

July/August 2008 - No. 158

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English version

**CLOSE-UP:
FRENCH BEANS**

**Fruit trade: who should
control the supply chain?**

**Citrus & exotics
Monthly review**

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Danish krone	7.4587
Norwegian krone	8.066
Canadian dollar	1.592
Australian dollar	1.627
New Zealand dollar	2.0591
Brazilian Real	2.531
Czech koruna	23.213
Polish zloty	3.2217
Chinese yuan renminbi	10.8218
Estonian kroon	15.6466
Slovak koruna	30.302
Turkish lira	1.9303
South African rand	12.1245
South Korean won	1 603.5

Source: Central European Bank

Castes operate according to unchanging codes. The rules governing these microcosms include esprit de corps, omerta and defending members at all costs. It is true that the individual is part of the personality of the group, but in return he can benefit from its eternal, unconditional support. The individual can then count on the recognition of his peers to express his opinions, give value to his behaviour or justify his actions. Learned societies still operate too often on this tutelary pattern. The latest writings by Professor Anania, our now famous Italian banana econometrist, is proof of this once again. In reply to much well-founded criticism of his work on forecasting the European market in 2013, and especially of the economic data used in setting the parameters of his model, he has coughed up a few pages justifying his approach and conclusions. This courageous act—for he could have ignored his critics—is nonetheless flabbergasting. We expected to read arguments backed up by figures, details of the economic theories used, of the hypotheses put forwards, on the body of data, etc. But no, none of that. For Professor Anania, it is enough for his allega-

'Forecasts are difficult, especially when they concern the future.'

Pierre Dac

tions to be published in more or less high-ranking scientific journals and for him to be invited to conferences organised by his peers for his words to become gospel. Trade operators and market analysts—you know, the guys who live in the real world—are either victims of a collective hallucination or much too down-to-earth to understand Great Science. The learned societies have recognised the prophet. So who made the emperor's new clothes? And that's that!

Denis Loeillet

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Supply chains in the international fruit trade

Who should control the supply chain?

Who should control the supply chain? Not who does – who should? Which stakeholder? Should it be the consumer who ultimately pays for the product? Should it be the retail customer without whom the producer would not exist? Should it be the importer, without whom the producer would not have access to market? Should it be the logistics service provider who is responsible for carrying the bananas/fruit/meat/whatever? Should it be the exporter who procures on behalf of the importer or who consolidates on behalf of a number of small producers? Or should it be the producer, the risk-taker, the one element in the chain on which all the other profit centres depend? The principal, sine qua non element indeed that pays for everything else.

But how many producers actually understand what happens to their fruit once it has left their pack-house? According to Dole's Andy Connell at the recent Lloyd's List reefer logistics conference in Antwerp, only a frighteningly tiny fraction. And this is predominantly because they are ignorant of or not interested in the mechanics of the whole business. It is enough for many to abdicate responsibility for their product at the farm gate and be grateful, or not, for what they receive, blaming someone else when something goes wrong, he said.

Although perhaps they shouldn't, the shipping lines do at least physically control the movement of product from origin to destination, while importers and exporters at either end facilitate the trade. The real argument is surely about whether it should be the head or the tail of the chain exerting the control.

At either end of the chain the retailer and the producer have diametrically opposing aims: while the retailer wants to source at the lowest cost, the producer wants to achieve the highest value. History demonstrates that with one notable exception it's not an even struggle - until this year there has been price stagnation or deflation at retail for the past 15-20 years!

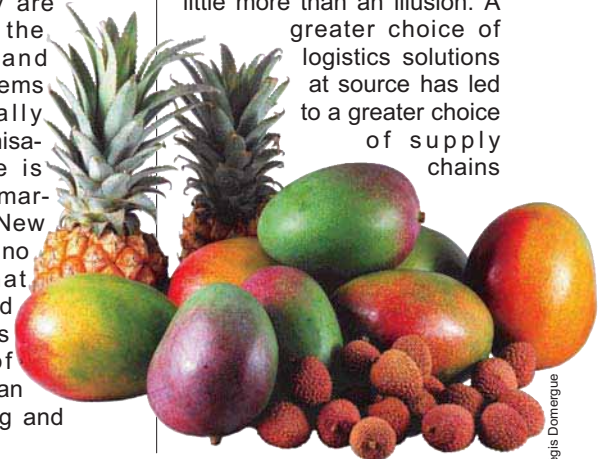
But is the change evident to date this year permanent or temporary? Despite encouraging upward movements on banana pricing for the first few months of this year, the benchmark Aldi price in the EU is now firmly back on historical pricing precedent! With a renewal of the price wars in the UK retailers are once again using fresh produce as their principal pawn in the battle for market share in the zero-sum-game that is the country's produce business. Even those vertically integrated producers who do have some control or ownership of their supply chains - i.e. the banana majors - are at the mercy of the stakeholder at the end of the chain.

The one notable exception is New Zealand's single-channel grower-owned kiwi-fruit marketer Zespri. Zespri's logistics strategy is at the core of its brand proposition. It places a huge emphasis on its fully-integrated supply model with a specialised reefer at the heart of its chain. The experience is not unique: when Capespan had single-channel control of South African fruit exports, the deciduous and citrus fruit industries were far more profitable than they are today, despite the inefficiencies and personnel problems that periodically rocked the organisation. The same is true of pipfruit marketer ENZA in New Zealand. It was no coincidence that the specialised reefer mode was at the heart of both the Capespan and ENZA pricing and

distribution strategy prior to deregulation of the fruit industries and that since those industries have fragmented, the market share has been gradually taken by the lines.

The banana multi-nationals too appreciate the value of vertical integration - there is no great secret to their profitability: it's all about supply chain management and control. The greatest threat to their businesses is supply and/or market fragmentation - and this in Europe is coming in the form of new container services, which are opening up markets for smaller producers desperate to avoid the clutches of the major exporters on whom they currently depend for their shipping solutions. But as long as the majors can keep control of a critical mass of either production or distribution, and preferably both, they stand a better chance of defending their branded product against the increasingly powerful retailers, the largest of whom now have global sourcing strategies.

Although the container lines offer a wider choice to the smaller producer/exporter, in many cases this new-found freedom has proved to be little more than an illusion. A greater choice of logistics solutions at source has led to a greater choice of supply chains



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© Denis Loeillet



from which retailers can cherry pick, divide and rule and then force prices down. There are plenty of examples to substantiate the argument, especially in South Africa and New Zealand. It is certainly true that more fruit has been shipped on the SAECS and other services by more independent shippers from South Africa - but at what cost to market stability and ultimately therefore the individual exporter?

For South Africa there is another issue as Capespan's Wiekus Hellmann pointed out in Antwerp: the decision by South Africa's largest two fruit marketers Capespan and Dole to move their locally-sourced citrus and deciduous fruit away from specialised reefers into containers has shortened the overall supply of containers to the rest of the market, thereby restricting equipment and slot availability to the smaller exporter groups. These groups can do nothing because due to local logistical limitations as yet it is physically not possible to increase the slot capacity to the South African ports. In other words even if more equipment were to be available, it could not be shipped.

Zespri control

The beauty of the Zespri supply chain system is precisely that all the needs of all the stakeholders in the supply chain are met. The consumer pays a reasonable price for a quality product; the retailer optimises its profit because its shelves are always fully stocked and waste/rejections/complaints are minimal; the distributor that adds value by holding stock or re-packing can make a profit; the shipping lines are paid a premium in order that the physical supply chain carries efficiently and optimises stock availability; the more efficient the post harvest operators, the more profit they make; finally and most importantly, the producers are incentivised to re-invest in production. Zespri

too makes a profit, from which it pays a dividend to its shareholders.

The system only breaks down when factors beyond the control of the chain have a negative impact – the most recent example of this is the appreciation of the NZ\$ against the currencies of its major destination markets.

If the Zespri system is so good, is it transferable? Unfortunately not! First and foremost because it's not WTO-trade compliant. Secondly the idea that any fruit industry anywhere else should be either regulated by statute or would do so voluntarily is laughable, despite there being strong evidence that suggests it would be to their benefit. Worse still, there will come a time when the New Zealand kiwifruit industry is obliged to deregulate. For the sake of all the stakeholders in the chain it should be hoped that the current logistics system stays in place.

Conclusion

There may be no simple answer to the question of who should control the various supply chains for fruit. Ultimately all links in the chain are if not equally important then at least inter-dependent. However there is a strong argument that suggests the Zespri chain is the most effective for all the stakeholders.

Because when one stakeholder has more power than the others the result is imbalance – this link has greater control over the chain and therefore benefits at the expense of some or all of the rest. The retailers are the most obvious examples of this iniquity, but the banana multinationals have also been guilty of abusing their positions, but predominantly at the head of the chain.

The container lines are routinely accused of riding roughshod over their smaller customers who complain that when a liner schedule is somehow compromised, it is always the interests of the customers who have 12-month businesses that take priority over the seasonal fruit exporters, no matter how perishable the product.

On this subject Mr Connell drew a distinction between a company that is a logistics service provider and one that is a true partnership, illustrating his point by offering to host a guided tour around Antwerp's red light district to meet some service providers and then on later to meet his wife, his partner. Far be it for the RQ to suggest that in this context the container lines are one or the other, but it is certainly true that for most of the time all the lines can offer is a box and a price!



Unlike the lines on which reefer is simply a passenger, the specialised reefer vessel is dedicated exclusively to the transportation of reefer product. On a pallet-by-pallet basis the mode is more direct, flexible and accountable. Although the mode comes at a higher cost, it creates more value for the shipper the more consolidated the chain. However the more fragmented the chain, the more the mode becomes just an alternative to the lower-cost container service offered by the lines.

Once the decision-makers at the head of the chain understand that as such the specialized reefer is a weapon that can be used in their favour perhaps they will re-appraise the role and value of the mode?

The problem is that this self-education process has not yet begun: and unfortunately in some trades it is too late for changes to take place – the damage is already done. With specialized reefer tonnage being demolished or diverted into other, more profitable trades the sky is already falling in on the South African citrus producers and shippers as well as the Ecuadorian banana traders – perhaps one day soon it will also fall on the US poultry industry and any other trade in which a) the specialised reefer is currently indispensable and b) where the supply chain in that trade does not, cannot or will not support the inevitable increase in charter costs ■

Richard Bright, consultant
info@reefertrends.com

Modernisation of Africa Express Line

After the Lady Rosemary, the Lady Rose has now joined the Compagnie Fruitière fleet. It will participate with the seven other ships in the transporting from Africa to Europe of 425 000 tonnes of bananas, pineapple, cherry tomatoes and papayas grown each year in the company's plantations in Côte d'Ivoire, Cameroon, Ghana and Senegal. This fleet modernisation policy will continue with the arrival of two larger vessels in 2009 and 2010. The prime purpose of the approach is to affirm the quality of the produce supplied by Compagnie Fruitière. Built in Japan, these ships on 'long-term' contracts with Fresh Carrier have cutting-edge technology and have advantages in terms of speed and modern management of temperature and controlled atmosphere. In addition, the new ships will allow considerable energy savings and improve the very fashionable carbon balance of the company.

The inauguration of the ship in Antwerp (Belgium)

on 11 June 2008, attended by the leading figures in the business, was also an occasion for Robert Fabre to give a reminder of the attachment to Africa of the company of which he is chairman. He stressed the economic, social and environmental obligation that he feels with respect to the different countries in which production activities are conducted. Speaking on behalf of the Republic of Cameroon, while thanking Compagnie Fruitière for the work that it does, Mr M'Barga, Minister of Trade, called on the investors in his country to do 'better or more' as banana is 'a factor of peace and fraternity' for fragile African economies. Robert Fabre made a plea to the WTO 'not to forget Africa' in the negotiations on EU customs tariffs on banana.



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Unfortunately, the last season did not avoid the faults of the preceding ones, especially as regards supply. The counter-season sales period is still set and regulated by shipments from Senegal, an interesting supplier during this period as regards supply, quality and cost. However, problems of uneven supply and quality strongly affected the image of the source on markets as varied as those of Italy, Belgium and even France. The other subsaharan sources did not do any better. Relying on air freight alone, they ran into the problem of the availability of flights. In addition, the batches reached the markets at the wrong moment, that is to say after a sales period or in too large quantities and this affected prices. The sources competing with Senegal in counter-season French beans are increasingly supplying niche markets, with the exception of Morocco and sometimes Egypt as these are the only alternative for large volumes of French beans during this period.

FRENCH BEANS

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The EU counter-season French bean market

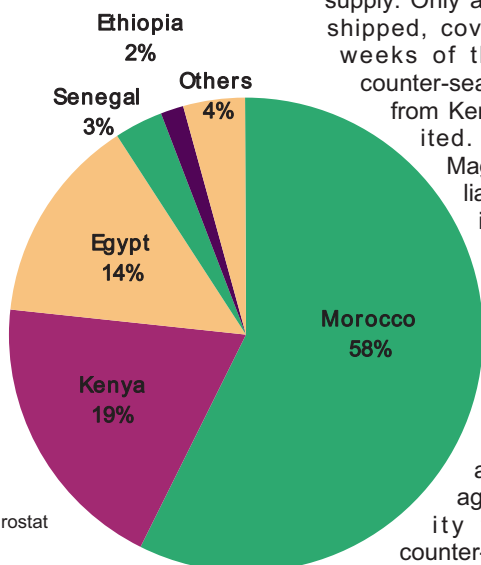
Supply still increasing

The French bean market is still growing. European Union imports increased by 15%, from more than 166 000 tonnes to more than 191 000 tonnes, between 2005 and 2007. Moroccan bean exports to Europe increased by 22% and Kenyan exports by 23%. Shipments from Egypt increased by only 3%. The largest increase in 2005-2007 was scored by Burkina Faso, whose exports increased by more than 80% from 514 tonnes to a little more than 925 tonnes. Shipments to Europe from all the other major sources decreased, with the most marked case being Mali, which ceased all exports in 2007. Ethiopian shipments decreased by 26%.

The solid increases in the volumes supplied by the major exporters had some effects on the market shares held by the various sources. Morocco made the most gain in Europe in 2007 and now accounts for 58% of the volumes imported in comparison with 54% in 2005. It is followed by Egypt, which has gained 2%, and by Kenya and Senegal, both of which gained 1% in terms of market share in 2007.

The quality of Senegal produce seems to have worsened. Mali was totally absent from the market for lack of exporters and Madagascar was hardly present at all as a result of uneven quality preventing regular supply. Only a few batches were shipped, covering hardly four weeks of the whole of the counter-season. The volumes from Kenya were fairly limited. Supply from the Maghreb was not brilliant in terms of quality either. Batches from Egypt became fairly rare as soon as production was switched to more costly greenhouse methods while Morocco left a fairly mixed image as regards quality throughout the counter-season.

**French beans
Extra-EU imports
2007**



Source: Eurostat

The story of the season

Price movements are examined on four markets, each of which plays a fairly important role during the counter-season. It was seen that the period displays an increasing tendency to become shorter. The reason given most frequently is either the late start of exports to certain markets or the early stopping of a season because of quality concerns. The four markets chosen for their importance are those of France, Belgium, the Netherlands and Italy.

France

This is the file market par excellence, even if Bobby beans are also sold. During the last season, only four sources made regular shipments of file beans to the French market: Kenya, Burkina Faso, Senegal and Morocco.

The beginning of the season is generally considered to have been catastrophic. Batches negotiated in interesting price ranges were seen here and there from Week 50 onwards. The prices of beans from sources other than Kenya were fairly high in the order of EUR3.00 per kg. They held at this level until Week 51. The arrival of large volumes in Week 52 resulted in a supply surplus when Christmas sales were already over. The resulting fall in prices continued until the middle of Week 2. A shortage of beans was observed on the market in weeks 3-4 and 8-9 but prices held without rising sharply, and this allowed very fluid sales. Supply better matched demand at the end of the season and prices were firmer.

Kenyan batches remained the reference for the quality of 'very fine' file beans. Supply from this source was fairly limited, enabling a certain tempering of the strong difference in prices between Kenyan produce and that from competing sources. Prices were steady throughout the counter-season, with a few peaks in Week 4 and around Easter (Weeks 12 and 13).

The absence of Madagascar and Mali and small supplies from Kenya enabled Burkina Faso to gain a better position. It is true that the market was overloaded with beans from Burkina Faso.

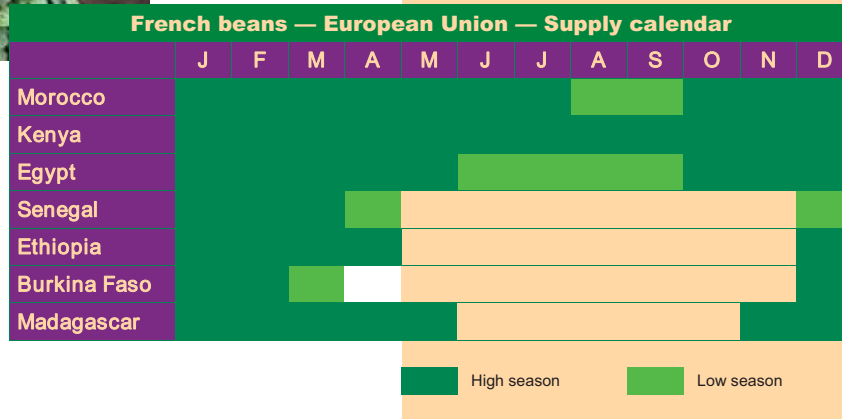


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European Union supply calendar

European production periods vary according to the country, running roughly from 15 June to 15 October. So-called counter-season supply from African countries runs from November to April. Kenya was the leading supplier of the European market until 2000 and ships regular batches throughout the year. Morocco is currently the European market's leading supplier and, together with Egypt, has succeeded in extending the production period by using greenhouses. Both suppliers also operate all the year round, but with smaller volumes during certain periods. In the last season, African counter-season supplies were much smaller in December. Indeed, Senegal and Burkina Faso deliberately reduced the volumes shipped to avoid the usual bottlenecks in the first weeks of the New Year that cause a fall in prices. Among the suppliers chosen, only Burkina Faso and Madagascar supply the market with fairly limited volumes, restricting them to niche markets.

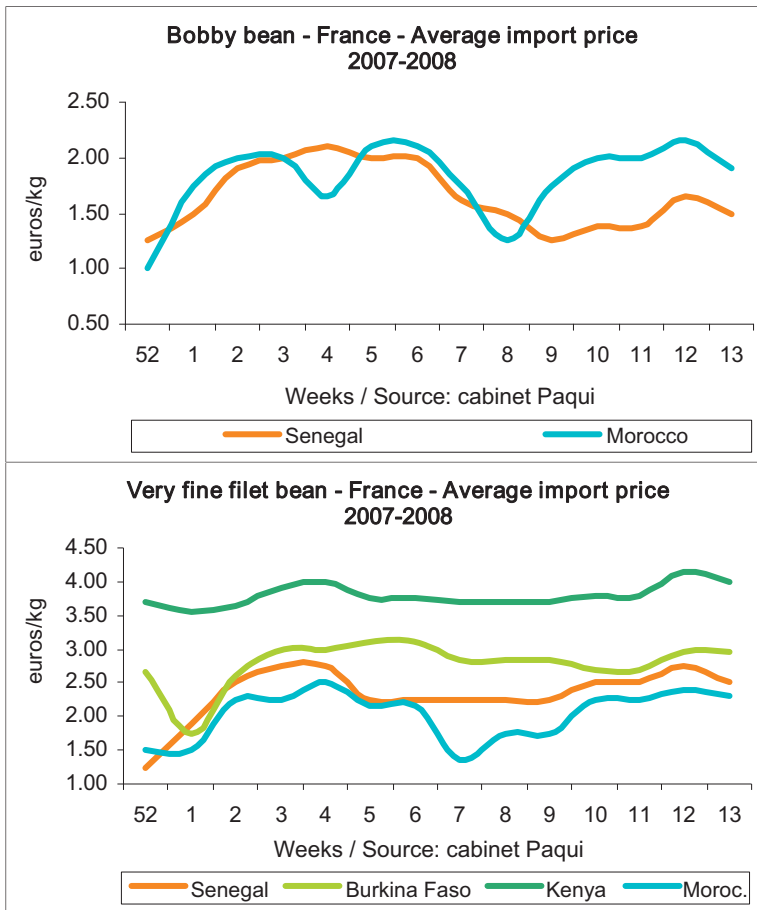


French beans — European Union — Monthly imports

	Seasons (Oct. to Sept.)			2007												2008		
	2004-05	2005-06	2006-07	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.
Intra EU, incl.	185 369	166 047	143 630	4 866	4 993	6 633	7 217	7 507	5 996	13 102	20 076	30 920	26 487	12 675	5 295	5 244	6 103	6 120
France	87 511	74 009	50 486	904	1 637	2 174	1 907	2 284	1 108	5 690	5 548	11 252	10 746	3 394	1 163	1 051	1 580	1 835
Netherlands	45 979	45 900	44 972	908	688	853	1 143	1 090	1 058	2 432	9 547	14 581	10 887	5 479	1 030	838	855	951
Spain	24 730	23 017	24 537	2 001	1 888	2 650	3 044	3 092	2 266	1 495	749	1 029	1 986	2 427	2 296	2 243	2 430	2 602
Germany	9 693	8 432	10 536	332	173	137	421	282	225	2 286	3 253	2 236	1 390	192	152	137	226	136
Belg.-Lux.	10 182	8 190	5 394	191	61	172	322	313	278	125	150	1 386	912	683	154	245	439	56
Italy	4 274	3 691	3 816	191	309	444	238	162	575	744	289	155	134	117	112	246	219	242
UK	833	498	776	86	42	54	25	36	52	78	34	50	94	57	14	64	43	40
Poland	359	610	749	2	3	1	3	1	27	62	230	164	244	95	76	147	44	78
Extra EU, incl.	162 069	181 381	189 393	17 663	17 836	25 224	22 036	20 958	14 210	8 433	5 143	8 333	14 046	19 337	18 580	23 821	20 060	20 714
Morocco	84 978	102 666	108 986	8 505	9 879	15 414	12 811	13 831	9 233	4 822	1 924	4 882	8 789	11 171	9 391	15 243	12 781	12 361
Kenya	30 543	32 925	36 600	2 791	2 509	2 996	3 131	3 181	3 307	3 042	2 807	3 000	3 494	3 617	3 659	3 088	3 187	3 853
Egypt	27 000	27 137	27 759	3 331	1 967	3 532	4 148	3 207	1 265	190	106	102	1 435	4 230	4 112	2 688	1 364	1 632
Senegal	7 059	7 096	6 420	1 448	1 675	1 652	948	157	-	-	-	-	12	-	316	1 478	1 333	1 357
Ethiopia	4 509	4 689	3 342	782	888	859	446	105	-	-	1	-	-	-	316	727	583	845
Burkina Faso	562	659	838	237	347	128	8	-	-	-	-	-	-	-	206	259	442	288
Zimbabwe	2 038	1 295	730	46	124	102	73	38	75	39	26	14	15	31	30	16	13	13
Dom. Rep.	385	413	724	67	68	74	72	70	60	50	51	63	71	37	56	66	71	73
Zambia	1 307	948	720	63	79	83	74	80	78	44	37	54	47	30	47	43	26	32
Turkey	901	796	633	14	13	31	90	97	65	74	42	88	33	30	19	3	2	22
Tanzania	1 009	1 055	520	28	17	18	32	45	41	59	55	51	75	56	61	59	53	48
Guatemala	310	363	379	27	32	48	45	50	39	14	6	13	34	22	24	51	29	37
China	160	42	320	144	23	93	23	1	5	1	23	-	-	-	23	1	2	-
Gambia	367	361	238	44	74	55	46	20	-	-	-	-	-	-	-	5	69	29
Jordan	174	233	172	29	41	40	18	3	0	-	-	-	0	-	5	34	12	17
Thailand	103	120	125	10	10	10	12	9	11	12	11	13	15	12	11	11	13	13
Peru	64	32	125	1	3	13	16	15	12	11	13	8	4	5		1	23	3
Nigeria	0	62	118	4	-	22	6	-	-	36	11	19	2	28	5	3	11	4
Madagascar	91	90	91	7	8	13	12	11	3	-	1	9	11	9	8	-	4	7

Source: Eurostat





ina Faso at the beginning of the season (Weeks 51 and 1), but the situation improved gradually. However, operators specialising in Burkina Faso consider that the reception of batches on a Saturday considerably handicapped sales. Operators in Burkina Faso must try to solve this problem of approach if they wish to make more of their market position.

Opinions on the quality of beans shipped from Senegal are very varied. It would seem that shipping batches by air and by sea to the same market, without any distinction, did damage to this source. Several buyers were surprised to see batches carried by sea changing rapidly for the worse and soon becoming very dry. It would seem that the reason was logistic problems, with a long gap between harvesting and sale. However that may be, Senegal frequently suffered from a problem of image, especially during Weeks 5, 6 and 7—preventing better

sales of produce in Weeks 8 and 9 when the market was short of beans. Indeed, buyers found it difficult to accept an increase in prices

when batches from Senegal had hardly found any takers at all for three weeks.

Morocco did not really manage to profit from the unevenness of Senegalese supplies. But the produce must be of good quality and unfortunately—fortunately for Senegal—this was not the case.

The batches of Bobby beans seen during the season were from Senegal or Morocco. In contrast with batches of real Bobby beans as found on the Dutch market, the prices mentioned concern both batches of Bobby and batches of filet beans that were too large and therefore downgraded. The difference between the two sources competing on this market was smaller, with prices in practically the same ranges for the entire season, with a slight slipping at the end of the season to the benefit of Morocco.

Belgium

Even if a small niche (supermarkets) does exist for filet beans, most trade is in Bobby beans. Three sources share the market: Senegal, Morocco and Egypt.

The season is generally set beforehand, leaving little room for surprises. However, changes were made in the choice of supplier during the last season. When the Senegalese season begins, the other sources generally suffer from a certain lack of interest by consumers.

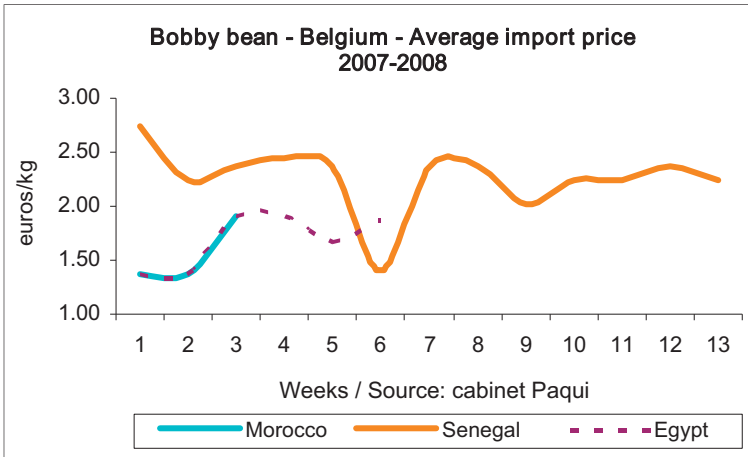
In addition, even if batches from Egypt were still found in around Week 5 or 6, they gradually disappeared as open field production was replaced by greenhouse crops that are more costly and less liked by consumers. During the last season, operators preferred to ship by air rather than by sea, as the latter shipments were considered more irregular and the quality of the

French beans - France Import price			
	euro/kg	Min	Max
Very fine			
Burkina Faso	1.75	3.10	
Kenya	3.55	4.15	
Morocco	1.35	2.50	
Senegal	1.25	2.75	
Bobby			
Morocco	1.00	2.15	
Senegal	1.25	2.10	

French beans - Belgium Import price			
	euro/kg	Min	Max
Bobby			
Egypt	1.38	1.90	
Morocco	1.38	1.90	
Senegal	1.40	2.75	



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produce was not such as to allow the staggering of sales. The quality of the batches that arrived by sea changed rapidly, had to be cleared quickly and so often sold less well. The prices given here are therefore based on prices of beans arriving by air. In addition to Week 6, when the batches received displayed serious quality problems, sometimes difficult sales were concluded in practically the same price ranges. Operators who chose beans carried by air seem satisfied in spite of the extra cost and plan to choose this option again in the next season.

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Logistics is of prime importance for export chains and in particular for the French bean trade

African exports of French beans to Europe depend on logistics to a considerable degree as the produce must reach the various markets under good conditions. Logistic problems are particularly important in the French bean chain because of the fragility of the produce.

Almost all the production sources in subsaharan Africa depend on air freight alone for the delivery of their production. The increasing cost of air freight does not have the same impact on the various sources. In Kenya, Madagascar and Ethiopia, producers/exporters have devoted much effort to developing and perfecting the quality image of their goods. Madagascar, shipping filet beans, has a niche slot with small volumes sold at high prices. Kenya owes its survival mainly to the development of produce with high value added such as pre-packaged beans ready for use and sold in supermarkets. Ethiopia is in the Bobby bean sector, supplying markets such as Italy with produce that is much sought after and appreciated for its quality.

In contrast, the increase in freight costs for landlocked countries such as Mali and Burkina Faso has not been compensated by greater attention to quality and export volumes have fallen gradually (Burkina Faso), to the point of practically disappearing from the markets—the case of Mali in the last two seasons. The disappearance of the airline Air Afrique struck a blow to the sectors in these countries. Indeed, in addition to the high cost of freight, the countries exporting by air have to handle the lack of availability of flights and cargo capacity and must also be able to deliver their goods on time to the markets concerned. This season, beans from Burkina Faso arrived on Saturday evening or Sunday, when demand for retail sales is strong mainly on Thursday and Friday! Many batches that did not keep well were thus sold at low prices to avoid greater loss.

Senegal recognised the risk of quasi-exclusive dependence on air freight fairly early on. Its closeness to the European markets enabled the development and better mastery of shipments by sea. This change in transport method has made it more competitive with regard to its main competitors Morocco and Egypt. However, the limits of the present system are being reached. After several years of sea freight trials, Senegalese operators still organise shipments on a one-off basis and they are not always able to anticipate and plan the volumes to be exported. The approach to questions of transport is still too individual and it is therefore impossible to schedule container availability. In addition, container loads always take time to be made up and transit time can easily vary from 10 to sometimes 20 days before the goods are available. This can sometimes strongly affect the quality of the produce exported. Senegal is still having difficulty in realising the weight formed by its out-of-season exports.

Close to the European markets, production sources like Morocco and Egypt use refrigerated road transport (mainly Morocco) and sea transport (Egypt). Transport by land was the most competitive solution before the very strong increase in fuel prices.

Photos © Régis Domergue

Netherlands

This market is the European reference for Bobby beans. The steadiness of prices and the distinction made by operators between sea and air batches seem to have standardised sales. The better sales on the Dutch market attract more and more operators. The prices and analyses below are based on exports by sea; these form 90% of the volumes shipped to this market from Senegal.

French beans The Netherlands Import price			
	euro/kg	Min	Max
Bobby			
Egypt	2.25	2.30	
Ethiopia	2.50	2.50	
Senegal	1.60	2.43	

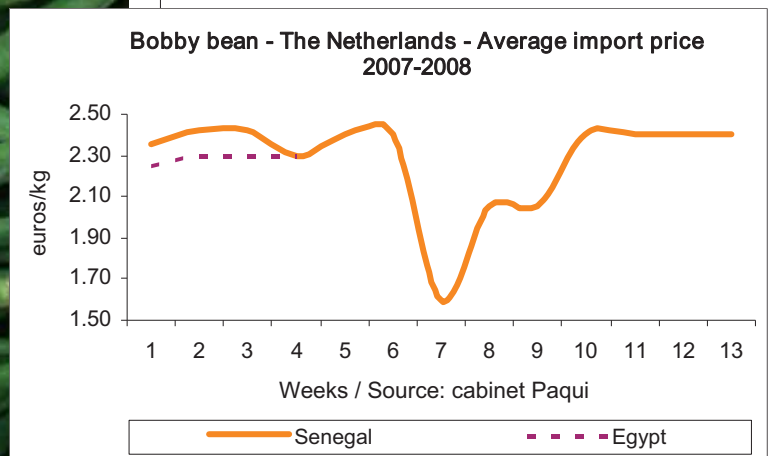
As in 2006-2007, the season started a little late for lack of available shipping. The beginning of the year was marked by small arrivals. Demand was clearly greater than supply at the beginning of the season; this made it possible to achieve and maintain a good price level. Even if the market gave the impression of a shortage, the prices—considered already high for produce exported by sea—did not increase more strongly. Concerns of quality with regard to arrivals in Week 7 affected the prices of the batches available but nonetheless prices soon regained their level, with sales remaining fluid until the Easter period.

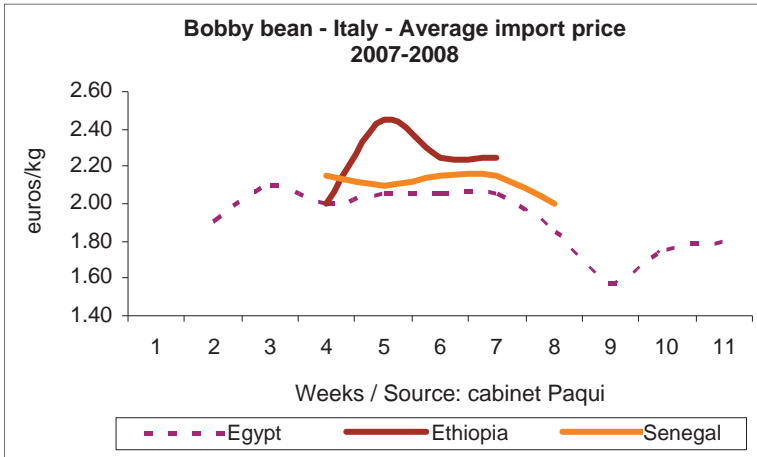
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Italy

This market is mainly interested in Bobby beans. The market is supplied by three sources: Senegal, Egypt and Ethiopia. It is noted that the season was particularly short for Senegal and Ethiopia

Senegalese beans did not start arriving until the end of January. The counter-season was more difficult in Italy overall. Operators fell back on





counter-season. Produce from Senegal and Ethiopia are still much appreciated for their quality, outclassing that shipped from Egypt. However, poor sales resulting mainly from quality problems and cost led operators to put an early stop to their import season. Even if the quality image remains, it may have been damaged by the general impression of unevenness; this seems to have resulted in certain operators displaying a cooler attitude to the two supply sources concerned ■

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French beans The Netherlands Import price			
	euro/kg	Min	Max
Bobby			
Egypt	1.58	2.10	
Ethiopia	2.00	2.45	
Senegal	2.00	2.15	

batches from Egypt while awaiting the first shipments from Senegal. The quality of the Egyptian produce was poor (rapid deterioration, very dry) and this had an effect on demand. The arrival of batches from Senegal that did not meet consumer expectations either had a damaging effect on the

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French beans — African

		Senegal	Burkina Faso
Range	core of range	Bobby	Filet
	complement	Filet	
Freight	land		
	air	Cargo and regular flights	Regular flights
	sea	Containers	
	availability	Unlimited for containers, medium by air	Medium
	price	High	High
	frequency	Weekly	Weekly
	service quality	Average	Medium
	destinations	France, Belgium, Netherlands, Italy	France (Roissy-CDG)
Competitiveness		Strong for Bobby, medium for filet	Medium for filet
Productivity		Good. Land available, development potential, skilled labour for Bobby and perfectible for filet	Medium. Land available, skilled labour for filet
Production organisation		Individual growers and groups. Increasingly professionalised sector.	Individual growers and groups. Longstanding growers lacking interest in growing beans, whence the decrease in production in recent years. But production is increasing again.
Export organisation		Associations of grower-exporters and of exporters	Several grower-exporter associations
Type of market	position	Market shared with several competitors in France, dominant in Belgium and the Netherlands	Minority in France (various competitors), dominant in Belgium and the Netherlands
	competitors	Morocco, Kenya and Burkina Faso in France; Morocco and Egypt in the Netherlands	Morocco, Kenya and Burkina Faso (France)
	core market	Filet for France, Bobby for the Netherlands	Filet for France
	range	Whole range	Filet, mainly very fine
	certification	Several companies with GLOBALGAP certification	Increasing number of companies with GLOBALGAP certification
	reputation	Irregular for filet (France) and good for Bobby (Netherlands, France)	Good for filet but sometimes irregular
Development potential		Volumes of Bobby, improvement of filet sorting and packing, development of the topped and tailed market ongoing with an operator.	Steady filet quality
Marketing period		100% counter-season (December to end of March / beginning of April), competition from all counter-season suppliers.	100% counter-season (December to end of February / mid- March)
Observations		Supplier with strong potential and stakeholders whose professionalism continues to improve. Nothing much to be added for Bobby. For filet, a need to improve harvesting and above all sorting at packing stations. Filet growers are increasingly confronted with a yield problem. Possibility for improvement of the quality of the produce shipped by better logistic structure.	Sector recovering strongly. The re-launch is slowed by freight costs that are too high to be covered by the quality of the produce as this is uneven. When quality is high, the produce sells well in comparison with that of West African competitors. Release on the market at the right moment is still a crucial problem that operators must solve.

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counter-season suppliers — Advantages and constraints

Morocco	Ethiopia	Egypt	Kenya
Filet	Bobby	Bobby	Filet
Bobby			Bobby
Refrigerated lorries			
	Cargo and regular flights	Regular flights	Cargo and regular flights
		Containers and reefers	
Unlimited	Limited	Very large by sea, medium if not small by air	Average and often irregular during the counter-season
Usually the lowest among non-European suppliers	Medium	Low for sea, medium for air	High
Several times a week and even daily depending on the distance of the market	Weekly	Weekly	Weekly
Medium	Good	Good, especially before the arrival of West African produce, and then more limited	Good
France, Spain Italy, Netherlands	Mainly Italy	Netherlands, Belgium, France, Italy	United Kingdom, France
High for filet, good for Bobby	High for Bobby	High for Bobby	High for filet and the various peas
Good. Land and labour available		Good. Land available, development potential, skilled labour for Bobby	Good. Land available, development potential, skilled labour for filet
			A few large operations that incorporate outgrowers, while training them and preparing them to respect increasingly strict private standards. The chain resolutely addresses private certification and is becoming increasingly professional.
			Several operators whose size and volumes exported vary form the driving force for the other sector operators.
Market shared with several competitors in France, minority in the counter-season in Belgium and the Netherlands	Shares Italian market with several competitors	Minority in France. Shares the market with various competitors in Belgium and the Netherlands	Market shared with several competitors in France, dominant in the United Kingdom
Senegal, Kenya and Burkina Faso (France), Senegal and Egypt (Netherlands)	Senegal, Egypt, Morocco	Morocco, Kenya and Burkina Faso (France), Morocco and Egypt (Netherlands)	Morocco, Kenya and Burkina Faso (France), Morocco and Egypt (Netherlands)
Filet for France, Bobby for the Netherlands	Bobby for Italy	Bobby for the Netherlands, Italy and Belgium	Filet for the United Kingdom and France
Whole range		Whole range	Whole range
GLOBALGAP for part of produce	GLOBALGAP for part of produce	GLOBALGAP for part of produce	GLOBALGAP for most exporters. But above all many operators seek to attain the level of GLOBALGAP requirements without seeking certification, cost being a limiting factor in this.
Quality generally lower than that of West African competitors during the counter-season period	Good for Bobby	Good for Bobby	Excellent for all produce exported—mainly filet and pre-packaged beans.
Filet quality	Regular quality and volumes of Bobby	Quality, evenness and cost when greenhouse production or produce exported by air are concerned.	Greater availability, especially on the French market during the counter-season
All year round with a dip in August and September	100% counter-season (December to end of April). Competition on the Italian market with produce from Senegal, Morocco and Egypt.	All year round with a dip in supply from November to March-April (greenhouse production).	All the year round according to the destination country. Supply is smaller in France, for example, when competition is strong (counter-season from December to March).
Production has increased steadily since the diversification of Moroccan exports and the development of French bean growing. In spite of the impressive volumes, this supplier finds it difficult to establish a true quality image during the counter-season period when preference generally goes to produce from its competitors.	A supplier recognised and reputed for the quality of its work with Bobby. However, it is handicapped by quality concerns that, combined with the high cost of air freight, often cause importers to halt their seasons early.	Like Morocco, Egypt suffers from counter-season comparison with produce from Senegal, often considered to be of better quality and sometimes cheaper (in comparison with greenhouse production).	Long the reference as the EU's leading bean supplier, Kenya has now been overtaken by Morocco. It remains the reference for quality that the others try to emulate. Handicapped by high freight costs, it stands out by the high quality of the produce shipped and the strong development of pre-packaged produce with high value added.



The 2008 Senegalese French bean season

Logistics and quality require harmonisation

The progress of the counter-season is determined by the shipments from Senegal that are an interesting alternative in terms of supply, quality and cost during the period concerned. But Senegalese operators have not always been aware of all the benefit that they could draw from the counter-season. As a result, the supplying of the European markets is fairly disorganised overall. To this must be added quality concerns that have seriously affected the general image of Senegalese beans on markets as varied as those of Italy, Belgium and even France. The sources that compete with Senegal during the counter-season are increasingly gaining niche market positions, with the exception of Morocco and sometimes Egypt. Senegal has the potential for growth and for increasing market shares but for this it must solve several problems. Not the least of these are the difficulties related to logistics and quality—both of which should be more regular and harmonised.

What kind of market approach logistics?

When the various import chain stakeholders are questioned about the last season, it is striking that all refer to the irregularity of quality and shipments. Several points are raised by operators specialising in Senegal, but the

main impression is one of a deterioration of the quality of the shipments. It does not matter whether the availability of shipping or air freight capacity are blamed; 'fine shipments' from Senegal have been pretty rare for most operators and they could not sell Senegalese beans well, to the extent that some put a premature end to the season—on the Italian market for example. For others, the irregularity of shipments by sea made it impossible to maintain certain contracts, leading to switching to shipments by air (for the Belgian market) that were smaller but more regular and of better quality.

Towards a gradual loss of diversity of sources of supply?

Senegal has supplied batches of counter-season filet beans and Bobby beans for a number of years. Growers have always known how to supply Bobby beans but much effort was devoted to developing filet exports and especially the 'very fine' category. The main criticism made concerned the quality of the batches supplied; this could be further improved if work in packing stations were to be better managed. Substandard sorting prevented Senegal from forming a real alternative to Kenya as a bean supplier. A point raised during the 2005-2006 season seems to have been confirmed: Senegalese growers are finding it increasingly difficult to obtain good yields of filet beans. When problems of the cost of labour are added to this, some growers seem to lose interest in the crop and switch back to Bobby beans, while some brands are beginning to emerge. If the trend continues, the 'very fine' filet bean market may well be reorganised. Although this is not of great interest for the other markets, it is important for France, the main consumer of this type of bean ■

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Producer country sheet

French beans in Senegal

Production zone

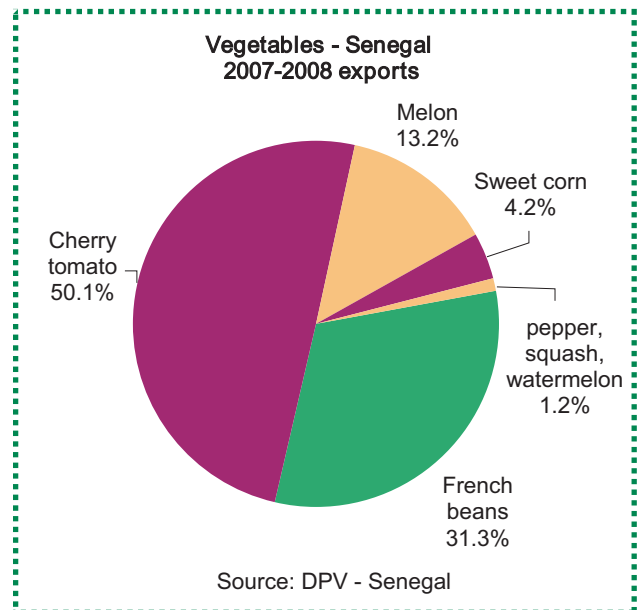
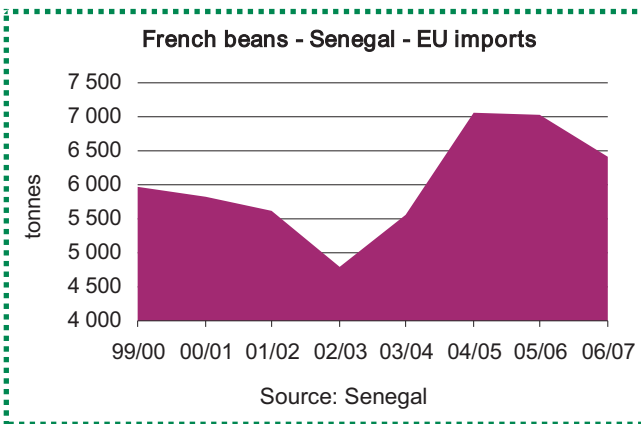
The French bean sector is important in Senegal, forming a third of horticultural exports. The filet and Bobby bean production zone is fairly large but nonetheless within the 'Petites Niayes' region.



French beans — Senegal — Production calendar						
	N	D	J	F	A	M
Filet and Bobby						

Production

Long specialised in Bobby beans, Senegalese growers have diversified into filet beans ('very fine' and 'fine'); these are considered to bring in better returns. However, the situation seems to be changing again, with growers returning to Bobby production. This seems to be a result of the higher yields of Bobby and smaller labour costs than for filet.



Total exports

The fourth-largest producer in Africa after Morocco, Kenya and Egypt, Senegal is still nonetheless the leading player on the European market during part of the counter-season, from December to March. Horticultural exports totalled 17 223 tonnes in 2007-2008, a dip of 800 tonnes in comparison with the preceding season. The decrease is mainly the result of French bean production, with yields strongly affected by difficult weather conditions in January and February (high temperatures and drying winds).

French beans — Senegal — Sea freight		
Port of departure	Port of arrival	Shipping time
Dakar	Northern Europe	6 to 8 days

Logistics

In the early 2000s, Senegal sought to reduce approach costs and become as competitive as its rival, Morocco. Sea transport was therefore the answer. In hardly eight years, the air freight:sea freight ratio has become totally reversed and more than 90% of produce is now shipped by sea.

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French bean cultivation in Africa

by Benoît Leverrier, benoit.leverrier@wanadoo.fr

Requirements

Under tropical conditions, French beans are mainly grown during the dry season in the Sahel zone (Senegal and Burkina Faso). In Kenya, production zones are at different altitudes with different climates and so beans can be produced all the year round. Although it grows on many soil types, French bean does best in soils that are fairly heavy but not too much so as the plants are susceptible to root asphyxia. The vegetative cycle is very short, especially in Sahel areas, with harvesting beginning 45 to 60 days after sowing. The cycle is longer in highland zones in Kenya, lasting for a minimum of 60 days. For this, plant development must be enhanced, with rigorous attention paid to fertilisation and irrigation. In spite of its short vegetative cycle, green bean is subject to attacks by pests and diseases that can affect both produce quality and financial returns.

Soil



Crop rotations are necessary to reduce fungal attacks after germination and emergence and to enhance field productivity. The best preceding crops are cereals. Leafy vegetables and Cucurbitaceae should be avoided. Soils with various textures

(silty-sandy, clayey-sandy) can be chosen. Cultivation is possible on sealing soils (silty) but a few precautions are required during the sowing to emergence period. Bean has a short vegetative period and so must develop rapidly. This is why meticulous, rigorous attention must be paid to soil preparation. Soil suitable for growing French beans must have the following features:

- tilled to a minimum depth of 35 to 40 cm;
- homogeneous structure and a fine, aerated seed bed;
- satisfactory levelling to avoid wet areas (causing poor plant development and the risk of fungal attack).

The basal dressing must be placed when the soil is prepared so that it is located in the root development zone. Organic fertilisation is not recommended as it can increase susceptibility to pests and diseases in case of poor decomposition. Only well-rotted organic material turned in when the land is prepared can be applied.

Sowing

Sowing must be performed so as to allow reasonable but not excessive vegetative development of the plants. Too high a density causes the etiolation of the plants, thus increasing fragility and sanitary risks. This is why the following factors must be taken into account in sowing densities:

- the variety and its vegetative development;
- the planting season (lower densities in wet periods);
- the irrigation method used (lower densities with furrow irrigation).

Registered, treated seed is recommended as this protects the seedlings against the first pests (bean fly) and is free of diseases of the *Fusarium* and common blight type. The quantity of seed required is some 30 kg per hectare for densities of about 200 000 to 250 000 plants per ha. When trickle irrigation is used, higher densities of up to 300 000 plants per ha are sown. Interrow spacing is generally 30 to 40 cm and the plants are set out at 5 to 7 cm intervals along the rows. In rainy or very humid periods, greater spacing along the row allows the plants to dry more quickly after rainfall. Seeds are sown at a depth of 2 to 5 cm on soil that has been left to drain well (if irrigation has been applied prior to sowing). Care should be taken not to sow at too shallow a depth in light filtering soil (sandy). In contrast, a depth of 2 to 3 cm is enough in heavy and/or sealing soil. Although irrigation is necessary and recommended in sandy soil, watering is not recommended between sowing and emergence in sealing soil. As a general rule, pre-sowing irrigation of silty-clayey soil is sufficient for germination and homogeneous, regular emergence in the field.



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French bean — Fertilisation — Recommended quantities and fertilisation plan

	N	P	K
Recommended quantity per hectare	70-90 u	80-100 u	150-180 u
Basal dressing as % of recommended fertilisation	40-50%	40-50%	40-50%
Top dressing (sowing + 15 days)	25-30%	25-30%	25-30%
Top dressing (sowing + 25-30 days)	25-30%	25-30%	25-30%

Fertilisation

The choice of form of fertiliser is important as the French bean cycle is short. The fertilisers used must contain elements that are taken up easily and quickly. The main elements (N, P, K) must be applied rationally, partly before the crop is sown (basal dressing) and the rest as top dressing during the vegetative cycle.

Single and complete fertilisers are applied in many production zones. Nitrogen fertiliser (N) is in urea, ammonia or nitric form, phosphorus (P) is applied as ammonium phosphate or triple superphosphate and the most common forms of potassium are potassium sulphate or nitrate. Chloride forms should be avoided as chlorine is toxic for many market garden crops and for French beans in particular. Shallow hoeing should be performed when top dressing is applied or fertilisation can be followed by watering. In some perimeters with more sophisticated installations, fertilisation—especially top dressing—can be combined with trickle irrigation.

In addition to the main elements, secondary elements are generally combined with the basal dressing; these are magnesium in the sulphate form and calcium in the form of slag. The trace elements essential for the crop (molybdenum, zinc, copper and manganese) are applied if necessary by foliar spraying or via the trickle irrigation system.

Irrigation

As for most counter-season crops in tropical countries and especially in the Sahel zone, it is essential to irrigate fields of French beans for a crop that is satisfactory in terms of both quality and quantity. In some highland zones (in Kenya), rainfall may cover part of the water requirements. Fields are traditionally watered by gravity irrigation. Some perimeters have installed more sophisticated techniques such as trickle irrigation and sprinkler irrigation.

Gravity irrigation

This type of irrigation requires good land levelling so that the water flows freely along the rows. Defects in levelling cause local accumulation of water with a risk of plants wilting as a result of root asphyxiation and the spread of certain fungal diseases. Very large amounts of water are required and the quantity is difficult to manage, especially during the rainy season when the total of irrigation water and precipitation may sometimes be excessive).

Trickle irrigation

Very well suited to this kind of crop, trickle irrigation requires rigour, in particular as regards filter equipment as water with a particle load can foul irrigation piping. This method uses much less water than gravity irrigation and the management of quantity is more flexible and rational. In addition, the technique can be used to apply top dressing with the applications split and distributed throughout the cultivation period. Much care must be taken

in the choice and quality of the fertilisers used for fertigation and the risk of blocking of the drippers can affect the overall quality of irrigation of all the rows and the field.

Sprinkler irrigation

This technique also enables better management of volumes and application of water throughout the vegetative cycle. It is better to water in the morning to avoid risk of leaf burn and also to limit risk of fungal infection during sultry weather. Sprinklers with large jets or large drops should not be used as they can damage foliage and also splash the pods with earth and reduce the commercial yield of the field. This watering technique has the advantage of limiting the populations of certain pests—in particular spider mites and thrips.

French beans are sensitive to water stress, especially at the emergence stage and during flowering/pod growth. However, excessive irrigation should not be applied at the post-emergence stage in order to avoid fungal attacks at the root collar of seedlings. A slight, rational water shortage after emergence enhances plant rooting as the roots explore a deep level of the soil. Irrigation frequency and dose are determined in the light of meteorological conditions, taking daily evaporation into account in particular. Installing tensiometers in the field can be a help in taking decisions concerning irrigation depths and frequencies. Knowledge and experience of the soil and the crop should be taken into account in irrigation management. It is preferable to perform both furrow and sprinkler irrigation in the morning, allowing the foliage to dry during the day. Sprinkler irrigation should not be carried out immediately after leaf spraying with fungicide or insecticide. Irrigated just before picking should be avoided. Harvesting conditions will be more comfortable (no wet areas) and the produce of better quality (no risk of mud or wet earth on the pods).

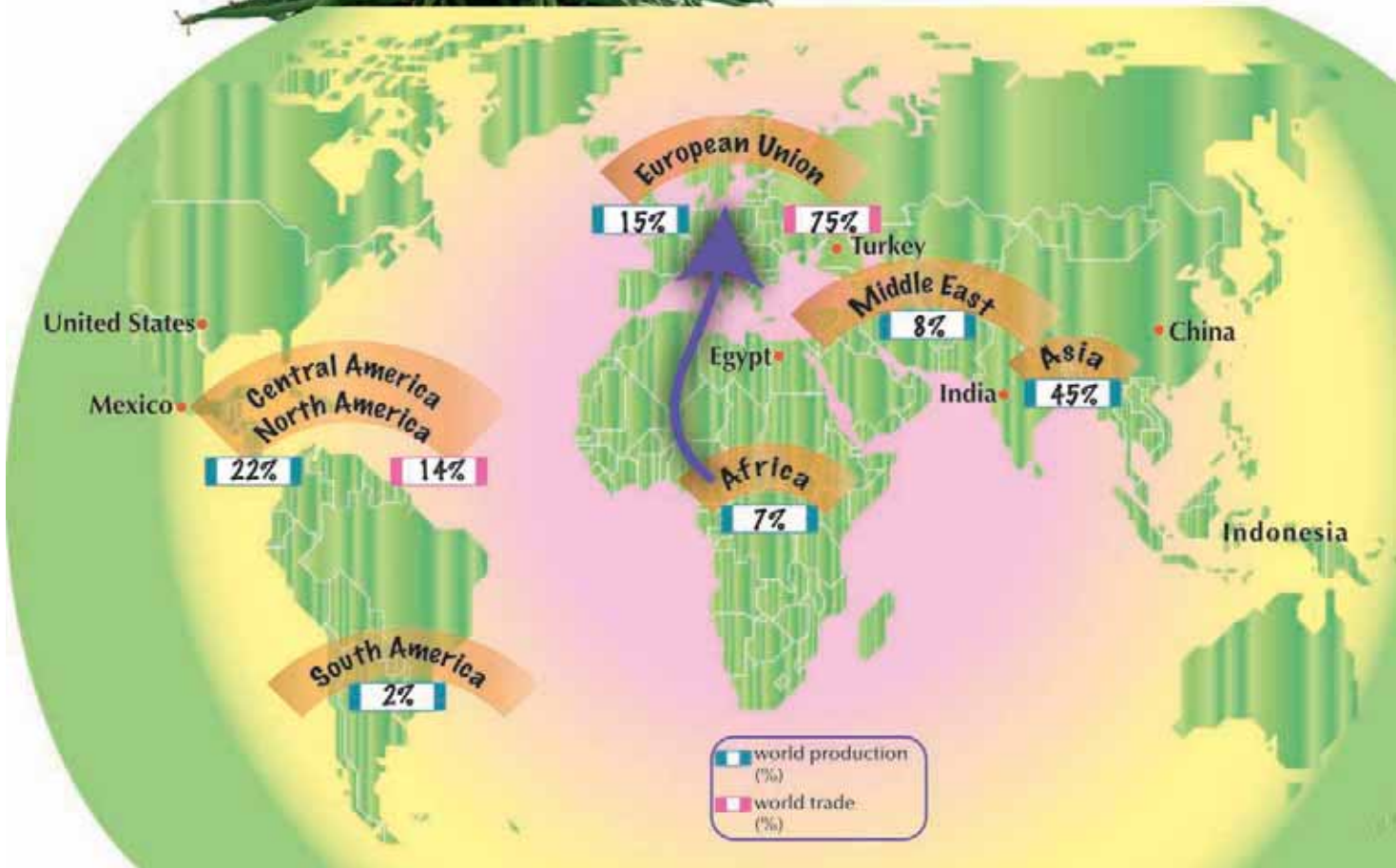


French beans

(filet, snap beans, etc.)

production 8.8 million tonnes

world trade 455 000 tonnes



tonnes	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Total, incl.	24 786	23 869	24 031	26 968	27 891	30 634	30 596	29 922	31 418	32 711	35 966
Mexico	22 951	22 271	20 827	25 040	26 780	28 797	28 086	26 883	27 497	26 787	28 525
Guatemala	92	262	376	350	254	478	339	422	1 679	4 535	6 730
Canada	1 544	1 185	2 544	1 310	486	832	1 341	1 862	1 527	832	222
Dom. Rep.	134	102	29	36	203	316	267	266	66	158	109
Peru	0	34	21	107	30	16	259	239	156	154	190
Nicaragua	0	0	0	0	0	24	0	18	280	100	41
Others	66	16	234	124	139	172	304	233	213	146	149

Source: US customs, code 070820

tonnes	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Total, incl.	1 389	1 029	1 144	1 339	1 310	1 435	868	1 119	1 635	1 555	1 132	992
Oman	809	705	947	882	976	993	727	925	1 397	1 211	1 028	0
China	23	0	37	269	161	154	100	144	164	278	80	0
United States	0	0	0	38	14	21	21	0	0	0	15	0
Unit. Arab Em.	1	0	3	6	28	135	11	47	70	64	8	0
Mexico	275	157	70	65	22	24	6	0	1	0	1	0
New Zealand	264	158	79	79	97	77	1	3	0	0	0	0
Others	18	9	7	0	12	31	3	0	2	1	1	1

Source: Japanese customs, code 070820000



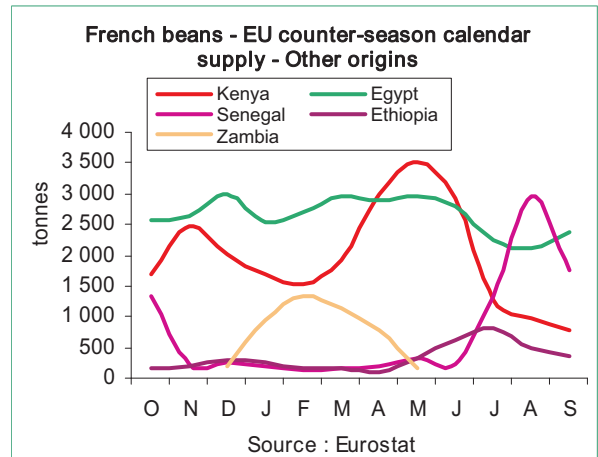
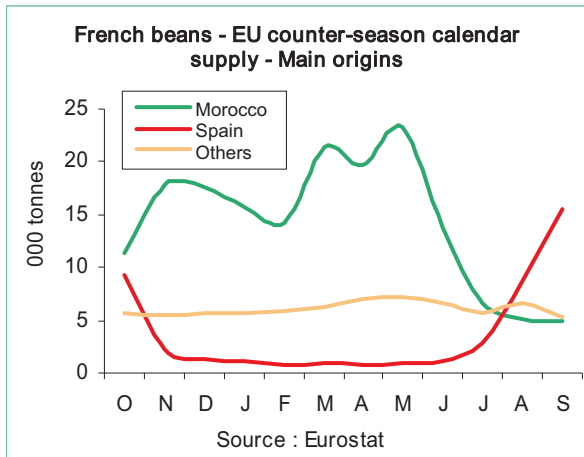


French beans World production	
2006	000 tonnes
World	6 416
China	2 431
Indonesia	830
Turkey	564
India	420
Egypt	215
Spain	215
Italy	191
Morocco	142
Belgium	110
United States	97
Thailand	92
Netherlands	70
Greece	68
Romania	64

French beans World exports	
2006	000 tonnes
World	460
Morocco	109
France	70
Kenya	37
Netherlands	36
Mexico	29
Egypt	28
Spain	26
United States	26
United Kingdom	20
Malaysia	15
Belgium	13
Germany	12
Kirghizistan	7
Senegal	6

French beans World imports	
2006-2007	000 tonnes
World	460
EU-25, incl.	333
Spain	81
Belgium	73
France	53
Netherlands	36
United States	36
Canada	30
Egypt	26
Singapore	11
Sri Lanka	6
Unit. Arab Em.	5
Malaysia	3
Switzerland	3
Lebanon	2

Sources: FAO, EU, USA, Japanese customs, Cirad



entry point

2005-2006

Source: Eurostat

French beans — European Union imports and production								
tonnes	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
Total, of which	182 021	208 225	251 474	282 584	321 058	345 671	341 783	333 011
France	26 914	27 257	64 429	66 391	70 003	87 511	70 773	50 486
Netherlands	27 188	36 476	36 628	48 011	52 626	45 980	45 271	44 972
Germany	8 080	6 451	8 354	8 149	8 007	9 693	8 426	10 536
Belgium	3 890	5 318	5 309	6 032	5 753	10 182	8 175	5 394
Italy	8 092	6 606	4 825	2 327	4 228	4 274	3 622	3 816
United Kingdom	298	693	664	809	1 186	833	498	776
Denmark	6	15	9	184	299	311	571	485
Poland	435	247	432	687	364	328	458	749
'Summer' supply	74 903	83 063	120 651	132 591	142 465	159 113	137 793	119 081
Intra EU without Spain								
Morocco	19 865	32 927	43 096	56 937	79 960	84 977	102 631	108 986
Kenya	23 169	22 514	21 539	23 202	28 854	30 543	32 980	36 600
Egypt	17 956	19 895	21 625	21 750	27 513	27 000	27 007	27 759
Senegal	5 974	5 830	5 608	4 800	5 556	7 059	7 040	6 420
Ethiopia	3 523	3 168	2 140	2 648	3 534	4 509	4 689	3 342
Burkina Faso	2 264	1 985	1 326	1 197	903	562	660	838
Zimbabwe	2 371	2 373	1 781	1 379	1 397	2 038	1 295	730
Dominican Republic	454	478	509	615	484	385	413	724
Zambia	2 479	4 060	2 007	2 225	1 466	1 307	948	720
Turkey	713	781	1 108	1 239	979	889	790	633
Tanzania	19	207	340	213	687	1 009	1 055	520
Guatemala	42	40	49	134	367	310	363	379
Total extra EU	81 802	96 594	103 064	118 070	153 155	161 830	181 133	189 393
Spain	25 316	28 568	27 759	31 923	25 439	24 729	22 857	24 537
'Autumn-winter-spring' supply	107 119	125 162	130 823	149 993	178 594	186 559	203 990	213 929
Extra EU with Spain								

Source: Eurostat, code 070820



Arthropodes des cultures légumières d'Afrique de l'Ouest, centrale, Mayotte et Réunion

Dominique Bordat
Laurence Arvanitakis



Centre de coopération
internationale en recherche
agronomique pour
le développement

L'OUVRAGE comprend une description de 135 espèces d'arthropodes nuisibles très répandus dans les cultures légumières d'Afrique de l'Ouest, centrale, Mayotte et Réunion. Cette description est accompagnée de 322 photographies représentant les stades les plus caractéristiques du développement des insectes et/ou les dégâts qu'ils occasionnent. Une énumération des plantes hôtes attaquées est donnée pour chacun de ces nuisibles dont, par ailleurs, la répartition géographique a été indiquée à partir des prospections menées par les auteurs dans les zones étudiées.

Ce manuel vise à apporter un appui à la détermination des principaux arthropodes nuisibles qui y sont rencontrés ; son objectif est de fournir une aide efficace aux hommes de terrain qui par leur travail ont l'occasion de les rencontrer fréquemment sur leurs cultures. Il s'adresse aux responsables du développement et aux professionnels agricoles.

Arthropodes des cultures légumières d'Afrique de l'Ouest, centrale, Mayotte et Réunion
Dominique Bordat et Laurence Arvanitakis

Prix 26 € HT ISBN 2-87614-593-6

Contact : dominique.bordat@cirad.fr



International Conference:

Diversifying Crop Protection

La Grande-Motte, France > October 12-15, 2008

Advances in crop protection have helped boost agricultural yields and consistency, but new concerns about human health and the environment and increased public awareness about the negative impact of pesticides mean farming systems less reliant on pesticide use need to be developed.

The most recent advances concerning the sustainable exploitation of crop protection strategies will be presented :

Implementation > Applying existing tactics and strategies.

Innovation > Building innovative strategies for tomorrow.

Impact and governance > Assessing progress toward sustainable development.

Plenary sessions will be devoted to the global challenges for crop protection and food safety, and include the perspectives of a variety of stakeholders: crop protection industry, retail sector, biocontrol manufacturers and environmentalists.

Specialised sessions will be devoted to various aspects of the durable exploitation of crop protection strategies.

Up to 400 participants from across the world are expected to attend.

About ENDURE
ENDURE is the European Network for the Durable Exploitation of Crop Protection Strategies, a Network of Excellence (NoE) with two key objectives: restructuring European research and development on the use of plant protection products, and establishing ENDURE as a world leader in the development and implementation of sustainable pest control strategies.

Eighteen organisations in 10 European countries are committed to ENDURE for four years (2007-2010), with financial support from the European Commission's Sixth Framework Programme, priority 5: Food Quality and Security.

To register and for more details go to:

www.endure-network.eu





French bean varieties

Variety photos © Seminis

The French bean varieties used for export to the European Union market have changed little since the mid-1990s. About half a dozen are used for all the crops in African and Mediterranean producer countries. The Royal Sluis company, a member of the Seminis group, supplies most of the seed for this particularly delicate counter-season crop. Several other seed companies are breeding new varieties that may soon afford a broader choice for producers.

Different varietal types: Bobby, fine filet and very fine filet

The varieties 'Amy', 'Teresa' and 'Samantha' are grown for fine stringless filet ("needle") beans while 'Paulista' and 'Nerina' are used more for Bobby type fine beans. 'Nerina' seems to be approaching the end of its life and is being gradually replaced by 'Paulista'. The 'Julia' and 'Sagana' very fine filet varieties are grown for export to France and for canning (in Cameroon and South Africa). The geographical distribution of the varieties is fairly even according to producer country although certain varieties will be grown more or less according to the market segment pattern sought. Thus, Kenya and Burkina Faso concentrate more on filet beans. Morocco, Egypt and Senegal opt for a more varied use of the varieties available according to destination markets on which Bobby bean is predominant. The different varieties have more or less the same production characteristics and differ in pod shape and length or have a more or less marked green colour (under the same production conditions). The very widespread 'Amy' variety seems to be more susceptible to rust, one of the main diseases of French bean.

Paulista

Bobby type

Size: 30% width 6 to 8 mm, 60% from 8 to 9 mm
Colour: brilliant dark green

'Paulista' is the best Bobby bean variety. It gives a stable yield and its quality is much requested for export. It also has high tolerance to transport. It is grown in Senegal, Gambia, Morocco, Ethiopia, Egypt, Kenya and South Africa (for the domestic market).



Samantha

Filet type

Length: 12 to 13 cm straight pod

'Samantha' is a vigorous variety thanks to its powerful root system and adapts well to stress. It has a very high yield potential. It is grown in Kenya and Burkina Faso.



Teresa

Filet type

Length: 13 to 14 cm pod
Colour: dark green
Resistance: rust, anthracnose and common mosaic

'Teresa' is the leading rust-resistant filet variety, making it important in a producer country like Kenya where this disease can cause serious problems. Kenya exports its entire production to the United Kingdom.



Amy

Filet type

Size: 70% smaller than 8 mm Long, straight pods

'Amy' is a vigorous variety with staggered flowering. It has excellent storage qualities after harvesting and packing. It is also a reference in manual picking. It is grown in Kenya, Senegal, Burkina Faso, Zambia and Zimbabwe. Most of the production of 'Amy' is shipped to France.





Pests and diseases of French beans

Crop protection should make it possible to produce beans that meet quality standards and respect maximum residue limits for pesticides. It must be in conformity with both the regulations in force in the producer country and with the MRLs laid down in the destination country. Chemical control must be rational above all. Observation and the detection of a minimum threshold must be taken into consideration before any fungicide application.

The main diseases

The appearance, spread and intensity of fungal diseases vary according to zone (the Sahel zone in Senegal or Burkina Faso, the highland zone in Kenya) and production period (during the rainy or dry season in Kenya). At certain times of the year, some diseases may have marginal qualitative and economic effects or, in contrast, a major impact on production.

Technical recommendations can help to prevent the occurrence of these fungal diseases:

- respect of the rotation and cropping pattern in fields used for growing French beans;
- irrigation management: this limits the spread of many diseases;
- use registered, treated seed;
- grow varieties known to be resistant;
- set up a phytosanitary programme in conformity with the MRL standards in force.



Alternaria

Disease caused by *Alternaria* sp. is generally limited to the lower leaves and does not affect the other aerial parts of the plant. However, the upper parts and the pods may be attacked under very moist, cold conditions. Pod symptoms may only appear after picking, once the beans have been packed and exported. It is important to respect recommended planting densities so that the plants dry quickly after rainfall or sprinkler irrigation. Fungicide treatments may be necessary.

Anthracnose

First, the leaves are attacked by the fungus. Subsequently all the plant organs are attacked in turn and especially the pods. Some bean varieties are resistant to this fungal disease. Such cultivars should be chosen in order to avoid risk. Fungicide sprays during cultivation can help to limit and control damage caused by this fungus.

Bacterial blotch of bean

The bacterium that causes the disease can attack all parts of the plant. Bad weather (cold and wet) enhances development. Appearance of the disease can be limited by using treated, selected seed. Some fungicidal treatments—copper-based sprays in particular—during cultivation limit the development of the disease.

Rust

Leaf symptoms appear first. All the foliage may be affected and wither during very wet weather. Production is compromised in this case. The disease is controlled by careful choice of fields (avoid low-lying land), irrigation management (water in the morning so that plants dry during the day) and the use of resistant varieties. A preventive fungicide spraying programme can be used as a last resort.

Pythium, damping-off

Emerging seedlings display necrotic, black roots and soon wilt. Root necroses can affect plant development and commercial yields in apparently healthy adjacent zones. Limiting attacks requires careful respect of crop rotations and the avoidance of plants susceptible to these diseases. Too much water and irrigation at the sowing/emergence stages increase the risk of outbreaks of these fungal diseases. It is recommended that sound seed treated with fungicide should be used. In addition to these two main diseases that can affect crops at emergence, attacks of *Fusarium* wilt and root and neck rot are similarly possible.

The main pests

As with the main fungal diseases, the damage caused by the main pests can vary according to the production zone and the season. Other pests including the bean fly, the pod borer and the 'army worm' can also affect French bean production. Regular field inspections are required to determine intervention thresholds and to design treatment.



Aphid colony

Aphids

In addition to direct damage to the plant (poor growth), aphids secrete honeydew that causes sooty mould.

Honeydew and sooty mould affect harvest quality. Aphids on crops are also a serious factor in the spread of virus diseases. If chemical control is justified, priority should be given to active substances that are harmless for the natural predators of aphids.

Noctuid moth caterpillar

Attacks by this caterpillar are concentrated on pods in particular and cause serious damage. Any batch of beans found to contain caterpillars is intercepted on arrival in Europe. This is why it is important to have a programme for the control of this pest. Preventive spraying is commonly performed. This can be combined with the introduction of specific predators. In this case, the active substances used should not affect the predator populations.



Noctuid



Whitefly

Whitefly

This pest is found in numerous production zones and it sometimes has a strong impact on market garden crops. Damage is caused by honeydew and the spread of numerous viruses. The honeydew secreted by larvae leads to sooty mould. The

spread of viruses in case of strong infestation by whitefly can compromise plant growth and the harvest. Insecticide spraying is becoming increasingly difficult as whitefly has developed resistance to numerous active substances. Although the new generations of substances are still effective, integrated control methods should be used, including in particular the introduction of natural predators (parasite Hymenoptera).

Thrips

Pricking by thrips affects the growth of the plant, which finally withers. Spread of the pest is enhanced by heat. Insecticide spraying is necessary in some cases.



Thrips damage



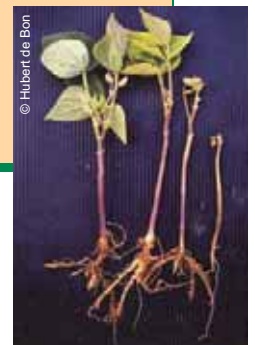
Bean fly damage

Bean fly

The adult flies lay eggs on young seedlings and the larvae spread in the stems and the plant finally withers. Damage caused by this pest is generally controlled by the use of treated seed.

Root-knot nematodes

The spread of nematodes in the root system affects plant growth. Well-managed crop rotations and appropriate tillage limit the impact of the pest in French bean crops.



Nematode damage



Spider mite damage

Spider mites

Strong red spider mite attacks affect plant growth and hence harvests. The weather conditions in hot, dry zones enhance the development of this pest.

Although chemical sprays can eradicate mite populations, increasing resistance is observed. Predators can also be introduced to limit mite populations in infested fields. In this case, it is essential to use pesticides that do not harm the predator that has been introduced.



French bean harvesting and post-harvest



Harvest

Harvest frequency will be adjusted to the type of bean exported. Extra fine beans (Kenya) are picked every day. It is advised that Bobby beans should be picked every three or four days and filet beans every two days. These intervals should be maintained throughout production so as not to penalise commercial performance by large amounts of sorting rejects. The pods are picked by hand, with the stalks. Particular care is needed to conserve the quality of the harvest:

- harvest boxes should not be over-filled (to avoid any risk of crushing);
- freshness should be conserved by not leaving produce in the sun;
- the produce should be placed in a cold store as soon as possible—even before sorting if the latter is delayed.

Picking is best carried out in the morning but not if the plants are too wet. The pickers must be made aware of the specific quality requirements of these beans.

Beans 'en filet' ('needle beans') European standard	
Pod width	Size
not exceeding 6 mm	very fine
not exceeding 9 mm	fine
not exceeding 12 mm	average

Packing

Packing operations result in boxes of produce that must be in conformity with the EU quality standard for French beans (standard EC 912/2001). For this, the produce must be sorted after picking in order to:

- remove pods that are broken, perforated, twisted, etc.;
- remove plant debris (leaves and stalks);
- grade the beans by size.

Each box packed for the export market must display the product characteristics, that is to say category, size and all the regulation information (origin, name of producer/exporter, etc.).

Storage

Whatever the transport method chosen (air or sea), it is essential that produce is placed in cold store as soon as it has been packed. Minimum storage temperature is about 4°C and this makes it possible to store French beans for about a week. This pattern is applied for exports by sea, especially from Senegal. For shorter marketing channels (air freight) and for fine grade beans, storage temperature should be close to 10 to 12°C. In addition to the question of temperature, the storage atmosphere for packed products should have relative humidity of around 80% for storage at 4°C and some 90 to 95% for storage at about 10°C. Excessive humidity can cause changes in pods and the appearance of moulds. This is especially important for produces transported in refrigerated containers (Senegal). Packed produce is stored in cold rooms with moderate ventilation to avoid the drying of the pods. It is important not to break the cold chain when the produce has reached its destination in order to conserve the quality of the beans.





Indicators

The main fruits	In shares by total volume and expenditure on fruits for the month in France		
	%	Volumes	Expenditure
Apple		26	19
Banana		16	10
Strawberry		11	24

Pages

The trends for the main produce of the month significantly influence the overall situation of the fruit market. A column entitled 'Indicators' discussing these fruits precedes the pages devoted to a selection of exotic and citrus fruits.

Banana.....	29
Avocado.....	31
Orange.....	32
Grapefruit.....	33
Litchi.....	34
Mango.....	35
Pineapple.....	36
Sea freight.....	37

MAY 2008

Apple

Supply was moderate since produce from the southern hemisphere displayed a deficit and quality was sometimes uneven. In this context, the last bicolour apples from Europe—even 'Braeburn'—moved more briskly. Prices increased markedly and were higher than average, even though the range was fairly broad for southern hemisphere fruits.

May 2008 / May 2007

Price	↗	Vol.	↘
-------	---	------	---

Banana

The market continued to worsen even though demand held at a good level. Poor weather limited supplies of the season's fruits and favoured banana consumption. However, supply was fairly large. Arrivals from both the dollar zones and the French West Indies were fairly substantial. Prices were disappointing, especially on the French market.

May 2008 / May 2007

Price	↘	Vol.	↗
-------	---	------	---

Strawberry

The market was fairly satisfactory. First, supply was distinctly smaller than usual as French yields were limited by poor weather conditions. Second, demand was good as supplies of competing fruits (Spanish stone fruits and French cherries) displayed a deficit. The average monthly price was higher than the average.

May 2008 / May 2007

Price	↗	Vol.	↘
-------	---	------	---

Sea freight

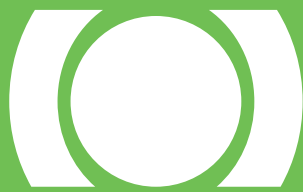
The TCE average figure of 101c/cbft for the month of May means that year-to-date average remains over 100c/cbft – with June continuing where May finished the likelihood is that the figure for the first six months will also top three figures, the first time this has ever happened. Much will depend on the cost of bunkers – if the price of oil continues its upward march then TCE yields will inevitably fall.

May 2008 / May 2007

large reefers	=	small reefers	↗
---------------	---	---------------	---

Notes concerning market appraisal methodology

The statistics on the following pages are estimates of quantities put on the market in France. They are only calculated for the main supplier countries and are drawn up using information on weekly arrivals or market release statements by representative operators. The figures in the 'Main fruits' section above are provided by the CTIFL, with SECODIP being the source. The data published in the French market pages are provided solely as a guide and CIRAD accepts no responsibility for their accuracy.



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Banana

MAY 2008

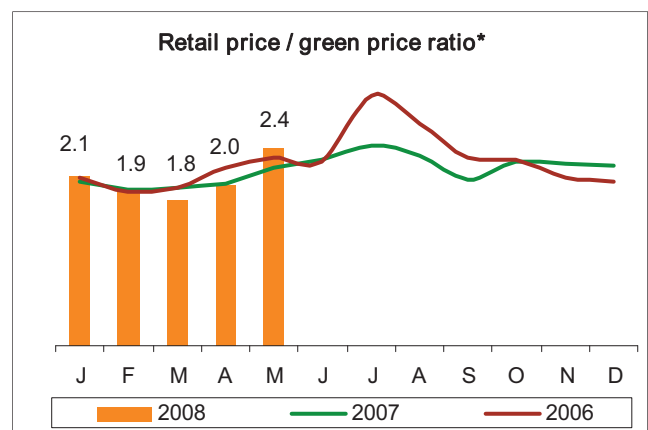
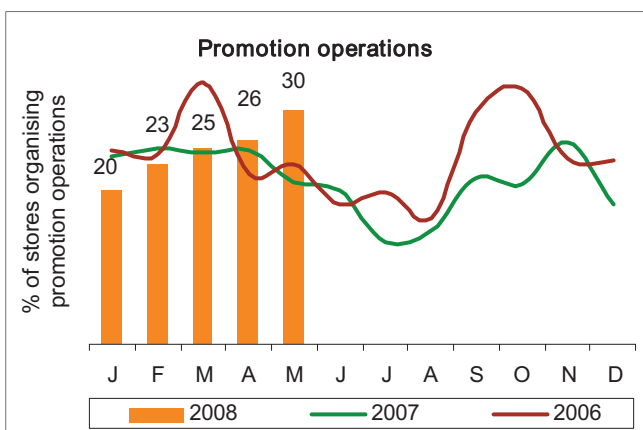
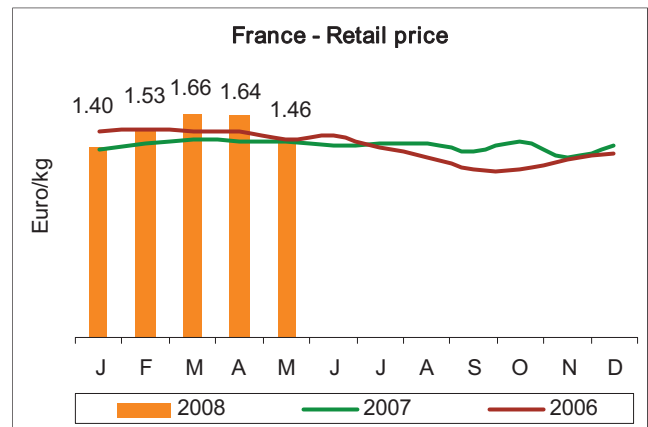
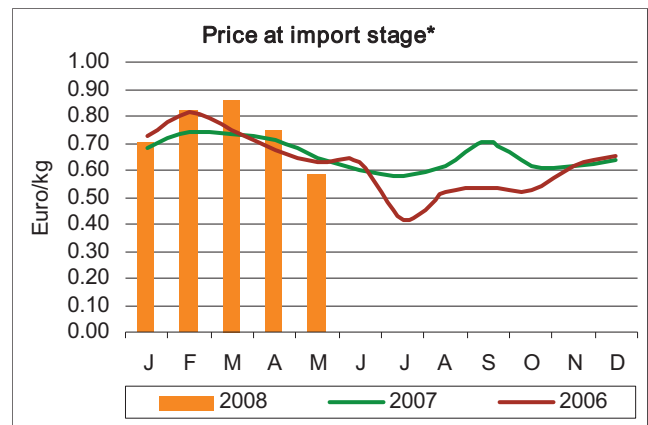
The market continued to worsen, especially during the first part of the month. However, demand was fairly good. Lousy spring weather limited the crops of competing fruits (strawberries and the first stone fruits from Spain), reducing their consumption. Banana was therefore very strongly present on retail shelves with numerous special offers in France and Germany. However, supply was substantial in spite of a significant and increasing deficit in shipments from Africa. On the one hand, deliveries from the French West Indies were distinctly larger than average as replantings after hurricane Dean resulted in a shift in peak production. On the other, dollar banana supplies continued to be substantial, in particular during the first part of the month, even though shipments from Costa Rica displayed a distinct deficit. However, deliveries from Colombia continued to be much larger than average. Likewise, although exports from Ecuador were fairly small overall, preference went to shipments to the EU at the expense of the USA. Spot volumes appeared in southern Europe.

In this context, prices fell markedly on all the European markets, with even some stocks forming in the first part of the month. Nevertheless, the average monthly price was higher than average in Germany. The situation was much more difficult in the countries operating reshipments and in those whose supplies consist mainly of reshipped fruits. The average price for the month was thus lower than the average in France, Italy and the United Kingdom and probably in most Eastern European countries.

Monthly and annual comparisons	
Volumes*	EU reference price**
May 2008 / April 2008	
↗ + 6%	↘ - 22%
May 2008 / May 2007	
↗ + 4%	↘ - 9%

* Arrivals from Africa/West Indies ** Green price in Germany (GlobalGap)

French banana market — Indicators



* African origin

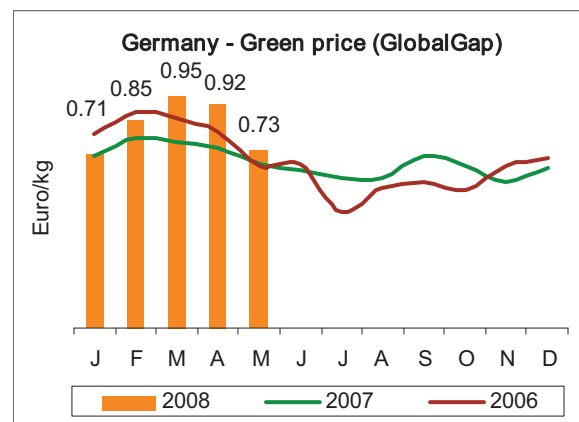
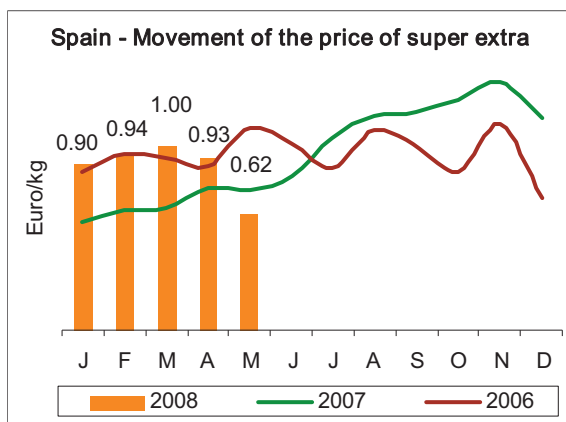
European banana market — Indicators

Main origins in Europe

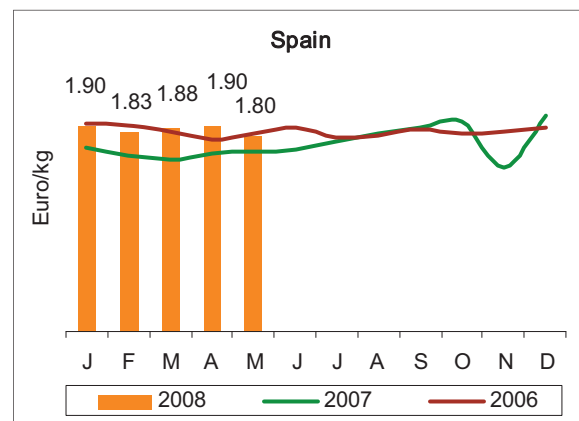
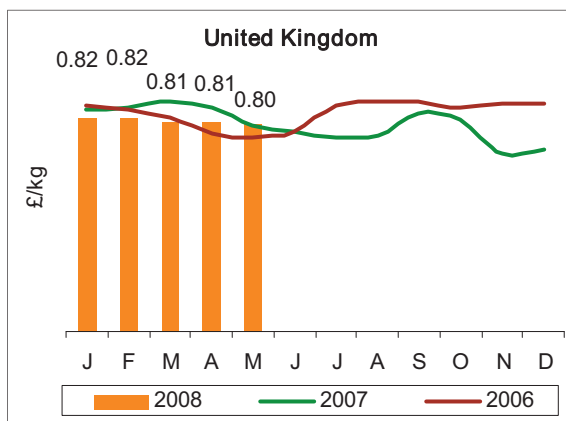
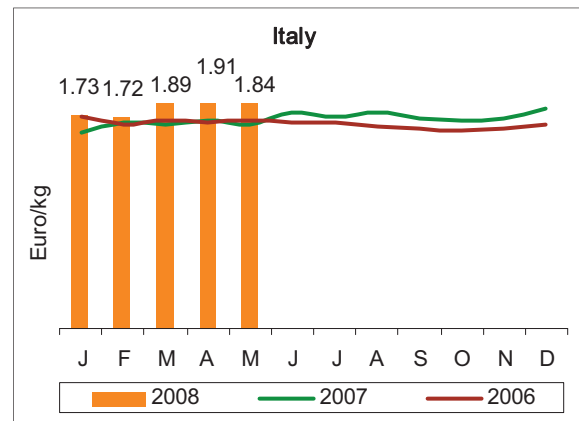
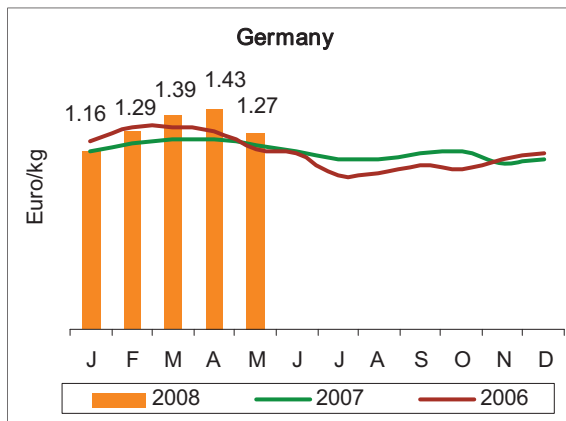
Tonnes	May 2008	Comparisons (%)		Total season 2008	Season comparisons (%)	
		2008/2007	2008/2006		2008/2007	2008/2006
Martinique	25 952	+ 30	+ 45	50 872	- 41	- 34
Guadeloupe	3 986	- 3	+ 8	14 271	- 28	- 17
Canaries	33 530	+ 15	+ 12	168 136	+ 11	+ 12
Côte d'Ivoire*	10 399	- 33	- 50	51 339	- 30	- 45
Cameroon	18 389	- 1	- 30	105 104	+ 7	+ 4
Ghana	4 220	+ 75	+ 74	18 723	+ 59	+ 404

* Except for container movements

Green price in Europe



Retail price in Europe



Sources : CIRAD, SNM, TW Marketing Consulting



Avocado

MAY 2008

The major supply deficit observed during the first part of the month, especially for 'Hass', was corrected gradually. The northern hemisphere seasons dwindled or ended early. Spain was the only one of these source countries to continue to supply significant quantities to the market, although deliveries were noticeably smaller than average. Hardly any goods arrived from Mexico as the fruits were fragile and could no longer be shipped to the EU. Similarly, Israel was totally absent from the market in contrast with May 2007 when it was still very present. However, arrivals from the main southern hemisphere sources increased sharply and volumes were well above average. Deliveries of 'Hass' and green varieties from Peru and South Africa were extremely substantial from mid-month onwards. Complementary supply of the green variety market with avocado from Kenya was also smaller than average.

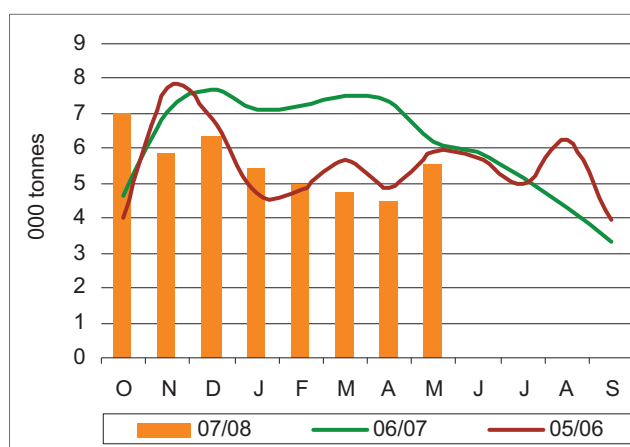
In this context, prices—especially for 'Hass'—held at an excellent level during the first third of the month and then gradually fell. However, the average monthly price was excellent.

Monthly and annual comparisons

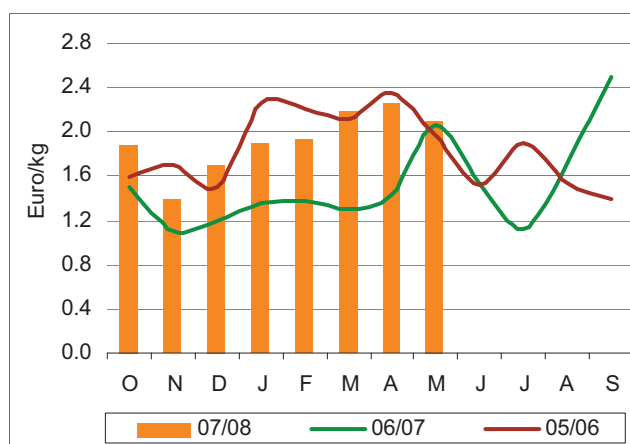
Volumes	Price
May 2008 / April 2008	
↗ + 25%	↘ - 8%
May 2008 / May 2007	
↘ - 10%	↗ + 2%

Estimated market releases in France

Volumes

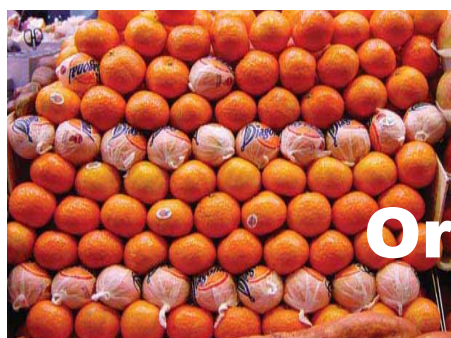


Price at import stage



Estimated market releases in France by origin

Tonnes	May 2008	Comparisons (%)		Total season 2007/2008	Season comparisons (%)	
		2008/2007	2008/2006		07-08/06-07	07-08/05-06
Mexico	95	- 16	- 57	8 057	- 3	- 41
Peru	1 747	+ 131	- 12	2 905	+ 253	+ 27
Israel	-	- 100	-	9 444	- 56	0
Spain	1 276	- 58	- 19	13 714	- 11	+ 1
Kenya	699	+ 53	- 29	2 106	- 18	- 28
South Africa	1 760	+ 119	+ 50	2 595	+ 329	+ 126
Total	5 577	- 10	- 6	38 821	- 30	- 16



Orange

MAY 2008

The supply deficit was very significant once again after a month of April marked by the return to average volumes thanks to increased momentum of the 'Valencia' seasons. Volumes of Spanish 'Navelate' were very small and some large operators even ended their season in the first half of the month. Furthermore, the Spanish 'Valencia' season soon ran out of steam after a practically normal start. Deliveries stabilised at a level much lower than usual for lack of fruits at production. Indeed, producer prices reached very high levels.

Deliveries of Maroc Late remained very large but did not make up for the Spanish deficit. The first marginal volumes of 'Navel' from South Africa were delivered right at the end of the month.

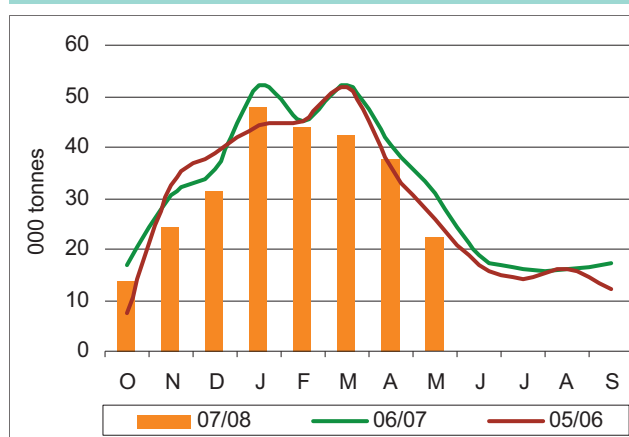
As a result, prices at the import stage remained very strong and distinctly higher than the average. Some flexibility was allowed for certain batches of fragile quality from Morocco.

Monthly and annual comparisons

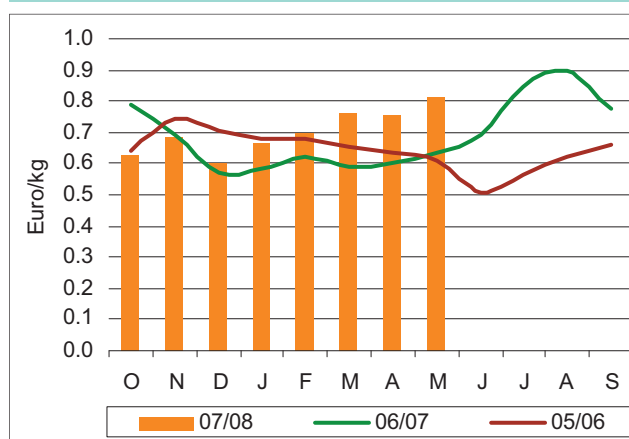
Volumes	Price
May 2008 / April 2008	
↘ - 40%	↗ + 7%
May 2008 / May 2007	
↘ - 28%	↗ + 29%

Estimated market releases in France

Volumes

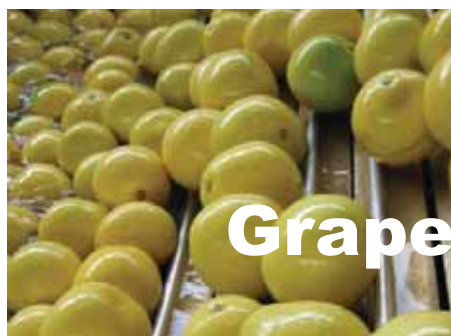


Price at import stage



Estimated market releases in France by origin

Tonnes	May 2008	Comparisons (%)		Total season 2007/2008	Season comparisons (%)	
		2008/2007	2008/2006		07-08/06-07	07-08/05-06
Spain	17 365	- 40	- 27	214 133	- 21	- 13
Morocco	4 946	+ 146	+ 195	13 185	+ 128	+ 23
South Africa	186	-	-	186	-	-
Total	22 497	- 28	- 13	227 504	- 18	- 12



Grapefruit

© Eric Imbert

MAY 2008

Supply was very small even though the Florida season was extended. Late fruit growth resulted in an increase in the volumes available at the end of the season and probably a transfer to the EU of a proportion of the volumes destined for the Japanese market. Supplies from the other northern hemisphere sources displayed a marked deficit. Turkish shipments were marginal and volumes from Israel well below average as a result of early sales at the beginning of the season. In addition, the start of the season for fruits from southern hemisphere sources was very gradual. Deliveries from South Africa were larger than in 2007 but still distinctly smaller than average as a result of a production shortfall and preference for the Russian and Japanese markets in May. Likewise, the Argentinian season started somewhat late and the volumes delivered were smaller than usual.

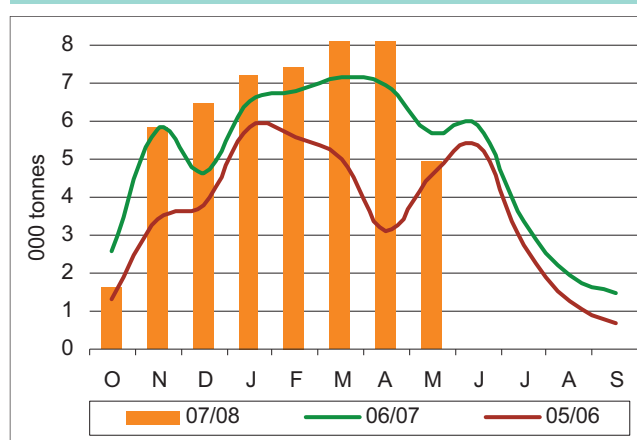
The season's demand resulted in fluid sales of Florida fruits, that held on to most of the retail referencing during the first two thirds of the month, thanks to stable prices that were slightly lower than those of 2007. In this context, sales of produce from other sources were somewhat slow during the period but matched the quantities available. Sales of southern hemisphere fruits speeded up noticeably at the end of the month as the last Florida batches found takes. The average price for the month was distinctly higher than the average.

Monthly and annual comparisons

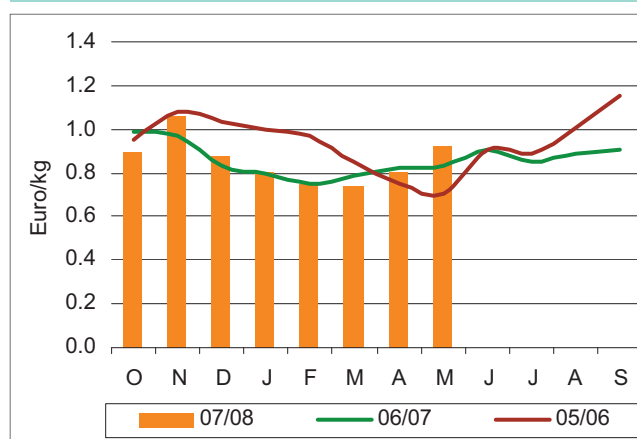
Volumes	Price
May 2008 / April 2008	
↘ - 40%	↗ + 15%
May 2008 / May 2007	
↘ - 13%	↗ + 11%

Estimated market releases in France

Volumes



Price at import stage



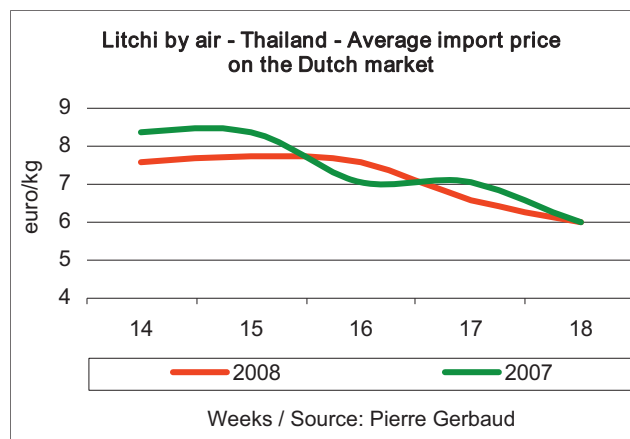
Estimated market releases in France by origin

Tonnes	May 2008	Comparisons (%)		Total season 2007/2008	Season comparisons (%)	
		2008/2007	2008/2006		07-08/06-07	07-08/05-06
Florida	1 697	+ 28	+ 580	37 095	+ 19	+ 145
Israel	580	- 22	- 10	6 947	- 14	+ 13
Turkey	21	+ 63	- 82	3 230	- 16	- 62
Argentina	773	- 45	- 10	773	- 47	- 13
South Africa	1 858	+ 40	- 7	1 858	- 34	- 7
Total	4 929	- 13	+ 8	49 902	+ 16	+ 67



Litchi

MAY 2008



Sales of Indian Ocean litchis came to an end in March with the last South African fruits. Although a few batches from Madagascar still remained here and there, they were no longer the most representative on the market. March, like October, featured practically nonexistent litchi supply, especially as there were no fruits from Australia this year. Supply of the European market resumed in April and May with the arrival of fruits from Thailand.

Sales of Indian Ocean litchi came to an end in the first fortnight of March with the 'Red MacLean' variety from South Africa and a few remaining batches from Madagascar. Litchis were totally absent from the market in the second half of the month, this being the second break in supplies to the European market, like that of October. The phenomenon was all the more noticeable as Australia, that generally occupies this niche, did not make any shipments, apparently for reasons of fruits quality.

Supply of the European market resumed at the beginning of April with the first shipments from Thailand, most of which went to the Netherlands. Small quantities of litchi shipped by air were sold on the Dutch market throughout the month. The other European countries do not seem to have received any goods or only occasionally in very small quantities. A few batches were sold in Ger-

many in the second half of April but the high prices asked considerably limited sales. Fruit quality remained satisfactory throughout the month although some batches consisted of small, pale fruits of uneven flavour.

The freight method for Thai fruits changed in the last week of April with a switch from air to sea freight. When the first container ships arrived, the price of air litchis lost considerable ground before these fruits disappeared from the market at the beginning of May.

The increase in supplies arriving by sea affected the selling price, which, fell gradually and then more markedly in the second half of the month. This is the time when supply for the European market becomes broader, with the appearance of Thai fruits in France in particular. They sold steadily at around EUR4.00 per kg in the third and fourth weeks of May. How-

ever, the volumes sold were small, given the slow demand for litchi at this time of year when most transactions concern the season's fruits. The French market also received a few shipments by air from Mexico at the end of May. This year Thailand shipped sulphur-treated fruits for the first time, having previously supplied untreated produce. They sold with difficulty at around EUR5.00 to 6.00 per kg.

A few sales of Thai litchis were also concluded in mid-month in Germany at EUR4.00 per kg. This limited trade niche closed rapidly after the detection of treatment residues at higher levels than permitted.

It would seem that litchi sales outside the Christmas/New Year period is limited for the second year running. The tonnages available seem smaller as demand is weaker.

Litchi — Import price on the Dutch market — Euro/kg							
Weeks 2008	14	15	16	17	18	April 2008 average	April 2007 average
By air							
Thailand	7.25-8.00	7.50-8.00	7.25-8.00	6.00-7.25	6.00	6.80-7.45	6.75-7.50
By sea							
Thailand	-	-	-	-	4.75-5.75	4.75-5.75	nc

Litchi — Import price on the Dutch market — Euro/kg							
Weeks 2008	19	20	21	22	May 2008 average	May 2007 average	
By air							
Thailand	5.00	5.00	-	-	5.00	6.60-7.50	
By sea							
Thailand	4.75-5.00	4.00-4.50	3.00-4.25	3.00-4.50	3.70-4.60	4.25-4.50	



Mango

© Christian Didier

MAY 2008

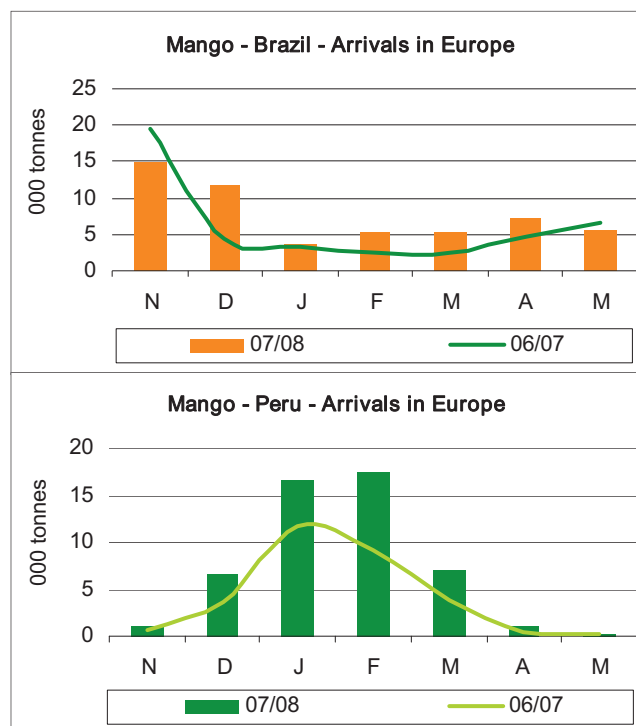
In May, the market gradually regained balance between supply and demand. The string of public holidays in the first part of the month also disturbed sales while supplies from West Africa increased, being added to the substantial shipments from Brazil. The concentration of supply in a very short period resulted in worsening prices during the second half of the month.

The European market regained balance at the beginning of the month with a concentrated increase in shipments from Côte d'Ivoire. This increase in volumes combined with large deliveries from Brazil, complementary supplies from Guatemala and Costa Rica and the last arrivals from Peru sent prices downward. The Peruvian season soon ended with fruits selling at good prices. Brazilian fruits, that had hitherto made up for the deficit in quantity throughout Europe, went back to the traditional northern European market while fruits from Côte d'Ivoire were sold mainly in France. The 'Amélie' season in Côte d'Ivoire ended at the beginning of the month, making way for 'Kent'. The first shipments of 'Kent' and 'Keitt' from Mali and Burkina Faso left simultaneously. The peak in West African supplies had a negative effect on prices. Price ranges first broadened

with uneven supply pressure as regards fruit size. Prices then weakened steadily with a more marked fall at the end of the month as substantial arrivals had accumulated since the middle of the month. The fall in prices in the second half of the month is explained not only by the increase in the volumes released on the market but also by a distinct decrease in demand. The succession of public holidays encouraged consumers to spend on non-food items (travel, leisure, clothes, etc.), especially as the weather was particularly fine. The very varied weather in the second half of the month tended to discourage the consumption of tropical fruits. Supply of the season's fruits also increased strongly then, stimulating competition.

The air mango market was soon saturated as deliveries were substantial from Côte d'Ivoire and Mali and to a

Mango — Weekly arrivals — Estimates in tonnes				
weeks 2008	19	20	21	22
By air				
Mali	100	100	80	80
Burkina Faso	40	20	20	20
Côte d'Ivoire	100	100	50	20
By sea				
Peru	110	40		
Brazil	1 400	1 580	1 300	1 200
Mali	220	220	220	220
Côte d'Ivoire	1 760	1 760	2 400	2 400
Guinea	180	220	220	220
Burkina Faso	110	150	130	220



lesser extent from Burkina Faso. The accumulation of arriving produce in a context of poor sales resulted in the forming of large stocks. Quality was fairly mediocre in May; fruits lacked colour and were very ripe. The quality of the goods from Côte d'Ivoire improved during the second part of the month but remained mixed for those from the other sources. As soon as

Kent formed the larger part of supplies, sales of the other varieties, and especially those from Mali, became difficult. It would seem that 'Valencia' is comparatively little sought-after this year after gaining a trade foothold in recent years. Deliveries of 'Amélie' are becoming increasingly marginal, interesting a clientele of connoisseurs.

Mango — Import prices on the French market — Euros

Weeks 2008		19	20	21	22	May 2008 average	May 2007 average
By air (kg)							
Mali	Amélie	2.30-2.50	2.30-2.40	2.30-2.50	-	2.30-2.45	2.40-2.55
Mali	Valencia	2.50-3.00	2.00-2.80	2.00-2.50	2.00-2.50	2.10-2.70	2.40-2.70
Mali	Kent	2.50-3.00	2.00-3.00	2.00-3.00	2.00-3.00	2.10-3.00	2.35-3.00
Burkina Faso	Amélie	2.20-2.40	2.20	2.00-2.60	2.00-2.50	2.05-2.40	nc
Burkina Faso	Kent	2.50-3.50	2.60-3.20	2.00-3.00	2.00-3.00	2.30-3.20	2.35-2.80
Côte d'Ivoire	Kent	3.00-4.00	3.00-3.50	3.00-3.50	2.80-3.50	2.95-3.60	3.30-3.80
By sea (box)							
Brazil	Tommy Atkins	4.50-5.00	4.00-4.50	-	-	4.25-4.75	3.00-4.00
Peru	Kent	6.00-6.50	5.00	-	-	5.50-5.75	-
Côte d'Ivoire	Amélie	4.50-5.00	-	-	-	4.50-5.00	-
Côte d'Ivoire	Kent	5.00-6.50	4.00-6.00	4.00-5.00	3.50-4.50	4.10-5.50	3.10-4.60
Mali	Kent/Keitt	-	5.00-5.50	4.00-5.00	4.00-4.50	4.30-5.00	2.90-4.00



Pineapple

© Denis Lœillet

Pineapple — Import price		
Euros	Min	Max
By air (kg)		
Smooth Cayenne	1.60	1.90
Victoria	2.80	3.80
By sea (box)		
Smooth Cayenne	5.00	8.00
Sweet	5.00	8.50

MAY 2008

As supply had been increasing and demand falling at the end of April, operators expected difficulties on the pineapple market at the beginning of May. However, problems of logistics (ships late) resulted in an unintentional postponing of market degradation until the end of the month. The supply of air pineapple was fairly small overall and, together with good fruit quality, this kept prices at a good level. In contrast, the 'Victoria' market was much more tense, mainly as a result of the arrival of the season's fruits—this always hits sales of small exotics.

A rumour that shipments of 'Sweet' from Latin America would be large began to spread from the beginning of May onwards. These goods in fact arrived in small batches. Late ships in the first two weeks of the month and the setting up of several promotion operations in the second week made sales fluid and kept prices at good levels. But the balance was only just holding and demand and prices plummeted at the beginning of the last week of the month, with prices sliding by more than EUR2 per box! In hardly a week, demand switched to the season's fruits that were available in large quantities and at low prices.

Sales of 'Smooth Cayenne' were merely satisfactory in the first two weeks as consumer interest in the variety dwindled. Fairly limited volumes were released, limiting price problems. The availability of 'Sweet' at low prices at the end of the month increased the pressure on 'Smooth Cayenne' which sold with increasing difficulty.

Supply of air pineapple was fairly small throughout the month. Although demand was not exceptionally strong, sales were fluid and prices firm. The choice made by some operators to develop certain brands seems to be paying off. Thus, although these sup-

plies are limited for the moment, they made it possible in some cases to make good sales of sources such as Guinea and Cameroon. More regular batches of 'sugarloaf' pineapples from Benin held at good price ranges, selling at between EUR1.90 and 2.00 per kg.

In spite of dwindling supply, sales of 'Victoria' pineapple decreased throughout May. It is true that the arrival on the European markets of the season's fruits at low prices generally results in decreased demand for small exotics and these become increasingly marginal

Pineapple — Import prices on the French market — Main origins — Euros

Weeks 2008		19	20	21	22
By air (kg)					
Smooth Cayenne	Benin	1.80-1.85	1.80-1.85	-	1.80-1.85
	Cameroon	1.70-1.90	1.75-1.90	1.80-1.90	1.80-1.90
	Côte d'Ivoire	1.80-1.85	1.80	1.80	1.80
	Ghana	1.60-1.70	1.60-1.70	1.65	1.65-1.75
	Guinea	1.80-1.90	1.80-1.90	1.80-1.90	1.80-1.90
Victoria	Côte d'Ivoire	-	-	2.80	-
	Réunion	3.60-3.80	3.50	3.50-3.60	3.40-3.60
	South Africa	-	-	3.20	-
By sea (box)					
Smooth Cayenne	Côte d'Ivoire	5.00-8.00	6.00-8.00	6.00-8.00	5.00-7.00
Sweet	Côte d'Ivoire	6.00-8.50	7.00-8.50	7.00-8.50	6.00-7.00
	Cameroon	6.00-8.50	7.00-8.50	7.00-8.50	6.00-7.00
	Ghana	6.00-8.50	7.00-8.50	7.00-8.50	6.00-7.00
	Costa Rica	6.50-8.50	7.00-8.50	7.50-8.00	5.00-7.00



Sea freight

MAY 2008

The TCE average figure of 101c/cbft for the month of May means that year-to-date average remains over 100c/cbft – with June continuing where May finished the likelihood is that the figure for the first six months will also top three figures, the first time this has ever happened. Much will depend on the cost of bunkers – if the price of oil continues its upward march then TCE yields will inevitably fall.

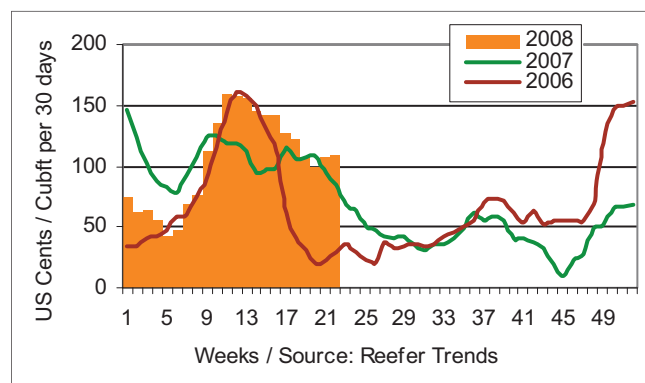
By the end of May 17 reefers and/or freezers (6m cbft) had either been demolished or converted with a further 12 candidates (5m cbft) reported to be heading for the breakers in the Indian sub-continent. Unsurprisingly a large percentage of this total is currently trading in and out of the Baltic – it will be interesting indeed to see how the major players in the region cover their positions in 2009 and onwards. With newbuilding finance hard to justify and the third party container alternative not yet a fully-functioning option for the Russian market, some fairly sensational long-term TC deals are expected to be announced over the next several months. If there is to be a reefer capacity crunch, who is to blame? It surely can't be the container lines because they are the only stakeholders who actually are investing both in newbuilds, slots and equipment. How then about the shippers? They surely can't be held directly responsible – with retailers unwilling to absorb ever-increasing supply chain costs cargo interests are under ever-increasing pressure to keep costs low, and will go for the lowest-cost option. Invariably this means the container and there are theoretically plenty of them around. It must therefore be the specialised reefer sector: an ageing fleet and an industry

that is shrinking and consolidating. New investment is scarce, confined to two owner operators and two yards. Reefer industry pioneer Lauritzen has left the building and there is plenty of well-informed speculation that NYK will soon follow. Certainly the consequences of the crunch will be felt more by those shippers who historically prefer the specialised reefer and whose business is less substitutable by containers: the fruit multinationals, independent Ecuadorian banana exporters, the Chilean grape exporters, the South African citrus exporters, the Argentinean deciduous and citrus exporters, poultry shippers, Zespri, most deepsea reefer product into Russia and sterilised product into the US and Japan, and finally the high-seas fish trade. But is it fair to level the blame at the specialised reefers? Operators would defend themselves by stating quite rightly that there is not sufficient financial incentive to invest. The competitive environment is hostile and, for the majority of cargo interests, cost still takes precedence over value. The lines continue to under-price their capacity, creating false expectations in the eyes of the charterers as they cannot deliver the capacity, or in many cases, the service. As a result in the seasonal markets they used to

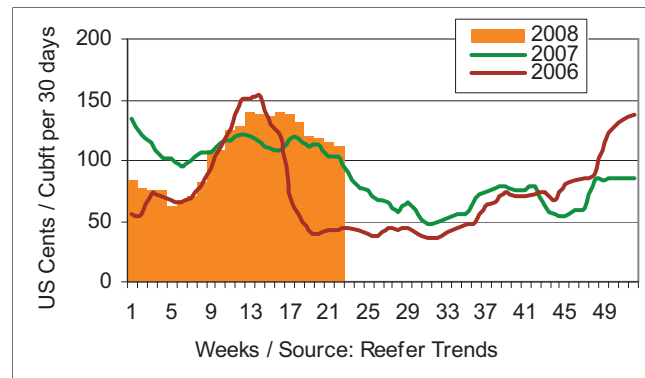
Monthly spot average		
US\$/cents/cubic foot x 30 days	Large reefers	Small reefers
May 2008	101	117
May 2007	101	110
May 2006	28	45

Weekly market movement

Large reefers (450 000 cuft)



Small reefers (330 000 cuft)



dominate reefer operators have become the price takers and not price makers. This is all about to change – there are signs at last that the tipping point has been reached. And that's not good news for charterers. If the above analysis is correct, then the resulting forecast is a little frightening: within 12 months there will simply not be enough reefer

capacity to meet existing global demand. If charterers do not book early there is a very good possibility that they will literally miss the boat. It will be a major surprise if there is not a rash of long-term Period deals fixed this autumn fixed in the 110-120c/cbft range.

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The independent news and information service for the reefer and reefer logistics businesses

					EUROPEAN UNION — IN EUROS				
					Germany	Belgium	France	Holland	UK
MANGO	Sea	KENT	COTE D'IVOIRE	kg		1.56	1.32	1.42	
		NOT DETERMINED	PERU	kg	1.25		2.00		
	PALMER	NOT DETERMINED	BRAZIL	kg					1.33
		PALMER	COTE D'IVOIRE	kg					1.73
MANGOSTEEN	Air		INDONESIA	kg				6.40	
			THAILAND	kg		8.00			
MANIOC	Sea		COSTA RICA	kg		0.90	1.20	1.11	
PAPAYA	Air	NOT DETERMINED	BRAZIL	kg			3.10	3.00	
			COSTA RICA	kg					2.37
			COTE D'IVOIRE	kg			3.10		
			GHANA	kg		2.85			
	Sea	FORMOSA NOT DETERMINED	BRAZIL	kg				2.88	
			BRAZIL	kg		2.29		1.92	
			ECUADOR	kg				1.82	
FORMOSA	BRAZIL	kg	2.19				1.50		
PASSION FRUIT	Air	PURPLE	COLOMBIA	kg	4.75	5.50	6.00		
			KENYA	kg	4.75			4.88	4.07
			SOUTH AFRICA	kg	5.50		7.00	4.25	
		YELLOW	ZIMBABWE	kg	4.75	5.66		4.57	
			COLOMBIA	kg	6.50	7.30	7.50	6.69	
PERSIMMON	Air		BRAZIL	kg	0.92	3.60		2.90	
			SOUTH AFRICA	kg	1.80				
PHYSALIS	Air	PREPACKED	COLOMBIA	kg	5.83	5.16	7.00	5.35	
			THAILAND	kg					6.27
	Sea		COLOMBIA	kg	4.38				
PINEAPPLE	Air	SMOOTH CAYENNE	CAMEROON	kg			1.80		
			GHANA	kg		1.55	1.75		
		VICTORIA	MAURITIUS	Box		14.00		11.50	
			REUNION	kg			4.40		
			SOUTH AFRICA	Box	11.00	12.50		11.40	
	Sea	MD-2	COSTA RICA	Box	6.25		7.83	10.00	6.75
PITAHAYA	Air	RED	THAILAND	kg	5.67				
			VIET NAM	kg	4.16	6.00		6.11	
		YELLOW	COLOMBIA	kg		10.00		8.60	
PLANTAIN	Sea		COLOMBIA	kg			1.15		
			COSTA RICA	kg				0.95	
			ECUADOR	kg		0.77	1.00		
RAMBUTAN	Air		INDONESIA	kg				5.50	
			THAILAND	kg				5.63	
			VIET NAM	kg		6.85			
SWEET POTATO	Sea		ISRAEL	kg		1.42	1.50	1.25	
			SOUTH AFRICA	kg			1.40		
			UNITED STATES	kg	1.17				
TAMARILLO	Air		COLOMBIA	kg		5.80		7.00	
YAM	Air		BRAZIL	kg			2.00		
	Sea		GHANA	kg			1.00	1.13	

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
T. 41 (22) 730 01 11 / F. 41 (22) 730 09 06



Republic of Suriname

Privatisation of Surland N. V.: call for expression of interest.

The Stichting Behoud Bananen sector (SBBS) has been mandated by the Government of Suriname to manage the restructuring of Surland NV and to organize its privatisation.

The Board of the SBBS announces that national and international companies are invited to participate in the international open tender for the privatisation of Surland N.V. in Suriname

Surland N.V. banana plantations are located in two estates: one covering 1350 hectares in Jarikaba, 30 kilometers from Paramaribo, the Capital of Suriname and the other one covering 1012 hectares, located 240 kilometers from Paramaribo. The total present area cultivated is 1550 hectares and 56 000 tons have been exported in 2007 to Europe.

Interested companies are invited to express their interest to the Board of Directors of SBBS.

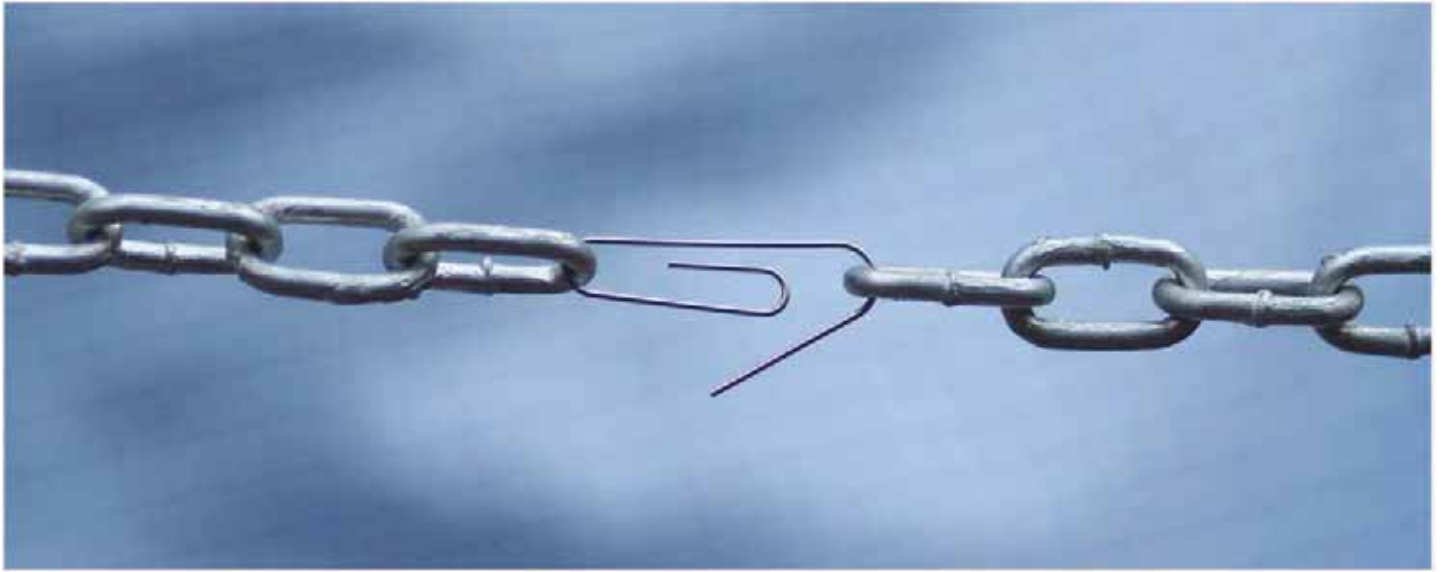
Companies who expressed their interest will receive a short note of presentation of the operation . On the basis of the information provided in the note by SBBS the companies still interested in the privatisation of Surland NV should confirm formally their definitive interest in the privatisation.

The definitive expression of interest should be submitted before
Monday 18 August 2008 at 2 pm local time

Each company is requested to submit expression of interest to the Board of SBBS by fax (00 597 328 015) or at the two following e-mail addresses:

- Mr Brahim, Chairman of the Board of SBBS: brahiman@sr.net
- Mr Dury, Managing Director of SBBS: durysur@yahoo.fr

Information... your weak link?



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

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

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

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

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

Reefer Trends' consultancy clients include shipbuilding yards, banana majors, banks, brokers and equities analysts. Reefer Trends provides sector reports and forecasts for brokers and charterers. It has also acted as an expert witness in a chartering dispute.

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