conditions in the consumption zones ■

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Mango

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After the grimaces of 2009, smiles seemed to return to the mango market in 2010. It is true that the year started badly with volumes from Peru peaking at unprecedented levels and, as a corollary, prices descending into the pits. A few exaggerations and untimely withdrawals of Brazil also disturbed the progress of sales on the European markets. But in comparison with preceding years, 2010 was a long quiet river. Peru, which doubtless never recovered from the losses sustained during the first two months of sales, was probably the source that came off worse. Supply from the other sources was concentrated and of satisfactory quality overall and they benefited from fairly satisfactory market conditions. Mention can be made of West Africa where the seasons ran fairly smoothly, with distinctly higher selling prices than in previous years. The summer seasons in Israel, Brazil and Mexico were also positive, confirming the trend observed for a number of years for summer sales to become a habit as long as supply is not excessive. Likewise, the Spanish mango season, with the variety 'Osteen', is now part of the market landscape, showing that innovations can be successful. The originality of 2010 is probably the autumn disturbance in Brazilian supplies with almost no deliveries from mid-October to mid-November, resulting in a rocketing of prices that was exceptional for the time of year. These conjunctural or structural movements are analysed in the pages that follow.

A report by
Pierre Gerbaud



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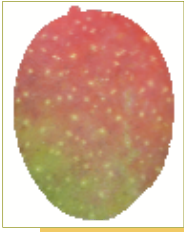
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European mango market

A brighter 2010 season

The 2010 season will be remembered as one with fewer over-supply crises on the European markets. Even though they did cause problems, periods of under-supply were more numerous and finally resulted in better performance for a fair number of supply sources. Indeed, these periods of shortage are only a difficulty insofar as they cause a subsequent period of over-supply accompanied by falls in prices and sales that are unprofitable for shippers or consignees. They also disturb the distribution of fruits, temporarily blocking sale by supermarket chains as purchasers wish to conserve their margins at the retail stage.

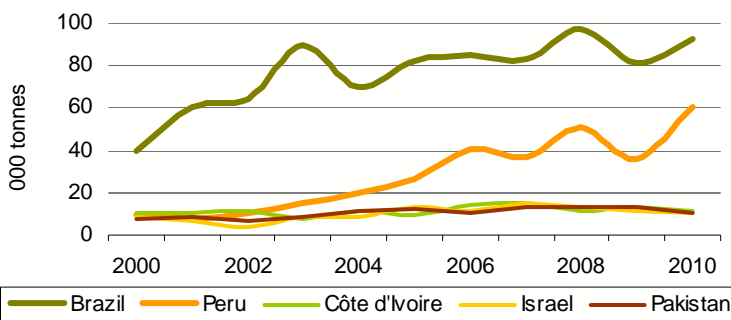


This to and fro movement between over and under-supply was limited in 2010, not because of the determination of trade stakeholders, which is difficult to imagine for seasonal produce like mango, but more because of the influence of production conditions on the one hand and by changes in the sectors of the various sources on the other. These external conditions doubtless

did not limit the volumes imported to Europe, but contributed to better distribution with regard to market demand. After the distinct decrease in European imports in 2009 (199 000 tonnes) in comparison with 2008, a record year for imports (232 000 tonnes), the volumes of mangoes imported by the EU increased again in 2010 to 225 000 tonnes. The variations in imported volumes in recent years seem to set an import level matching present European market capacity of around 200 000 to 220 000 tonnes per year.

There were no upsets in European market supply in 2010 and it remained focused on the five main sources providing the greater part of imports—Brazil, Peru, Côte d'Ivoire, Israel and Pakistan—together with nearly a dozen secondary sources that make up for possible shortages of supply from the leading five. A fresh increase in shipments from Brazil was noted. Côte d'Ivoire, Israel and Pakistan (shipping mainly to the United Kingdom) decreased their shipments slightly, a trend that can be considered more as stagnation than a true decrease. In contrast, after a strong decrease in shipments during the 2009 season for reasons of production, Peru achieved its largest exports ever with over 60 000 tonnes. The slump in exports from certain sources was amply compensated by the return of Peruvian export potential and the increase in Brazilian exports.

Mango - EU-27 - Imports from the five major suppliers



Source: Eurostat

Concentration in time and mastery of supply

It is also noted that 2010 exports from the main sources supplying the European market were characterised by a concentration of the shipping calendar. Brazil escaped this trend insofar as its planned production and the diversity of the production zones make it possible to export mangoes all the year round. This concentration was more visible for Peru, whose season started at

the end of the year as usual but ended sooner than in preceding years. The same observation applies to Côte d'Ivoire where the increase in volumes shipped was faster in 2010 but interrupted by operators in the second half of May to avoid the development of fungal attacks at the end of the season. In spite of a later extension of the season, Mali and Burkina Faso also ceased their shipments more quickly in 2010. Likewise, Israel supplied mangoes for a shorter period, with only marginal volumes shipped after the end of October. Finally, Spanish presence was smaller in November. This succession of early ends to seasons lengthened the transition phases between major sources, leaving longer sales periods for other suppliers such as Mexico and the Dominican Republic.

But flow management does not depend on the better or worse weather conditions in producer countries, with flows often compensated by other sources. The difficult 2009 season will be remembered with numerous varied supply episodes against a background of the international economic downturn, with mercurial markets where prices were generally closer to the floor than the ceiling. The results of the 2009 season

probably caused sector changes in several supplier countries. The absence of resources to relaunch an export season and the shortage of credit in a sector often feared in financial circles limited exporters' ambitions in many cases. One of the consequences was the reduction of the number of players and this allowed better mastery of flows and hence better economic performance. For several sources, the concentration of supply in time became handled by more solid and probably more professional structures, closing out occasional operators for a while.

The other side of the coin as regards fairly satisfactory performance in 2010, apart from weather conditions that cannot be predicted in the medium term, is among other things the return of occasional operators that these good results will doubtless make appear. And in 2011 the political situation in Côte d'Ivoire may change the position for part of European supply as exports could be smoother or might be halted ■

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European mango market in 2010 month by month

An unusual year... as usual!

January Market slump followed by stagnation marasme

With the Christmas period over and demand slowing, together with a strong increase in deliveries from Peru, the market was stagnant in January 2010. This resulted in continued over-supply and the accumulation of stocks, even though fruit quality was satisfactory overall.

February - March Improvement and then recovery as Easter approached

A slight livening of the market was noted in February, with a simultaneous decrease in arrivals from Peru. The European market improved but only slowly. Price ranges remained broad as a result of disparities in produce quality, depending on whether the fruits had been stored or had just arrived.

In contrast, March featured a rapid and strong rise in prices. The increase in deliveries from Brazil did not make up for the strong decrease in shipments from Peru, and dip in European supply continued.

The run-up to Easter caused a distinct increase in demand, maintaining the upward trend, although the situation was different on the various European markets.

The increase in deliveries of 'Tommy Atkins' from Brazil

created a market in two parts, with the northern European markets displaying a preference for this variety.

April Supply switch Peru-West Africa

The European market peaked before Easter and then marked time. Conditions worsened on the different European markets as a result of medium demand and an increase in the overall volumes received. The market entered a new phase with considerable diversification of the sources represented and the varieties and sizes available. 'Tommy Atkins' from Brazil suffered most from these conditions and the selling price fell, affecting the entire market and bringing down the prices of other varieties.

The switch from Peru to West Africa took the form of the first deliveries of 'Amélie' and then the first containers of 'Kent' from Côte d'Ivoire.

End of April - Beginning of May

An unusual situation:
a new period of under-supply
approvisionnement

Shipments from Brazil lessened, resulting in a gradual improvement of market conditions for 'Tommy Atkins'. In parallel, in contrast with previous years, deliveries from West Africa also tended to dwindle. The main reason was the arrival of rain in the production zones in Côte d'Ivoire and that caused several Ivorian export operations to stop for



© Régis Domergue



the season. The dip was all the more marked as the production of seasonal fruits in Europe was late.

There was no real alternative as none of the important sources could make up the deficit. Arrivals fell to distinctly less than 100 containers per week. The supply deficit made it possible to maintain high prices on all the European markets.

7 May - 23 August Towards a fairly varied summer market profile

The European market continued to be under-supplied but to a less worrying degree. Firstly, arrivals increased, in particular with greater volumes from Brazil, and secondly large deliveries of red fruits (cherries and strawberries) refocused demand on seasonal produce and eased the pressure on tropical fruits.

The European mango market gradually slipped into a summer situation that was less favourable for the sale of massive quantities.

This was followed by a split market. Brazilian 'Tommy Atkins' displayed a downward trend while the other varieties available performed better with firm prices. Supplies from Mexico and Senegal increased, together with complementary shipments from Puerto Rico and the Dominican Republic. The start of the Israeli campaign was added to this at the beginning of July, with the first deliveries of air quality mangoes.

European market supply remained moderate first to maintain high selling prices and second to match fairly sluggish demand. The multiplicity of sources, varieties and quality gave the market a fairly uneven profile.

End of August - Mid-October Brazil + Spain marked the start of the autumn



photos © Régis Domergue

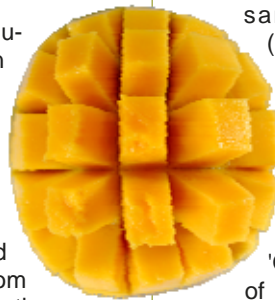
At the end of August, the European mango market was firmly dominated by supplies of 'Tommy Atkins' from Brazil. Although the variety does not seem to be liked very much, it is still a pillar of supermarket supplies

even though shipments from Brazil are diversifying to include 'Keitt' and 'Kent'. However, Brazilian exporters seem to prefer to ship fruits to the North American market.

European demand remained limited overall. However, supply remained smaller than demand and prices remained high, except for the less sought-after 'Tommy Atkins'.

The diversity of sources and of the varieties available contributed to making the balance delicate. The season gradually ended for Mexico, as did that of Israel, seemingly shorter and smaller than in preceding years for Israel. In contrast, shipments of 'Osteen' from Spain increased strongly and supplies reached all the European markets.

Brazil entered a more active phase of its season in mid-September. The increase in the volumes shipped affected the price of 'Tommy Atkins', which tended to weaken gradually before hitting rock bottom at the end of September. With quantities well up on those of the same period of the previous year (+ 120% in September), Brazil clearly dominated European market supply. Brazilian mangoes sold at falling prices in the United States.



Spain, the second largest source of European market supply, continued its export season with the variety 'Osteen', which formed the greater part of supply. Shipments peaked during the week of 11 to 15 October. The prices of these goods varied considerably according to the distribution channels concerned and the quality of the produce. Diversification of varieties was seen, with the sale of the first 'Kent' completing the range, and also limited quantities of 'Irwin' and 'Manzanillo'.

18 October - 12 November A change in the situation and an unexpected rocketing of prices!

A change of trend in mid-October caused an unexpected period of under-supply accompanied by prices that rocketed in various proportions according to the market concerned. The phenomenon was probably caused by a decrease in shipments from Brazil, an increase in demand resulting from the numerous promotion operations organised in supermarkets in several European countries and a simultaneous weakening of Spanish supply.

This situation seemed exceptional at a time of year when there is usually an increase in Brazil-

ian shipments. However, these decreased strongly on both the European and US markets, leading to supposing that there were serious difficulties at the production stage, not to speak of the difficult political, economic and social period experienced by Brazil. There was a clear rebalancing of supply from Brazil, with 50% 'Tommy Atkins', 25% 'Keitt', 24% 'Kent' 1% other varieties.

Mid-November - December Falling market in December in spite of the start of the Peruvian season



The European mango market fell distinctly at the end of November. Sales of Brazilian mangoes became marginal on the North American markets, where Ecuador quickly took over.

Brazilian shipments to Europe were also completed by the first

arrivals from Ecuador and Peru. The start of the Peruvian season and continued substantial quantities from Brazil kept European mango supply at about 200 containers per week. Demand did not increase markedly and the downward trend in prices continued.

Furthermore, the total quantity available still did not meet the requirements of distributors. Most of the fruits that arrived from Peru were small and more difficult to sell well. Furthermore, they were only just ripe and so buyers were not encouraged to increase their orders.

The European market started to sink once again in spite of the increase in demand just before the Christmas period.

At the end of December, Peru became the main supplier of the European market for the next three months. The year ended with a further fall in prices for Peruvian produce, whose size and degree of ripeness did not match the requirements of European retail distributors ■

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Review of the 2010 mango season by source

A smoother season in spite of a few ups and downs

Brazil

The uncontested leader

In spite of sometimes substantial price variations in 2010 that resulted from the quantities exported and the state of the European market, Brazilian mango sales were fairly satisfactory. This trend is all the more noteworthy as the context was difficult and tonnages were larger than in the preceding season. Brazil is more than ever the leading supplier of mangoes to the European Union, shipping some 90 000 tonnes each year. With various orchard areas in an immense territory, it is the only country that can ship mangoes all the year round. Of course the flow of shipments varies according to the season and the varying sizes of the production zones. Quantities are largest in the autumn-winter period from October to December, but the omnipresence of produce from Brazil forms the basis of supply of the European market.

The problem with this source is its capacity to adapt its exports to the European market according to the positions of the other major exporters. It seems to have managed this fairly well this year, judging by the average prices on the European markets. These were around EUR 4.70 per box (average price on the Dutch market) for 'Tommy Atkins', the leading variety shipped, and EUR 5.70 per box (average price on the French market) for 'Kent'. These averages should not hide certain fluctuations during the year.

As usual, the sale of Brazilian fruits was hindered by the massive arrivals of Peruvian produce in December 2009. The clogging of the European market during this period caused marked price decreases. By aiming at end-of-year sales corresponding to their production calendar, year after year the two sources have changed what was a fairly favourable period from the commercial point of view into a difficult period, certainly making it possible to shift large volumes but at prices that are not very profitable.

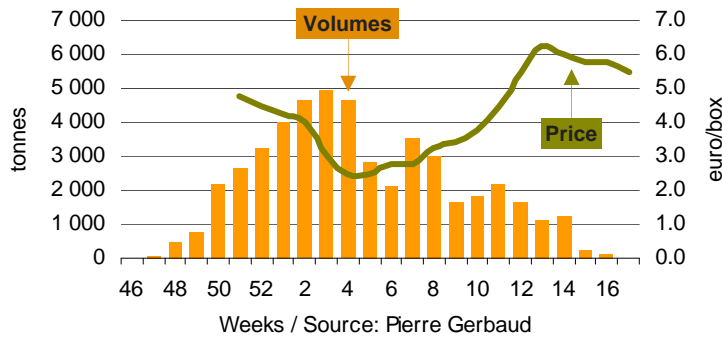
The strongly competitive situation continued in January until shipments from Brazil decreased considerably. Prices recovered fast in February. Brazil escaped the pressure of the shipments from Peru during this period because of the difference in the varieties shipped. Brazil is the only supply source to ship 'Tommy Atkins' and benefited from favourable market conditions, especially in the northern European countries where this variety is more popular.

Counting on an early end of the Peruvian season in the spring, Brazil rapidly increased weekly shipments from 500 tonnes to nearly 3 000 tonnes from mid-March to mid-April. This speculation was partially positive as it made up for a rapid decrease in Peruvian supply around Easter, but also caused a serious fall in prices but that turned out to be temporary. With a return to more moderate shipments (1 000 to 1 500 tonnes per week), Brazil returned to a buoyant position during the West African season. In June, volumes

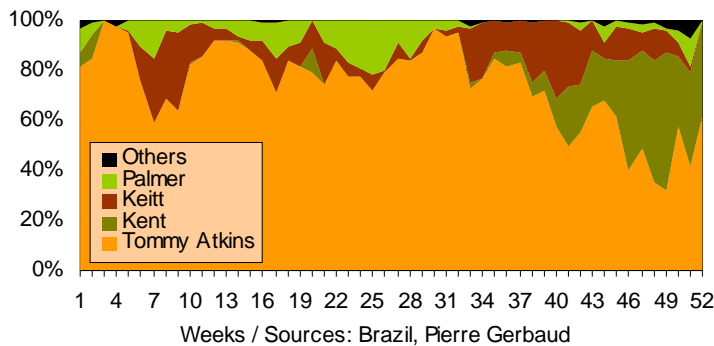


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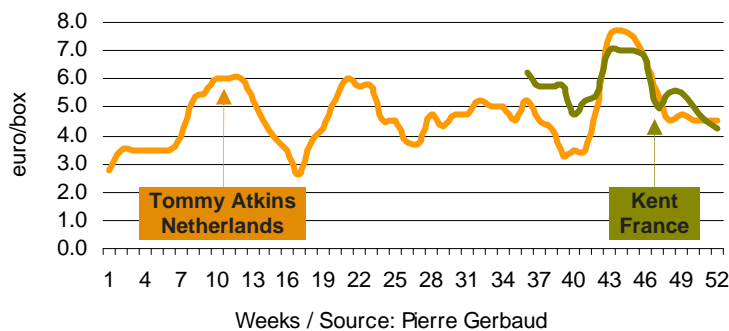
Mango by sea - Peru - Arrivals in Europe and average import price on the French market in 2009-10



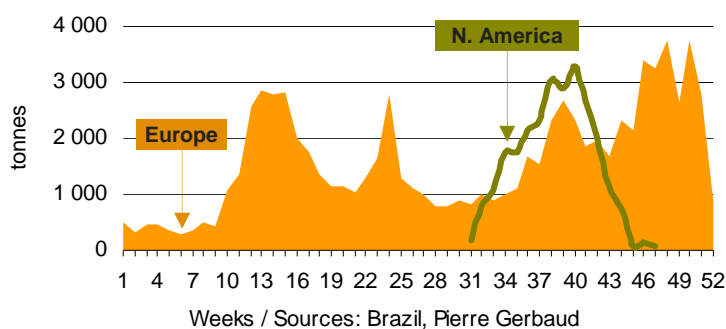
Mango - Brazil - Varietal distribution of exports to Europe in 2010



Mango - Brazil - Average import price for Kent in France and Tommy Atkins in the Netherlands in 2010



Mango by sea - Brazil - Arrivals in Europe and in North America in 2010



were a bit larger but decreasing and the price of 'Tommy Atkins' dipped even though the market was undersupplied. This counter-current trend is a classic phenomenon of opposition between supply and demand resulting from continuing deterioration of fruit quality requiring fast sales that are always propitious for lowering prices.

During the summer, steady volumes of less than 1000 tonnes per week enabled Brazil to make up at least partially for the export deficits of Israel and Senegal and for the small Mexican season. The fairly high prices did not weaken until the beginning of September when shipments went to the European and North American markets at the same time and in equivalent proportions. During this period, the specificity of 'Tommy Atkins' meant that Brazil stood out from competing sources that tended to ship 'Kent' and 'Keitt'.

Brazilian exports peaked in September, sending prices into a marked downward spiral. The price of 'Tommy Atkins' settled at around EUR 3.50 per box, promising a difficult end to the year if exports were to continue at their high rate. This was plausible as the 'Kent' season started particularly early. Unexpectedly, shipments from Brazil dipped sharply in mid-October, a time when volumes generally increase. Prices moved upwards again at the start of the 'Kent' season and reached higher levels than have ever been seen at this time of year. This situation held until mid-November, when supply rocketed from 3 000 to 3 500 tonnes per week. Prices fell as quickly as they had risen a month earlier but stabilised at a median level of EUR 4.00 to 5.00 per box until the end of the year for both 'Tommy Atkins' and 'Kent'. 'Keitt' exports seem to have been smaller. It will be remembered that sales conditions were difficult for this variety in the previous year for reasons of serious quality problems. This risk doubtless limited ambitions as regards increasing exports.

Adaptation to demand in terms of volume on the European market or the luck of the supply calendar? These could be the parameters that explain the good overall behaviour of the prices of Brazilian produce in 2010. Both factors were probably mingled during the season, but the periods of crisis that dotted the year were shorter and less intense than in the past. Indeed, the periods of low prices were less marked and did not last long. Average prices rarely remained lower than EUR 3.00 per box for three weeks in a row, whereas prices lower than EUR 2.00 per box were observed for longer periods in some previous seasons.



Although luck in supplying the market doubtless benefited the Brazilian mango sector, it is not enough to explain the results. A few features can be seen although it is not possible to quantify them. First, the difficult past seasons probably reduced the number of exporters in Brazil, leaving only the largest or those whose work is most suited to market conditions in Europe. Production programmes, and especially calendars, were probably changed. This would account for export fluctuations at different times than in preceding years. The economic development of Brazil and the revaluation of the real also favoured increased purchasing power for a fringe of the population now able to buy mangoes originally intended for export. These deep-seated changes give the Brazilian mango sector more flexibility through the multiplication of trade outlets: the domestic market, processing and regional and inter-continental exports (see the article below about Brazil).

Peru Poor start, good finish

In contrast with the 2008-09 season when bad weather considerably limited Peruvian mango production and hence shipments to the European market, the 2009-10 season was generous in terms of volume. Exports to the European Union totalled 49 200 tonnes against only 22 150 t in the preceding season. Hardly any earlier than the previous one, the harvest started at the end of October/beginning of November with rapidly increasing quantities. Given the shipping time, the first fruits reached Europe in the second half of November. Delivered first to the Dutch market, they spread more widely to the other European markets from early December onwards.

Right from the first releases on the market, 'Kent' from Peru ran up against competition from Brazil, whose fruits had been on the European market since October. In contrast, the supply of mainly small fruits lacking colour fanned competition between the two sources. This intensified throughout December with the accumulation of volumes arriving on a market where demand remained moderate. Indeed, weekly shipments from Peru in December soon reached 150 to 200 containers, whereas Brazil continued to peak at more than 140 containers. The market became clogged and prices plummeted between the start of the Peruvian season and the end of December. Starting at EUR 4.00



to 5.00 per box, Peruvian mangoes fetched no more than EUR 2.00 to 3.00 per box at the end of the year. Brazilian deliveries did not decrease to a low level until the end of December, leaving substantial stocks on the European market. The disturbance to the market for Brazilian fruits caused by the massive arrival of fruits from Peru in December reversed with the New Year. The worsening quality of the end-of-season fruits from Brazil in turn disturbed sales of fruits from Peru, where the harvest was in full swing.

January 2010 was without a doubt the most difficult month for sales of mangoes from Peru, liberated from competition from Brazil. This was when deliveries peaked at more than 4 000 tonnes per week, asphyxiating a market where demand was slow after Christmas and the New Year. Selling prices did not clear EUR 2.00 to 3.00 per box, with some transactions reaching only EUR 1.50 per box. This dark period during which there was no longer a real market price because stocks were large and demand slow continued until the first half of February. After a phase of cleansing of the market when long-stored fruits still sold at low prices but when arriving batches began to sell better, the volumes shipped decreased rapidly.

Demand recovered gradually in the heart of the counter-season while arrivals decreased. Prices recovered to around EUR 3.50 to 4.50 per box at the end of February. The trend accelerated in the first half of March and prices rose spectacularly, reaching EUR 5.00 to 7.00 per box in the second part of the month in the run-up to Easter (beginning of April) when demand was brisker. In spite of a serious decrease in volumes in April, prices lost ground again at the end of the season



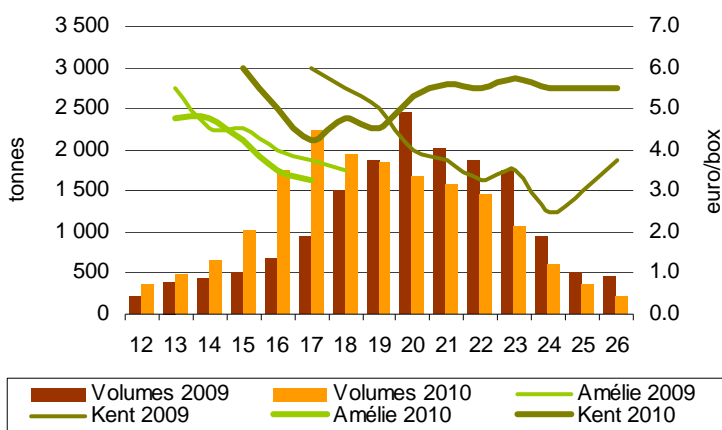
(EUR 4.50 to 5.50 per box). However, they held at levels that were nothing like those of the worst part of the season in January.

The rapid end of the Peruvian season caused a serious dip in supply, especially at Easter. This was partially compensated by the starting of the seasons in West Africa.

Once again, Peruvian exports contributed their measure of fluctuations, with disproportionate quantities at the beginning of the year and a quick end to the season leaving the market strongly under-supplied and subject to one-off speculation operations that are always harmful for the image of the fruit in the long term. Indeed, how can distributors learn to value a fruit that costs less than EUR 3.00 per box for half of the season? Even if these sales at low prices during periods of over-supply enhance distribution to new consumer segments or new outlets, they generally consist of fruits of mediocre quality and thus little representative of the intrinsic value of this 'noble' fruit.

The new Peruvian season started in mid-November 2010 and as in 2009-10 volumes increased rapidly and encountered the same difficult market conditions in competition with Brazil. Prices fell rapidly, especially as Peruvian supply consisted mainly of small fruits (10-12) not well suited to demand then led by Brazilian produce. Worse still, fruit colour was poor and, above all, many were immature. Quality problems also appeared at the end of December with the development of fungi, although this is traditional rare in Peruvian fruits. These features are not too good for the image of Peruvian mangoes!

Mango - West African arrivals and average import price of Kent and Amélie from Côte d'Ivoire on the French market



Weeks / Source: Pierre Gerbaud

The race for quantities that seems to be guiding the Peruvian mango sector is probably leading to a dead-end. If the poor economic performance of the first month and a half of the season have to be compensated by the next two and a half months, the calculation is soon made by comparing the quantities delivered during the two periods.

West Africa Côte d'Ivoire surfacing again

The sales season for West African mangoes in 2010 was very different to the preceding ones as it seems to have been positive for most operators, whether exporters or importers. As regards volume, it totalled some 17 300 tonnes exported by three countries: Côte d'Ivoire, Mali and Burkina Faso. This was an 830-tonne increase on the total of 16 500 tonnes in 2009. The increase was accompanied by much better market conditions than in previous seasons, that cast doubt not on the need for these sources in the European supply calendar but on their capacity to adapt supply to an increasingly competitive market.

The apparent success of the season resulted from a combination of favourable features. First, the fairly rapid early decrease in deliveries from Peru left the field free for the West African sources at the start of their season, limiting head-on competition that is often difficult commercially. Shipments from Peru ceased suddenly in Week 12, just when the first West African mangoes arrived. The overlapping of the two sources was thus extremely limited and favoured fluid continuity of supply and so sales conditions remained fairly linear. Furthermore, the change of supplier from Peru to West Africa took place a fortnight before Easter, a period of increased mango sales.

The early end of shipments from Peru also coincided with a faster start to West Africa shipments, with a smooth transition in terms of the quantities released while demand remained strong. The phenomenon was enhanced by a faster increase in shipments from West Africa than in preceding years and that better matched market requirements. This increase in volumes was undoubtedly more gradual than in the previous year, allowing better distribution of volumes. Deliveries from West Africa peaked in Week 17 in the 2010 season whereas they were at maximum in Week 20 in 2009. The decrease in deliveries was also more gradual even

Guinea Quiet progress

Shipping a thousand tonnes in 2010, Guinea more than doubled the 2009 figure of some 400 tonnes shipped to the European Union. Most of the exports were shipments by sea of 'Keitt' from April to June. A few batches of 'Kent' and 'Palmer' were added to these. Most of the shipments of 'Keitt' were sent to the British market. 'Palmer' went to Spain where this variety seems to be appreciated. In addition to these inter-continental exports, Guinea also sent a few containers of produce to closer markets like Morocco, profiting from appropriate logistics from Conakry or via Abidjan to link up with the major maritime routes.

though the 2010 season was shorter than the previous one.

The rapid halting of shipments, especially from Côte d'Ivoire, generated under-supply of the European market from June. It was all the more marked as at the same time shipments from Brazil increased strongly, with batches of 'Tommy Atkins' for which there was less market demand and whose quality was mediocre overall. Buyers therefore favoured fruits from West Africa whose quality better matched demand. Ivorian exporters' fears of seeing their produce sell with difficulty at the end of the period also played a significant role in the progress of the 2010 season. The concentration of shipments in preceding seasons, together with quality problems (development of fungal diseases after rains) led shippers to be cautious this year. The poor economic results of the 2009 season also concentrated the goods in the hands of a smaller number of operators and this enhanced the mastery of flows. This reduction by default was finally a good thing as it favoured longstanding exporters at the expense of occasional operators whose professionalism was more erratic.

In June, as the season approached the end, Central American fruits were not strongly represented even though market conditions were good. Guatemala, Nicaragua, Costa Rica, etc. delivered smaller volumes than in

previous years, making life easier for the competition.

Fruit quality was satisfactory overall and this also contributed to the success of the season. Pressure from diseases had been very marked in preceding seasons but weaker in 2010. Many exporters who feared the development of fungal diseases from mid-May onwards reduced or halted shipments. Although fungal diseases were limited, fruit fly infestation was substantial. Although they were greater for batches shipped by air, several batches sent by sea were seized on arrival in Europe. This is a recurrent problem and the various control plans set up at both national and regional levels have not succeeded in reducing pest pressure so far.

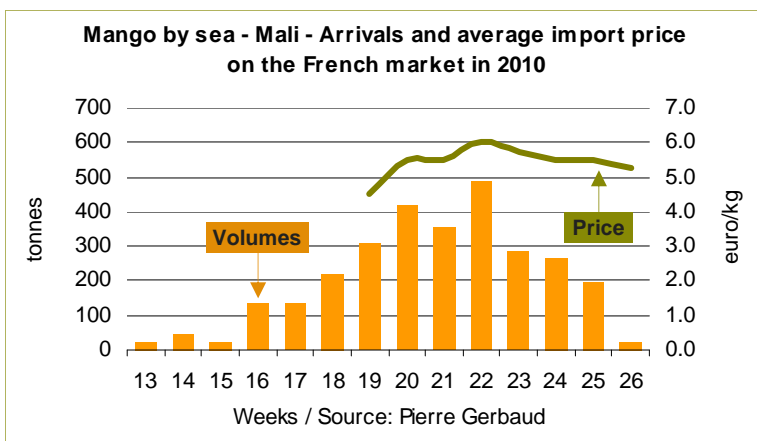
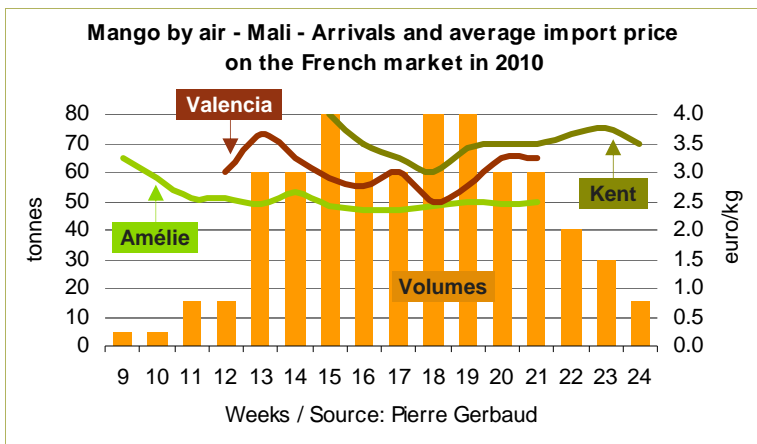
Côte d'Ivoire was the source of 66% of West African mango shipments in 2010. It is still the driving force behind the region, benefiting from more rapid logistics between production zone and shipping port and increasing production. Burkina Faso contributed 17% of West African volumes, gaining about 1000 tonnes in comparison with the previous season and with fruits shipped mainly to the Netherlands. Mali was in third position with 16% of total exports. It started a little later at the beginning of the season by continued to ship until July. The fruits were therefore more destined for the northern European markets and especially the Netherlands at the beginning of the season. Distribution was then broad when the quantities shipped from Côte d'Ivoire decreased, with operators traditionally working with Ivorian partners being more interested in produce from Mali, an alternative on a market short of mangoes. Mali and Burkina Faso complement



supplies from Côte d'Ivoire, whose produce is cheaper overall on arrival in Europe. In addition, their sometimes staggered calendar makes it possible to regulate flows when shipments from Côte d'Ivoire have ceased.



Analysis of the last two seasons shows the better distribution of volumes in time (and in relation to demand) and that selling prices were distinctly firmer in 2010 than in 2009, except for the 'Amélie' sales period which is always more complex. A few batches of 'Amélie' were shipped by sea at the beginning of the season to make up for the short quantities on the market, benefiting from the earliness of the variety. But the rapid beginning of shipments of 'Kent' compromised shippers' expectations. Sales of 'Amélie' were particularly difficult right from the beginning, with only a third of the volumes sold with satisfactory market conditions. The rest was sold at decreasing prices at the limit of cost price or even lower. The question of the inclusion of this variety in the Ivorian export season arises every year. It has to be admitted that apart from its recognised taste qualities, 'Amélie' is only an export opportunity when it reaches the market before the first arrivals of 'Kent'. It is an adjustment variable or a complementary variety for Ivorian exporters and in no way their leading variety.



Mali Vacillating stability

Exporting nearly 3 700 tonnes, Mali is consolidating its position as the supplier of the European market that comes after Côte d'Ivoire, the West African export leader. The figure is similar to that of the preceding season. Exports consist of about 2 800 to 2 900 tonnes shipped by sea and around 800 tonnes by air. The sustained exports flows from this landlocked West African country make it possible to sell a proportion of its mango production, which also finds buyers in the subregion for consumption and also as produce for international exports by enterprises in neighbouring countries. Sea shipments leave from the port of Abidjan, resulting in extra transport costs in comparison with Ivorian exports. In spite of this limiting factor, Malian exports by sea have been substantial for several years. However, weighty logistics and exports at the same time as fruits from Côte d'Ivoire hinder an increase in volumes. It also seems that Malian production was smaller in 2010 and it was very difficult to supply the packing stations with export quality fruits. As mentioned above, Malian exports were shipped mainly to the Netherlands, especially at the beginning of the season. In contrast, they found outlets on the French market in the second half of the season when arrivals from Côte d'Ivoire dwindled. Mali is usually able to prolong its season, resulting in renewed interest from buyers when its main competitor in the region has ceased its shipments.

Exports from Mali by air mark the start of the season in West Africa. The first batches arrive in March, bringing diversity to sources on the European markets supplied practically only by Peru since January. In 2010, the first arrivals of 'Amélie' were early, at the beginning of March. Quantities increased slowly while demand became stronger in the weeks before Easter (beginning of April). Supply from Mali broadened at the end of March with the delivery of numerous Floridian varieties such as 'Smith', 'Valencia', 'Haden', 'Irwin', 'Zill' and finally 'Kent'. However, the enlarged varietal range was little suited to market demand. For several years, Mali has attempted to develop exports of secondary varieties to the French market but without real success. This produce is aimed at diversifying exports to make up for the shortage of coloured fruits in the face of the dominant variety 'Amélie' whose colour is less intense. But the established supply of 'Kent' from Peru and buyers' lack of knowledge of the other varieties considerably reduces their

commercial outlets. In addition, numerous small batches of many sizes and varieties, generally little coloured and not ripe enough were shipped, and these did not meet the success expected. The 'Valencia' variety had received a good reception in preceding seasons but not in 2010. Its rapid maturation and the lack of coherence of shipments sent it back to the same level as the others. The disparity of the quality of Malian fruits continued throughout the season for all the varieties proposed, including 'Kent' whose lack of colour and uneven ripeness were not good for the source. Malian mangoes faced competition from Ivorian fruits from mid-April to mid-May after that of Peru at the beginning of the season. The steadier quality of the fruits from Côte d'Ivoire and smaller number of shippers allowed better mastery of the market and hence of selling prices. The prices of Malian mangoes firmed in the second half of May while, paradoxically, quality deteriorated. This trend resulting from the end of Ivorian shipments and the mediocre quality of the first fruits from Mexico continued until the end of the season in the second half of June.

An important source of fruits imported by air from March to June, Mali's image is losing its gilt because of uneven quality. Varietal disparity does not seem to suit European demand for the moment, especially as it is generally accompanied by great unevenness in fruit quality. The fear that batches might be seized on arrival in Europe because of the presence of fruit fly larvae encourages Malian operators to ship fruits that are often hardly ripe enough. Although this alternative might be judicious for limiting the risks of the impounding of batches, it is poorly suited to buyers who go for air mango to have higher quality, standing out clearly from the fruits arriving by sea and aimed at other market segments.

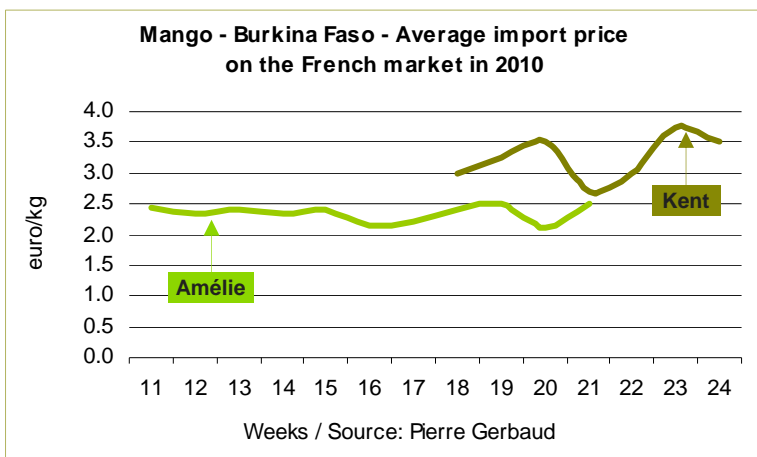


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Burkina Faso An increase in volumes

After several seasons of decreasing volumes, Burkina Faso displayed a more positive trend. A landlocked country like Mali, its fruits are shipped from the port of Abidjan. Exports during the 2010 season totalled nearly 3 000 tonnes, that is to say a thousand tonnes more than in 2009. Some 200 tonnes was also shipped by air.

The fruits shipped by sea were sold mainly in the Netherlands, thus avoiding direct competition with Ivorian fruits on the French market. In contrast, most of the air freighted exports went to France. Exports started with the shipment of small quantities of 'Amélie' that sold steadily at between EUR 2.20 and 2.50 per kg. Burkina Faso also started the first shipments of 'Kent' in Week 12. More were sent in the following weeks but the fruits were not ripe enough and turned out to be unsaleable. It was only in Week 18 that the shipments of this variety were resumed with fruits that were more up to the quality requirements of the market. Like mangoes from Mali, they were exposed to competition from fruits from Côte d'Ivoire and other sources such as Costa Rica, that in April shipped 'Cavallini', 'Mora', 'Haden' and 'Irwin' with better colour and ripeness. The Burkina Faso air export season finished in mid-June, benefiting from firm prices because of the small quantities available at that time.



Dominican Republic The emergence of a new source

With 4 250 tonnes shipped to the European markets, the Dominican Republic gained the status of an important emerging source as 2009 exports had hardly reached 3 000 ton-



nes. Exports are aimed mainly at the Dutch (52%), British, Spanish and French markets. Production runs from April to July, making it possible to supply the European markets between the peak season in the West African countries (Côte d'Ivoire, Mali, Burkina Faso and Guinea) and the later summer season when fruits arrive from Senegal, Israel and Mexico. This is the trading window sought by the source as a complement to its shipments to the North American markets. Although a few batches have been exported to the European market by air for several years (mainly 'Keitt'), the greater part of the volumes available is shipped by sea. Sales started in mid-May when West African supplies were shrinking and continued until the end of July. In the first part of the season, the varieties 'Haden', 'Springfield' and 'Keitt' were shipped to an under-supplied market, enabling sales at EUR 4.00 to 4.50 per box. In June, an increasing shortage of fruits sent the price of Dominican mangoes up to around EUR 5.00 to 6.00 per box, with supply consisting of 'Keitt' alone. Sales became more difficult in July as fruit quality worsened. Good quality fruits still changed hands at high prices (around EUR 5.50 per box) but the overall returns were worsening as fruits of poorer quality sold at from EUR 3.50 per

box. The Dominican Republic seems to suffer from the same types of climatic problems as Côte d'Ivoire and Senegal, with the arrival of the rains in the production zones increasing the risk of fungal infection of the fruits.

Mangoes from the Dominican Republic are an interesting alternative in June and July when the European market is under-supplied to a greater or lesser degree, according to the year. If this positioning may be favourable, it is still delicate as turning points in display are never fixed.

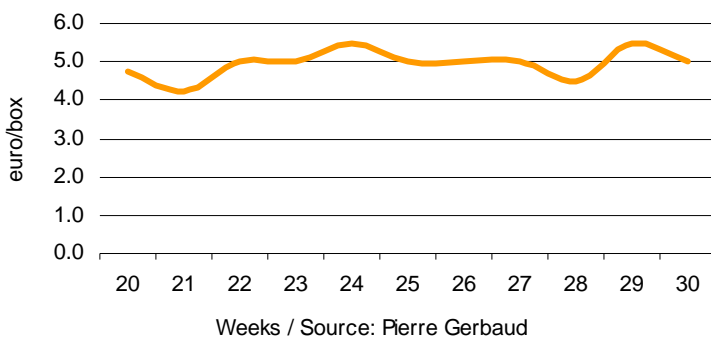
Senegal A small season with different episodes

Exports from Senegal were well down in 2010, with a total of around 3 000 tonnes in comparison with 5 000 to 6 000 tonnes in preceding years. The sales season was in two distinct phases corresponding to two consecutive, separate flowerings. The first ran from the end of June to the beginning of August, first with shipments by air soon followed by shipments in marine containers.

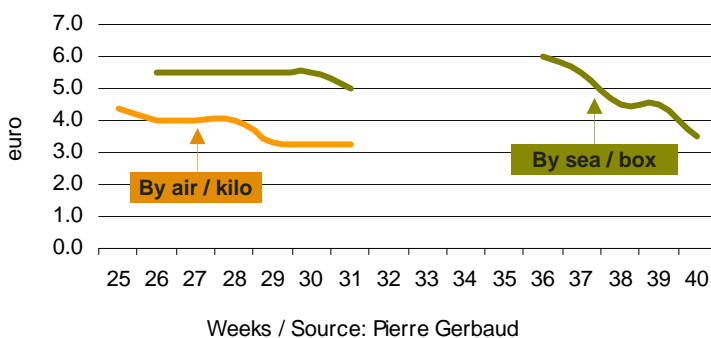
Market conditions were good during the first two weeks of sales of mangoes exported by air and prices were high because only small volumes of 'Kent' were available. But after this good start, sales became more complex as a result of the increase in the volumes available as the first batches arrived from Israel, a decrease in demand resulting from the summer holidays and also and above all the deterioration of the quality of the fruits received. Fungal attacks appeared on Senegalese mangoes particularly early and caused a dip in prices and then mediocre financial returns because of rejects when operators sorted the fruits. Spreading blemishes continued to develop on fruits until early August when shipments by air were definitively halted.

Less affected by fruit quality problems, shipments by sea did distinctly better and benefited from firm, regular prices. They also came to an end at the beginning of August with a few deliveries of 'Keitt', complementing the larger shipments of 'Kent'. Shipments were resumed in September for about another five weeks. This second wave had a less favourable environment as the market was more amply supplied (by Brazil and Spain) and the mangoes shipped were very fragile. The rapid development of fungal attacks compromised the results of this second period. Prices decreased markedly until the

Mango by sea - Dominican Republic - Average import price on the French market in 2010



Mango - Senegal - Average import price on the French market in 2010

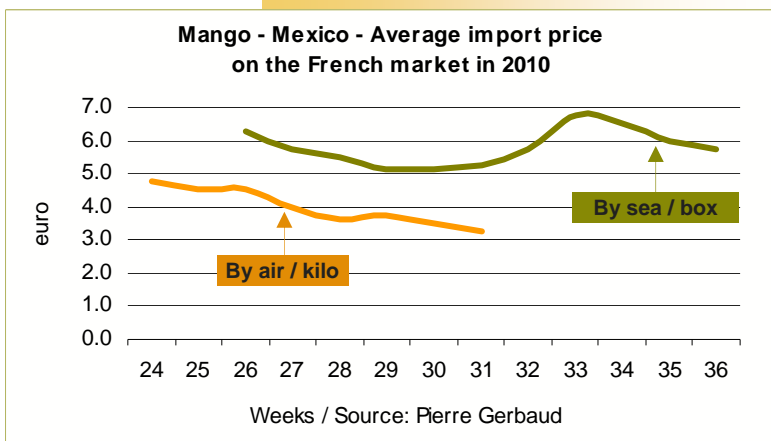


end of the season, resulting from the obvious lack of reliability of fruits from Senegal. This source had increased its shipments to the European markets tenfold in a few years and made it possible to maintain the presence of West Africa by its staggered production. It now sees its commercial niche compromised by the recurrent occurrence of serious quality problems. The image of Senegalese mangoes tends to deteriorate from one year to the next. Numerous distributors hesitate to sell these fruits that lack reliability in terms of their evolution.

Mexico An opportunist season

The comparative under-supplying of the European market from June onwards doubtless led Mexican exporters to pay more attention to this destination that they had more or less ignored in previous years. Mexico is one of the main suppliers of mango on the international market but its favours the closer North American consumption zones with which it has more regular contacts. This year, the opportunity of selling mangoes at good prices probably explains the strong increase in the volumes shipped to Europe. These totalled 4 900 tonnes in 2010 against only 1 500 tonnes in 2009.

Mexican exports by air started in mid-June. In the absence of substantial volumes of 'Kent', shipments from Mexico sold well on the European markets. However, selling prices remained chaotic at the beginning of the season for reasons of lack of colour and maturity. Under the effect of a slowing of demand during the summer holiday period, the uneven quality of the produce available and the increase in volumes, especially with the start of the Israeli season, the prices of Mexican fruits lost ground until the beginning of August when shipments by air ceased.



The reception of batches of fruits of advanced maturity made prices even weaker as consignees tried to shift this fragile produce rapidly.

Shipments by sea reached the European market at the end of June, a fortnight after the first batches sent by air. They continued until the beginning of September. Like the first fruits delivered by air, those arriving by sea displayed a serious lack of maturity and colour and this weakened prices until mid-August. Prices then recovered as there was a dip in the supply of 'Kent' (shipments from Senegal suspended and small tonnages of this variety from Israel). The end of the Mexican season was uneven, with performance depending on the quality of the produce available. Good quality fruits continued to sell at high, firm prices whereas those of more random quality fetched much less, affecting the economic results of the season.

Israel A more concentrated, smaller season

Sales of mangoes shipped from Israel by air started in the second half of June and finished at the beginning of September. The largest tonnage was shipped from the end of June to mid-August with the small fruit varieties 'Maya' and 'Aya'. These sold at prices decreasing from EUR 4.00 to 3.00 per kg, with a few sales at lower prices during the first fortnight of August. A few batches of 'Orly' were sold with difficulty at the beginning of the season. This new variety with fine colour turned out to be slightly fibrous and without flavour. It was initially successful



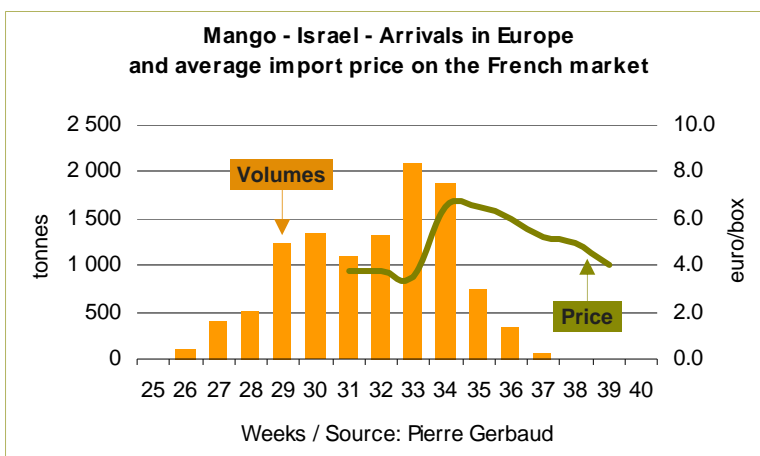
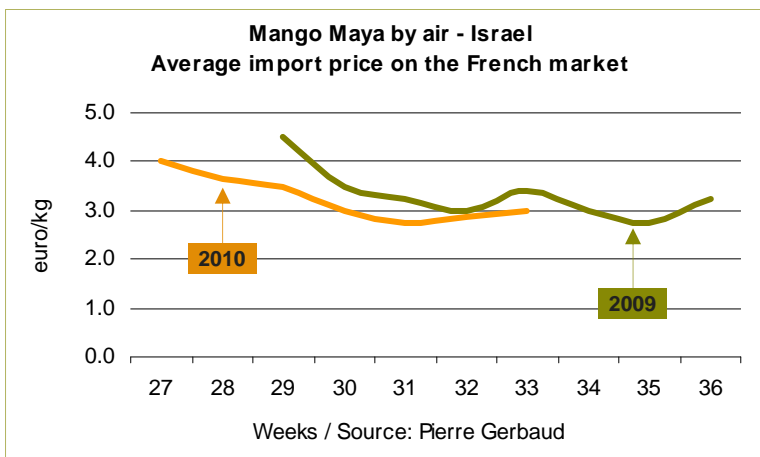
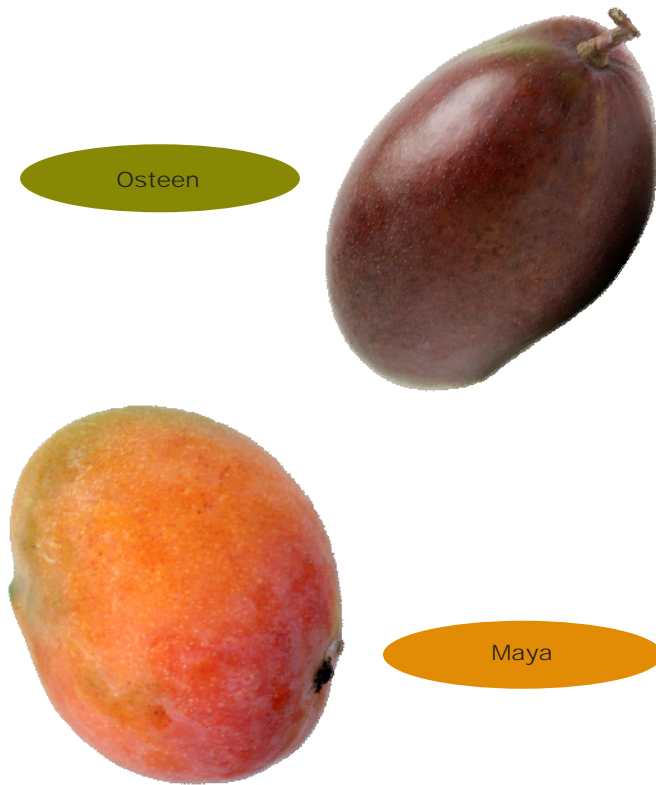
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because of its fine appearance by buyers soon lost interest in it. In August, Israeli supply was complemented by other varieties such as 'Shelly' and 'Kasturi', which fetched EUR 3.50 to 4.00 per kg, contributing to a better end of the season for air quality mangoes. Production of these slightly later varieties seems to have been affected by a strong heat wave in the production zones and this led to a reduction of shipments.

Exports by sea took place in August and September, thus losing two to three weeks of sales in comparison with previous years. After a short period of sale of 'Tommy Atkins' and 'Shelly', Israeli shipments concentrated on 'Keitt'. Sales of 'Kent' seem to have been particularly small. Given the limited supply of 'sea' mango from mid-August onwards, selling prices rocketed and exceeded EUR 6.00 per box for several weeks. They fell again in September, returning to EUR 4.00 to 5.00 per box while the volumes shipped from Israel decreased strongly, but were amply compensated by strongly increasing arrivals from Brazil and an increase in shipments from Spain.

With some 11 000 tonnes shipped in 2010, Israel kept its position as a major source of supply of mangoes in the summer. The 1 000 to 2 000 tonnes less exported this year in comparison with 2009 enabled a shortening of the sale period that was somewhat favourable for Israel as in September the market displayed a downward trend because of, the large quantities exported from Brazil.

Spain Confirmation

On a scale comparable to that of 2009, the Spanish mango sales season ran from the end of August/beginning of September until the end of November. Nevertheless, the distribution of volumes seemed to be different, with shipments concentrated more from mid-September to mid-October and smaller volumes shipped at the beginning and the end of the season. Shipments during the 2010 season totalled 7 000 to 8 000 tonnes, an increase of 500 to 1 000 tonnes in comparison with 2009. As in previous years, it was concentrated on the variety 'Osteen' that forms the greater part of production. The prices of the first batches released was high this year because supply of quality mangoes was smaller at the end of August/beginning of September. However, the quality of the first fruits to arrive was mediocre, with



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batches often consisting of large fruits of dubious ripeness and thus in contradiction with the phrase 'ripened on the tree' displayed on the packaging. Quality then improved as supply increased. Prices lost ground from mid-September to mid-October, in parallel with the volumes released on the market. Quantities of 'Kent' and 'Keitt' were fairly small. Sales of 'Kent' were concentrated in October and in November for 'Keitt', which was later with smaller volumes.

The prices of 'Osteen' mentioned should doubtless be reduced to approach the reality of the market. Indeed, considerable price disparity was observed, with large differences during the height of the season. Considerzble differences were observed while deliveries were running strongly. The phenomenon seems to go beyond the simple comparison of supply and demand and is also explained by the large number of operators during this period. The few major Spanish brands that sell most of the fruits are faced with more volatile, unstable distribution channels when the season is in full swing. For at least part of the season they formed internal competition on the destinations markets by a mechanism of downward price competition between the production and sales sectors.

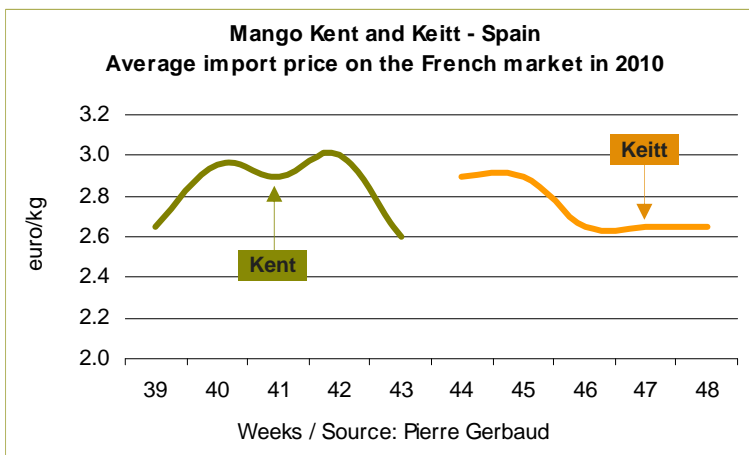
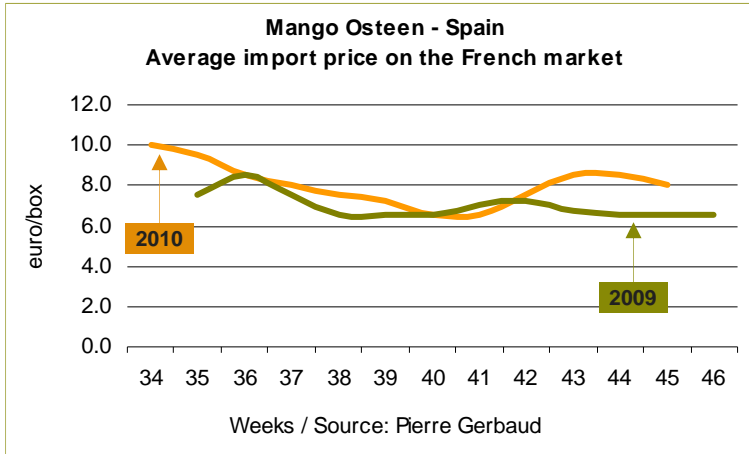


© Simon Barnard

Another trend was confirmed in sales of Spanish mangoes with regard to the distribution channels addressed. For example, importers on the French market no longer sell mangoes from Spain. It is more wholesalers or wholesaler/importers that take reception of the goods. The trend observed for two or three years became more marked. As Spain is a European supplier, delivery directly to wholesalers seems natural in order to avoid using one more middleman, and some suppliers go directly to retail distribution chains. Using a short distribution channel conserves the margins of the limited number of middlemen. The downside lies in an atrophy of the outlet potential possible via the range of consignees. This contraction of distribution channels leads Spanish suppliers themselves to seek for new outlets. This seems to have happened in 2010 with direct distribution to other targets, in particular by increasing shipments to markets other than France, hitherto the main export destination. Thus the Dutch and German markets, among others, were addressed more strongly than in the past. Market conditions during the Spanish season, with moderate competition from Brazil, seem to have favoured this determination to increase the distribution area of Spanish mangoes.

As Spain is a member of the European Union and plays an important role in supplying fruit and vegetables to neighbouring markets, it is a special source of mango supply. It is apart from the conventional trade in mangoes but is affirming its position as an essential supplier in the annual calendar ■

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Mangoes from Brazil

Varietal diversification and the domestic market as responses to the sector crisis



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A traditional crop

The Portuguese introduced mangoes in Brazil in the sixteenth century, and in particular brought varieties from the Philippines. The fruits gradually spread to most parts of the country following the pioneer fronts that opened up land. It was also produced little by little by the native populations, and this enhanced crosses between varieties and was followed by multiplication and the appearance of new cultivars. Mango thus proliferated throughout the country, whence its omnipresence in private gardens in both towns and the country. Mango is very present in the diet of Brazilian families. This goes a long way towards explaining why 88.5% of national production is sold on the domestic market.

Mango - Brazil - Distribution of production by regions



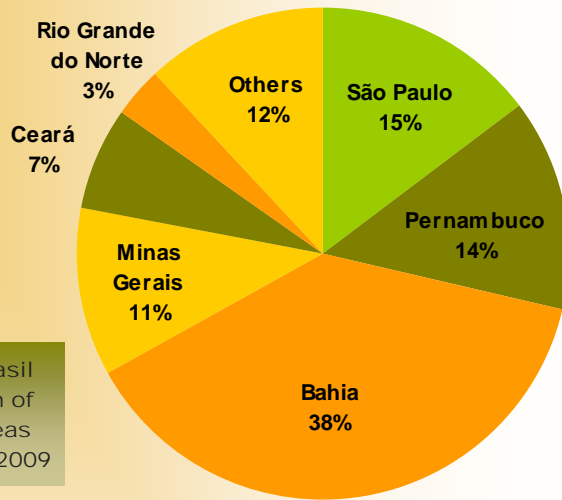
Source: IBGE 2009 / Graphics: Cirad - Chez Vincent

From the traditional regions in the south-east to the large irrigated orchards in the north-east

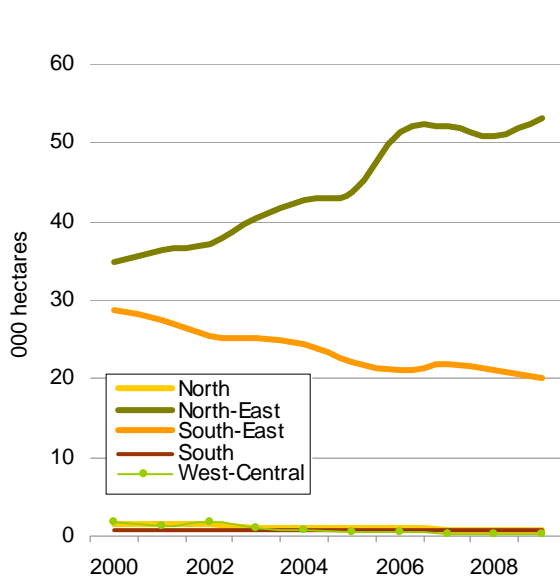
The greater part of production was concentrated in the traditional regions in the south-east (São Paulo and Minas Gerais states) until the mid-1990s. Brazil's presence on the international market increased thanks to the use of modern production methods enabling harvesting practically all the year round—in particular by the use of planned floral induction and the setting up of irrigated cropping in the north-east region. The Nordeste region currently accounts for 76.3% of production and 92% of Brazilian mango exports.

Mango - Brasil
Distribution of
planted areas
by states in 2009

Source: IBGE

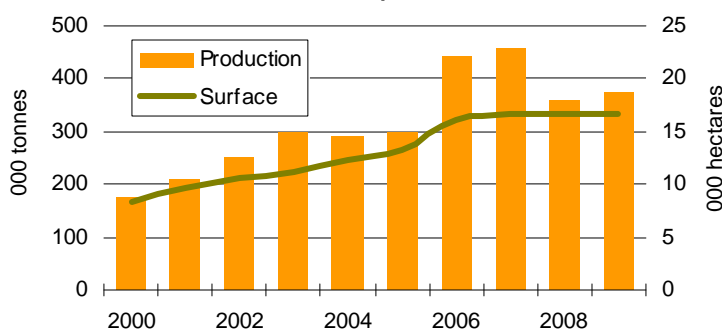


Mango - Brazil - Planted areas by region



Source: IBGE, 2010

Mango - Brazil - Petrolina/Juazeiro
Production and planted areas



Source: IBGE, 2010

It is the site of the Petrolina/Juazeiro fruit production centre in the Rio São Francisco valley where most Brazilian export mangoes are grown. While planted areas have increased by 25.5% at the national scale in the last 10 years, they have increased by 337% in this zone. In contrast, production has decreased by about 16% in other traditional cultivation regions such as São Paulo and Minas Gerais.

From 1996 to 2009, production in the Nordeste increased by 93% from 364 000 to 703 000 tonnes. Bahia and Pernambuco states have the largest areas under mango in São Francisco Valley, where average yields reach 22 tonnes per hectare.

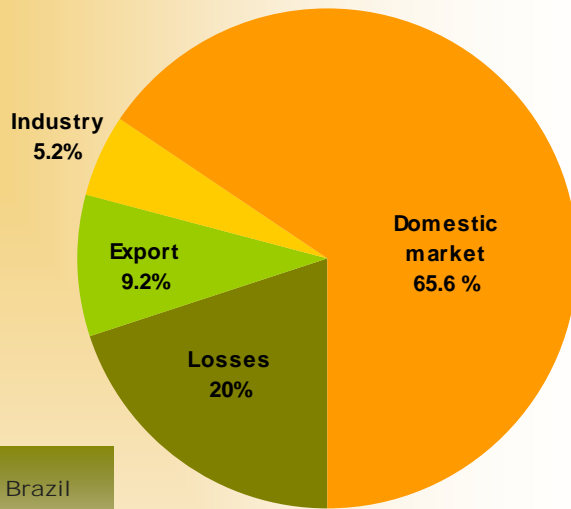
In 2009, the Nordeste and the Sudeste accounted for 98% of national production between them.

Diversified farming systems

Large fruit production and export enterprises set up in a substantial part of São Francisco Valley, with considerable public financial aid. In parallel, small and medium-sized farms set up on public land on a share tenancy basis. They first grew food products to supply the local market but changed little by little and became specialised in growing fruit—especially mango. These small and medium producers gradually became favoured suppliers of the large export companies, wholesale markets and supermarket chains on the domestic market (for this change see the study by L.A. Favero, P. Gerbaud et al.: *A Cultura da Manga no São Francisco: posicionamento, limites, oportunidades e ações estratégicas*. Banco do Nordeste do Brasil, Fortaleza - Brasil, 2008). The 1990s were decisive for the development of production in this region. There were only a few hundred hectares of mango at the beginning. After five years the planted area exceeded 5 000 ha while production increased from 4 700 to 42 500 tonnes during the same period.

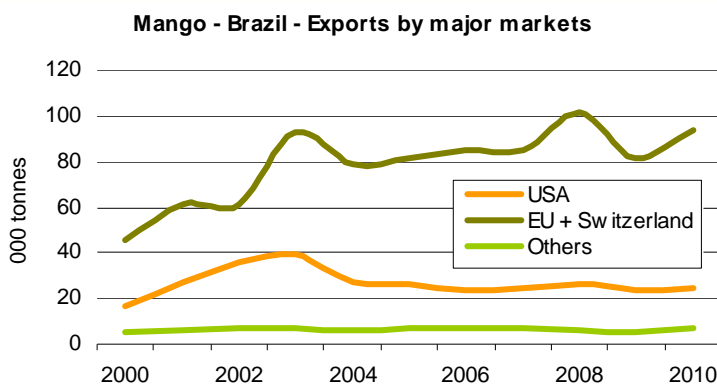
The development of other pioneer areas

Attracted by the good performance of mango on the international market for a



Mango - Brazil Distribution by outlets

Source: IBGE



Source: COMTRADE

large part of the 1990s, other production centres developed in the Nordeste region, such as that of the Rio Brumado in the south-west of Bahia state, the Açú River in Rio Grande do Norte state and Ceará state.

Located in regions with different soils and climates, even though they do not have the scale of the Petrolina/Juazeiro area, these centres are more specialised in out-of-season production—earlier or later than that of the other regions. This means that they can grow fruit for the US and EU markets and also for the domestic market when mango supply is smaller.

These new zones have plant health advantages as they are little infested by fruit fly and fungal diseases.

A source among world trade leaders

The increase in orchard area has enabled Brazil to become one of the world's leading exporters. Brazilian presence began to be significant in the 1990s, with exports shipped first to the United States and then to Europe, which is now the destination for nearly 95% of exports of mangoes from Brazil.

Production continued to grow in subsequent years as orchards came into production and planting continued strongly. This basic trend remained in spite of the marked, continuous fall in prices on export markets. Simultaneously with the increase in Brazilian production, other producers like Mexico, Peru and Ecuador developed ex-

Mango (+ guava and mangosteen) — Brazil — Exports

tonnes	2 000	2 001	2 002	2 003	2 004	2 005	2 006	2 007	2 008	2 009	2 010
Total	67 593	95 038	104 544	138 769	112 384	114 911	115 724	116 271	133 944	110 355	124 844
EU + Switzerland	45 629	61 654	61 472	92 618	78 546	81 892	85 386	84 983	101 914	81 622	93 368
United States	16 896	27 371	36 283	38 990	27 396	26 341	23 372	24 549	26 045	23 598	24 613
Canada	2 556	2 766	4 467	4 937	4 669	3 663	3 858	4 848	4 424	3 184	3 151
Guatemala	1 962	1 942	405	981	837	984	654	487	642	848	980
Saudi Arabia	192	587	847	506	308	612	709	177	44	-	-
Ghana	-	130	411	311	378	405	693	331	148	8	1 094
Chile	242	151	193	195	89	153	131	241	220	166	476
Japan	-	-	0	0	-	31	341	402	318	406	591
Others	116	436	466	229	162	831	581	255	190	522	571

Source: COMTRADE



ports to the USA and Europe, increasing competition in mango.

At the beginning of the 2000s, Brazilian production reached a million tonnes, a 25% increase. The increase was fed mainly by the São Francisco production zone where growth was close to 50%. Today, Brazil is one of the ten leading mango producing countries with more than 75 000 hectares of orchards and production totalling 1.2 million tonnes. More recent markets are developing, such as the United Arab Emirates.

A very broad but under-exploited varietal range

Unlike other exporting countries like India, Mexico and Israel, which have developed new commercial varieties, Brazil has profited very little from its genetic richness. But it possesses a great diversity of mangoes: 230 according to EMBRAPA, the public research body responsible for development and plant breeding. In spite of this diversity, nearly 75% of Brazilian production consists

of 'Tommy Atkins', with the proportion being even higher in the São Francisco Valley region where it forms 87% of mango production.

National varieties resulting from natural crosses, such as 'Bourbon', 'Rosa' and 'Espada', fetch up to five times the price of American varieties like 'Tommy Atkins', depending on the season. These local varieties are for the domestic market only and are not exported. Excess production between October and January often causes prices to fall considerably and growers—mainly small farmers in the São Francisco Valley—leave the fruits on the trees rather than pick them.

Difficult logistics

Logistics is still one of the main problems for Brazilian mangoes. Firstly, the state of the roads means that haulage to the shipping ports is long. Furthermore, shipping time to both Europe and the United States is 10 to 15 days.

Practically all the volumes for the EU are shipped by sea, with only 1% by air. The main entry point in Europe for Brazilian mangoes is still the Netherlands, and especially the port of Rotterdam; the fruits are then shipped to the other countries by road, waterways or rail. Although the Netherlands handles a large proportion of Brazilian exports at 66%, it has lost ground as the figure was over 80% in the 1990s. Spain and Portugal have become major importers and distributors of Brazilian mangoes in Europe. Transport time and the cost of logistics strongly affect quality and price at the import stage.

Mango — Brazil — Production calendar													
Production regions	J	F	M	A	M	J	J	A	S	O	N	D	Varieties
São Paulo													TA, Haden, Palmer, Bourbon, Rosa
Minas Gerais													TA, Haden, Uba, Espada
Rio Grande do Norte, Ceará*													TA, Espada
Rio Brumado Valley*, Pernambuco/Bahia/São Francisco Valley													Espada, TA, Haden, Keitt, Kent, Palmer

*new production zones outside São Francisco Valley / Sources: IBRAF, EMBRAPA/CPATSA, field research





Tommy Atkins

Logistics costs for Europe (involved in transport from farm to port of loading, sea freight, forwarding from the port of arrival and placing in cold storage) generally represent an average of 430% of production costs and 48% of the selling price.

Mangoes are shipped to the United States by sea from Brazil, contrasting with Mexican fruits that travel by road because of the geographic proximity. The main ports of arrival are Philadelphia (51%) and New York (29%). Shipments to the East Coast ports start in September and those to the West Coast in October.

The beginnings of a new reality for the market for Brazilian mangoes?

Changes in the Brazilian mango sector have been seen over the past five years. First, total production has decreased by about 5%. But above all, São Francisco Valley production has lost ground in terms of proportion of national production as it accounted for 42% in 2006 and no more than 32% today.

In addition, Brazilian mango exports are stagnating at between 110 000 and 115 000 tonnes per year. The latter figure was only exceeded when the harvest was poor in Peru in 2008. This situation also shows that only 9.2% of Brazilian production is exported in comparison with 13% five years ago.

It would seem that production is now being restructured by the market. In recent years, economic results have been negative or mediocre, especially for small and medium-sized producers. In the early 2000s, the race to ship ever-increasing volumes—especially from September to November—caused a serious fall in selling prices. Two other parameters also had a very negative impact on economic returns. First, the Brazilian real rose considerably against the dollar and the euro. Second, production costs increased as prices of agricultural inputs have increased. In parallel, the government's policy of increasing

purchasing power has resulted in wage increases. Production costs are higher in Brazil than in the main competing countries Mexico, Peru and Ecuador.

The crisis is having many effects. The shortage of financial resources to set up mango growing (because of the points mentioned above) and the absence of advances from the import sector have caused the partial or total abandoning of the crop and even the bankruptcy of a number of farms and companies. Indeed, the financial slump has made it impossible for them to repay loans.

In addition, growers are now more interested in the vast domestic market which has increased purchasing power, and greater dynamics in employment and national economic growth. This considerably enhances food purchases and especially fruits such as seedless grapes and mango varieties hitherto reserved for export. The domestic market thus took two-thirds of production in 2009.

There has also been diversification of the varieties available for export, with 'Kent' and 'Palmer' reducing the share held by 'Tommy Atkins'. The deconcentration of production that was previously focused on the period from September to November makes export flows more fluid. The Brazilian mangoes are found on the European market almost all the year round, to a great extent thanks to technical improvements, plantation management and production in complementary regions where crops are aimed at both the export and domestic markets ■

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Specialist in world fresh fruit and vegetables markets

In collaboration with Maria Rosângela Barbosa da Silva

and Fábio de Oliveira Medeiros



Haden



Keitt



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THE SELECTION OF THE MANGO

“ We search for you the best sources, brands and varieties to ensure you the best sales all year-round ”

Gabriel Burunat



Producer country sheet

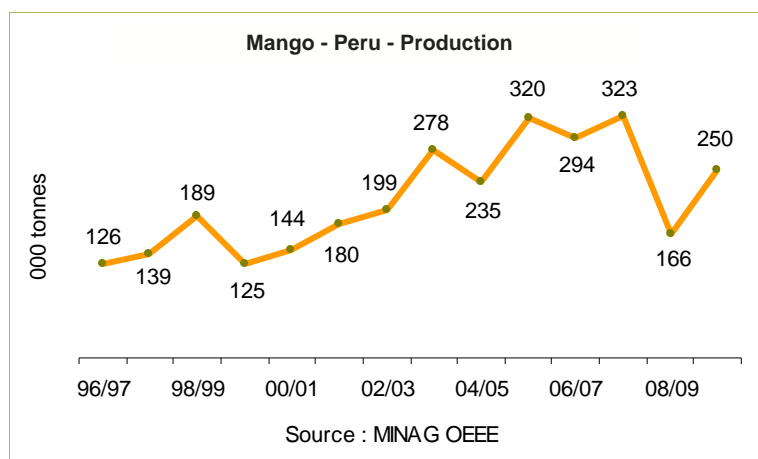
Mango in Peru

by Eric Imbert

Benefiting from favourable soil and climate conditions and an excellent window on the international counter-season market, the Peruvian mango sector developed rapidly thanks to exports to Europe and the United States in the 1990s and 2000s. It has gained a position among the leading five exporters with more than 1000 000 t shipped each year. Faced with decreasing profitability caused by fiercer international competition, the sector is seeking areas for growth by diversifying markets and strengthening its organisation, which still features broad scattering both upstream and downstream.

Production zones

Practically all of the 24 000 hectares of mango in Peru is concentrated in the extreme north of the coastal strip between the Pacific and the Andes. The characteristic climate of the region is both hot and dry, making it possible to grow high-quality mangoes while limiting certain sanitary problems such as anthracnose. The Piura region alone accounts for nearly two-thirds of the area under mango. The San Lorenzo Valley irrigated perimeter created in the 1960s in a desert characteristic of the coastal area of Peru thanks to water from the River Piura is the heart of the country's orchards (Tambogrande district). The rest of the plantations in the region are in the River Chira Valley (Sullana district) and in the Alto Piura (small growers in Chulucanas district). The Lambayeque region accounts for about 15% of the areas, mainly around Olmos and above all Motupe. The rest of the orchards are in the Ancash (Casma), Lima (Huaral Valley), Cajamarca and Ucayali regions. Farming systems are varied and range from minifundios (very small farms) to commercial orchards, with about 90% of the 14 500 growers operating on less than 10 ha. The presence of fruit fly is a strong constraint for access to certain markets. In addition, meteorological events caused by the El Niño and La Niña phenomena cause sporadic decreases in production.



Production

Production was moderate and consisted mainly of indigenous cultivars for the local market until the beginning of the 1990s. The opening of the United States frontier after approval by APHIS (the US Animal and Plant Health Inspection Service) of the hydro-thermal disinsectisation process gave decisive impetus to the sector. New plantations of grafted monoembryonic varieties such as 'Kent', 'Haden' and 'Tommy Atkins' were established, especially in the San Lorenzo Valley, to meet the demand for counter-season mango in the United States and the European Union. National production increased from some 60 000 to 70 000 t at the beginning of the 1990s to more than 300 000 t

in 2006. However, the decrease in the profitability of the crop since the mid-2000s has put an end to the increase in orchard area. Competition has increased on the international market (Ecuador and Brazil). In addition, the great variability of production structures is a weak point in terms of both quality and market organisation. The sector is backed by five associations, including APEM and PRO-MANGO in particular, that are attempting to federate growers.

Calendar and varieties

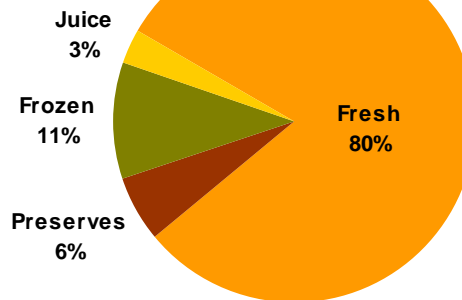
Kent clearly dominates production and forms nearly 90% of exports, with the range being completed by 'Haden', 'Tommy Atkins', 'Keitt' and 'Edward'. Local varieties like 'Criollo de Chulucanas', 'Chato' and 'Rosado de Ica' are mainly used for processing. The season starts at the very end of November and lasts until the beginning of March, with the bulk of shipments between mid-December and early February. The northernmost zones are the hottest and earliest.

Mango — Peru — Export calendar

	N	D	J	F	M
Piura					
Lambayeque					
Ancash					



Mango - Peru
Exports by
kind of product



Source: Promperu

Outlets

Some 25 to 30% of production is exported fresh. The rest is sold locally or processed. Peru is also an important player on the international juice market (about 3 000 tonnes per year), canned products (4 000 to 5 000 t per year) and IQF mangoes (about 20 000 t per year).



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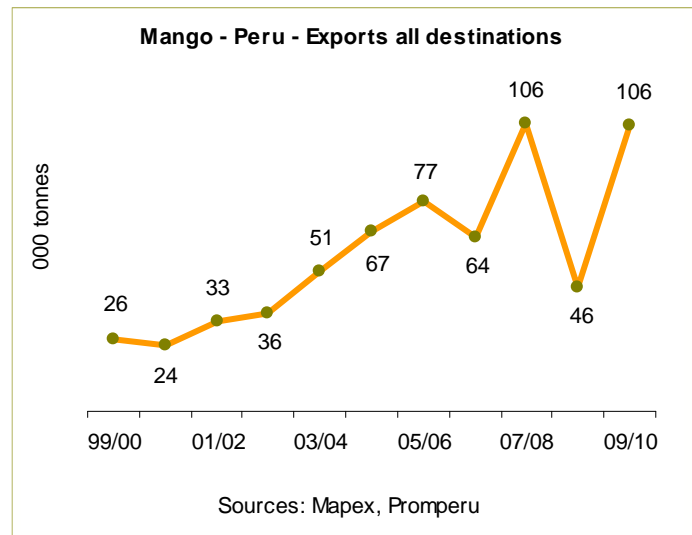
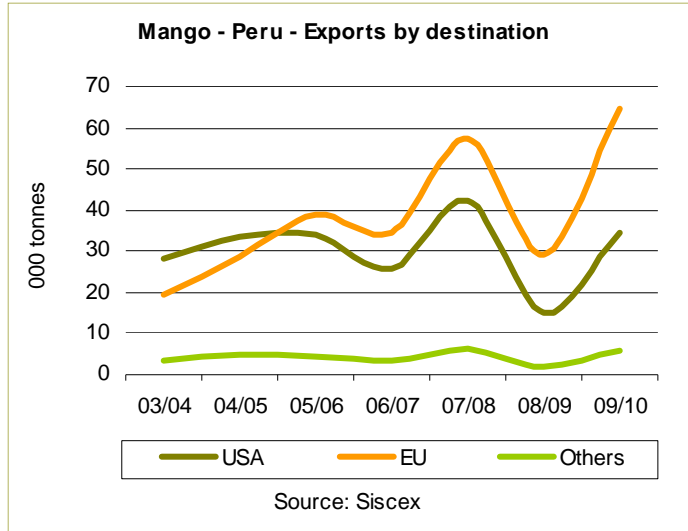
Perú / Francisco Graña 155, Santa Catalina
Teléfono (+51 1) 621 0800 / Fax (+51 1) 621 0804

Exports

Exports grew strongly until 2007-08, when they exceeded 100 000 t. They held at this level in 2009-10 after a strong decrease caused by weather problems in 2008-09. The EU became the main market for mangoes from Peru in recent seasons as demand stagnated in the USA. About 90% of the volumes exported are from the Piura region and the rest is shipped by operators in Ancash, Lima and Lambayeque. The export sector suffers from the same dispersion as production. Nearly 120 exporters were referenced in 2009-10 (19 packing stations of which 9 have APHIS approval), with 5 handling about 35% of volumes. Downstream, no fewer than 234 importers handle mango during the season, generally on a commission basis. The sector has succeeded in diversifying to new markets in recent years, thanks in particular to the work of APEM and SENASA, the Peruvian phytosanitary authority (sanitary procedures set up with Mexico, China, Japan, New Zealand and Chile). Shipments to these new client countries are growing but still modest (5 000 t in 2009-10). Other market segments (fair trade and organic) have also been developed.

Mango — Peru — Exports by operators in 2010	
Sunshine Export	13%
Camposol SA	7%
Perishable de Frutierrez Latinoamerican	6%
Dominus SAC	5%
Sociedad Empacadora de Frutos Tropicales	4%
Sociedad Agrícola Frontera del Peru	4%

Source: Promperu



Logistics

Most of the fruits are shipped by sea from the port of Paita; this is close to Piura and 3 hours by road from Lambayeque. A few batches are also shipped from the port of Callao near Lima (slightly less than 10% of shipments in 2009). Europe is supplied in a little less than 20 days. Rotterdam is the main point of entry, with 85% of arrivals in 2009, followed far behind by Tilbury and Algeciras. As regards the United States, it takes about 10 days to reach both the West Coast (port of Los Angeles) and the East Coast (ports of Miami, Philadelphia and New York).

Mango — Peru — Export distribution by port of departure	
Piura	90%
Callao	8%

Source : Promperu 2010

Air freight was used for between 2 and 6% of total exports in 2008 and 2009. Batches go mainly to the airports of Newark in the United States and Charles de Gaulle in France.



Mango in Côte d'Ivoire

Review of 2010 and prospects for 2011

The 2010 season brought a measure of hope for the mango sector in Côte d'Ivoire. A positive season at last after very difficult years that had resulted in serious losses for operators. Will these improvements be there in the coming season?

Better mastery of quality

The crop was early in 2010. Picking started at the beginning of April and the weather was much better than in 2009. Indeed, the rains started two weeks later, allowing better harvest conditions and discouraging the development of anthracnose and pricking by fruit fly.

Taking these quality features into account, exporters quickly halted shipments at the beginning of May, which had not been the case in 2009. The season was therefore concentrated on the first four weeks of harvesting, leading to European market supply problems at the beginning of June.

The 2010 season proved that it is extremely difficult to export 'Kent' from mid-May onwards and exporters are well aware of this. Indeed, in addition to fungal and disease risks, the excessive maturity of the variety means that it can no longer be shipped to Europe under optimum conditions.

Although the season started early, it was delayed by more than a week for reasons of the stage of ripeness suitable for exports by sea.



The harvest could have started at the end of March. This can be explained by two factors: the ongoing 'Amélie' export programmes and the wait for 'Kent' to reach a more advanced stage of ripeness for shipping by air. Thus problems of overripeness of fruits shipped by sea ran up against producers' and exporters' interests from the beginning of the season.

On the eve of another season, it would certainly be a good thing to solve the problem. This depends mainly on exporters who can trigger harvesting in conformity with the right picking stage.

The overripeness phenomenon has been aggravated by the difficult working conditions in packing stations subject to power cuts. The batches picked sometimes waited for a long time before treatment and chilling.

Mango exports by air were disturbed for a week by the cancelling of flights because of dust from the Icelandic volcano.

Overall, thanks to better mastery of quality (colour, size, taste quality, etc.) and evenness during the export season, Côte d'Ivoire mangoes are conserving their leading position on the European markets.

Stabilisation of volumes

Mango exports totalled nearly 12 000 tonnes in 2010, roughly equivalent to the 2009 figure. The tendency for the volume to stabilise should continue in 2011.

This year, the configuration of mango production in Côte d'Ivoire is similar to 2010. The first flowering started around 10 December and picking may start with large volumes at the end of March. The second flowering is also substantial. There are no major worries for what promises to be a large harvest in Côte d'Ivoire.

Mango — West Africa — Number of 40' containers* exported from Abidjan port

Origin	2009	2010
Côte d'Ivoire	528	522
Mali	135	130
Burkina Faso	89	135
Total	752	787

*a container holds about 22 tonnes of mangoes / Source: Bolloré Africa Logistiques Abidjan

However, operators should be vigilant, start picking on time and stop exports as soon as the first rains arrive, as was the case in 2010.

Indeed, some people might think that shipments should be continued to meet European market demand in June. But taking quality problems into account should slow the development of shipments in mid-May. Ensuring optimum quality of Ivorian mangoes for buyers should be the main objective of shippers and distributors.

With new plantations coming into production, Ivorian mangoes should feature better size and colour.

Increasing the quantities exported is no longer an aim. Both exporters and producers seek guaranteed minimum prices to allow the coherent development of their enterprises and plantations.

Several concerns to be handled

In spite of an extremely complex political situation, mangoes from Côte d'Ivoire will be present on the European markets this year.

But it is clear that production costs should increase significantly, especially because of the cost of inputs (boxes, freight, logistics) and a political context that will certainly not allow the levying of the high taxes paid in the production zone.

The functioning of export logistics using rail from the production zone to the port and then transport to Europe should not be affected ■

Alexis Moulin



The threat of bacterial canker disease

Observed for the first time in West Africa, bacterial canker disease caused by *Xanthomonas citri* threatens all the production areas in the region.

Previously only observed in southern and East Africa, bacterial canker disease (BCD) was recently seen in West Africa for the first time. Samples bearing *Xanthomonas citri* pv. *mangiferae indicae* were found in Ghana, Burkina Faso (Bobo-Dioulasso, Banfora and Orodara) and Mali (Bougouni, Koulikoro and Sikasso regions). Ongoing research at CIRAD has revealed the genetic similarity of the strains from Mali, Ghana and Burkina Faso.

BCD attacks the various aerial parts of the plant, causing black patches with a crust-like appearance on leaves and fruits. Cankers may be observed on shoots and trunks. Severe attacks cause the shedding of leaves and fruits. Damage increases during the rainy season when bacteria are spread naturally by rain and wind and cause fresh outbreaks of infection. Spread over long distances is linked to the transport of infected germplasm by man.

Control is very difficult in orchards. Only prophylactic methods can be used (pruning infected plant parts), with the protection of trees and fruits by copper-based contact sprays. However, the effectiveness of these treatments is fairly doubtful. The only truly effective method is preventing the disease from entering a country and, when it is detected after introduction, eradicating it in the zone concerned.

The emergence of this bacterial disease is a threat to all the production areas in West Africa.

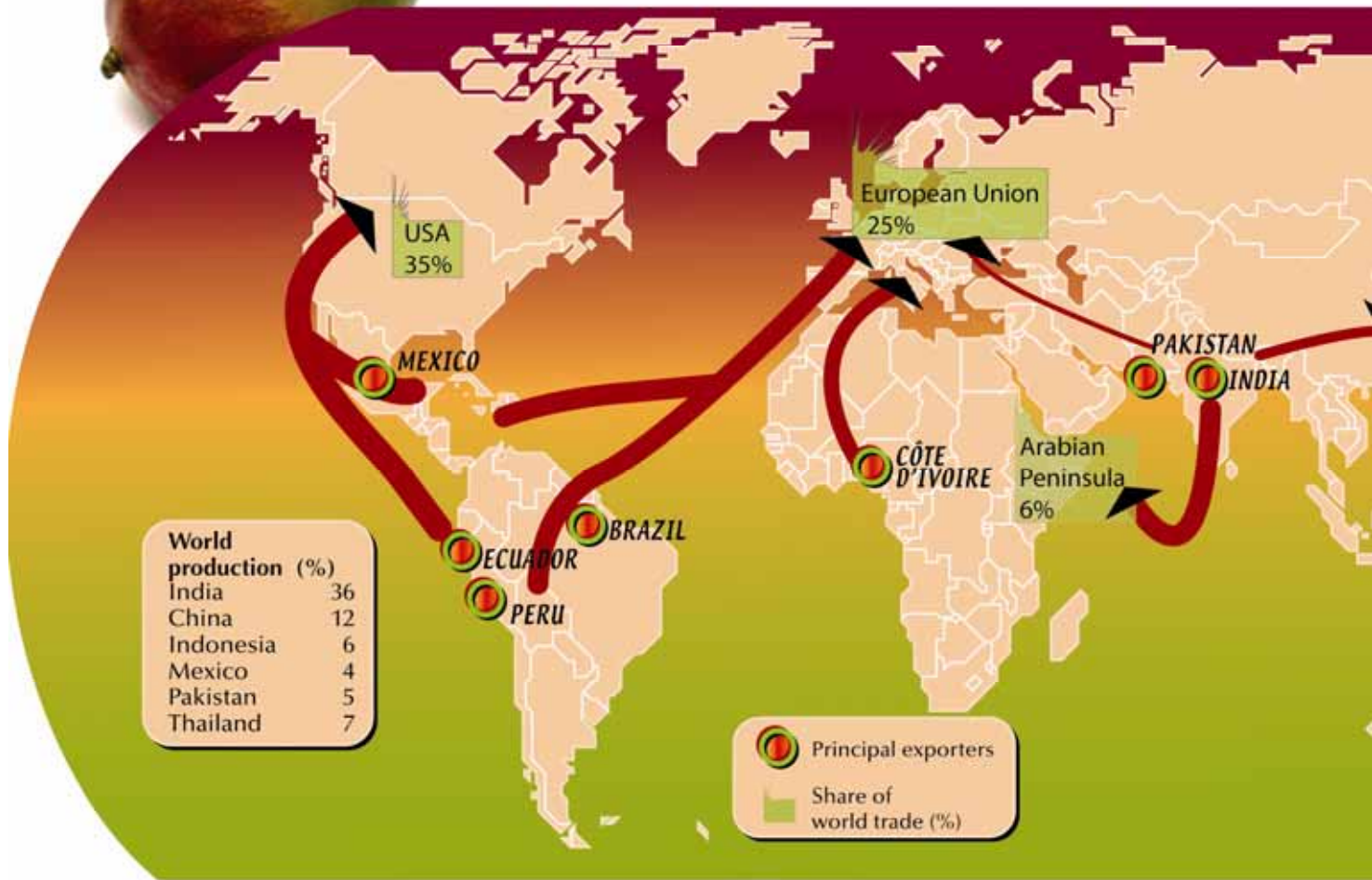
Asian citrus canker caused by another subspecies of *Xanthomonas citri* (*Xanthomonas citri* pv. *citri*) has also appeared in the region.

Source: lettre d'information COLEACP – CIRAD n°10, novembre 2010



Mango...

production: 34 000 000 tonnes
world trade: 950 000 tonnes



Mango (and guava) — United States imports

tonnes	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total	239 051	240 278	266 280	282 360	281 658	267 017	298 088	303 562	305 958	295 653	332 095
Mexico	166 767	156 548	164 193	173 630	174 799	159 550	181 163	185 279	182 754	186 807	221 945
Peru	12 297	15 553	20 515	20 582	30 334	29 854	33 614	29 193	38 323	17 316	32 175
Ecuador	20 428	19 797	21 602	27 350	25 036	24 083	31 070	31 250	24 682	35 304	25 650
Brazil	16 984	26 937	36 040	39 034	27 187	26 144	23 088	24 679	25 774	23 193	24 407
Guatemala	8 284	10 314	9 550	8 259	8 775	9 317	9 131	12 881	14 919	14 706	12 679
Haiti	10 159	5 878	8 376	6 070	8 065	9 391	10 266	8 681	8 274	9 014	6 502
Philippines	151	514	1 315	2 166	2 877	3 620	2 974	3 545	3 268	2 996	2 815
Others	3 981	4 738	4 690	5 270	4 585	5 061	6 782	8 053	7 964	6 318	5 922

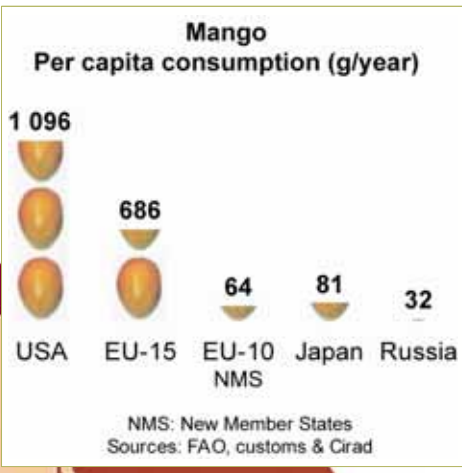
Source: US customs (code 080450)

Mango (and guava, mangosteen) — Japanese imports

tonnes	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total	9 627	8 901	8 875	10 307	12 336	12 139	12 383	12 389	11 589	11 103	10 391
Mexico	3 155	2 445	2 178	2 342	2 908	3 587	4 329	5 386	5 260	5 050	3 974
Philippines	5 618	5 397	5 601	6 746	7 303	6 274	5 443	3 797	3 070	2 720	2 834
Thailand	194	460	487	621	901	955	1 099	1 566	1 482	1 407	1 520
Taiwan	101	109	123	75	505	476	444	781	851	990	995
Brazil	0	0	0	0	0	250	403	445	316	395	571
USA	258	153	153	149	244	253	317	57	285	286	277
Australia	301	318	330	370	475	343	338	268	233	187	124
India	0	0	0	0	0	0	9	88	73	27	10
Others	0	19	2	5	0	1	1	0		41	86

Source: Japanese customs (code 080450019)





Mango (and guava, mangosteen) World production

Country	2009	tonnes
World		33 700 000
India		12 300 000
China		4 176 716
Thailand		2 469 814
Indonesia		2 150 000
Pakistan		1 753 686
Mexico		1 505 367
Brazil		1 272 180
Bangladesh		802 750
Philippines		771 441
Nigeria		734 000
Egypt		450 000
Yemen		404 573
Kenya		384 461
Vietnam		370 000
Cuba		354 200

Mango (and guava, mangosteen) World exports

Country	2009	tonnes
World		950 000
Mexico		270 000
Thailand		144 079
Brazil		124 844
Peru		105 684
Pakistan		81 450
India		74 460
Ecuador		38 511
Philippines		21 637
Yemen		18 950
Guatemala		14 000
Israel		11 500
Côte d'Ivoire		11 500
Indonesia		11 585
Kenya		8 977
Spain		8 000

Mango (and guava, mangosteen) World imports

Country	2010	tonnes
World		950 000
United States		332 095
EU-27, incl.		242 452
Netherlands		134 512
United Kingdom		35 318
Spain		21 345
France		12 859
Portugal		12 174
Belgium		11 972
China		125 000
Canada		41 544
Malaysia		40 676
Saudi Arabia		38 583
Singapore		21 485
Oman		19 407
Japan		10 391

Source: FAO

Mango — EU supply calendar — Main origins

Origin	J	F	M	A	M	J	J	A	S	O	N	D
Peru Kent												
Brazil Tommy Atkins												
Brazil Kent												
West Africa Kent												
West Africa Keitt												
Senegal Kent												
Israel Tommy Atkins												
Israel Kent												
Israel Keitt												
Spain Osteen												
Spain Kent												

Mango (and guava, mangosteen) — EU imports — Main supplying countries

Country	tonnes	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010*
Total extra-EU, of which		119 364	135 593	134 992	175 544	163 938	187 932	212 713	211 944	231 628	198 878	224 974
Brazil		39 636	60 338	63 804	89 942	69 838	82 293	84 858	83 025	96 870	80 670	92 880
Peru		9 304	7 749	10 760	15 356	20 054	26 394	41 027	36 854	50 756	36 270	60 129
Côte d'Ivoire		10 306	10 842	11 147	7 176	11 428	9 856	14 428	14 706	11 250	11 680	11 129
Israel		8 454	6 595	4 117	8 646	8 285	12 916	11 349	15 006	12 743	12 998	10 679
Pakistan		7 094	8 750	6 263	8 680	10 940	12 307	10 120	13 225	12 941	12 916	10 595
Mexico		3 648	2 117	2 569	2 301	2 574	565	1 764	2 680	1 674	1 596	4 938
United States		10 314	6 731	6 944	7 370	7 620	6 894	5 971	7 404	7 516	5 535	4 744
Dominican Rep.		583	690	748	616	1 228	1 591	1 618	2 767	4 307	4 186	4 302
Mali		1 141	886	708	947	2 096	2 560	3 477	4 317	4 902	3 480	3 672
Costa Rica		3 092	1 734	1 852	2 636	4 006	6 271	7 545	4 664	5 360	5 685	3 452
Burkina Faso		182	338	260	770	928	1 164	2 152	3 191	2 406	1 988	3 304
India		1 746	2 625	1 077	930	915	1 722	2 472	2 428	2 577	2 472	3 116
Senegal		618	822	1 650	2 067	2 810	3 011	7 088	4 702	6 034	6 240	2 656
Total intra-EU, of which		65 422	57 490	66 515	73 865	81 882	104 025	110 602	126 768	131 314	112 843	134 771
Netherlands		37 171	34 325	37 798	42 275	48 504	60 019	63 529	74 018	81 516	64 279	74 141
France		9 685	9 233	11 107	11 043	11 038	14 977	16 039	17 499	14 419	10 162	20 171
Spain		7 985	5 596	6 969	6 432	8 008	12 855	12 301	14 348	12 628	14 918	17 478
Germany		3 715	3 490	4 168	7 476	6 818	7 556	7 539	7 053	10 031	7 605	8 381
Belgium		5 258	3 270	4 174	4 542	3 959	3 559	6 597	9 344	7 683	6 776	7 551
Italy		423	280	916	554	603	808	749	1 023	1 034	5 139	2 732
United Kingdom		597	523	611	762	1 551	1 132	1 883	1 275	804	1 588	1 288

* 2010: provisional figures / Source: Eurostat (code 080450 mango, guava, mangosteen)

Mango quality defects



Immaturity and spotting



Natural discoloration of the epidermis



Misshapen fruit



Scarred-over insect pricking



Mechanical wounds after picking



Mechanical wounds after picking



Stalk too long



Spotting on epidermis



Anthrachnose type fungal infection



Fruitfly larvae



Sun scorch



Misshapen fruit



Discoloration caused by scales



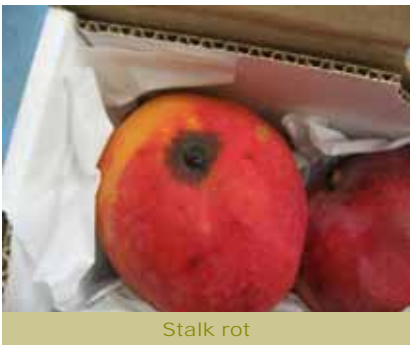
Wounding with wind-caused rubbing



Postharvest sap burn



Postharvest soiling by sap



Stalk rot



Fungal infection



Overripeness



Internal breakdown caused by excessive nitrogen (high calcium and boron contents too)

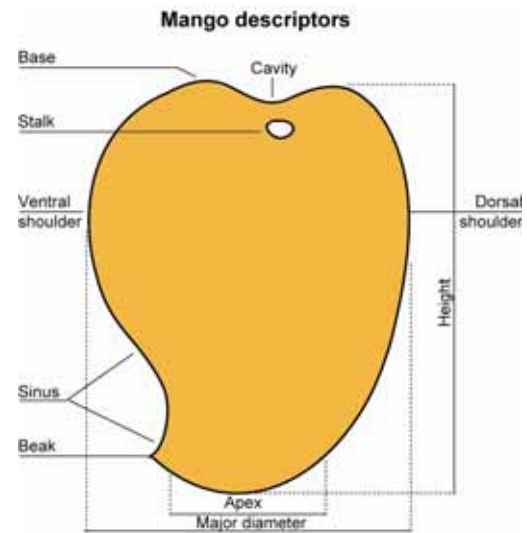


Photos © Pierre Gerbaud



The main varieties of mango

Mango, *Mangifera indica*, probably originated in a region on the frontier between India and Burma. Today, there are certainly more than a thousand different varieties around the world. Mango plays an important role as a foodstuff in many countries. Distinction was originally made between two main families of mango with clearly different features that came from two diversification zones—the Indian sub-region and tropical Asia. A great many of the commercial varieties grown today were bred in Florida at the beginning of the twentieth century from multiple crosses between parents from these two families. Exported fruit are generally from budded plants.



After 'Le manguier' by F. de Laroussilhe, Maisonneuve et Larose

Requirements of mango

Mango is suited to a broad tropical climate range from humid to dry. It is found in regions with very different annual precipitation. In the tropics, the halting of vegetation caused by a dry or cool season lasting for a few weeks or months is a condition for good flowering intensity and hence high productivity. Production is often small and irregular in equatorial humid zones as a result of the absence of a halt to vegetation. The optimum temperature range for tree development and fruit growth is 24° to 30°C. Temperatures lower than 10°C can cause physiological damage. Water supply to the tree must be optimum throughout the fruit growth period and then during the growth of new shoots. Rainfall distribution over the year is more important than cumulated annual precipitation, especially for the production of high-quality fruits. The lower limit for precipitation for commercial mango growing seems to be 750 mm. Mango can grow in a very varied range of soil types if the underlying horizons are sufficiently loose and well-drained. However, the tree prefers deep, fairly light soils with average structure. It can suffer from shortage of water in sandy soil and produce small, insipid fruits. It is sensitive to salts in the soil and in irrigation water. Wind can cause damage of varying seriousness and cause imbalance in the water supply. Windbreaks should therefore be grown in windy areas before mango trees are planted.

Characteristics of the two mango families		
	India	Tropical Asia
Diversification zone	India, Pakistan	Burma, Malaysia, Philippines
Seed	Mono-embryonic	Polyembryonic
Shape	Round to ovoid	Elongated with cylindrical or flattened cross section
Skin colour	Yellow to orange, sometimes with purple flushes	Green to yellowish green, no purple
Taste	Marked, hint of turpentine	Less marked
Observations	Susceptible to anthracnose	

Tommy Atkins

Shape: ovoid, sometimes slightly oblong. Sloping dorsal shoulder. Ventral shoulder above the stalk zone. Round apex, small lateral beak.

Peel: thick. Yellow orange and bright red. Dark purple bloom. Numerous large greenish-yellow lenticels.

Flesh: strong orange colour. Good quality but slightly fibrous.

Average weight: 450 to 710 g

Bred in Florida in 1922, it was soon chosen by growers for its productivity, robustness when handled and good resistance to anthracnose, in spite of its medium fibre content. Flesh quality deteriorates markedly if too much fertiliser or water is supplied. This is the most widespread variety in Brazil, where it forms the greater proportion of exports. It is particularly well-liked in northern Europe for its bright colour. Most exports consist of medium-sized fruits (8 to 10 fruits per 4 kg box); this matches the requirements of supermarket chains.



Kent

Shape: ovoid, rounded dorsal shoulder and apex. Full ventral shoulder. No beak.

Peel: thick and strong, light adherence. Main colour greenish-yellow with red or even crimson surface in the parts most exposed to light. Slight greyish bloom.

Flesh: strong yellow to orangey yellow, rich flavour with melting, fibreless texture.

Stone: 9% of total fruit weight.

Average weight: 600 to 750 g

Bred in 1932 in Florida from sown 'Brooks', it bears comparatively large fruits, ranging from 440 g to more than 1 kg on young trees. Much appreciated by both the upstream and downstream ends of the sector, yields are medium but with a high proportion of export quality fruits. Fruit colour is attractive and the tasty flesh is firm and ripens very gradually. It is grown in most of the countries supplying Europe, where it is considered to be the yardstick for mango. However, considerable variations in colour and size according to the production zone can lead to sales problems.



Keitt

Shape: oval, abruptly falling dorsal shoulder. Full and rounded ventral shoulder. Rounded, obtuse apex with no beak.

Peel: thick and strong, fairly high adherence. Orangey yellow to crimson yellow on the side exposed to the sun, with numerous small pale yellow to russet lenticels. Fairly strong lavender-coloured bloom.

Flesh: orange to deep yellow. Rich and fruity flavour. Melting texture with many fibres that are not particularly unpleasant as they are fine.

Stone: 7 to 8% of total fruit weight.

Average weight: 510 g to 2 kg

Bred in 1939 in Florida from sown 'Mulgoba', it has high, regular yields. The reddish colour appears very early before the fruit is ripe and can lead to problems of evaluation of maturity; the latter can be enhanced by time in a ripening chamber. An end-of-season variety in most provenances that makes it possible to prolong the export season. Less appreciated than 'Kent', it is nevertheless of increasing importance during periods of gaps between supply origins.



Osteen

Shape: oblong with a rounded base. Rounded apex, sometimes with a small beak.

Peel: thick, not very clinging. Main colour violet/purple with some lavender lights. White lenticels.

Flesh: lemon yellow, firm and juicy. Very high quality and not fibrous.

Stone: long and flat.

Average weight: 500 to 800 g

'Osteen' is from Florida, where it was bred from sown 'Haden' in 1935. It is little grown at the world scale in spite of its good commercial features. It has become more common on the EU market since 2000 as it forms most of Spanish production.



Haden

Shape: oval to rounded cordate. The ventral shoulder is broader and slightly higher than the dorsal shoulder. Well-rounded apex.

Peel: mostly dark red with numerous whitish-yellow lenticels.

Flesh: orangey yellow, almost fibreless. Pleasant, slightly acidulated taste.

Average weight: 510 to 680 g

Variety bred from a sowing of 'Mulgoba' in 1902. Shipped almost only by air, this variety completes supplies of 'Kent' when these are too small to meet demand. The fruit has a fine appearance and a reputation for fragility, requiring rapid sale.



Valencia Pride

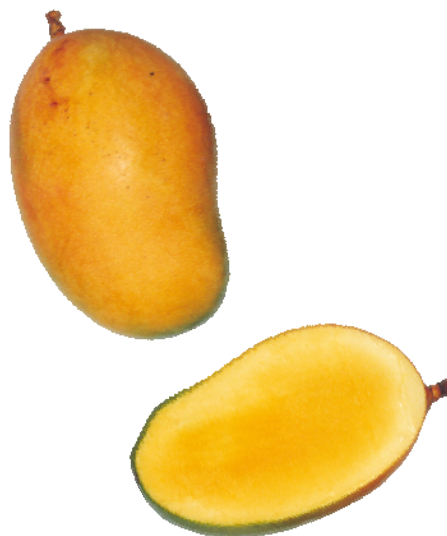
Shape: elliptic. Rounded apex, large apical beak.

Peel: comparatively thin but detaches fairly well. Basic colour greenish-yellow with a large red to purple area. Yellow lenticels.

Flesh: deep yellow. Aromatic and practically fibreless.

Average weight: 600 to 900 g

Variety bred from sown 'Haden' in Florida in 1941. Very elongated, fairly large fruits with attractive colour and shape. Good productivity. Grown mainly in West Africa, it long enabled varietal diversification at the beginning of the season when shipments consisted mainly of 'Amélie'. Its attractive colour formed an alternative. Gradually chosen by a proportion of consumers, it is now consolidating its market share in the range of fruits shipped by air.



Wholesale market prices in Europe

January 2011

					EUROPEAN UNION — EURO				
					Germany	Belgium	France	Holland	UK
AVOCADO	Air	TROPICAL	BRAZIL	Box			14.40		
			DOMINICAN REP.	Box			12.00		
	Sea	ARAD	ISRAEL	Box				4.75	
			FUERTE	Box	5.00		4.87	4.75	
		HASS	KENYA	Box			4.00		5.22
			CHILE	Box			7.88		
	Truck	PINKERTON	ISRAEL	Box	8.50		8.00	8.50	7.51
			HASS	Box	5.38	5.00	4.88	4.85	
BANANA	Air	RED SMALL	ECUADOR	kg				4.88	
			COLOMBIA	kg			7.19		
			ECUADOR	kg				5.17	
	Sea	SMALL	ECUADOR	kg		3.30	1.75		
CARAMBOLA	Air		MALAYSIA	kg		4.67	4.77	4.28	
	Sea		MALAYSIA	kg				3.22	
CHAYOTE	Air		COSTA RICA	kg		1.53	1.40	1.25	
COCONUT	Sea		COSTA RICA	Bag				15.50	
			COTE D'IVOIRE	Bag		11.00	6.53	11.33	
			DOMINICAN REP.	Bag				17.50	
			SRI LANKA	Bag				17.50	
DATE	Sea	MEDJOOOL	ISRAEL	kg	7.20		7.88	7.75	
			SOUTH AFRICA	kg		7.90			
		NOT DETERMINED	TUNISIA	kg				1.77	
EDDOE	Sea		BRAZIL	kg			1.40	1.50	
			CHINA	kg			1.40		
			COSTA RICA	kg		2.08			
GINGER	Sea		BRAZIL	kg	1.92		2.00	2.38	
			CHINA	kg			1.81	1.68	2.35
GUAVA	Air		BRAZIL	kg			5.00	5.83	
			THAILAND	kg		6.75			
KUMQUAT	Air		ISRAEL	kg	3.50	3.90	4.50	3.75	3.19
LIME	Air		MEXICO	kg			4.35		
	Sea		BRAZIL	kg	2.11		2.99	2.94	3.24
			MEXICO	kg			3.78		
LITCHI	Air		SOUTH AFRICA	kg	2.50		2.90	2.63	
	Sea		MADAGASCAR	kg	0.88		1.00	1.25	
			SOUTH AFRICA	kg	1.38	2.78			2.35
MANGO	Air	KENT	BRAZIL	kg			4.50	4.00	
			PERU	kg			4.80		
			THAILAND	kg				7.90	
	Sea	NAM DOK MAI	PALMER	kg	3.38				
			ATKINS	kg	1.19			1.19	
		HADEN	KENT	kg				1.13	
			BRAZIL	kg			1.63	1.19	
		ECUADOR	kg		0.96				
		PERU	kg	0.90	0.98	1.20		1.09	

					EUROPEAN UNION — EURO				
					Germany	Belgium	France	Holland	UK
MANGOSTEEN	Air		COLOMBIA	kg				9.38	
			INDONESIA	kg				8.69	
			THAILAND	kg			9.50	8.00	
MANIOC	Sea		COSTA RICA	kg		1.32	1.20	1.06	
MELON	Sea	CANTALOUPE	BRAZIL	kg	1.70			1.90	
			HONDURAS	kg	1.70				
		CHARENTAIS GALIA	BRAZIL	kg				1.95	
			BRAZIL	kg	1.50				
		HONEY DEW	BRAZIL	kg	1.50			1.65	
PAPAYA	Air	FORMOSA NOT DETERMINED	BRAZIL	kg	3.11			3.28	
			BRAZIL	kg			3.20	3.25	
			THAILAND	kg				4.69	
	Sea		BRAZIL	kg				1.63	
			ECUADOR	kg	1.71	1.93		1.63	1.30
PASSION FRUIT	Air	NOT DETERMINED PURPLE	COLOMBIA	kg	5.38			5.38	
			KENYA	kg		4.75		4.75	
			SOUTH AFRICA	kg	6.50		7.00	4.75	
			VIET NAM	kg				7.50	
			ZIMBABWE	kg	5.38	4.75	5.50	4.75	
			YELLOW	COLOMBIA	kg		6.75		7.75
PERSIMMON	Sea		ISRAEL	kg	2.39		2.60	2.10	
PHYSALIS	Air		COLOMBIA	kg				7.09	
	Sea		COLOMBIA	kg	4.90	5.67	6.67	5.11	
PINEAPPLE	Air	SMOOTH CAYENNE VICTORIA	GHANA	kg			2.00		
			MAURITIUS	Box		11.50		12.75	
			MAURITIUS	kg			3.30		
			REUNION	kg			3.80		
			SOUTH AFRICA	Box	11.60			11.25	
	Sea	MD-2	COSTA RICA	Box	9.25	8.63	7.75	6.50	11.54
PITAHAYA	Air	RED	ECUADOR	kg				8.00	
			THAILAND	kg	5.83				
		YELLOW	VIET NAM	kg		5.60		6.34	
			COLOMBIA	kg				9.00	
			VIET NAM	kg			9.00		
PLANTAIN	Sea		COLOMBIA	kg			1.08	1.05	
			ECUADOR	kg			1.25		
RAMBUTAN	Air		INDONESIA	kg				7.50	
			VIET NAM	kg		7.25	9.25	7.63	
SWEET POTATO	Sea		BRAZIL	kg				1.35	
			EGYPT	kg			1.18		0.87
			ISRAEL	kg	1.42		1.42		1.64
TAMARILLO	Air		COLOMBIA	kg		5.80		6.40	
YAM	Air		BRAZIL	kg			2.60		
	Sea		GHANA	kg			1.25	1.25	

Note: according to grade

These prices are based on monthly information from the Market News Service, International Trade Centre UNCTAD/WTO (ITC), Geneva.
MNS - International Trade Centre, UNCTAD/WTO (ITC), Palais des Nations, 1211 Geneva 10, Switzerland
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SUPPLY OF IRRIGATION MATERIALS IN CDC BANANA PROJECTS

EU ATF 2007 AND CDC 2011 BUDGET



The General Manager, Cameroon Development Corporation (CDC), launches an International Tender for the supply of Irrigation Equipment and Materials for its Banana Sector. The activity will be undertaken in Mafanja 1 and Mafanja 2 under Tiko Banana Project and Ekona under Banana Expansion Project.

The activity is funded jointly by the European Union – Budget line B/21.06.05 Financial and Technical Assistance to the Banana Sector Convention No. B- 21.06.05/856/02 and CDC 2011 Budget.

The documents for the invitation to tender can be obtained from the following address:

**GENERAL MANAGER,
CAMEROON DEVELOPEMNT CORPORATION, CDC,
Head Office, Bota – Limbe,
SW – Region,Cameroon.**

The documents for the invitation to tender can also be obtained from the following address:

www.cdc-cameroon.com and banacdc@yahoo.com

The deadline for submission of tender is:

12:00 noon – 10 May 2011

Possible additional information, clarifications/questions shall be published on the CDC website:

www.cdc-cameroon.com

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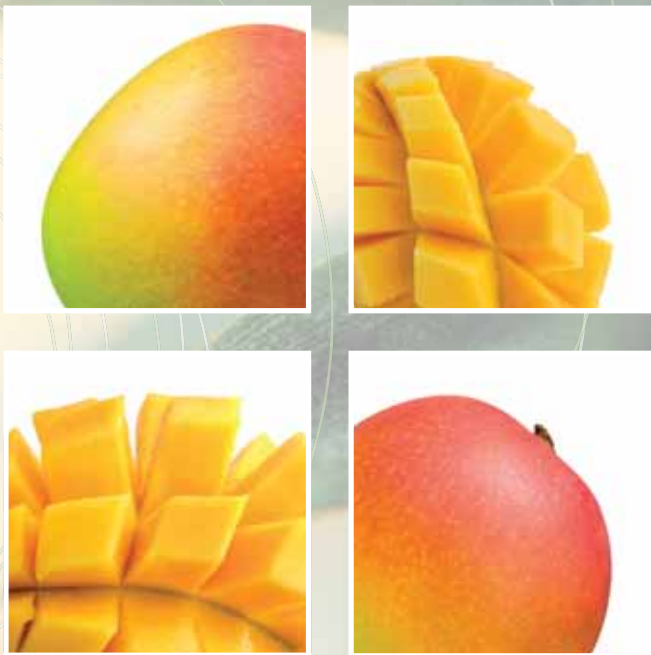
Market information for tropical fruit
and vegetable professionals

Independent economic analysis

Specialised weekly newsletters
on litchi, mango, etc.

Quality control

Growing and delivering fresh produce



Katopé's diversified production base allows to produce and to ship a huge variety of fresh produce throughout the year, including tropical fruits like lychees, mangoes, pineapples and bananas.

All Katopé growers and supply partners are committed to advanced safety, ethical and environmental standards.

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The personal touch