

March 2014 - No. 220

FR*ui*TROP

English edition

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20 years

20 years of FruiTrop... Your review is 20 years old. *What a slice of life! The 20 years leading up to its birth saw the birth of the import sector, the discovery of new fruits, the invention of techniques enabling massive growth in volumes thanks to sea freight, when operators played the role of discoverers, of roving sourcers, when the whole system was yet to be put together.*

The past 20 years have been all about the management, improvement and adaptation of the techniques, regulations and standards, labels and tariff or non-tariff barriers, restrictions, entry duties, the rise to prominence of the big supermarket chains... giving us, in short, a trade which is globalised but under heavy constraints. 20 years to bring the import fruit markets to the age of maturity, when the consumer cannot even imagine that a mango can travel more than 10 000 km, and keep for weeks.

What will the next 20 years bring? The current mood seem to be about sustainability, agro-ecology, safeguarding the environment, protection of workers, distribution of value, the social impacts of the industries and, the latest finding, climate change.

With FruiTrop marking its 20th anniversary, I ask your leave to recall the great human endeavour making up this editorial venture. In order to grow, any organisation needs to be driven by fine and noble values. This is what its founders set out to do, and what its contributors aim to perpetuate with every new edition. Thank you to everyone!

Denis Loeillet



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www.fruitrop.com

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Printed by

Impact Imprimerie
n°483 ZAC des Vautes
34980 Saint Gély du Fesc, France

ISSN

French: 1256-544X

English: 1256-5458

Separate French and English editions

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Subscription rate

EUR 300 / 11 issues per year

(paper and electronic editions)

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FRUITROP

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Banana

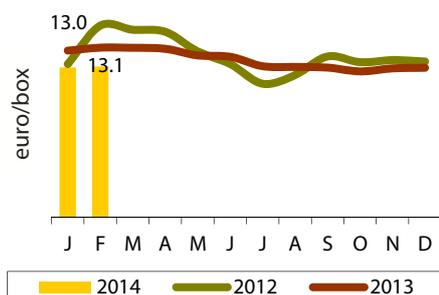
February 2014

In February, the difficult banana market started to recover a better balance. The seasonal increase in volumes from the French West Indies and Africa continued, with combined imports 23 % above average. The dollar banana supply, very high in January, registered a considerable fall, returning to a seasonal level. Furthermore, quality problems on some of the Colombian volumes led to merchandise rejections, and storms in the Atlantic disrupted the logistics, temporarily intensifying the supply dips. Hence a shortage of fruits began to be felt on the North European markets. Sales picked up considerably in February, on both local and export markets, because of the waning small citrus season (fall in volumes, less competitive prices) and very mild temperatures for the season. In addition, promotions at the yellow and retail stages also helped maintain a good sales dynamic. Hence green banana prices strengthened slightly from mid-February. Conversely, levels in France remained short of the average (- 16 %). In Germany, rates remained unchanged at below-average levels for the season (- 16 %), due to the contracts set in January, though they began to strengthen on the free market. Russia maintained a good balance thanks to smaller dollar banana volumes, due to the rise in FOB prices in Ecuador and a distinct fall in the rouble/dollar exchange rate. Finally, only the Spanish market started to sway, because of the seasonal rise in volumes from the Canaries, which registered above-average levels (+ 6 %).

NORTHERN EUROPE — IMPORT PRICE

| February 2014 euro/box | Comparison | |
|---------------------------|----------------|--------------------------|
| | previous month | average for last 2 years |
| 13.14 | + 1 % | - 16 % |

Germany - Green price (2nd/3rd brands)



■ Climate forecasts in South America for the period March to May 2014.

Statistical analysis by 380 meteorological service stations of nine South American countries shows an increased probability of above-normal rainfall, especially in the following regions:

- Colombia: Caribbean and Andean regions;
- Ecuador: central and northern Andean regions;
- Peru: central and southern Andean regions.

The rainfall could be below normal in the central coastal region of Ecuador.

Above-normal maximum temperatures could occur in Colombia (Caribbean and Andean regions) and in Ecuador (Andean and central coastal regions). Conversely, below-normal temperatures are predicted in northern Ecuador (Andean region) as well as Peru (central and southern coast of the country).

For the moment, it would be very premature to talk about a climate phenomenon such as El Niño.

Source: CIIFEN

■ And the winner is... Fyffes!

The news has gone well beyond the boundaries of the fresh fruits and vegetables sector. All the big press agencies, i.e. all the media as a whole, have picked up on this item. Two giants of the sector, Chiquita and Fyffes, have officially announced their engagement, which will be consummated by the end of 2014 if the competition authorities give the green light. The merged entity would have a total turnover of some 4.6

billion USD, practically exclusively in the banana, pineapple and snacking products. The post-merger governance will apparently be slightly in favour of Chiquita, whose shareholders hold 50.7 % of voting rights. Yet we should recall that Chiquita in fact provides two-thirds of the turnover. For its part, Fyffes will hold 49.3 % of the merged entity, though it contributes only one third of the revenue to the couple's basket. True, it also provides the opportunity of generating margins and profits, which Chiquita now does only very rarely. It is also a marriage between relatives, since Fyffes belonged to Chiquita until 1986. Finally, it is a logical match, since both entities complement each other well, particularly on the markets under their control. Chiquita contributes the highly enclosed North American market, and Fyffes the highly fragmented European market. The analysis should also take into account Fyffes' commercial links with its offshoot Total Produce, created in 2006 following the separation and stock market floatation of the Irish company's more downstream (spin-off) activities. Although it is an independent entity, we can imagine that certain good relations will have lasted, and be maintained under the new merged entity.

Hence without Total Produce, the new group would hold a banana market share of 30 %, at world or European level, a production base (own or under contract), transport capacities (own or under contract), a network of ripening centres, etc. FruiTrop will come back to this merger at length in its banana dossier of April 2014, based on the analyses proposed by some experts from the sector.

Source: CIRAD

EUROPE — RETAIL PRICE

| Country | type | February 2014 | | | Comparison | |
|-----------|---------------|---------------|--------------|--------------------------|------------|--|
| | | euro/kg | January 2014 | average for last 3 years | | |
| France | normal | 1.56 | + 1 % | - 2 % | | |
| | special offer | 1.37 | 0 % | + 1 % | | |
| Germany | normal | 1.27 | - 2 % | - 7 % | | |
| | discount | 1.18 | 0 % | - 1 % | | |
| UK (£/kg) | packed | 1.15 | - 1 % | - 7 % | | |
| | loose | 0.73 | - 4 % | - 6 % | | |
| Spain | plátano | 1.98 | - 3 % | + 9 % | | |
| | banano | 1.34 | - 2 % | - 2 % | | |



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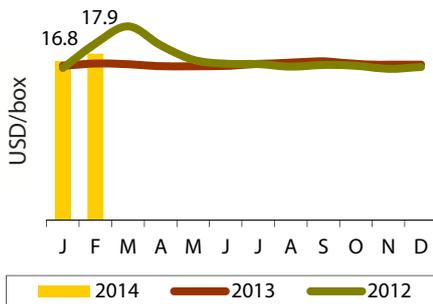


www.euasparagus.gr

Banana

UNITED STATES

USA - Green price (spot)

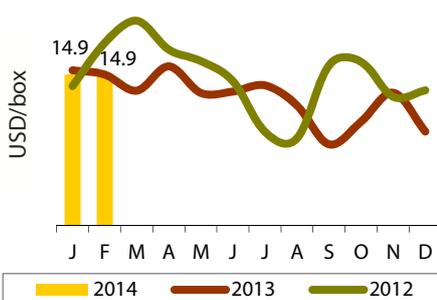


USA — IMPORT PRICE

| February 2014 USD/box | Comparison | |
|--------------------------|----------------|--------------------------|
| | previous month | average for last 2 years |
| 17.10 | + 5 % | 0 % |

RUSSIA

Russia - Green price

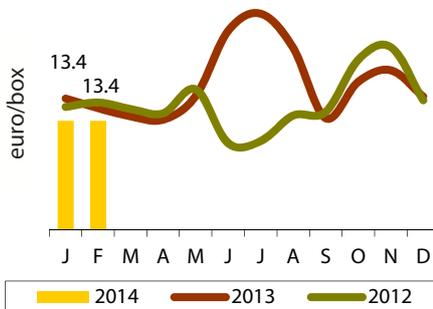


RUSSIA — IMPORT PRICE

| February 2014 USD/box | Comparison | |
|--------------------------|----------------|--------------------------|
| | previous month | average for last 2 years |
| 14.90 | 0 % | - 9 % |

CANARIES

Spain - Platano green price*



CANARIES — IMPORT PRICE*

| February 2014 euro/box | Comparison | |
|---------------------------|----------------|--------------------------|
| | previous month | average for last 2 years |
| 13.40 | 0 % | - 13 % |

* 18.5-kg box equivalent

■ **US and EU banana supply: an upside-down world in January 2014.** The EU continued on its 2013 trajectory. It imported 6 % more bananas than in January 2013, and 11 % more than the 2011-2012-2013 average. In absolute terms imports were up 22 000 t for a total of 424 000 t, an all-new record. With the exception of Cameroon, all the Extra-Community suppliers contributed to the market growth. Both proportionally and in absolute value, the Dominican Republic scored best with a 31 % gain from January 2013, for a volume of 5 800 t. Africa has stagnated, with Côte d'Ivoire rising steeply (+ 3 000 t), but Cameroon falling steeply (- 3 000 t). The ACP suppliers have been doing excellent business, with a historically high volume brought to market for a January. As for the dollar sources, only Peru has cut its supply, by approximately 7 %. However, we should beware the data about this source. Indeed, some utterly staggering statistics were provided by European statistics (Eurostat) for November and December 2013. If we add national

production to imports, we can confirm the positive trend of the market in terms of volume. European production is up 2 % to 47 000 t (excluding sales in the production regions). Compared to January 2013, Martinique is down again 4 %, with the Canaries holding up (+ 1 %) and Guadeloupe confirming its great shape (+ 23 %).

For once, the situation for the United States is very different. There the market is falling; but no need to panic. The fall is only 1 %, i.e. slightly more than 3 000 t. There is still a comfortable "surplus" above the 2011-2012-2013 three-year average: 14 400 t. Ecuador, Colombia, Mexico and Honduras are driving down the market, whereas Costa Rica is having a field day: + 12 122 t, i.e. + 17 % from January 2013! Re-exports to Canada are rising vigorously (+ 7 %), which also explains the very modest market contraction at the beginning of 2014.

Source: CIRAD



Banana - January 2014 (provisional)

| tonnes | 2012 | 2013 | 2014 | Difference 2014/2013 |
|-------------------------------|----------------|----------------|----------------|----------------------|
| EU-27 — Supply | 429 809 | 445 945 | 470 529 | + 6 % |
| Total import, of which | 379 319 | 400 168 | 423 644 | + 6 % |
| MFN | 306 204 | 321 194 | 339 223 | + 6 % |
| ACP Africa | 40 034 | 48 786 | 48 987 | 0 % |
| ACP others | 33 082 | 30 188 | 35 434 | + 17 % |
| Total EU, of which | 50 491 | 45 777 | 46 885 | + 2 % |
| Martinique | 12 547 | 9 968 | 9 555 | - 4 % |
| Guadeloupe | 5 040 | 5 040 | 6 192 | + 23 % |
| Canaries | 31 150 | 29 601 | 29 969 | + 1 % |
| USA — Import | 361 009 | 378 291 | 378 226 | 0 % |
| Re-exports | 40 011 | 43 239 | 46 414 | + 7 % |
| Net supply | 320 998 | 335 053 | 331 812 | - 1 % |

Sources EU: CIRAD, EUROSTAT (excl. EU domestic production) / Source USA: US Customs

EUROPE — IMPORTED VOLUMES — FEBRUARY 2014

| Source | Comparison | | |
|------------------------------|--------------|---------------|--|
| | January 2014 | February 2013 | 2014 cumulative total compared to 2013 |
| French West Indies | ↗ | + 15 % | + % |
| Cameroon/Ghana/Côte d'Ivoire | = | + 15 % | + 3 % |
| Surinam | = | - 2 % | - 4 % |
| Canaries | ↗ | + 5 % | + 3 % |
| Dollar: | | | |
| Ecuador | ↘ | + 38 % | + 43 % |
| Colombia* | = | + 2 % | - 3 % |
| Costa Rica | = | + 28 % | + 28 % |

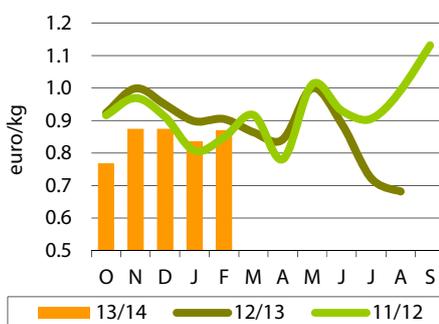
Estimated thanks to professional sources / * total all destinations

Grapefruit

February 2014

The market remained catastrophic for Mediterranean sources. Firstly, sales remained slow throughout the European Community. Secondly, while the overall Mediterranean supply continued to register a below-average level, the competition between sources was very lively. Turkish operators, faced with a considerable fall in Russian demand, proved particularly aggressive. The market remained barely average for Florida, both in terms of volumes sold and the sale prices.

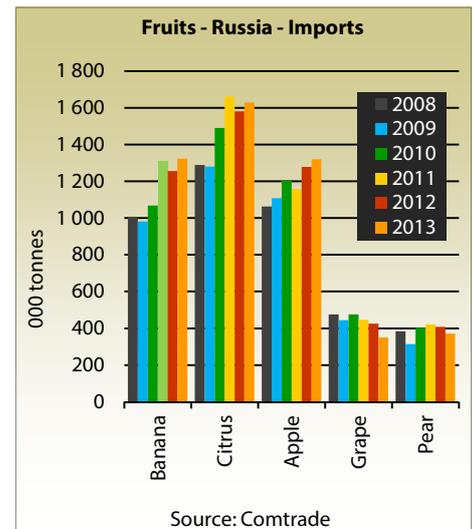
Grapefruit - France - Import price



Russia: an increasingly basic fruit market in 2014, as in 2013?

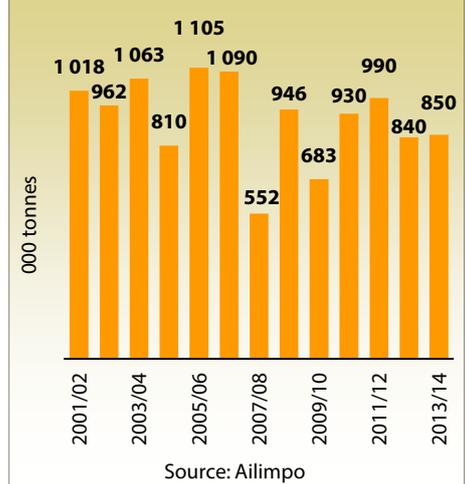
This is the conclusion emerging from the report on the fruit trade in Russia in 2013, published by Fruitnews.ru. While imports have remained stable in terms of volume from 2012, the section staples have taken on a bigger role, to the detriment of higher-range fruits. Hence imported volumes of the three section leaders (citruses, banana and apple) are up 3 to 5 %, while fruits such as the grape and pear are down by very considerable amounts. Another highlight is that the pressure on purchase prices from international suppliers has never been as high. This trend is probably associated with structural changes in the organisation of the import sector. Indeed, big supermarkets such as MAGNIT are increasingly making direct purchases, and also taking advantage of a less organised supply, due to the closure of Moscow's main wholesale market, Petrovskaya, the return of certain suppliers such as Georgia, the blowout of the supply from certain traditional suppliers, etc. This downward levelling phenomenon could extend through 2014, given the fall in the purchasing power of Russian consumers, and the collapse of the rouble, making retail prices of imported fruits more expensive.

Source: Fruitnews.ru



Source: Comtrade

Lemon - Spain - Production



Source: Ailimpo

Lemon: tension on the European market at the end of the winter season?

The Spanish inter-professional association for lemon and grapefruit (AILIMPO) revised its production forecast 50 000 t downward, with the particularly dry climate having impeded the fruit size range. At 860 000 t, the harvest is back to a level similar to

2012-13, and well below the 930 000 and 990 000 t of 2011-12 and 2012-13. So rates should remain strong in spring, and maintain a good level during the summer season, given the Argentinean shortfall (see **FruiTrop** no.218).

Source: AILIMPO



| PRICE | Type | Average monthly price | Comparison |
|-------|--------------------|------------------------|-------------------------------|
| | | euro/box 17-kg box eq. | with average for last 2 years |
| | Tropical (Florida) | 17.00 | - 1 % |
| | Mediterranean | 10.00 | - 5 % |

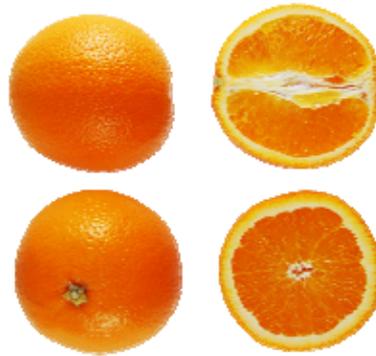
| VOLUMES | Type | Comparison | |
|---------|--------------------|----------------|--------------------------|
| | | previous month | average for last 2 years |
| | Tropical (Florida) | ↗ | + 2 % |
| | Mediterranean | ↘ | - 12 % |

| VOLUMES | Sources | Comparison | | Observations | Cumulative total / cumulative average for last 2 years |
|---------|---------|----------------|--------------------------|--|--|
| | | previous month | average for last 2 years | | |
| | Turkey | ↗ | + 31 % | Shipments to the EU still large and well above average, because of the steep downturn in Russian and Ukrainian demand. | + 14 % |
| | Florida | ↗ | - 1 % | Average supply level maintained in Europe, despite overall exports well below normal (steep fall in shipments to Japan). | - 13 % |
| | Israel | ↘ | - 20 % | Exports to EU below average because of the very difficult market situation. Attempted diversification of outlets (Asia, etc.). | - 13 % |

Orange

February 2014

The market remained extremely difficult. Demand remained slow, with temperatures very mild for the season and the sometimes heterogeneous quality level of the supply adversely affecting consumption. The Spanish Navel, with its extended season, continued to provide significant volumes for most of the month. Its prices, which remained rock-bottom, had a negative impact on the Navelate market from this same source; this variety gradually took over. Similarly, the Tunisian Maltaise was sold at barely average basic prices, despite a considerable drop in incoming shipments.



■ **Orange variety of the month: Valencia Late.** Originating in the Azores, Valencia is the most commonly planted variety in the world. This medium-sized variety is round and slightly oblong. The peel is thin, well-coloured and slightly grainy. The flesh is very juicy, with 2 to 4 seeds. It is also known as Maroc Late (from Morocco) and Jaffa Late (from Israel).

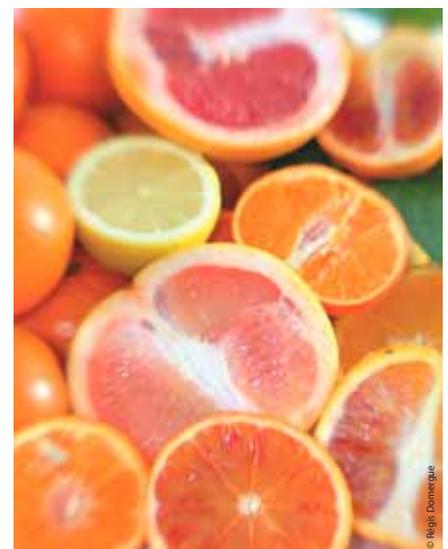
Source: CIRAD

■ **University of Florida releasing six new citrus varieties.** Half of this new range comprises grapefruits: two cultivars with an innovative non-bitter taste, and pink or red pulp, and another with red pulp which has the advantage of being harvestable over a long period. We can also find a seedless lemon in the form of Tangelo, aimed at a niche market. But without doubt, it is the rootstock "Tetrazyg" and the industrial orange "C4-16-12" that should attract the most attention from producers. These two cultivars exhibit better greening resistance than the conventional varieties. The rapid distribution procedure approved by the University of Florida should bring down the time frame for its availability to producers to ten to fifteen years, as opposed to between fifteen and twenty years ordinarily.

Source: University of Florida

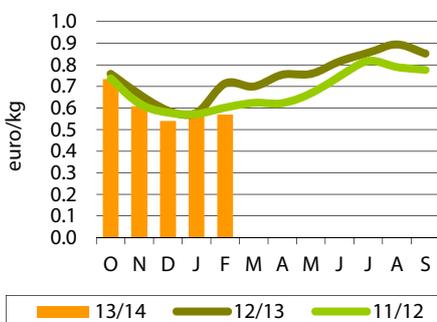
■ **State of emergency drought in California.** This decision was taken by Governor Brown in mid-January, with the recorded rainfall the lowest in the past 153 years! Furthermore, climatological studies indicate that precipitation should maintain a below-normal level until at least mid-April, while the snow-pack reserves are 20 % short of average. The reserves currently available mean that restriction measures of agricultural water do not need to be taken immediately. However, it is highly probable that they will come into effect if the situation does not improve very considerably in the medium term. California is the leading US agricultural State in terms of turnover (45 billion USD in 2012), thanks to its 80 500 farms. This State is of major importance for the US fruit growing sector, to which it contributes half the national turnover (42 % for citrus and 73 % for fruits other than citrus).

Source: California Department of Agriculture



© Régis Domergue

Orange - France - Import price



| PRICE | Type | Average monthly price euro/15-kg box | Comparison with average for last 2 years |
|---------------|-----------------|--------------------------------------|--|
| | Dessert oranges | 8.40 | - 14 % |
| Juice oranges | 8.85 | + 2 % | |

| VOLUMES | Type | Comparison | |
|-----------------|------|----------------|--------------------------|
| | | previous month | average for last 2 years |
| Dessert oranges | ↗ | + 8 % | |
| Juice oranges | ⇒↗ | - 13 % | |

| VOLUMES | Varieties by source | Comparison | | Observations | Cumulative total / cumulative average for last 2 years |
|--------------------|---------------------|----------------|--|--------------|--|
| | | previous month | average for last 2 years | | |
| Spanish Naveline | ↘ | + 9 % | Season extended, because of the abundant production and poor sales in previous months. Quality often fragile, with the size range remaining on the small side. | 0 % | |
| Spanish Navelate | ↗↗ | + 7 % | Started the season on its normal calendar, with volumes slightly above average. Size range better than for Naveline. | + 5 % | |
| Spanish Salustiana | ⇒↗ | - 13 % | Season in full swing, based on below-average volumes. | - 13 % | |
| Tunisian Maltaise | ↗ | - 29 % | Imports still below-average because of the very poor market context and a disappointing quality level for certain brands. | - 34 % | |



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Nature's most beautiful gifts

Easy peelers

February 2014

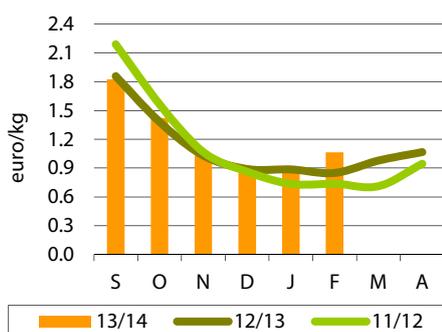
The market proved relatively satisfactory, despite temperatures unfavourable for consumption. The clementine retained a bigger presence than in 2013, though relatively fragile in terms of quality. Nonetheless, the hybrids range established itself under relatively good conditions. For top-end varieties, Spanish and Moroccan Nadorcotts were sold at above-average basic prices, unlike the Israeli Or, hindered by a sometimes heterogeneous quality level and intensified competition between operators. Prices of Spanish Ortanique and Herandine were also higher than in 2013, while the Moroccan Nour suffered from a positioning problem.

■ **Greening in Paraguay: an additional threat to Argentinean citrus growing.** The Paraguayan phytosanitary authorities (SENAVE) confirmed in late December the presence of 63 sources of the fatal bacteriosis. This is bad news in several ways. Firstly, the disease directly threatens the 320 000 to 330 000 t production of the country's 11 000 ha of citrus orchards, primarily located in the south-east (Itapua, Alto Paraguay and Cordillera). Secondly, the vice is tightening on the big production zones in northern Argentina, already threatened to the west by the presence of the disease in Brazil (Parana). The Argentinean provinces of Corrientes and Misiones, with total cultivation areas of 17 000 and 9 000 ha respectively, border south-eastern Paraguay.

Source: abc.com.py



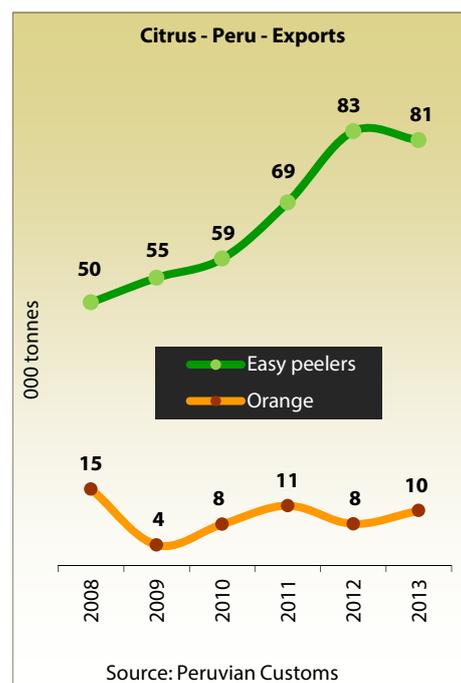
Easy peelers - France - Import price



■ **Peruvian citrus: planting dynamic to maintain its surge?**

According to ProCitrus, Peruvian citrus exports should grow by approximately 10 %, breaking the symbolic 100 000-t mark in 2014. Big growth is expected in particular from Satsuma (+ 30 %) and W. Murcott. And Peruvian exporters are not set to stop there. According to agricultural consultant Fernando Cilloniz, the small citrus cultivation area has increased at an annual rate of between 2 000 and 2 500 ha over the past few years on the Central Coast, in the traditional growing zone situated between Huaral and Ica. The country's Plant Health Service (SENASA) is working to extend the exports approval to the United States to certain northern provinces (Libertad, Ancash) and southern provinces (Arequipa).

Sources: ProCitrus, Inform@ccion



Source: Peruvian Customs

| PRICE | Comparison | | |
|-------|------------|-------------------------------|--|
| | Varieties | Average monthly price euro/kg | Comparison with average for last 2 years |
| | Clementine | 0.79 | + 11 % |
| | Hybrids | 1.23 | + 26 % |

| VOLUMES | Comparison | | |
|---------|------------|----------------|--------------------------|
| | Varieties | previous month | average for last 2 years |
| | Clementine | ↘↘ | + 14 % |
| | Hybrids | ↗ | + 2 % |

| VOLUMES | Varieties by source | Comparison | | Observations | Cumulative total / cumulative average for last 2 years |
|---------|---------------------|----------------|--------------------------|---|--|
| | | previous month | average for last 2 years | | |
| | Spanish Clementine | ↘ | + 14 % | Volumes moderate from the beginning of the month, though above average. Quality sometimes heterogeneous. | + 7 % |
| | Spanish Nadorcott | ↗↗ | + 30 % | Volumes high from mid-February, and well above average, because of the cultivation stock reaching its potential. | + 48 % |
| | Moroccan Nadorcott | ↗↗ | - 23 % | Volumes seeing late growth from mid-February. Overall imports below average. | - 23 % |
| | Israeli Or | ↗↗ | + 10 % | Imports rising because of the cultivation stock reaching its potential. Quality sometimes heterogeneous for certain brands. | + 10 % |



UNIQUE



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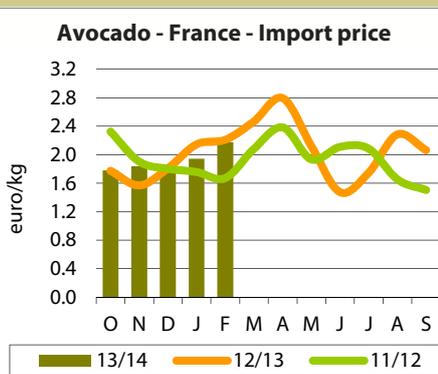
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Avocado

February 2014

The market remained highly buoyant, despite the abundant supply. Hass imports were already big. The Chilean season ran on, with volumes maintaining an unusually high level throughout the month. Furthermore, Spanish and above all Israeli shipments grew, peaking at a level far above average. Some batches from Mexico, Colombia and Kenya supplemented the supply. Nonetheless, the market remained balanced, at very high basic prices throughout most of the month, thanks to proper division of volumes between the various EU markets. The green avocado market took advantage of this context, with volumes sold and prices registering above-average levels.



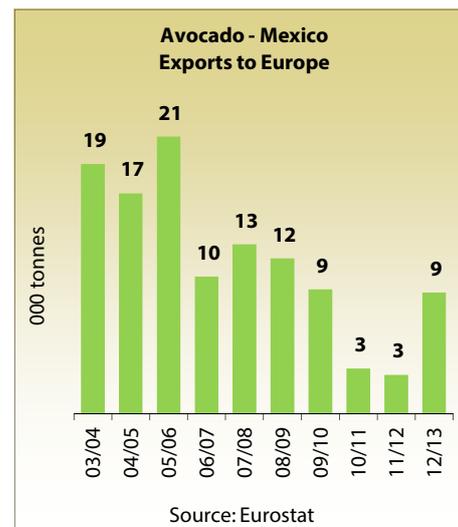
Mexican avocado: APEAM reiterating its interest in the European market... in words.

Expanding the presence of the Mexican Hass in the United States and Japan, but also Europe: this is the stated aim of the heads of APEAM (the Michoacán Association of Avocado Producers and Packers). They are even talking conquest, but without specifying the means they plan to implement in order to achieve this. While Mexico has made up some ground in Europe since 2012-13, going back over the 10 000-t mark, volumes are a long way from those seen ten years earlier, when the country was the number three supplier during the winter season, behind Israel. Nonetheless, the dizzying growth in surface areas over the past few years (see **Fruitrop** no.218) indicates that Mexican exporters will probably need medium-term diversification markets, despite the appetite of local consumers and those from the neighbouring United States.

Source: USDA

Peruvian 2014 avocado season: a steep increase in production, primarily aimed at the United States.

The expected boom in production seems to be coming to pass. According to AGAP (Peruvian Agricultural Producers Trade Union), in 2014 Peru should be able to export 140 000 t of Hass in total to all destinations, as opposed to 100 000 t in 2013. Should we expect a surge on the European market? Probably not. On the one hand, the United States market seems much more open than in 2013, despite a Mexican presence which should maintain just as high a level in the first half-year. Califor-



nia, the major market player from March to October, registered a near-record production shortage after two consecutive years of big harvests (see **Fruitrop** no.219). On the other hand, the Chilean market, close at hand and a big consumer, will be accessible for the first time this season, and should receive considerable volumes. Hence according to Peruvian professionals, volumes aimed at the EU should remain similar to the 100 000 t received in 2013, for Hass alone.

Source: Reefer Trends



| PRICE | Varieties | Average monthly price euro/box | Comparison with the last 2 years |
|-------|------------|--------------------------------|----------------------------------|
| | Green | 6.00 | + 17 % |
| Hass | 9.50-10.00 | + 12 % | |

| VOLUMES | Varieties | Comparison | |
|---------|-----------|----------------|--------------------------|
| | | previous month | average for last 2 years |
| Green | | ↘ | + 11 % |
| Hass | | ⇒↗ | + 40 % |

| VOLUMES | Sources | Comparison | | Observations | Cumulative total / cumulative average for last 2 years |
|---------|---------|----------------|--------------------------|---|--|
| | | previous month | average for last 2 years | | |
| | Chile | ↘ | + 92 % | Hass shipments to Europe still well above average, despite a dip at the beginning of the month (impact of Chilean dockers' strike). | + 47 % |
| | Mexico | ↘ | - 34 % | Volumes very small, with the US market remaining buoyant. | + 25 % |
| | Israel | ↗ | + 35 % | Volumes large, especially for Hass in the latter two-thirds of the month. | + 11 % |
| | Spain | ↗ | + 19 % | Imports on the rise, well above-average, with the rise in Hass still compensating for the distinct downturn in the green varieties. | - 8 % |

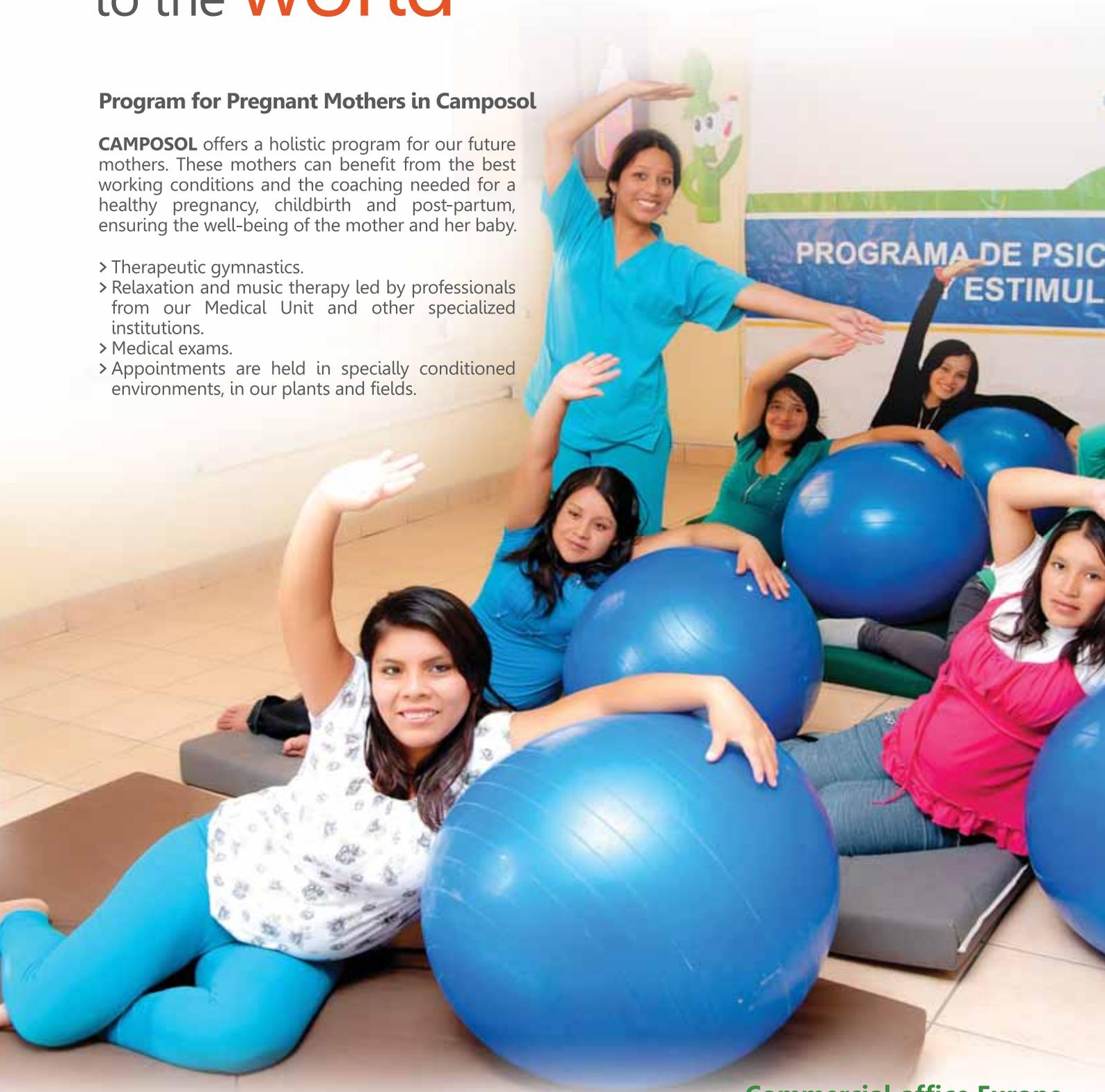


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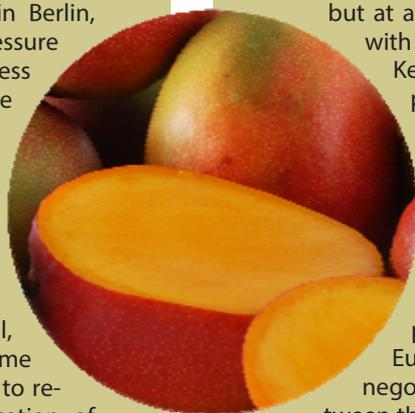
Pineapple

February 2014

Demand on the pineapple market in February was highly disrupted. At the beginning of the month, when the Fruit Logistica fair was held in Berlin, sales were slow, with pressure remaining high on the less popular small sizes. The temporary increase in the Costa Rican Sweet supply at the beginning of the second half-month coincided with the start of the winter holidays. Initially, sales really came to a standstill, but then they saw some degree of fluidity thanks to re-exports and the organisation of multiple promotions. Unfortunately, the stocks clearance was detrimental to prices. No change on the Cayenne market, with the supply still highly restricted, and selling more or less well on its niche market.

In February, the air-freight pineapple supply was fairly limited. At the beginning of the month, the many quality concerns had the consequence of uncertain sales, with disputes and claims. During the first half-month, the market seemed heavy, though the supply remained limited. So the numerous quality concerns forced exporters to cut their volumes. Hence the second half-month was marked by a considerable reduction in the Cayenne supply. Until the end of the month, the market was under-supplied, which contributed to strengthening rates. The reduction of the Cayenne supply benefitted Sugarloaf sales, with rates fluctuating between 1.75 and 2.10 euros/kg throughout the month.

The Victoria supply remained fairly small. The rise in volumes in the middle of the month unbalanced the supply and widened the rates range, to the detriment of small-size fruits.



Mango

February 2014

The European market supply in February was practically exclusively provided by Peru. Brazilian shipments continued, but at a far lower tempo, and with a varietal turnaround: Kent completely disappeared, and Keitt and Palmer were cut back, in favour of Tommy Atkins which made up the majority of the Brazilian volumes. These products, sold primarily on the North European markets, were negotiated upward between the first and second half-month (from 4.00-5.00 to 5.00-5.50 euros/box), given the scarcity of the quantities available. The large Peruvian volumes and the normal level of demand for the time of year caused prices to stagnate. However, an improvement in the market conditions from the previous month was observed. In the middle of the month, a gradual switch took place: small-size fruits, previously in the majority, became scarcer in the Peruvian supply, in favour of larger fruits. Initially, the rate for large sizes rose, but it

fell rapidly when they became predominant in the incoming shipments. The price ranges remained fairly wide throughout the month, due to the reversal of the size proportions, but also because of qualitative problems, especially on fruits that had been through more or less prolonged storage.

The air-freight mango market, always difficult at the beginning of the month, improved bit by bit. The big fall in supply levels caused by the change of harvest zone (switching from the Piura region to Casma) led in the second half-month to a sale price re-evaluation, to back above the 4.00 euros/kg threshold.

MANGO — INCOMING SHIPMENTS (estimates in tonnes)

| Weeks 2014 | 6 | 7 | 8 | 9 |
|--------------------|-------|-------|-------|-------|
| Air-freight | | | | |
| Peru | 100 | 40 | 50 | 60 |
| Sea-freight | | | | |
| Brazil | 660 | 480 | 460 | 480 |
| Peru | 5 630 | 3 740 | 6 730 | 5 150 |

EUROPE

MANGO — IMPORT PRICE ON THE FRENCH MARKET

| Weeks 2014 | | 6 | 7 | 8 | 9 | Average February 2014 | Average February 2013 |
|-------------------------------|------|-----------|-----------|-----------|-----------|-----------------------|-----------------------|
| Air-freight (euro/kg) | | | | | | | |
| Peru | Kent | 3.00-4.00 | 3.50-4.00 | 3.50-4.20 | 4.00-4.50 | 3.50-4.15 | 3.55-4.30 |
| Sea-freight (euro/box) | | | | | | | |
| Peru | Kent | 3.00-5.00 | 4.00-5.00 | 4.00-5.00 | 4.00-5.00 | 3.75-5.00 | 3.85-5.00 |

PINEAPPLE — IMPORT PRICE

| Weeks 6 to 9 | Min | Max |
|-------------------------------|------|------|
| Air-freight (euro/kg) | | |
| Smooth Cayenne | 1.70 | 2.00 |
| Victoria | 2.20 | 4.00 |
| Sea-freight (euro/box) | | |
| Smooth Cayenne | 6.00 | 8.00 |
| Sweet | 6.00 | 8.50 |

PINEAPPLE — IMPORT PRICE IN FRANCE — MAIN SOURCES

| Weeks 2014 | | 6 | 7 | 8 | 9 |
|-------------------------------|---------------|---------------|-----------|-----------|-----------|
| Air-freight (euro/kg) | | | | | |
| Smooth Cayenne | Benin | 1.85-1.95 | 1.85-2.00 | 1.85-2.00 | 1.85-2.00 |
| | Cameroon | 1.70-1.90 | 1.70-2.00 | 1.70-2.00 | 1.80-2.00 |
| | Ghana | 1.85-2.00 | 1.85-2.00 | 1.85-2.00 | 1.85-2.00 |
| Victoria | Réunion | 3.50-3.60 | 3.50-3.80 | 2.40-4.00 | 2.50-4.00 |
| | Mauritius | 3.00-3.30 | 3.00-3.30 | 2.20-3.00 | 2.20-3.00 |
| Sea-freight (euro/box) | | | | | |
| Smooth Cayenne | Côte d'Ivoire | 6.00-8.00 | 6.00-8.00 | 6.00-8.00 | 6.00-8.00 |
| | Sweet | Côte d'Ivoire | 7.00-8.50 | 7.00-8.50 | 7.00-8.50 |
| | Ghana | 7.00-8.50 | 7.00-8.50 | 7.00-8.50 | 7.00-8.50 |
| | Costa Rica | 6.50-8.50 | 6.00-8.00 | 6.00-8.00 | 6.00-7.50 |

EUROPE

Sea freight

February 2014

What appeared to be the start of a strong peak season as recently as mid-January evaporated before the eyes of reefer operators during February due to factors largely beyond their control. With the container lines reverting to aggressive pricing policies in order to re-gain the Ecuadorian banana volumes lost last year, the immediate future for those vessels that rely exclusively on the charter market looks unpromising.

Developments in Ecuador assumed a greater importance because of developments, mostly weather-related, elsewhere in South America. After a strong start to the season Chilean grape volumes from the major production regions were as low as initially forecast. There was just about enough fruit for vessels to load without incurring dead freight, but revised forecasts suggest there is little likelihood of the need for additional capacity prior to the April USDA Marketing Order deadline. Charterer CSAV redelivered vessels early while the shortage of grapes may also reduce sailings to Russia and N Cont later in the season, which will impact on the demand for both reefer and container line services.

Argentinean deciduous shippers switched the majority of their cargo into third-party liner services: during the month spot requirements were few and far between while the Star Reefers and Baltic Shipping services into St Petersburg were less regular. It is both baffling and ironic that shippers have chosen this year to 'defect' from the specialized reefer given the logistical issues the industry has in exporting to Argentina's major markets: while each and every reefer is loading without problems from San Antonio Este, containerized cargo shipped from SA Oeste encountered delays and potential quality and customer consequences as it was

obliged to re-route via Brazil and not Uruguay.

After a strong run stretching back to last September the small segment came under some rates pressure as demand tapered off, principally due to a surplus of expensive frozen fish in West African coldstores. By the end of the month it appeared as if equilibrium had been restored, partly because of a resurgence in demand in Nigeria and partly because the Lavinia fleet was being absorbed in the South Atlantic for the seasonal squid catch. If demand here for capacity is as strong as anticipated the market should at worst remain in equilibrium until mid-April. However there is significant upside potential if demand for the larger units recovers.



■ Litchi: a quick end to the season.

The early start to the Madagascar litchi trading season hinted that the end would come just as early, like last season. And that is indeed what happened. The final batches were sold in early February at falling rates, of around 1.50-1.80 euro/kg for fruits of satisfactory quality. Certain merchandise was rejected from the market for quality reasons. Ageing of the fruits, alongside the lack of interest from the distribution sector, put an end to the 2013-14 season. Sales of South African litchis extended until the middle of the month, with marginal quantities. The decent quality of these last shipments enabled prices to hold up, or even increase for the big sizes (2.75-3.75 euros/kg). The moderation of volumes available, considering all sources, and their compatibility with the various trading phases from December to February, made the 2013-14 season an undeniable economic success.

Source: Pierre Gerbaud

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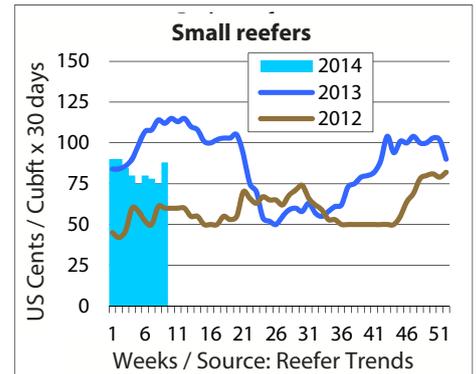
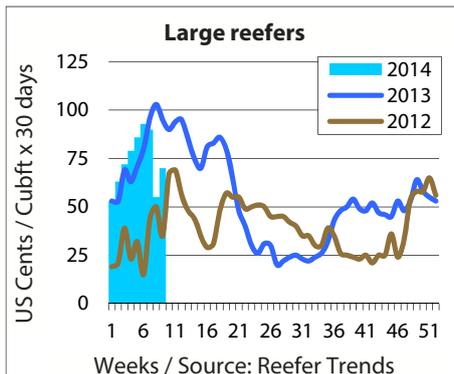
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REEFER

MONTHLY SPOT AVERAGE

| USD cents/cubic foot x 30 days | Large reefers | Small reefers |
|--------------------------------|---------------|---------------|
| February 2014 | 70 | 79 |
| February 2013 | 89 | 107 |
| February 2012 | 39 | 55 |



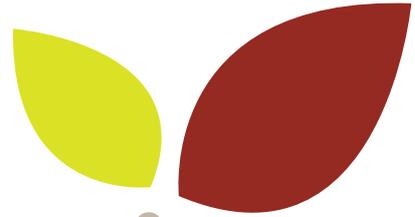
Mediterranean strawberry

A more assured range



Although recent seasons have been very difficult, the varietal renewal over the last few years and the vitality of the small red fruits market seem to be heralding stable or even increased strawberry production in Spain and Morocco; especially as competition from other Mediterranean sources is waning year on year.

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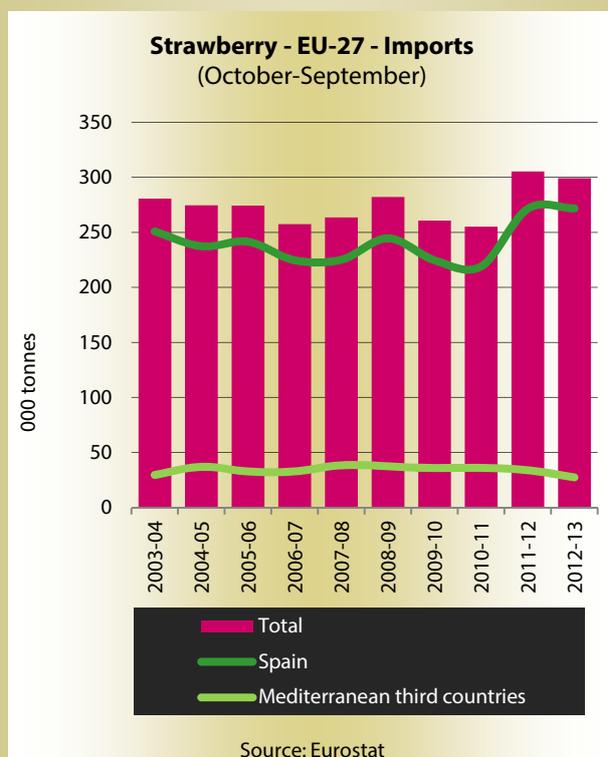


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2012-13 season not too rosy

Last season was very disappointing for the Mediterranean operators, since it came too late and the fruit quality was particularly affected by weather conditions. Although the Moroccan season started in late November, it did not get going until January. It then remained slow due to very cold nights in the production zones, both in Spain and Morocco, and the storm which hit the Huelva zone. Shipments were even well below expectations until week 5. As for the seasons in the other European sources, they started early in Italy (late February/mid-March), and above all in France where production is increasingly early thanks to the development of hydroponics. Furthermore, hydroponic surface areas saw considerable growth in France in 2013, making up 2 114 ha (+ 35 % on 2012) of the 3 273 ha planted area.

But it was mostly February and March that were particularly damaging, due to recurrent rain in Morocco and Spain. The quality was highly compromised, leading to sorting with approximately 40 % rejects from the second half of March, whereas demand was particularly impeded by the coldest spring for the last thirty years in Europe. Many promotions had to be cancelled, which further restricted sales. So the fresh strawberry season was truncated, switching early to the industrial sector.

Price levels were down 20 to 30 %, depending on the periods. The crisis reached its height in mid-April, when the Spanish season reached its full potential, with production still fragile, and local produce was being promoted to its detriment. Prices went very low, down to 0.80 euro/kg, at the French import stage. The market flow was then boosted with the fall in supply, the late arrival of stone fruits and of the North European produced strawberries. The export season extended to late June to claw back the turnover somewhat, but there were heavy financial losses for producers. At the end of the season, Freshuelva estimated that 60 % of its members would not cover their production costs.

Similar volumes on the European market

Strawberry imports into the European Community reached a high level last season, in spite of its lateness and the production losses caused by very poor weather conditions. They approached the 300 000-t mark, above all thanks to Spanish





exports holding up (271 000 t) – with its season shifting to extend to June - whereas volumes from other Mediterranean countries (Morocco, Turkey, Egypt, Israel and Palestine) fell slightly (27 500 t as opposed to 34 000 t the previous season). Morocco remains by far the main Extra-Community supplier, though its exports were cut in 2012-13 by the bad weather (17 900 t as opposed to 22 500 t in 2011-12). Volumes from Turkey also fell (3 500 t). Egyptian volumes did hold up (6 000 t), although trade with this source has been more uncertain in recent years due to the political situation. It is still well below its previous level (11 000 t in 2009-10) and the expectations associated with the development of its production potential. Similarly, shipments from the Gaza Strip are in long-term decline (130 t in 2013).

An expanded Moroccan range

In spite of two particularly difficult years on the fresh market, due to very poor weather conditions, Moroccan strawberry production is holding up, reinforced by the industrial outlet which represents 50 % of volumes, as opposed to 25 % for the local market and 25 % for exports. This crop currently extends over 3 000 ha, situated overwhelmingly in the Larache zone, and providing a produc-

tion potential of 140 000 t. It has also been boosted by the vitality of the small red fruits industry and the diversification of the range, which has picked up considerably with the arrival of foreign investors. Initially expanding with the raspberry (3 100 t exported in 2013, as opposed to 950 t in 2008), it is now widening further with the blueberry (4 400 t in 2013, as opposed to 140 t in 2008).

But the strawberry potential should rise further, mainly because of the improvement in yields, but also a small increase in surface areas. Indeed, cultivation is constantly modernising (big tunnels, plug trays, new varieties), and research is above all making for earlier production, i.e. expanding the export window while reducing overlap with Spanish production. Hence the varietal breakdown has changed greatly over the past two years, practically ousting Camarosa, the iconic variety of Mediterranean production in the last decade, and which still represented 70 % of tonnages in 2009. There are now three varieties sharing the market: first of all Sabrina, which has established a strong footing in the past two years, representing 40 % of surface areas, followed by Splendor and Festival. This new order enables operators to be present with more significant volumes in December/January, although the production peak is still in March.

Spanish production shored up

Spanish strawberry production is stable, or even up slightly, despite the weather conditions. But the increase is mostly marked for other red fruits, with surface areas increasing for the raspberry, blackberry and more particularly the blueberry, 2 520 ha in total in 2014 according to Freshuelva (+ 16 % on 2013). For the strawberry, surface areas reportedly grew 5 % last year (8 000 ha), and should do so again by 2 % this year, for a production potential of 300 000 t, 94 % of which located in Huelva.

But, as in Morocco, one of the big changes in recent years lies in the reshuffling of the varietal range, with the quest for plant stock better suited to the pedoclimatic conditions, and above all earlier. Hence, Sabrina, Splendor and Fortuna alone now represent 70 % of surface areas in Huelva, supplemented by other very early varieties such as Antilla or Primoris (5 % each). Candonga, a flagship for





the varietal renewal in Spain over the past few years, after deposing Camarosa, is now itself being superseded, though it still represents 11 % of the total.

The other big change, inherent to the considerable climate vagaries of recent seasons, concerns protection of farms. More and more producers are taking out insurance, after recent seasons hit their cash flow hard. The surface area insured has reportedly risen by 40 % in Huelva, according to the figures from the Delegation of the Huelva Regional Ministry for Agriculture (6 362 ha in 2014, as opposed to 4 560 ha in 2013).

Exports shackled in other Mediterranean countries

The other big Mediterranean production zones are struggling to hold up on the European market; because of the intrinsic parameters, but also increased competition from Spain and Morocco, present on the market increasingly early, and the extension of the production calendar of North European sources (hydroponics). Furthermore, these sources have been heavily impeded by the political situation in some cases, and by the weather vagaries of the past few seasons.

Hence while the potential should have increased considerably in Egypt with the implementation of new production zones (Nile Valley, Lake Nasser irrigation programme), it has ultimately maintained a level of around 242 000 t. Overall exports are highly variable, not exceeding 6 000 t to Europe, with the changing economic conditions since the 2011 revolution having led to steep inflation and unfavourable parity which for the moment is casting a veil over the future, although there have been no more export suspensions since 2011. Nonetheless, the big facilities are continuing to develop their customer portfolio, especially in Russia and Asia. Exports should even branch out to North America, with the import authorisation granted in 2013 by the US sanitary authorities.

Similarly, the situation in the Gaza Strip is complicated due to relations with Israel. So exports have fallen steeply in the past few years. The potential is only 500 t as opposed to 1 500 t before 2007, and it could be further reduced this year because of a storm which hit the zone in late 2013.

Market getting back some of its colour in 2014

The season began under better auspices, with decent Moroccan volumes at the very start of the season, especially for the end-of-year holidays. However, the supply again struggled to get going at the beginning of this year, with volumes reduced by the lack of maturity (cold nights), meaning that the first promotions could not be implemented. Nonetheless, the improvement in the weather conditions at the production stage from week 8 provided hope for the Moroccan and then the Spanish supply to show more considerable growth; while a host of promotions were already taking shape, with the end of the winter holidays and weather conditions fairly favourable for consumption on the export markets. Price levels were up 22 % from 2013 in week 9 (+ 8 % on the 3-year average), and prospects were rather bright with the Easter holidays this year falling at the end of week 16, coinciding with the expected Spanish production peak ■

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Fairtrade banana

Right message, wrong targets?



The start of Fairtrade fortnight in the United Kingdom generally coincides with an NGO condemning the retail sector for its pricing policy on bananas. This year was no exception. In fact the Fairtrade Foundation went one step further than criticism when it called on the British government to intervene in a price war that it says could possibly lead to shortages in the longer term.

© Pauline Feschet

| Banana — United Kingdom Average import prices in 2002 and 2012 | | | |
|---|----------|--------|-----------|
| | 2002 | 2012 | Variation |
| • £ per tonne | 605.54 | 486.33 | - 19.6 % |
| • with adjustment for inflation | 784.02 | | - 38.0 % |
| • USD per tonne | 910.04 | 770.74 | - 15.3 % |
| • with adjustment for inflation | 1 178.27 | | - 34.6 % |

Source: Eurostat / Processed by Fairtrade Foundation

| Market shares of national supermarket chains in UK (grocery market) | | | |
|--|---------------------------|---------------------------|----------------|
| | 12 weeks to 11/11/2012 | 12 weeks to 11/11/2013 | Variation % |
| Tesco | 30.5 | 29.8 | - 2.3 |
| Asda | 17.6 | 17.2 | - 2.3 |
| Sainsbury's | 16.9 | 16.8 | - 0.6 |
| Morrisons | 11.7 | 11.5 | - 1.7 |
| The Co-operative | 6.5 | 6.3 | - 3.1 |
| Waitrose | 4.6 | 4.8 | + 4.3 |
| Aldi | 3.0 | 3.9 | + 30.0 |
| Lidl | 2.7 | 3.0 | + 11.1 |

Source: Kantar Worldpanel / Processed by Fairtrade Foundation



In its analysis the Foundation, which aims to protect farmers in developing countries, says the price of bananas in UK retailers has nearly halved in the past 10 years. It points out that the fall in the price of bananas comes despite a rise in the price of 'other' staple foods such as bread, eggs, milk and sugar, of 79% on average. The foundation's CEO, Michael Gidney, said that its research is showing that this squeeze is disabling farmers, making it impossible to build up resilient businesses and to trade out of poverty.

In response the British Retail Consortium denied that farmers were being squeezed. "The fact that supermarkets are choosing to sell bananas at below margin cost has no relationship to what they are paying producers. Producers are getting a good price and customers are getting a good price as well. Supermarkets sell such an enormous range of products that they can choose to sell particular products at a loss," it said.

In the dairy market, prices for milk have improved after high-profile action by farmers and concern from shoppers forced individual supermarkets to agree deals with their suppliers to pay at least the cost of production. Mr Gidney said banana farmers had suffered because they were less able to publicise their plight from far overseas.

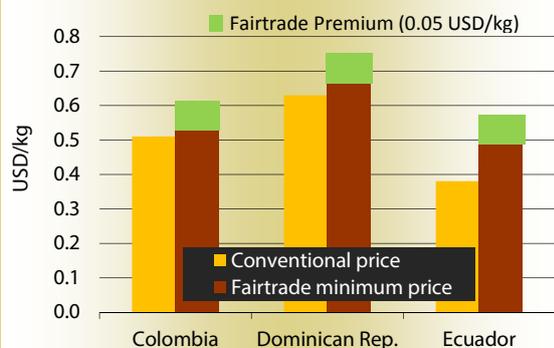
Unsurprisingly the British Government has little appetite for an intervention. "It is not our policy to get involved in price-setting. The price that people pay at the checkout is down to the supermarkets," said a spokesman for the Business Secretary.

It is reasonable to argue that the Foundation is largely squandering its hard-earned equity by making such a plea. This is not to say that the points it raises are not justifiable – they are just targeted at the wrong audience. Firstly, the British Government is never likely to intervene in a commercial transaction unless it is illegal or there is a threat to national (food) security, no matter how legitimate the complaint: in the UK the banana is not a staple, unlike bread and dairy.

Retailers meanwhile have every right to price as they please, and the banana is and will remain by far the biggest loss leader in the fresh produce section as long as the supply is plentiful. Retail is not driven by conscience: retailers will only take the fair trade moral high ground if there is a trading justification - anything else would be commercial suicide.

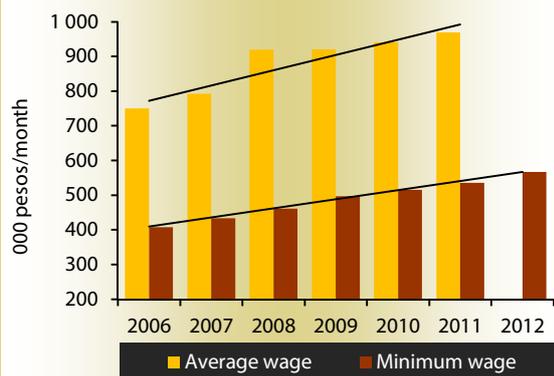
Thirdly, consumers are motivated almost exclusively by price. If a consumer could distinguish one banana from another in the way that a New Zealand kiwifruit can be identified from a Chilean, or a Jazz apple from a Braeburn, then there would be an argument for differentiation. But they can't. The banana multinationals might disagree but to the retailer a Fairtrade banana is no different from a no-name or branded piece of fruit. This is because bananas have essentially

Banana - Average price available to producers compared to Fairtrade Minimum Price in 2012

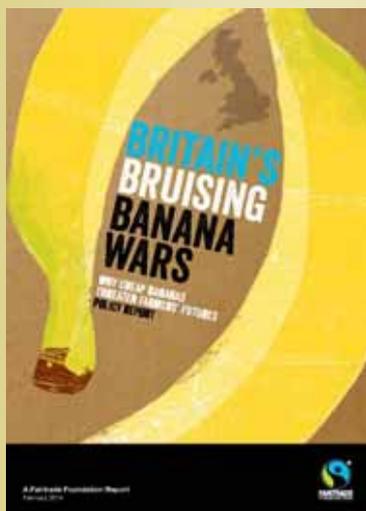


Source: Fairtrade Foundation

Colombia - Comparison between the minimum wage and the average wage in banana regions



Source: Augura (2013) / Processed by Fairtrade Foundation



Britain's bruising banana wars

Why cheap bananas threaten farmers' futures

Policy report

A Fairtrade Foundation Report
February 2014

lost their exotic identity – they are now nothing more than a commodity. This is why the big banana brands spend so little on above-the-line advertising: unfortunately fruit in general and bananas in particular fall into the same retail category as cat litter. When a product has been commoditized to such an extent that there is no longer a brand to build, the corporate focus shifts instead to cost reduction.

This argument, if sound, brings other so-called 'value adders' into the firing line. Although they make great PR what value, for example, does Rainforest Alliance or SA8000 certification add to the banana? Do retailers use the certifications as criteria for procurement? Do either certifications influence consumers' purchasing behaviour? Err, no and no. Should they? Yes, absolutely! And if they and other certifications added value and not just cost, there would arguably be no need for the Fairtrade movement, which to be brutal, trades on the conscience and/or pity of consumers in the developed world. To be fair, it has little choice: the farmers on whose behalf the Foundation campaigns are little more than victims in the chain: they are wholly dependent on variables outside their control for their survival.

In a commercial environment such as the UK that strongly favours the consumer over the supplier, it will always be the head of the chain that bears the brunt of any pricing pressure. Even if current WTO rules and regulations are amended, the real solution to the fair trade conundrum lies at the source, not the destination. In order to trade out of poverty, you need to be able to take control of your destiny.

Realistically there are only two ways to increase the rate paid to the banana producer - either by State decree or by restricting market supply. However inherent in these solutions is an additional problem: unless the supplier nations act in concert, those that legislate or deliberately cut supply will lose out to those who do neither - to which Ecuador will testify.

If the Fairtrade Foundation is seeking a universal solution, it should focus on addressing the cause of the iniquity rather than trying to treat symptoms that are untreatable. The Foundation could do this by taking the 'market forces' case to the Governments of the worst affected countries by the banana price wars in the UK and Northern Europe and encourage them to take responsibility for the plight of their own citizens. Unfortunately the Foundation would likely get a similar response in Latin America to that given in the UK, albeit for a different reason – too many vested interests! And anyway this work is already taking place under the auspices and guidance of the World Banana Forum ■

Richard Bright, consultant
info@reefertrends.com

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A report by
Pierre Gerbaud

Mango

Mango

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The European mango market has really brightened up, against a prevailing context of gloom. 2013 was another year of progress for this product, with import volumes reaching more than 260,000 tonnes, which is a record, doubling the quantities since 2000. True, these figures do not necessarily mean exponential economic results, but they nonetheless prove the vitality of the sector. Though still a long way off the banana or pineapple in terms of quantities sold on the European market, the mango is nevertheless an essential part of the range of tropical products available to European consumers. The supply vagaries of this fruit with its marked seasonality have, as every year, shaped the various phases of the European market. But what we will remember above all are the exceptional conditions of spring 2013, when an import fruits shortfall coincided with a big delay in European fruit production, leaving the field open to the mango. We need to go back to 1991 to find a similar configuration.



European mango market

Market still turbulent
in the switchover periods

The production vagaries of the main mango suppliers to the European market always affect fruit sales. Once more this year, the late start to the West African season in April/May, and to the Brazilian season in September/October, disrupted the supply, leading to temporary rate explosions.

Some will see in this the effects of climate imbalances, others purely short-term conditions. Yet it must be observed that every year the mango seasonality forces importers to juggle sources to feed a market still growing.

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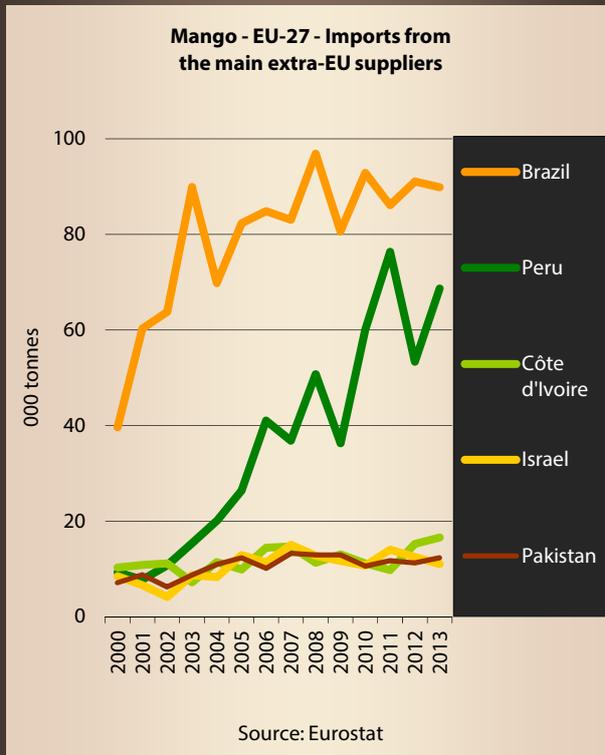
Seasonal fruits AWOL

There were two periods particularly characterising the European mango season in 2013. After a difficult start to the year, with massive quantities received from Peru, the market gradually recovered. From mid-February, the Peruvian mango rate picked up under the effect of more dynamic demand, which was supported and even intensified by the shortage of winter fruits taken out of storage (e.g. the apple and pear). The same happened in March and April, with the delay to European spring produce. This shortage probably boosted the rapid recovery of Peruvian mango rates, in spite of the large volumes. The particularly high prices observed in April and May were also the consequence of this atypical long-lasting under-supply of seasonal fruits.

The West African season developed in this context, and specifically the Ivorian season. In May, purchasers complained every week about the shortage of volumes compared to demand. There were suspicions at the time of low Ivorian production, and therefore small exports. With the benefit of a little perspective, it should be recognised that Ivorian shipments actually exceeded the level reached the previous year, which at the time seemed easily sufficient and even excessive. We can only conclude that the overall lack of seasonal fruits, indeed their near-absence, led consumption to switch to imported fruits! Furthermore, this trend of strong demand for the mango waned in June, with a dip in rates parallel to the magnitude of the supply. Of course, the recurrent end-of-season qualitative problems were not unrelated to this swing in price trend. But we cannot also fail to mention the rise in supply of seasonal produce, which had previously been marginal.

Brazil back to its place

The second period of note in 2013 was late summer, at the turn of August to September. The end of the Senegalese and Mexican seasons, and the steep fall in Israeli shipments, represented the first factors in a new more unusual phase of under-supply. This market development was actually associated with the announcement of a small-scale Spanish season, but most of all with a marked delay to the start of the Brazilian winter season. For the past two years, this source came increasingly early onto the European market, boosting continuity of Kent sales, first by air-freight and then soon by sea-freight. In 2013, it recovered its traditional place with the season starting in mid-October and slower growth of its exports, shared between the European market



and North American market. Rates peaked at that time. The fallout from this unexpected period came in November when, to make up for its delayed volumes, Brazilian produce arrived in incessant waves until the end of the year, driving down rates to much lower levels.



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Turbulent seasons

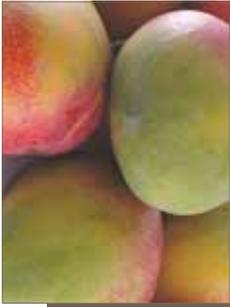
The early or late season starts, and the prolonged or curtailed season ends, of the main sources supplying the European market remain highly disruptive to the fruit trade. They are forcing operators into changing and sometimes random supply manoeuvres. Although overall control of the flows ultimately seems like a vain hope for this seasonal fruit, the craze for the mango shows no signs of flagging, with a variable increase, though always positive in the medium term.

In the turbulent context of the European mango supply, there are nonetheless some trends taking shape. Some countries, such as Côte d'Ivoire and Israel, are concentrating their seasons, though without a corresponding quantitative decrease. Others are extending their season, such as Puerto Rico or the Dominican Republic. So is it down to refocusing, specialisation, the expansion dynamic or merely the vagaries of weather or trade? It is hard to judge ■

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2013 mango season Review by source

Supply turbulent at the cusp of the seasons

Besides the fluctuations in the seasons of the various sources, often caused by more or less favourable production conditions, with a few years' perspective, we can perceive underlying trends of season contraction or extension: for example, concentration of the export period from Côte d'Ivoire and Israel (without directly affecting the volumes shipped) or, conversely, an extension from Puerto Rico and the Dominican Republic. The supply calendar to the European market, which used to be set gradually, is still shifting.

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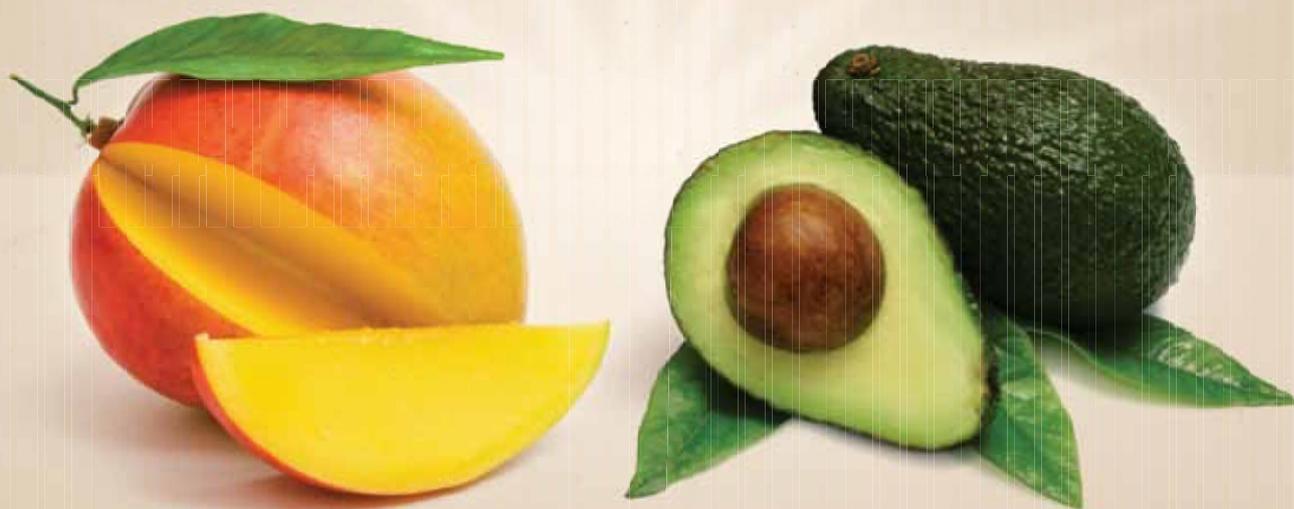
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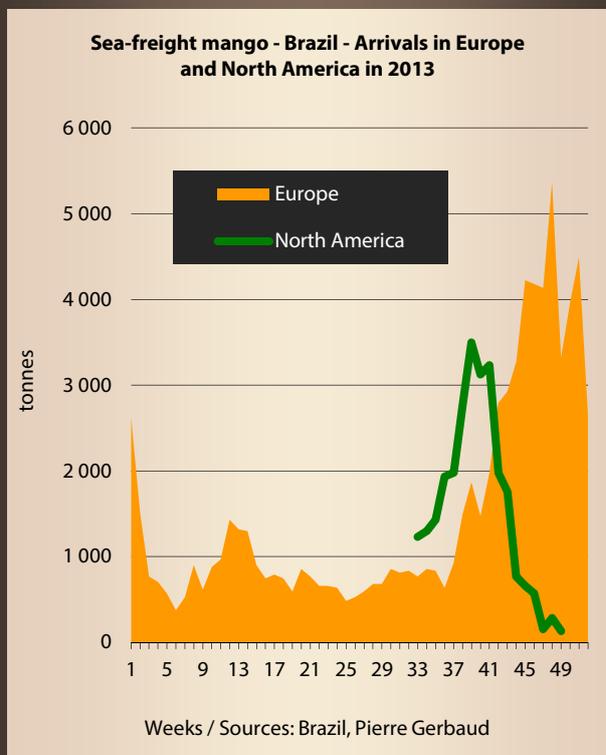
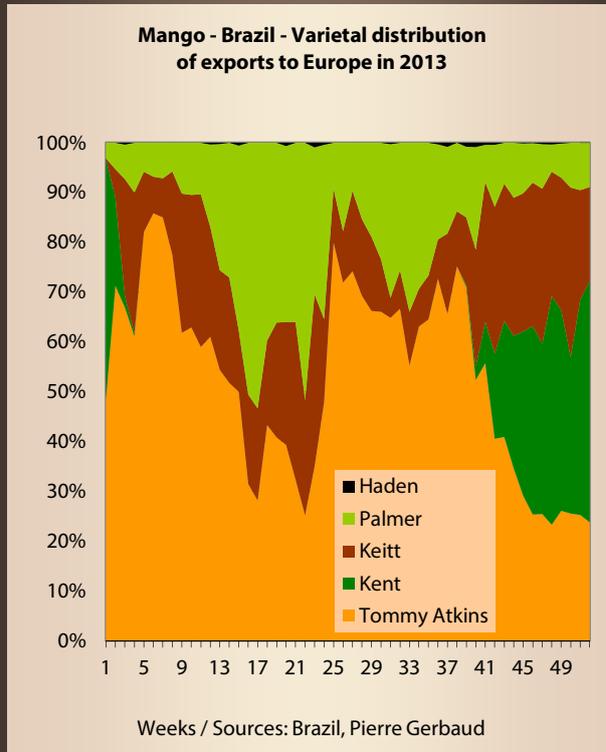
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Brazil A good year with a bad ending

Though approximately one thousand tonnes down on 2012, Brazil maintained its place as the number one supplier to the European mango market. Rumours, heard at various times over the course of this year, that Brazilian exports had slumped seem ill-founded in view of the results registered by European Customs. The same can be said for exports to North America, which were down by just a few hundred tonnes. With a modest presence during Q1 2013, Brazilian mangoes supplemented the volumes from Peru, which are highly dominant at this time of year. The rate of Brazilian fruits recovered bit by bit, doubtless thanks to Tommy Atkins, a variety always prized on certain European markets, and a Brazilian speciality. In spring 2013, the rate rose steeply given the overall temporary fall in supply due to the switchover from the Peruvian season to the West African season. Tommy Atkins went from 5.00-6.00 to more than 9.00 euros/box, a level rarely achieved by this variety. But after a few weeks, the fall proved just as great, with prices of less than 5.00 euros/box in late summer.

It was in the autumn that the situation of the Brazilian export season was at its most striking. For two years, Brazilian shipments had started expanding from September, in anticipation of the traditional start of the season in October, with the arrival of the first Kent. Yet in 2013, the growth of volumes of Kent, but also Keitt and Palmer, was considerably delayed, causing another price explosion (8.00 euros/box) for Tommy Atkins in September. In mid-October, the large-scale arrival of Kent resulted in rapid deterioration of this variety's rate (from 8.00 to 5.00 euros/box) within weeks, and the collapse of the Tommy Atkins rate (4.00-5.00 euros/box). Doubtless wanting to make up for the quantitative delay at the beginning of the season, Brazilian exporters stepped up their shipments in November and December, causing an oversupply to the European market. In this context prices could only fall rapidly, reaching 4.00-5.00 euros/box from the end of November. The situation barely improved until the end of the year, with the early arrival of Peruvian produce aggravating the deterioration of sales conditions, which the surge in demand from the end-of-year holidays did not manage to halt. The Kent season ended in January 2014, with high pressure on prices generated by massive shipments from Peru and the qualitative deterioration of Brazilian fruits.



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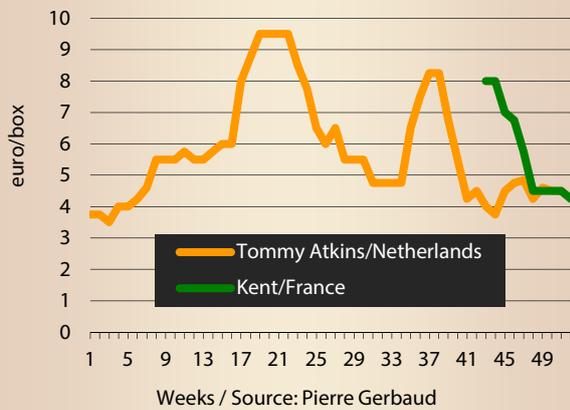
THE LIME is highly rich in vitamin C. It enhances the flavour of fruits such as the Austin mango, or the Formosa or Golden papaya.

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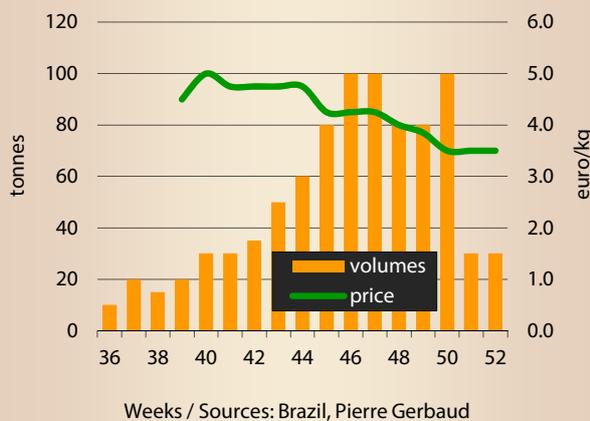
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Sea-freight mango - Brazil - Average import price for Kent in France and Tommy Atkins in the Netherlands in 2013



**Air-freight Kent mango - Brazil
Weekly arrivals and average import price on the French market in 2013**



The late start to the Brazilian winter season, the proliferation of shipments and the overlap of the Brazilian and Peruvian seasons tarnished the rather satisfactory results registered by Brazil for the rest of the year. Without claiming to be prophetic, an article in the October edition of *FruiTrop* (no.215) referred to the tricky end-of-year changeover from the Brazil to the Peruvian season.

The air-freight Kent export season was divided into two parts. The first, from September to early November, was characterised by modest shipments, helping maintain high and strong rates of between 4.50 and 5.00 euros/kg. In the second part, from November to mid-January, the substantial tonnages received, as well as the average quality of the fruits, caused a gradual drop in rates, which stabilised in November at around 4.00-4.50 euros/kg before descending again in December to around 3.50 euros/kg, as the competing Peruvian supply grew.

Over the past few years, Brazil has modified its varietal range. It based its export production on the Tommy Atkins variety, for its production capacities, its generally intense coloration and its good resistance to sea-freight. However, its lower appeal on the European markets compared to other varieties, especially the tastier and less fibrous Kent, has gradually led Brazilian orchards to evolve. True, Tommy Atkins remains the main export variety — practically the only one to the North American markets — but its share in shipments to Europe is on a declining trend, with a 10 % drop over the past two years. The varietal diversification of Brazilian exports is primarily to the benefit of the Palmer variety, whose share is up by nearly 7 %, followed by Keitt which has increased by 2.5 %. Kent now represents barely 10 % of Brazilian shipments, down 1 % in 2013. This small representation is probably due to the variety's poorer suitability to the country's pedoclimatic conditions, which can disrupt its cultivation and therefore its export potential more severely; which explains the commercial variations from year to year. Maybe we should look there for the reasons for the mediocre end to the Brazilian season in Europe.

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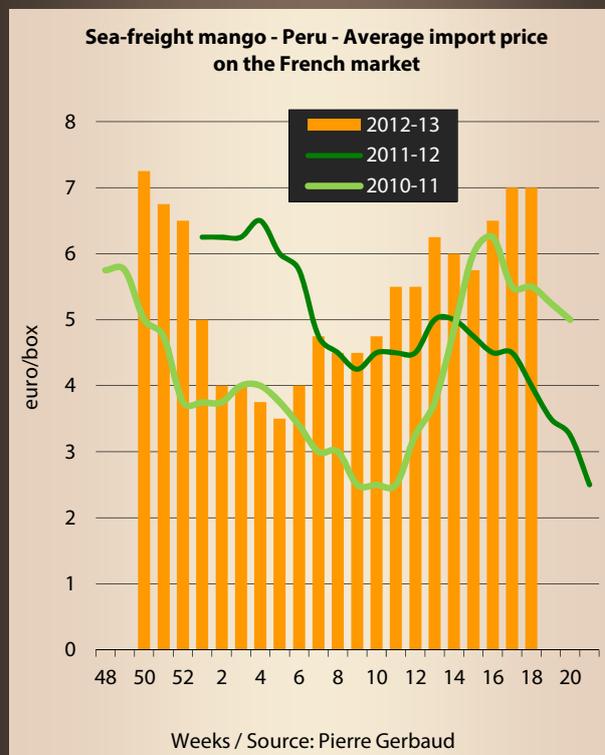
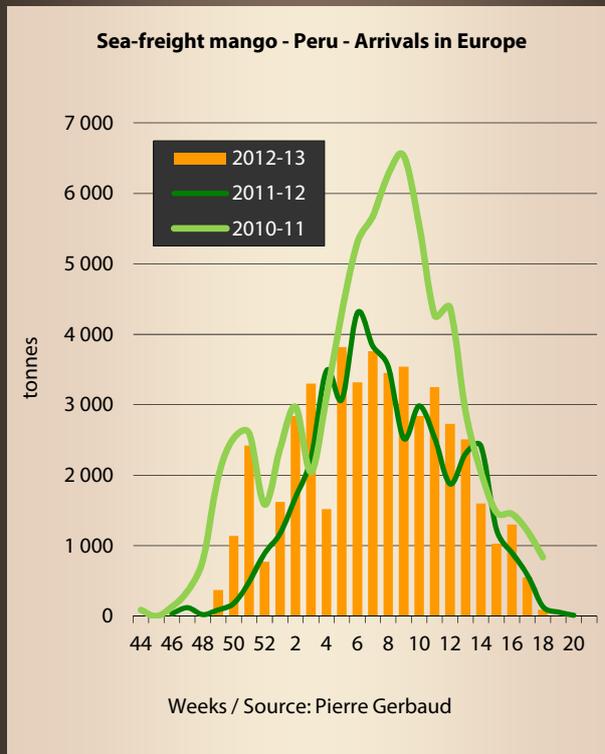
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Peru A classic season of plenty

Without reaching the record export level of 72 000 tonnes to Europe in 2011, Peru did ship nearly 69 000 tonnes in 2013. So the number two supplier to the European Union is back on form, after a leaner 2012 (53 000 tonnes), following the same trend on the US market. The poor weather conditions which had hit production hard in 2011-12 were not repeated, enabling the Peruvian sector to consolidate its essential place in the international mango trade. The profile of the European season also echoed previous seasons. The arrival of bigger and earlier tonnages than the previous season, from early December, did not particularly impede the market, since Brazil was simultaneously embarking on a considerable fall. However, while the fruit influx did not cause congestion, its immaturity did lead to poor sales. In fewer than three weeks, the rate dropped by 3.00 euros per box. It struggled to sell in January in spite of better staggering of incoming shipments, though they were still too big for the demand level, always more moderate at this time of year.

In mid-February, the trend reversed and prices rose steadily until the end of the season in late April (from 4.50 to nearly 7.00 euros/box). This turnaround in the situation was due not to a steep and sudden reduction in quantities, but rather to the atypical state of the European market. Indeed, the long harsh winter caused a fruit shortfall and delayed the arrival of seasonal produce. Under these conditions, imported fruits saw more substantial demand. The strengthening of Peruvian mango prices picked up in March, given the decrease in incoming



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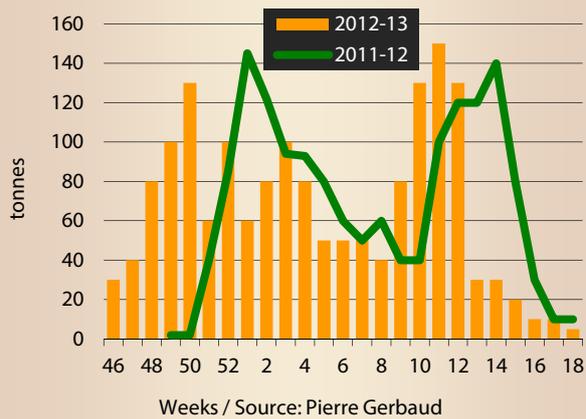
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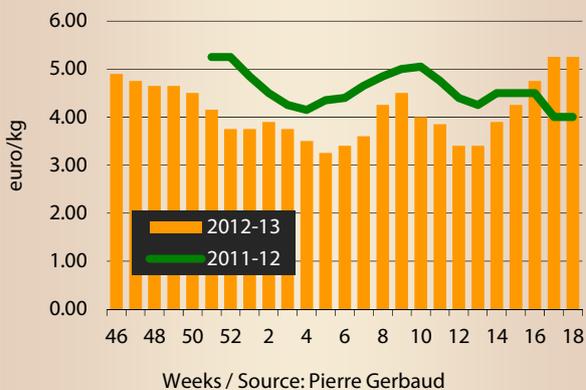
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Air-freight mango - Peru - Arrivals on the French market



Air-freight mango - Peru - Average import price on the French market



shipments and a quicker end to the season. The Easter holidays in early April represented a factor boosting revitalisation of demand. The late start to the West African season left the field open to Peru, providing the only produce available on the market.

The tempo of shipments from Peruvian exporters is not always suited to the needs of the market. The inertia generated by the long transport time also makes it difficult, or even impossible, for shippers to react rapidly. Yet what degree of quality and shelf-life can be expected from a fruit with a time interval between harvest and market of at least 4 to 5 weeks? Shipments repeated several weeks in a row have good chances of creating congestion on the European market - in which case, the merchandise undergoes prolonged storage, always detrimental to quality. Steadier shipments would definitely help mitigate these jolts disrupting trade.

The size distribution is also a recurrent theme. In the first part of the season, small sizes often predominate, which devalues the produce. In the second part of the season, the big sizes take over, also causing rates to sag. True, the fruits do not come in a uniform size for each period of the season, but a better distribution of sizes in the shipments would be a way of helping sales along. Opting to favour medium sizes would also help better regulate flows to Europe and prevent major price variations.

The air-freight season was more uneven. Given the rapid stoppage of Brazilian exports at the end of 2012, the prices of Peruvian fruits remained fairly high in November and December, although on a downward trend. In January, they reached their lowest level at around 3.50 euros/kg. They recovered considerably in February, but fell again in March under the effect of a steeply rising supply. In April, the dwindling supply and weak competition from West African countries enabled rates to rise to 4.00 and then 5.00 euros/kg.

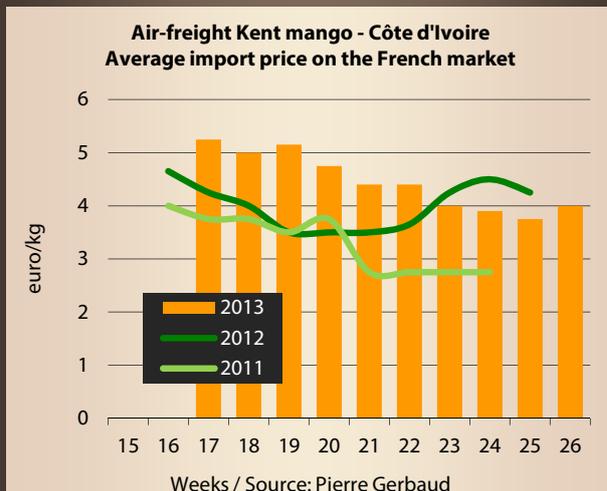
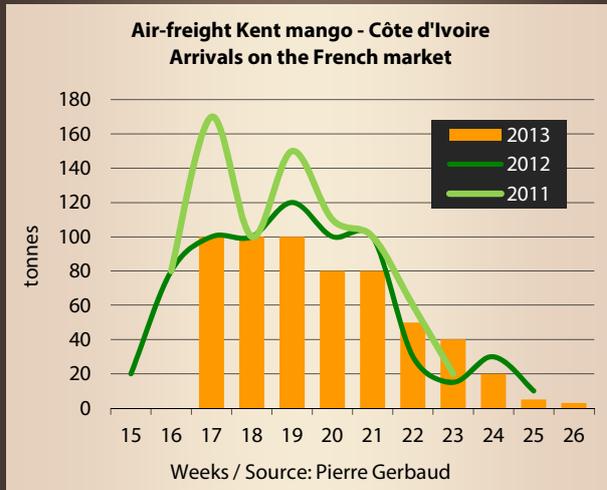
Peru's last two seasons are contrasting in terms of volume and apparent result. The 2011-12 season, despite waning tonnages, did not ultimately lead to better sales results, in particular because of major quality problems. Conversely, the 2012-13 season proved more satisfactory, though volumes returned to their usual level. Variation from one season to the other does not depend solely on a source's export capacity, but above all on external factors, the state of the receiving market and the competition active there.

West Africa An abundant 2013 season

With more than 24 000 tonnes shipped to the European markets, West African sources seem to be recovering their rightful place in the international mango trade, after several seasons disrupted by serious political crises. True, 2012 was fairly plentiful in terms of volume, with 21 000 tonnes of exports, but the sales conditions were less favourable. We need to go back to 2006 to 2008 to find sales similar to last season, since in 2011, the total exports amounted to barely 14 000 tonnes. The rise in export volumes from West African sources is mainly due to Côte d'Ivoire, which has stood out for the past three seasons, achieving sales of 10 200 t, 15 200 t and 16 500 t respectively. Next comes Mali with 1 800 t, 3 800 t and then 4 800 t. Burkina Faso has made a more modest contribution, with 2 100 t in 2011 and 2012, and nearly 3 000 t in 2013.

The rise in export volumes and the improvement in economic results in 2013 are due to the production and export capacities of the countries concerned, but also to a combination of highly positive factors. The steep fall in tempo of Peruvian shipments in April created an under-supply favourable for the start of the West African season. Another decisive factor was the high demand level, generally lower at this time of year. The particularly harsh winter in Europe had the consequence of delaying fruit production by approximately one month, causing consumption to switch to imported produce. Hence the first seasonal fruits on the market charged high prices, enabling imported produce to maintain greater competitiveness. This exceptional situation comes about only rarely; the last time was back in 1991 when the frost delayed and undermined the seasonal supply in similar fashion. Furthermore, the switchover between the Peruvian and West African seasons was not disrupted by other sources, whose supply is often chaotic in terms of volumes, varieties and quality.

The 2013 West African season registered positive overall results, especially thanks to the good market conditions in Europe, especially in May, though this period traditionally sees an influx of merchandise which hinders maintaining profitable prices. Yet behind the rise in quantities, there remain quality and phytosanitary problems, which instil a degree of fragility in exports from these sources.



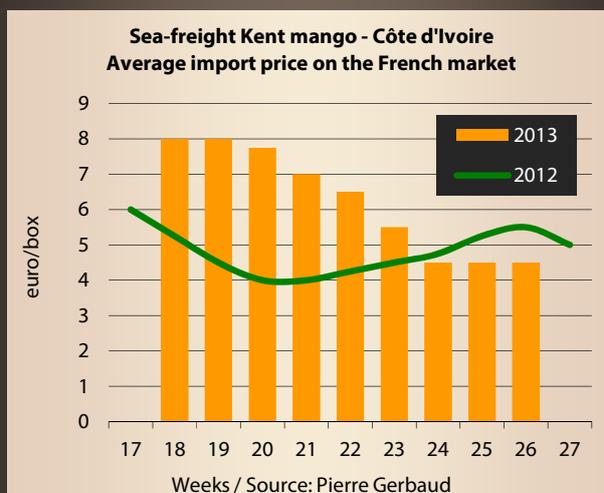
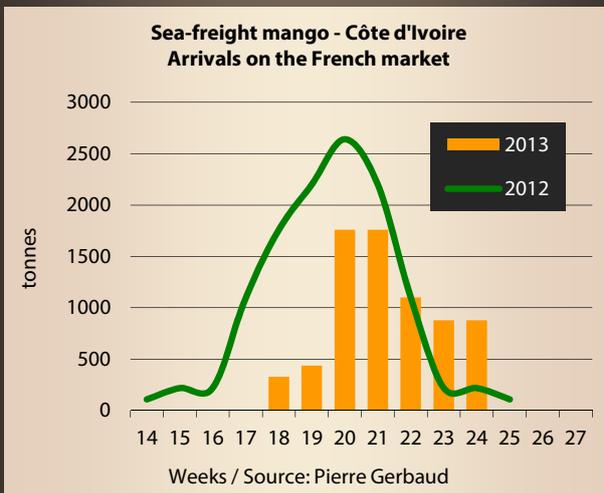
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Côte d'Ivoire A quantitative record

Delayed by unfavourable weather conditions, the Ivorian season was supposed to be difficult and small-scale. In reality, the 16 500 tonnes exported to Europe represents a record. Air-freight shipments started at the end of April, when the Peruvian supply had practically disappeared. As if to make up for their lateness, Ivorian exporters shipped big quantities from the first week of the season, for one month. The 80 to 100 tonnes per week were absorbed by the European markets at high prices of around 5.00 euros/kg, falling in late May to around 4.50 euros/kg. Shipments dipped steeply in June, accompanied by a price collapse to 4.00 euros/kg due to the competition from other West African countries, and a temporary deterioration in quality.

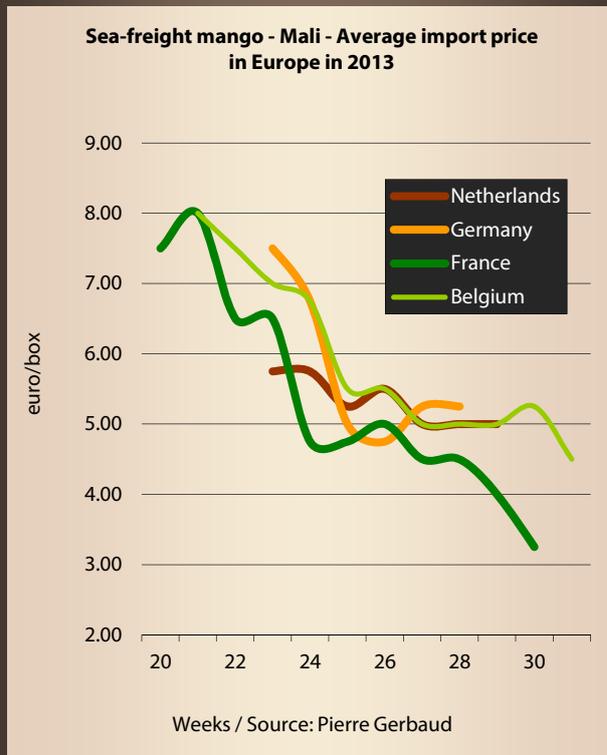
The first sea-freight mangoes were received in Europe in early May. Volumes reached their peak in the middle of the month, and then dropped until mid-June. The rate of Côte d'Ivoire mangoes was set at the beginning of the season at a particularly high level (8.00 euros/box), rarely observed for this source. It deteriorated gradually throughout the season, to reach 4.50 euros/box at the end of the period. This continuous fall in rates was doubtless caused by the influx of merchandise over a short time interval, causing temporary congestion of the market. At the end of the season, prices proved to be more uncertain because of the qualitative deterioration of the fruit.

While Côte d'Ivoire left a big mark on the 2013 season, it was more down to exceptional market conditions than deliberate action by the industry players. Nonetheless, the overall satisfactory results were limited, as in previous years, by the concentration of shipments, still problematic in ensuring sales fluidity. Fear of quality deterioration at the end of the period is still a factor restricting rational extension of exports. The arrival of precipitation to the production zones in May compromises the end of the season, often restricting the country to shipping only Kent, though it would be able to extend its exports with Keitt, if the risk of qualitative deterioration was not so heavy. The parasite pressure also weakened exports last season. European statistics for interception of Ivorian mangoes due to the presence of fruit fly larvae indicate 24 seizures during the season. These aspects highlight the constraints of the Ivorian mango industry, which also demonstrated its undeniable ability to handle large volumes.



Mali

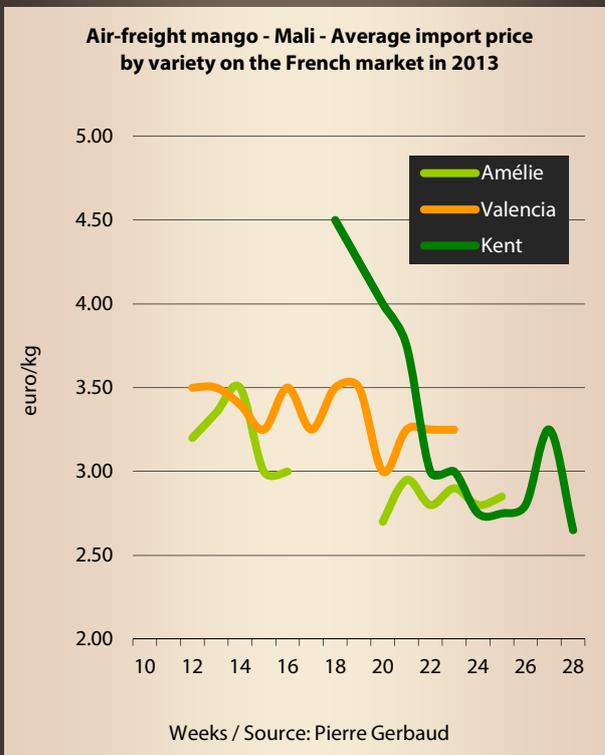
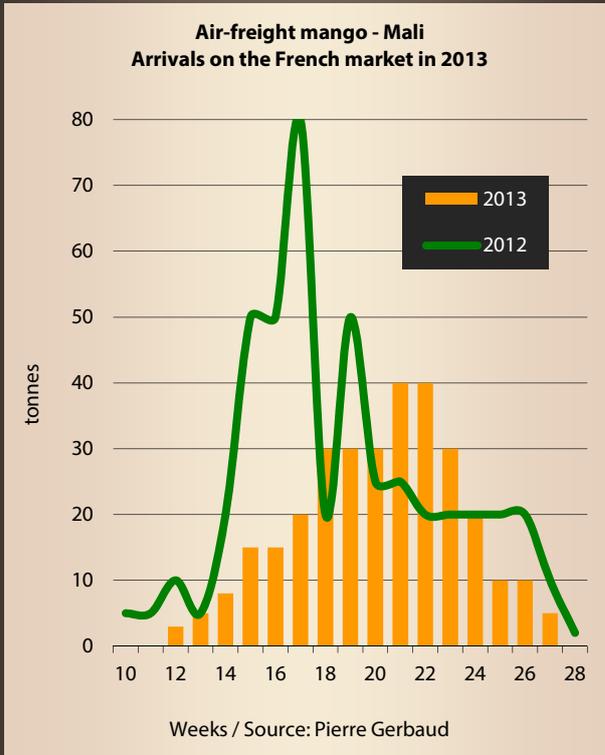
In its neighbour's wake



2013 marked a new performance high by Mali in the international mango trade. The season conditions described above also benefitted this landlocked source, which is positioned behind its Ivorian neighbour. With exports of nearly 5 000 tonnes, Mali consolidated its supplementary position in the West African region. Definitely less exposed to climate vagaries, this country's season extends over a longer period than Côte d'Ivoire, but remains dependent on the capacity limitations of air freight and the logistical corridors via Abidjan and Dakar for sea freight. The great distance between the packing zones and the port infrastructures is reflected in the higher delivery costs.

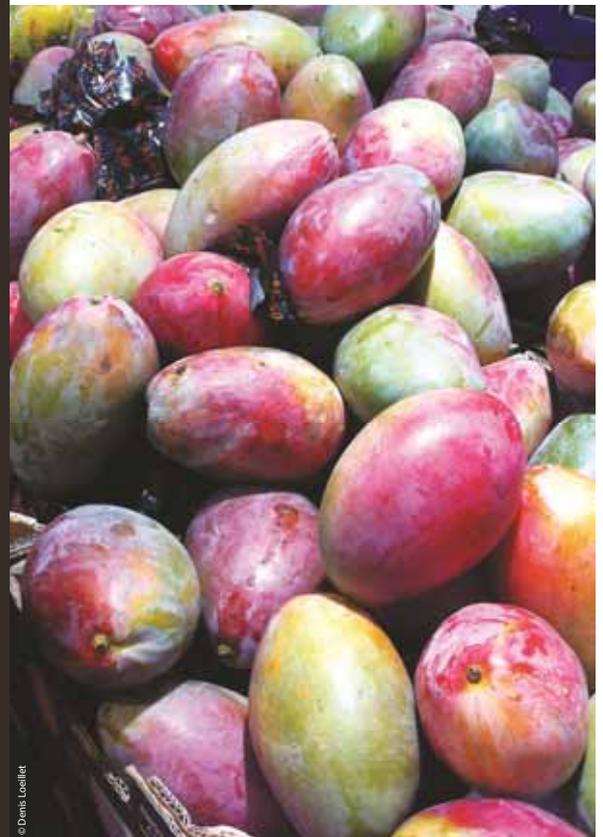
Mali began its export season shipments of Amélie and Valencia from mid-March, providing varietal diversification from the omnipresent Peruvian Kent. Slightly cheaper than the competition, these mangoes nonetheless sold steadily at fairly strong prices: 3.50 euros/kg on average for Amélie at the beginning of the season, a relatively rare level for this variety. In April and May, their rate dipped slightly below 3.00 euros/kg, a more usual level. Valencia saw a more level trend from the beginning to the end of the season, between 3.00 and 3.50 euros/kg, also taking advantage of the volume shortfall in April. Early May saw the beginning of Kent exports, with prices of more than 4.00 euros/kg, which rapidly waned under the effect of the growth in volumes and the strong presence of Ivorian produce. They stabilised in late May at around 2.50-3.00 euros/kg, until the end of the season in mid-July, without a significant recovery due to competition from Mexico and Senegal, and weakening of the shipment quality.

The sea-freight season began at the same time as the Ivorian season, in early May. Again, under pressure from big tonnages from Côte d'Ivoire, Malian mangoes sold for less as the month went on. While the first batches were sold at around 7.00-8.00 euros/box, they were trading at around 5.00 euros/box at the end of the month. These prices lasted until early July, and then became more uncertain, at between 4.00 and 5.00 euros/box, given the growth of the sources on the market (Senegal, Mexico, Israel), but also the qualitative deterioration of the fruits. Exclusively comprising Kent until early June, shipments from Mali were enhanced by Keitt, which came later and ensured supply continuity.



Malian fruits were distributed on the French market, but also in Belgium, Germany and Holland. This diversification of destinations scaled back the Ivorian competition. Hence opening up to various markets and the extension of the season are probably Mali's assets. Like Côte d'Ivoire, it is highly exposed to parasite pressures. There were 21 interceptions due to the presence of fruit fly larvae in 2013, which in proportion to the tonnages shipped, makes Mali the country most affected by this recurrent problem. The scale of the seizures highlights the lack of resources implemented, both by the operators and the public authorities, to effectively manage this phytosanitary handicap characteristic of the entire West African mango plantation area.

The recent construction of refrigerated infrastructures in Sikasso, a major mango production region, should ensure in future better quality control of fruits intended for sea-freight export, with pre-refrigeration before transfer into containers guaranteeing conservation of the produce. These facilities, supplementing those already in place in Bamako, provide Mali with up-to-date resources likely to improve the quality level of its exports.



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Burkina Faso A slight rise

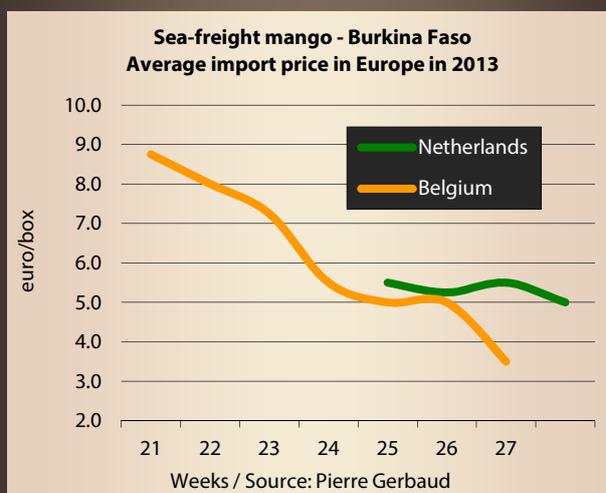
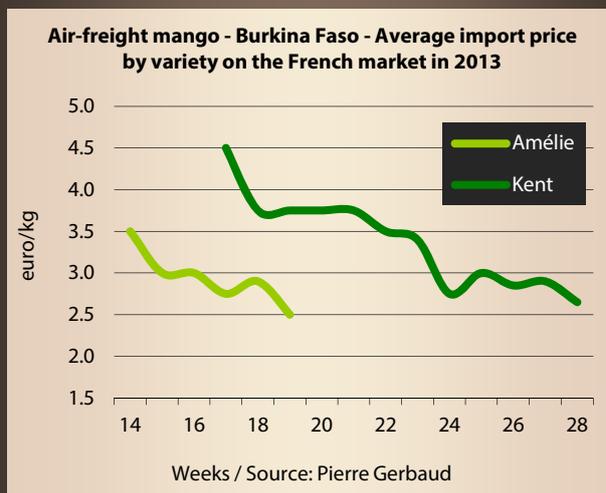
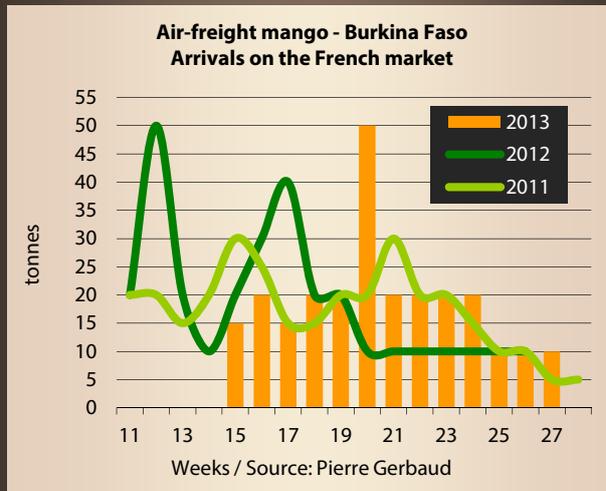
Traditionally exporting around 2 000 t, in 2013 Burkina Faso shipped nearly 3 000 t. With a more condensed season than Mali, it began in April with some Amélie batches sold at prices falling from 3.50 to 2.50 euros/kg until May. The Kent flow took over bit by bit from late April, and continued until the second week of July. These products were subjected to competition from other West African sources, and were initially sold at around 4.00 euros/kg, dipping thereafter until the end of the season, down to 2.50-3.00 euros/kg.

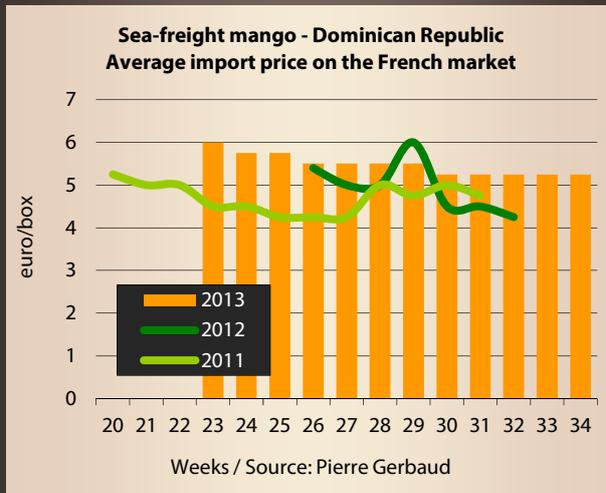
The sea-freight season was mainly aimed at Belgium and the Netherlands, and stretched from mid-May to late June. Selling well at the beginning of the season (7.50-8.50 euros/box), these mangoes saw their rates dip in June to around 5.00 euros/box. Burkina Faso appears to be a top-up source, with limited export capacities in view of its production potential. Some of its mangoes pass via Côte d'Ivoire, whose logistical infrastructures facilitate exports.

Dominican Republic In the big league?

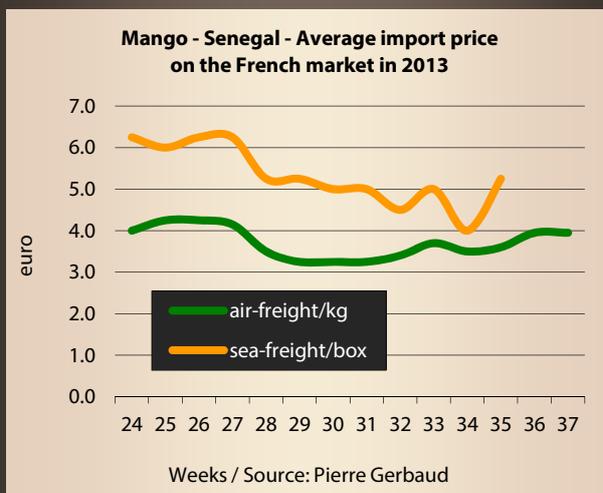
Exports from the Dominican Republic have been rising for 5 to 6 years. Previously peaking at around 4 000 t, they provided a top-up for the European market. But shipments picked up the tempo in 2011 and 2012, with 6 000 to 6 500 t. In 2013, another step was taken with more than 9 600 t, propelling the source into the top 10 mango suppliers to the European market. Primarily comprising Keitt, Dominican exports are staggered from June to August, thereby joining the group of Mexico, Senegal and Israel, the market suppliers during the summer period. The growth in volumes has been accompanied by a significantly extended season, though it was restricted to July and early August in 2012. Aimed primarily at the supermarket sector, Dominican mangoes sold steadily for prices dipping slightly from 6.00 to 5.00 euros/box. This source also sometimes ships some air-freight batches, when the market has a Keitt and also Kent shortfall, in limited quantities.

Dominican exports remain under close phytosanitary monitoring from the European Union. Indeed, 48 batches were intercepted in 2013





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because of the presence of fruit fly larvae and other pests. The parasite pressure was particularly great, raising the country to the source with the second most EU interceptions. In addition to the economic damage caused by these interceptions, the suspicion regarding Dominican mangoes causes plenty of disruption to imports, with frequent shipment delays undermining the sales fluidity of the fruits.

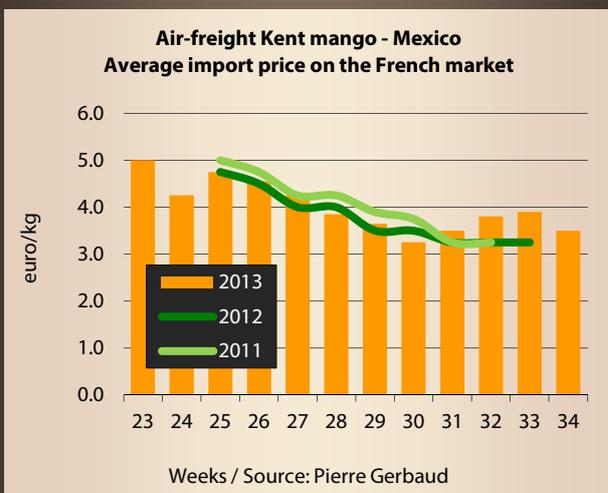
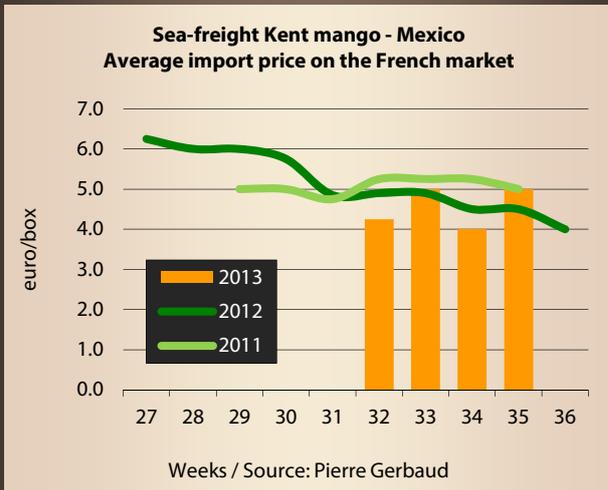
Senegal A record year

With 8 300 t of mango exports to Europe in 2013, Senegal has been beating its records since it started up in the 1990s. The previous biggest export volume amounted to approximately 6 000 t (2008, 2009 and 2012). This level seemed to be a sort of ceiling, equating to the country's potential (excluding exports to other destinations, representing approximately 3 000 t). It has now been exceeded, which would seem to point to an increase in the potential of this source active on the European markets in summer. However, we should wait for this rise to be confirmed over the forthcoming seasons.

Senegalese exports in 2013 were earlier, starting up in June and above all growing rapidly. Limited to around 500 tonnes in June in previous years, they amounted to nearly 2 000 t in 2013. They peaked in July with more than 4 000 t, then shrank in August to around 2 000 t, and were marginal in September. The decrease in volumes in August can be explained in particular by the increase in the risk of development of quality problems (fungal attacks) due to the precipitation affecting the production zones. This risk became a reality, forcing purchasers to sort batches on the market. Conversely, produce of satisfactory quality was sold at fairly strong rates during this period, due to a Kent shortfall on the European market. The small presence of Brazil and moderate presence of Israel at this time provided Senegal with favourable market conditions. In June, the Senegalese air-freight mango rate held up above 4.00 euros/kg thanks to the dip in shipments from the other West African sources arriving at the end of the season. Senegalese produce also enjoyed a novelty effect over the sources already in place for several months. In July, prices dipped with the increase in shipments, on a market where demand was withering due to the summer holidays. Sea-freight mango prices followed the same overall trend for the same



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reasons. Subject to high parasite pressures, Senegalese mangoes too were the object of interceptions upon entry into the EU because of fruit fly larvae.

The summer slot seems to have been expanding for the past few years with Senegal's new performances, but also with the return of Mexico, which had abandoned the European market after several poor seasons. The variation in Israeli volumes also plays an important role at this time of year, with its wider varietal range. Though demand fades at this time of year, it does not disappear, which seems to mean that sources with Kent in particular can establish increasingly substantial flows.

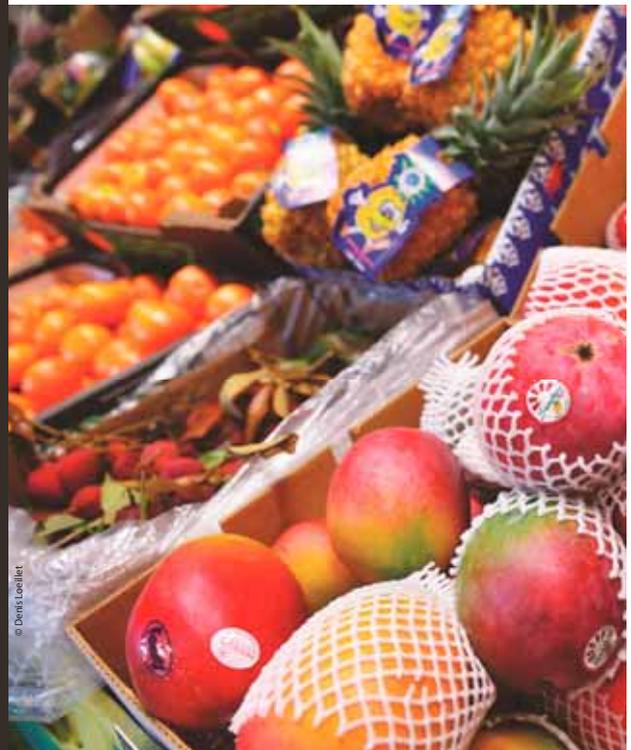
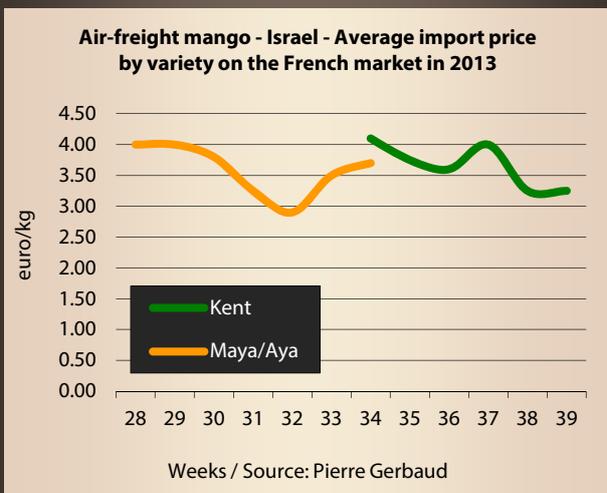
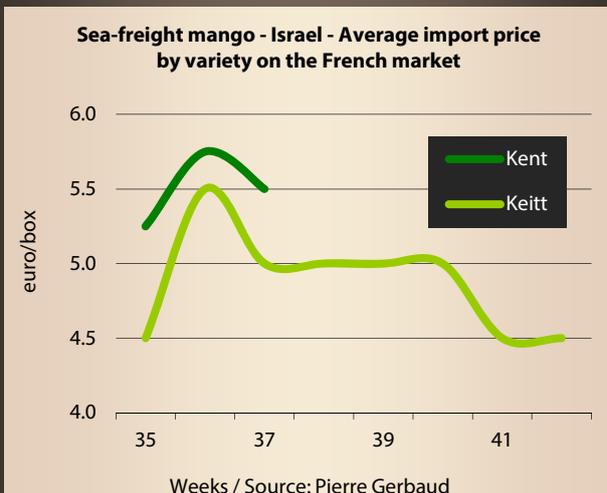
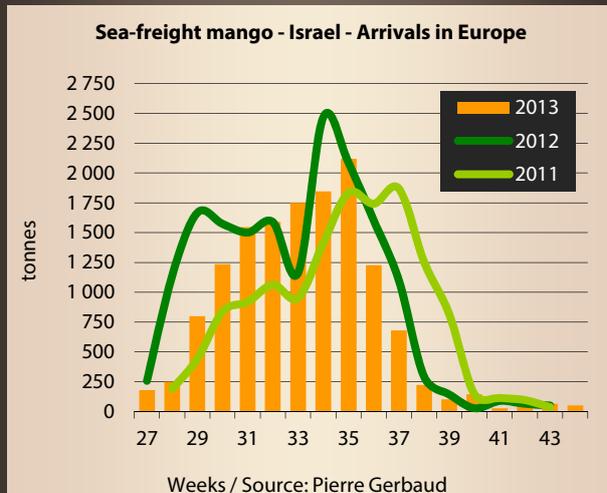
Mexico Another downturn

Mexico has gradually established itself on the European market over the past few years, with supplementary volumes during the summer period. It provides a Kent supply at the same time as Senegal (June-August) - at a time of year when this variety has low availability - between the end of the West African seasons, primarily comprising Keitt, and the beginning of the Israeli season. We cannot avoid observing the downturn from this source since its export peak in 2011, with more than 5 000 t. In 2013, Mexico could only make nearly 2 950 t of shipments, confirming the fall observed in 2012 (4 500 t). Despite aiming to start exporting earlier, Mexico began its season as in 2012, in the second half of June, because of the immaturity of its fruits before this date. It was air-freight shipments which dominated this season until late August. The Mexican supply proved to be of fairly average quality, with great disparities in fruit coloration and maturity on a limited market. Above 4.50 euros/kg at the beginning of the season, rates dipped to an average of 3.25 euros/kg in late July. Thereafter they did rise, though without reaching 4.00 euros/kg, until the end of the season, given the volume shortfall in late August, and in spite of a qualitative deterioration of the produce. The sea-freight season was packed into August, with unstable prices fluctuating between 4.00 and 5.00 euros/box. So it was a small-scale European season for Mexico, which is the world's leading mango exporter but more focused on the United States, a closer market which is often more dynamic and less uncertain.

Israel A concentrated and smaller-scale season

Israeli exports to Europe were down slightly in 2013, with approximately 11 000 t, but the source is still one of the biggest suppliers to the European Union. With slightly later exports than Mexico and Senegal, it provides a large part of the summer supply until September-October, i.e. until Brazilian exports pick up and the Spanish season starts.

Like last season, the first air-freight shipments were received in Europe in mid-July, taking over from the West African sources, whose supply was running out. Mexico and Senegal, already in place on the market, were shipping Kent, which was selling steadily. The specific Israeli varieties, Maya and Aya, made up most of its supply. Their rates rapidly deteriorated, down from 4.00 to 3.00 euros/kg for merchandise often lacking in coloration. Some Kasturi and Shelly batches supplemented the supply in the second half of July, selling for below 3.00 euros/kg, and barely attracting any interest from purchasers. In the first half of August, Maya and Aya saw their rates recover, with the Mexican and Senegalese competition of haphazard quality. These varieties were then replaced by Kent, which were sold until late September at gradually dropping rates.





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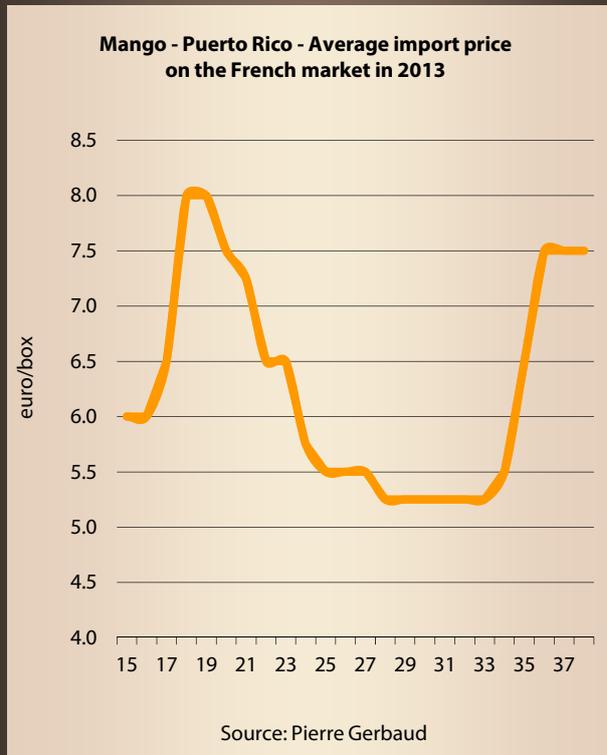
Nature at it's best



Mango | Avocado | Sunrise | Medjol Dates | Orri | Sharon

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The sea-freight season started in early July, and grew rapidly until late August. Israeli Tommy Atkins exports, as well as Lily and Shelly, to the North European markets (United Kingdom, Netherlands) sold steadily. It was only in August that there were Israeli mangoes on the French market, with the Kent variety and then Keitt. In late August, shipments waned rapidly, but persisted in small quantities until October. These fruits, most often exhibiting green coloration but satisfactory maturity, sold steadily at between 6.50 and 7.50 euros/box. The lack of bright coloration of the fruits made sales more difficult, but the absence of large volumes at this time made for fluid movements.

This season will be remembered for confirmation of the concentration of the Israeli supply in July-August, and for a smaller supply to the European market in September-October, as was generally the case a few years ago.

Puerto Rico An auspicious season

Without making a big fuss, Puerto Rico has slowly made itself a major supplier to the European market. Fluctuating between 4 000 and 8 000 t, depending on the year, its exports to the EU saw a steep rise in 2013, with 12 000 t. The particularity of this source lies in the duration of its season, which in 2013 extended from April to September, putting it second behind Brazil, which remains the only country able to export mangoes year round. This enabled it to take advantage of the supply interruptions to the European market in April, with its Keitt priced at between 7.00 and 8.00 euros/box. This then dipped to between 5.00 and 5.50 euros/box until the second half of August, before rising to around 7.50 euros/box in September, during the second major supply interruption of the year. The United Kingdom was the main recipient of this produce, which was less common on the Continental European markets.

Spain Sitting pretty

After its record 2012 season, when Spain exported around 14 000 t of mangoes, the 2013 season was set to be considerably less plentiful. The production conditions, after a harsh winter and a more chaotic vegetative period, proved much more limited, down by an estimated 50 to 60 % from the previous year. The contrast

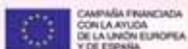


*the mango
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The spanish specialist on subtropical fruit

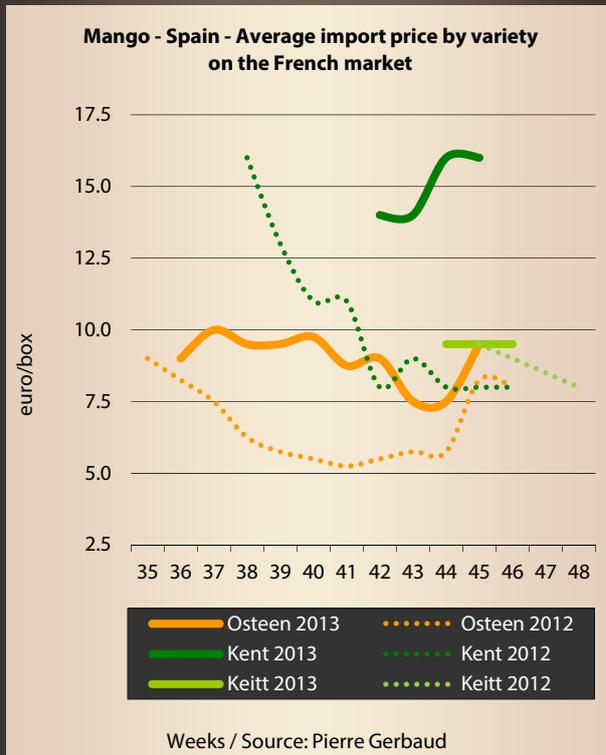
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between these last two years is remarkable in more than one respect, particularly the difference in volumes and duration. In 2012, the Spanish flow had been uninterrupted from late August to late November, whereas the 2013 season was shorter, covering September and October, and only protruding hesitantly into November.

While during the two seasons in question Osteen made up most of the Spanish supply, the other varieties traditionally available (Tommy Atkins, Kent, Keitt, and Irwin) were uncommon in 2013; they had provided a more substantial share in 2012. With their production less extensive, and probably more delicate, Kent and Keitt were more heavily affected by the changeable weather conditions of 2013, limiting not only the quantities exportable, but also the duration of the market season.

Thanks to its scale, the 2012 season favoured widespread distribution of Spanish mangoes to the various European markets, with more attractive prices than in previous years. Hence certain markets, previously reticent due to the prices charged, opened up more to these products. In 2013, the situation was completely different, with a more concentrated Israeli season and a particularly late start from Brazil. Thus, in spite of the limited quantities put on the market by Spain, purchaser demand was very lively despite the high prices. Varying from 5.00 to 9.00 euros/box in 2012, the Osteen rate remained considerably stronger in 2013, at around 9.00 euros/box over most of the season. Kent and Keitt, with restricted shipment quantities, sold at around 15.00 and 9.50 euros/box respectively.

An essential source in autumn 2012 thanks to its large volumes, in 2013 Spain became the only possible alternative to at least partially compensate for the general shortfall to the European market ■

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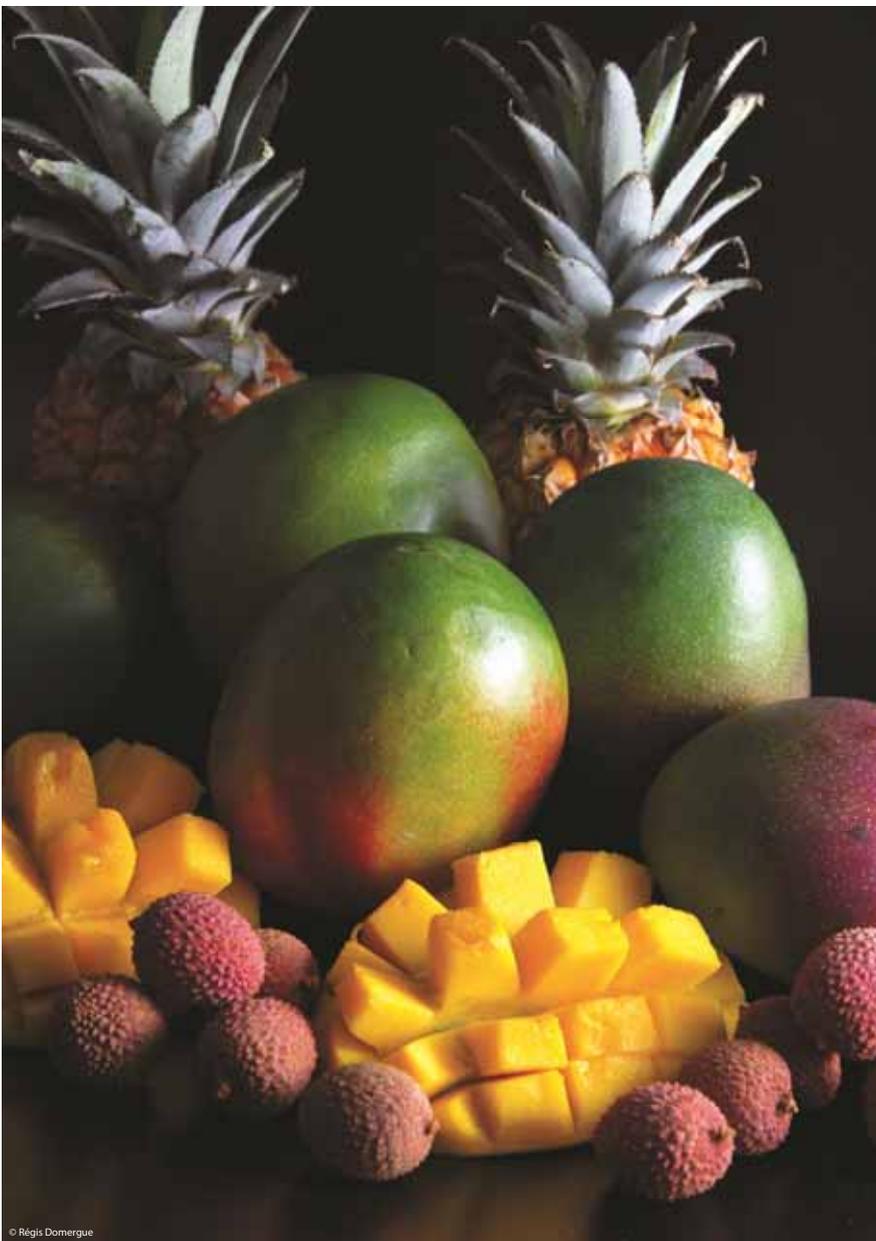


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European mango market Review of 2013 by week

Supply in chaos



The end-of-year intersection of the Brazilian and Peruvian seasons, with its accompanying fall in rates, seems to be turning back the clock a few years for the European mango supply profile. Conversely, the quantitative shortfalls in spring and autumn have widened. All these interference factors are disrupting sales of this produce.

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Weeks 1 to 6 The usual post-holiday depression

The first week of 2013 carried on in the same vein as the previous year, with much more marked deterioration of the market conditions. The dip in demand after the end-of-year holidays came at a time of high supply, precipitating the fall in rates. In addition, small sizes dominated the incoming shipments, though demand was more focused on the medium to large sizes. Most of the operators opted for the Peruvian source, to the detriment of Brazilian produce. The post-holiday depression seemed to be especially deep since prices had previously held up, more or less artificially, at particularly high levels. The cold spell and snowfall which hit Northern Europe in January did not help the market fluidity or consumption of tropical fruits.

Weeks 7 to 10 Mango not the Queen of the Carnival

In mid-February, the improvement was much more significant. Better demand and a more balanced supply in terms of size range helped this positive development. Yet demand quickly shrank, leading to a short-term stagnation. The start of the winter holidays and Carnival period in several European countries intensified this trend. Furthermore, shipments from Peru primarily comprised large-sized fruits, leading to a change in price-setting policy: the rate for small sizes, now scarcer, tended to strengthen, while the rate for larger sizes took a downturn.

The air-freight mango market, with a supply shortage because of the change of harvest zone, strengthened considerably.

Weeks 11 to 15 A stabilising market

In early March, the supply was still fairly stable, with 180 to 200 containers per week, helping restore relative balance to the sale prices. The reduction of volumes shipped from Peru even slightly revitalised rates. Hence this slight decrease in

the supply, at a time when demand was picking up in the run-up to the Easter holidays, caused an under-supply, enabling rates to remain high and strong, and even some temporary increases and speculations.

Weeks 16 to 22 Unprecedented under-supply

In mid-April, incoming shipments fell below 100 containers per week (not to mention shipments from Costa Rica and Puerto Rico), marking a phase of under-supply to the European market, in a context of stable demand. End-of-season Peruvian shipments decreased gradually, and were partially compensated for by Brazilian, Costa Rican and Puerto Rican shipments. The delay to the West African season, above all in Côte d'Ivoire, created a period of shortfall, helping maintain the sea-freight mango rate at a high stable level. This situation, which had not been observed for several seasons, led to a general increase in rates and to speculation effects pushing certain prices to exceptional levels. In early May, the switch from the Peruvian season to the West African season was going slowly, causing a big dip in volumes. This under-supply trend was mainly due to the scarcity of West African shipments, as well as the shortfall from Brazil (- 30 to - 50 % from the same period of 2012).

Weeks 23 to 34 Traditional transition period

In late May, the momentum of the European mango market was running out of steam. The quantities available remained limited, but demand, particularly from the supermarket sector, dipped significantly due to the persistent high prices, unfavourable weather conditions and the larger-scale arrival of seasonal fruits. On top of this there was the more haphazard quality of Ivorian fruits - the dominant market source at the time. In June, interest in the mango fell in proportion to the rush for the long-awaited European-produced fruits. In addition, the mangoes available were of less reliable quality, with



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their development often proving dissatisfactory (fungal attacks, withering).

The European market then entered a transition phase with the end of incoming shipments from Côte d'Ivoire, though Mali and Burkina Faso kept up limited volumes. Senegal and Mexico then started their export season to a market in a downward phase.

From mid-July, faced with declining demand, the supply started to diverge in terms of source, varieties and quality. Produce was imported from Brazil (Tommy Atkins, Keitt and Palmer), Puerto Rico and the Dominican Republic (Keitt), Senegal and Mexico (Kent), as well as the final batches from Mali (Kent and Keitt). The incoming shipments remained restrained and covered requirements, particularly those of the supermarket sector.

Weeks 35 to 43 Back to under-supply

Late August marked a turning point in the market development. The combination of demand picking up and a distinct under-supply roused the market from the relatively flat period in which it had been stagnating for several weeks. The price of mangoes, without distinction between sources, saw an abrupt and considerable increase. The trend was confirmed in September. The shortfall of volumes, due to the scarcity of shipments from Israel and the limited imports from Brazil (which would boost the North American market until the end of October), intensified the upward price

trend. The second supply source to the European market was Spain, mainly with the Osteen variety. Its cost, relatively high compared to the competition, limited its distribution to primarily the supermarket sector.

Weeks 44 to 48 Downturn

At the end of October, Brazilian exports were on the rise, and diversifying with the first Kents. Shipments were mainly aimed at the European markets, gradually shifting away from the North American markets. The price trend, previously having maintained a high level due to a long period of supply slightly below the natural absorption capacities of the market, took a downturn. Brazil remained the only source providing substantial volumes. In mid-November, the rates saw another considerable deterioration. The increase and regularity of the Brazilian shipments satisfied demand, logically causing a dip in prices, which varied between the European markets. Nonetheless, they maintained a decent level with respect to the quantities received, and well above those received at the same time the previous year, for five weeks. Brazilian imports primarily comprised large sizes, more difficult to mark up, especially in the supermarket sector.

Weeks 49 to 52 Difficult end to the year

At the end of November, the market conditions deteriorated steeply right across Europe, with more or less marked price falls. The substantial increase in Brazilian shipments, which built up for three weeks, created an oversupply situation in a context of sluggish demand, which did not pick up in the run-up to the end-of-year holidays. In December, the market was actually in a slump, with a marked oversupply maintaining high pressure on rates. The quantities received were well in excess of the European market's absorption capacities. Demand remained modest, and the approaching holidays did not seem to restore any interest from buyers. The difference between supply and demand led to the formation of stocks, which only swelled with time ■

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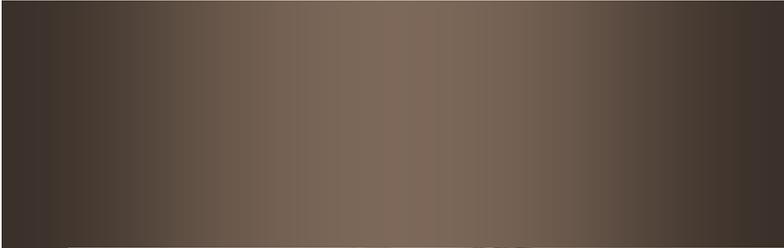
Mango trade Ready-to-eat segment

Another step in the quest for quality

Providing consumers with ready-to-eat fruit remains a major concern of the mango industry operators with the aim of increasing sales and added value. This issue, hitherto often tackled with artisanal solutions, is progressing year on year. Use of increasingly sophisticated new techniques is likely to enable the sector's development objectives to be met.



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packaging, or in a dedicated package (boxes, trays, etc.). This imperfect system nonetheless met an expectation, and did achieve some success. Yet it primarily concerned the air-freight mango, which de facto limited its expansion.

A similar method applied to the sea-freight mango has been developed bit by bit. It consists in subjecting fruits to high temperatures to precipitate their maturation. While this process has been partially satisfactory, it has all the same remained incomplete and uncertain. Since the mango develops heterogeneously, the ripening techniques applied have led to results just as diverse. The fruit sources, the time of the season, the variety, etc., are all dissonant parameters getting in the way of ensuring a quality level appreciated by consumers.

The installation of machines able to estimate the degree of maturity using a non-destructive penetrometric index has improved the quest for fruit quality. Initially developed for the avocado, this technique

was quickly applied to the mango, thereby moving on to a new stage. However, while it has meant progress, it has nonetheless failed to eliminate the problems of heterogeneity of the mango maturation processes.

In its last mango dossier, **Fruitrop** recalled the processes set up by certain importers to provide distributors with a ready-to-eat mango. The heterogeneous maturity of the mangoes available to consumers in the supermarket sector is a real impediment to sales growth. Who has never experienced this problem at the supermarket shelves? Mango enthusiasts generally employ a "tactile" technique to select the fruit to their satisfaction. Which can lead to disappointment for those following, when we bear in mind the numbers visiting the fruits and vegetables section of big supermarkets, and the lack of care by purchasers with the produce!

For the past few years, the trade has been trying to harness added-value uses, in order to increase consumption. This is not about imposing an intangible concept of quality, which in any case would still be subjective, but about using more objective methods to work toward a fruit state bringing together optimum characteristics in terms of customer satisfaction.

Hitherto, the most widespread method was artisanal, consisting of selecting fruits "on the turn" and repacking them either in their original

A new process

There is now a new triggering process aiming to enhance the previous ones, based on the results obtained and a long trial procedure. This technology, developed in the United Kingdom, the Netherlands and Belgium, is now entering the French market. SIIM is initiating this approach by investing in an innovative process and movement. Based on the concept of approaching not a stage of maturity, which is always subjective, but rather a general state of fruit fit to ensure customer satisfaction and lead to repeat purchases, this recent system is based on a combination of several objective quality criteria. Four successive phases are combined to make a reference index which can adapt to demand by the distributors. The merchandise received can be subjected in advance to a tem-





perature aimed at accelerating maturation. It is then exposed to tests with a machine able to:

- detect internal defects using infrared wave emission;
- determine the brix degree non-destructively;
- determine a penetrometric index non-destructively;
- analyse the fruit structure using resonance.

Since the fruits are transported on roller conveyors enabling them to be turned over, the measurements can be taken several times on each face. Processing of the various measurements ultimately provides an index ensuring homogeneity of the batch in accordance with the purchaser's desired criteria. At the end of the line, the fruits are classified by index, and repacked.

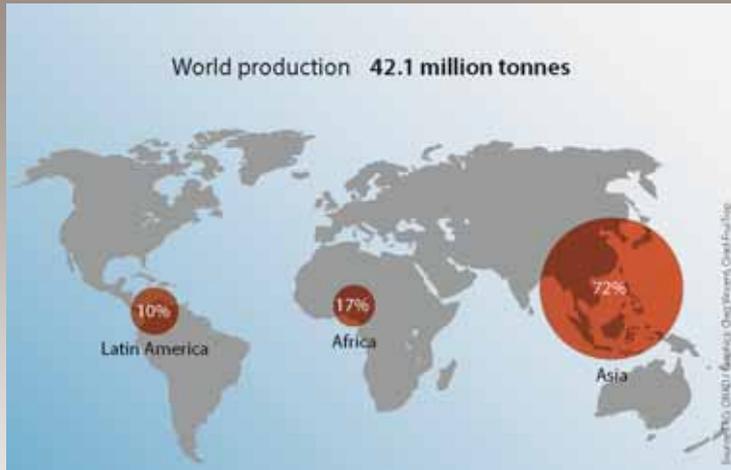
To be efficient, this technique also needs the batches received to be as homogeneous as possible. For this reason it entails a strong commitment from the upstream sector. Production and harvest supervision, as well as logistical management, are stepped up in order to minimise rejects.

By reducing the number of non-repeat purchases by providing a ready-to-eat fruit, backers of this technique are aiming for customer satisfaction and increased supermarket sales, as is the case in countries that have already adopted it. The trial's historical results are enabling the objective measurements to be adapted to the various sources and various trade periods. This currently marginal process needs to prove itself to distributors and consumers in order to initiate the virtuous circle of repeat purchasing ■

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MANGO — Production (2012)



| Mango — The 10 leading producer countries | |
|---|------|
| million tonnes | 2012 |
| India | 15.3 |
| China | 4.4 |
| Thailand | 2.7 |
| Indonesia | 2.4 |
| Pakistan | 2.0 |
| Mexico | 1.8 |
| Brazil | 1.2 |
| Bangladesh | 0.9 |
| Nigeria | 0.9 |
| Egypt | 0.8 |

Source: FAO

MANGO — Imports (2012)



| Mango — The 6 leading importing countries | |
|---|---------|
| tonnes | 2012 |
| United States | 377 408 |
| China | 231 938 |
| Netherlands | 141 662 |
| Saudi Arabia | 70 390 |
| Malaysia | 60 637 |
| Germany | 52 138 |

Sources: national Customs, COMTRADE

MANGO — Exports (2012)



| Mango — The 6 leading exporting countries | |
|---|---------|
| tonnes | 2012 |
| Mexico | 287 771 |
| India | 229 192 |
| Thailand | 152 285 |
| Brazil | 126 568 |
| Peru | 123 863 |
| Pakistan | 105 130 |

Source: COMTRADE

| USA — Imports — Main supplier countries | | | | | | |
|---|----------------|----------------|----------------|----------------|----------------|----------------|
| tonnes | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
| Mexico | 182 754 | 186 807 | 221 945 | 241 468 | 251 321 | 285 679 |
| Ecuador | 24 682 | 35 304 | 25 650 | 30 364 | 37 868 | 45 945 |
| Peru | 38 323 | 17 316 | 32 175 | 45 223 | 26 974 | 41 277 |
| Brazil | 25 774 | 23 193 | 24 407 | 24 810 | 24 215 | 23 924 |
| Guatemala | 14 919 | 14 706 | 12 679 | 17 875 | 16 986 | 16 948 |
| Haiti | 8 274 | 9 014 | 6 502 | 9 241 | 8 045 | 10 262 |
| Philippines | 3 268 | 2 996 | 2 815 | 3 989 | 2 929 | 2 411 |
| Others | 7 964 | 6 318 | 5 922 | 6 833 | 9 070 | 9 639 |
| Total | 305 958 | 295 653 | 332 095 | 379 803 | 377 408 | 436 085 |

Source: US Customs

| Canada — Imports — Main supplier countries | | | | | | |
|--|---------------|---------------|---------------|---------------|---------------|---------------|
| tonnes | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
| Mexico | 28 643 | 25 768 | 27 843 | 29 501 | 35 923 | 35 173 |
| Brazil | 5 182 | 4 722 | 3 563 | 3 529 | 4 310 | 4 850 |
| Peru | 4 808 | 4 766 | 1 627 | 4 704 | 6 195 | 4 346 |
| Ecuador | 3 254 | 3 236 | 3 445 | 3 568 | 4 083 | 3 709 |
| Total | 46 736 | 42 459 | 41 544 | 46 649 | 56 375 | 54 291 |

Source: COMTRADE

| South America — Imports — Main markets | | | | | | |
|--|--------------|---------------|---------------|---------------|---------------|---------------|
| tonnes | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
| Colombia | 2 722 | 5 078 | 7 277 | 9 675 | 13 132 | 13 132 |
| Chile | 453 | 690 | 766 | 2 344 | 6 567 | 3 421 |
| Mexico | 2 161 | 2 007 | 2 982 | 2 300 | 1 976 | 2 921 |
| Honduras | 973 | 843 | 970 | 1 000 | 1 000 | 2 565 |
| Salvador | 930 | 987 | 1 582 | 665 | 569 | 1 966 |
| Argentina | 517 | 729 | 873 | 1 024 | 1 353 | 1 408 |
| Costa Rica | 64 | 190 | 110 | 406 | 391 | 673 |
| Panama | 74 | 111 | 137 | 173 | 374 | 400 |
| Bolivia | 41 | 84 | 77 | 105 | 79 | 132 |
| Guatemala | 219 | 147 | 155 | 201 | 228 | 124 |
| Paraguay | 29 | 142 | 50 | 112 | 128 | 117 |
| Ecuador | 150 | 155 | 4 | 784 | 317 | 28 |
| Total | 8 334 | 11 163 | 14 982 | 18 787 | 26 113 | 26 887 |

Italics: estimate / Source: COMTRADE

| EU-27 — Imports — Main supplier countries | | | | | | |
|---|----------------|----------------|----------------|----------------|----------------|----------------|
| tonnes | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
| Extra-EU + Spain | 362 942 | 311 721 | 370 475 | 401 033 | 386 082 | 397 012 |
| Extra-EU | 231 628 | 198 878 | 224 995 | 252 521 | 232 267 | 260 686 |
| Brazil | 96 870 | 80 670 | 92 256 | 91 490 | 91 093 | 89 884 |
| Peru | 50 756 | 36 270 | 60 386 | 72 350 | 53 323 | 68 689 |
| Côte d'Ivoire | 11 250 | 11 680 | 11 323 | 10 177 | 15 245 | 16 553 |
| Pakistan | 12 941 | 12 916 | 10 596 | 11 745 | 11 272 | 12 295 |
| USA | 7 516 | 5 535 | 4 744 | 8 475 | 7 954 | 12 009 |
| Israel | 12 743 | 12 998 | 10 700 | 14 016 | 12 492 | 11 011 |
| Dom. Rep. | 4 307 | 4 186 | 4 303 | 6 357 | 6 652 | 9 636 |
| Senegal | 6 034 | 6 240 | 2 758 | 5 341 | 6 197 | 8 267 |
| India | 2 577 | 2 472 | 3 201 | 3 016 | 3 782 | 6 037 |
| Mali | 4 902 | 3 480 | 3 672 | 1 795 | 3 816 | 4 802 |
| Costa Rica | 5 360 | 5 685 | 3 429 | 6 873 | 3 860 | 4 027 |
| Ecuador | 2 313 | 2 011 | 1 406 | 1 523 | 2 071 | 3 311 |
| Mexico | 1 674 | 1 596 | 4 938 | 5 255 | 4 512 | 2 954 |
| Burkina Faso | 2 406 | 1 988 | 3 302 | 2 129 | 2 126 | 2 933 |
| Ghana | 1 098 | 880 | 428 | 227 | 847 | 1 627 |
| Thailand | 1 055 | 1 021 | 1 178 | 1 101 | 1 061 | 990 |
| Gambia | 696 | 1 246 | 776 | 1 503 | 981 | 876 |
| Guatemala | 634 | 1 587 | 845 | 1 033 | 24 | 597 |
| South Africa | 1 780 | 1 876 | 1 040 | 507 | 681 | 297 |
| Nicaragua | 249 | 933 | 435 | 947 | 824 | 211 |
| Venezuela | 1 286 | 1 008 | 729 | 332 | 141 | 182 |
| Intra-EU | 131 314 | 112 843 | 145 480 | 148 512 | 153 816 | 136 326 |
| Netherlands | 81 516 | 64 279 | 80 214 | 95 239 | 84 438 | 77 946 |
| Spain | 12 628 | 14 918 | 19 485 | 23 228 | 31 502 | 21 654 |
| Germany | 10 031 | 7 605 | 9 299 | 9 807 | 11 492 | 11 104 |
| Belgium | 7 683 | 6 776 | 7 898 | 6 950 | 9 445 | 9 482 |
| France | 14 419 | 10 162 | 21 006 | 7 581 | 7 611 | 7 599 |
| UK | 804 | 1 588 | 1 394 | 1 535 | 1 924 | 2 287 |
| Italy | 1 034 | 5 139 | 2 780 | 569 | 669 | 399 |

Source: EUROSTAT

| Other Western European countries — Imports | | | | | | |
|--|--------------|---------------|---------------|---------------|---------------|---------------|
| tonnes | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
| Switzerland | 5 933 | 7 039 | 7 154 | 8 849 | 9 730 | 9 905 |
| Norway | 3 593 | 4 174 | 3 264 | 4 249 | 4 657 | 4 608 |
| Iceland | 262 | 295 | 253 | 300 | 344 | 393 |
| Total | 9 787 | 11 508 | 10 671 | 13 398 | 14 731 | 14 906 |

Source: COMTRADE

| Russia — Imports — Main supplier countries | | | | | | |
|--|--------------|--------------|--------------|--------------|--------------|--------------|
| tonnes | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
| Brazil | 3 444 | 4 388 | 3 201 | 4 893 | 4 967 | 5 442 |
| Peru | 115 | 546 | 152 | 922 | 876 | 665 |
| Thailand | 267 | 332 | 295 | 393 | 452 | 559 |
| China | 235 | 67 | 200 | 437 | 418 | 435 |
| Ecuador | 137 | 319 | 195 | 415 | 254 | 87 |
| Total | 4 517 | 6 123 | 4 480 | 7 416 | 7 488 | 8 091 |

Source: COMTRADE

| Other Eastern European countries — Main markets | | | | | | |
|---|------------|------------|------------|------------|--------------|--------------|
| tonnes | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
| Ukraine | 584 | 681 | 400 | 534 | 694 | 774 |
| Croatia | 86 | 73 | 136 | 260 | 256 | 217 |
| Belarus | 70 | 87 | 88 | 106 | 114 | 148 |
| Total | 740 | 840 | 624 | 899 | 1 064 | 1 139 |

Source: COMTRADE

| Mediterranean — Imports — Main markets | | | | | | |
|--|--------------|--------------|--------------|--------------|--------------|---------------|
| tonnes | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
| Palestine | 21 | 14 | 4 | 2 318 | 3 735 | 4 000 |
| Jordan | 5 633 | 3 944 | 2 518 | 1 765 | 966 | 3 271 |
| Lebanon | 558 | 721 | 843 | 817 | 1 344 | 1 700 |
| Morocco | 482 | 715 | 1 174 | 993 | 1 000 | 1 027 |
| Turkey | 130 | 151 | 183 | 271 | 260 | 318 |
| Algeria | 52 | 94 | 97 | 130 | 209 | 233 |
| Total | 6 877 | 5 640 | 4 819 | 6 294 | 7 515 | 10 549 |

Source: COMTRADE

| Japan — Imports — Main supplier countries | | | | | | |
|---|---------------|---------------|---------------|---------------|--------------|--------------|
| tonnes | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
| Mexico | 5 260 | 5 050 | 3 974 | 3 446 | 3 828 | 3 569 |
| Philippines | 3 070 | 2 720 | 2 834 | 2 197 | 2 113 | 1 733 |
| Thailand | 1 482 | 1 407 | 1 520 | 1 514 | 1 773 | 1 309 |
| Taiwan | 851 | 990 | 995 | 1 155 | 834 | 805 |
| Peru | - | - | 60 | 958 | 339 | 548 |
| Brazil | 316 | 395 | 571 | 551 | 598 | 424 |
| USA | 285 | 286 | 277 | 172 | 178 | 109 |
| Australia | 233 | 187 | 124 | 38 | 57 | 62 |
| Total | 11 589 | 11 103 | 10 391 | 10 055 | 9 741 | 8 588 |

Source: Japanese Customs

| Other Asian countries — Imports — Main markets | | | | | | |
|--|----------------|----------------|----------------|----------------|----------------|----------------|
| tonnes | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
| China | 109 837 | 125 576 | 252 705 | 240 710 | 203 184 | 231 938 |
| Malaysia | 23 433 | 29 767 | 40 676 | 42 015 | 50 960 | 60 637 |
| Singapore | 19 406 | 18 415 | 21 485 | 18 232 | 20 920 | 22 716 |
| Nepal | - | - | 1 696 | 1 964 | 5 740 | 6 000 |
| Cambodia | 935 | 2 392 | 2 441 | 3 401 | 3 287 | 5 734 |
| Thailand | 753 | 156 | 257 | 69 | 1 311 | 3 602 |
| South Korea | 1 784 | 1 666 | 904 | 1 351 | 2 270 | 3 041 |
| Indonesia | 1 193 | 1 097 | 877 | 1 206 | 1 064 | 1 093 |
| Brunei | 500 | 500 | 500 | 500 | 500 | 658 |
| Bangladesh | 958 | 697 | 461 | 500 | 500 | 500 |
| Vietnam | 370 | 489 | 540 | 500 | 500 | 500 |
| Total | 159 170 | 180 755 | 322 542 | 310 449 | 290 234 | 336 419 |

Italics: estimate / Source: COMTRADE

| Oceania — Imports — Main markets | | | | | | |
|----------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|
| tonnes | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
| New Zealand | 2 706 | 2 496 | 1 742 | 1 993 | 2 614 | 2 488 |
| Australia | 973 | 843 | 969 | 665 | 1 206 | 1 271 |
| Total | 3 679 | 3 339 | 2 711 | 2 658 | 3 820 | 3 759 |

Source: COMTRADE

| Persian Gulf — Imports — Main markets | | | | | | |
|---------------------------------------|---------------|---------------|---------------|----------------|----------------|----------------|
| tonnes | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
| Saudi Arabia | 45 660 | 35 643 | 38 583 | 58 250 | 63 497 | 70 390 |
| Oman | 16 992 | 15 015 | 19 407 | 18 338 | 19 794 | 21 283 |
| Iran | 4 500 | 8 000 | 13 000 | 15 670 | 18 073 | 19 000 |
| Bahrain | 2 622 | 2 459 | 2 515 | 2 801 | 5 581 | 6 000 |
| Qatar | 3 448 | 2 756 | 3 500 | 4 184 | 4 500 | 4 500 |
| Kuwait | 482 | 715 | 1 174 | 1 200 | 1 200 | 1 200 |
| Un. Arab Em. | 517 | 729 | 873 | 900 | 1 000 | 1 000 |
| Total | 74 222 | 65 317 | 79 053 | 101 344 | 113 645 | 123 373 |

Italics: estimate / Source: COMTRADE

| Africa — Imports — Main markets | | | | | | |
|---------------------------------|--------------|--------------|---------------|---------------|---------------|---------------|
| tonnes | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
| Tanzania | 1 | 1 802 | 2 866 | 2 020 | 4 649 | 4 003 |
| Niger | 2 001 | 3 474 | 3 300 | 4 223 | 3 274 | 3 676 |
| Rwanda | 163 | 218 | 624 | 1 000 | 1 360 | 1 471 |
| Botswana | 1 082 | 1 531 | 1 230 | 1 956 | 1 369 | 1 451 |
| Uganda | 67 | 87 | 91 | 111 | 111 | 1 310 |
| Mauritania | 38 | 40 | 41 | 549 | 774 | 890 |
| Swaziland | 558 | 721 | 843 | 850 | 850 | 850 |
| Namibia | 544 | 826 | 568 | 600 | 461 | 420 |
| South Africa | 823 | 514 | 500 | 305 | 467 | 385 |
| Total | 5 277 | 9 213 | 10 063 | 11 613 | 13 314 | 14 456 |

Italics: estimate / Source: COMTRADE

Mango quality defects



Immaturity and spotting



Natural discoloration of the epidermis



Misshapen fruit



Scarred-over insect pricking



Mechanical wounds after picking



Mechanical wounds after picking



Stalk too long



Spotting on epidermis



Anthracnose type fungal infection



Fruitfly larvae



Sun scorching



Misshapen fruit



Discoloration caused by scales



Wounding with wind-caused rubbing



Postharvest sap burn



Postharvest soiling by sap



Stalk rot



Fungal infection



Overripeness



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

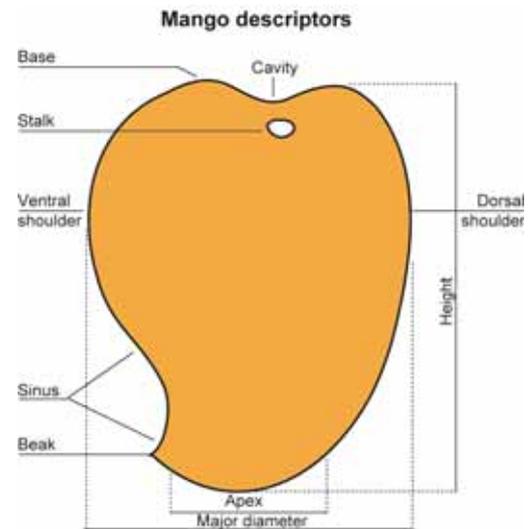


Photos © Pierre Gerbaud



The main mango varieties

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



After « Le manguiier » by F. de Laroussilhe, Maisonneuve and Larose

Requirements of mango

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

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

Tommy Atkins

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

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

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

Average weight: 450 to 710 g

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



Kent

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

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

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

Stone: 9% of total fruit weight.

Average weight: 600 to 750 g

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



Keitt

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

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

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

Stone: 7 to 8% of total fruit weight.

Average weight: 510 g to 2 kg

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



Osteen

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

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

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

Stone: long and flat.

Average weight: 500 to 800 g

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



Haden

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

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

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

Average weight: 510 to 680 g

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



Valencia Pride

Shape: elliptic. Rounded apex, large apical beak.

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

Flesh: deep yellow. Aromatic and practically fibreless.

Average weight: 600 to 900 g

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



Wholesale market prices in Europe

February 2014

| | | | | | EUROPEAN UNION — EURO | | | | |
|-------------------|-------|---|----------------|-----|-----------------------|---------|--------|---------|-------|
| | | | | | Germany | Belgium | France | Holland | UK |
| AVOCADO | Air | TROPICAL | BRAZIL | Box | | | 14.00 | 16.50 | |
| | | | DOMINICAN REP. | Box | | | 13.20 | | |
| | Sea | ARAD FUERTE HASS | ISRAEL | Box | | | | 7.25 | |
| | | | ISRAEL | Box | 5.50 | | | 6.75 | |
| | | | CHILE | Box | | 6.00 | 8.00 | 10.00 | |
| | | | COLOMBIA | Box | | | 8.05 | | |
| | | | ISRAEL | Box | 9.00 | | 8.00 | | |
| | | | KENYA | Box | | | 7.75 | | |
| | Truck | NOT DETERMINED PINKERTON HASS NOT DETERMINED | MOROCCO | Box | | | 8.58 | | |
| | | | DOMINICAN REP. | Box | | | | | 6.98 |
| | | | ISRAEL | Box | | | | | 7.89 |
| | | | ISRAEL | Box | 5.50 | | 6.13 | 6.75 | |
| | | | SPAIN | Box | | | 9.50 | 11.63 | |
| | | | SPAIN | Box | | | | | 7.89 |
| BANANA | Air | RED | ECUADOR | kg | | | | 4.88 | |
| | | SMALL | COLOMBIA | kg | | | 7.77 | 5.17 | |
| | Sea | SMALL | ECUADOR | kg | | | 1.70 | 2.65 | |
| CARAMBOLA | Air | | MALAYSIA | kg | | | 4.86 | 4.94 | 4.16 |
| CHAYOTE | Sea | | COSTA RICA | kg | | | 1.30 | 1.43 | |
| COCONUT | Sea | | COTE D'IVOIRE | Bag | | | 14.08 | 13.66 | |
| | | | DOMINICA | Bag | | | | | 10.92 |
| | | | SRI LANKA | Bag | | | 15.00 | 20.10 | |
| DATE | Sea | KENTA MEDJOL NOT DETERMINED RAVIER | TUNISIA | kg | | | | 1.88 | |
| | | | ISRAEL | kg | 4.00 | | 8.00 | 7.85 | 6.07 |
| | | | IRAN | kg | | 3.00 | | | |
| | | | TUNISIA | kg | | | | | 1.70 |
| EDDOE | Sea | | COSTA RICA | kg | | | 2.10 | 1.86 | |
| GINGER | Sea | | CHINA | kg | 2.62 | | 3.17 | 2.73 | 2.57 |
| | | | THAILAND | kg | | | | 2.69 | 2.61 |
| GUAVA | Air | | BRAZIL | kg | | | 6.29 | 6.21 | |
| KUMQUAT | Air | | ISRAEL | kg | | | | 3.43 | |
| LIME | Air | | MEXICO | kg | | | 4.40 | | |
| | Sea | | BRAZIL | kg | 1.11 | 1.28 | 1.59 | 1.44 | 1.42 |
| | | | MEXICO | kg | | | 2.40 | | |
| LONGAN | Sea | | THAILAND | kg | | | | 3.92 | |
| MANGO | Air | KENT NAM DOK MAI | PERU | kg | | | 4.70 | 4.83 | |
| | | | THAILAND | kg | | | | 8.40 | |
| | Sea | ATKINS KEITT KENT NOT DETERMINED | BRAZIL | kg | | | | 1.66 | |
| | | | BRAZIL | kg | | | | 1.25 | |
| | | | BRAZIL | kg | | | 1.31 | 1.63 | |
| | | | PERU | kg | 1.13 | 1.15 | 1.50 | 1.25 | 1.49 |
| | | | BRAZIL | kg | | | | | 1.14 |
| MANGOSTEEN | Air | | INDONESIA | kg | | | 9.00 | 7.47 | |
| | | | THAILAND | kg | | | 9.00 | | |
| MANIOC | Sea | | COSTA RICA | kg | | | 1.30 | 1.30 | |

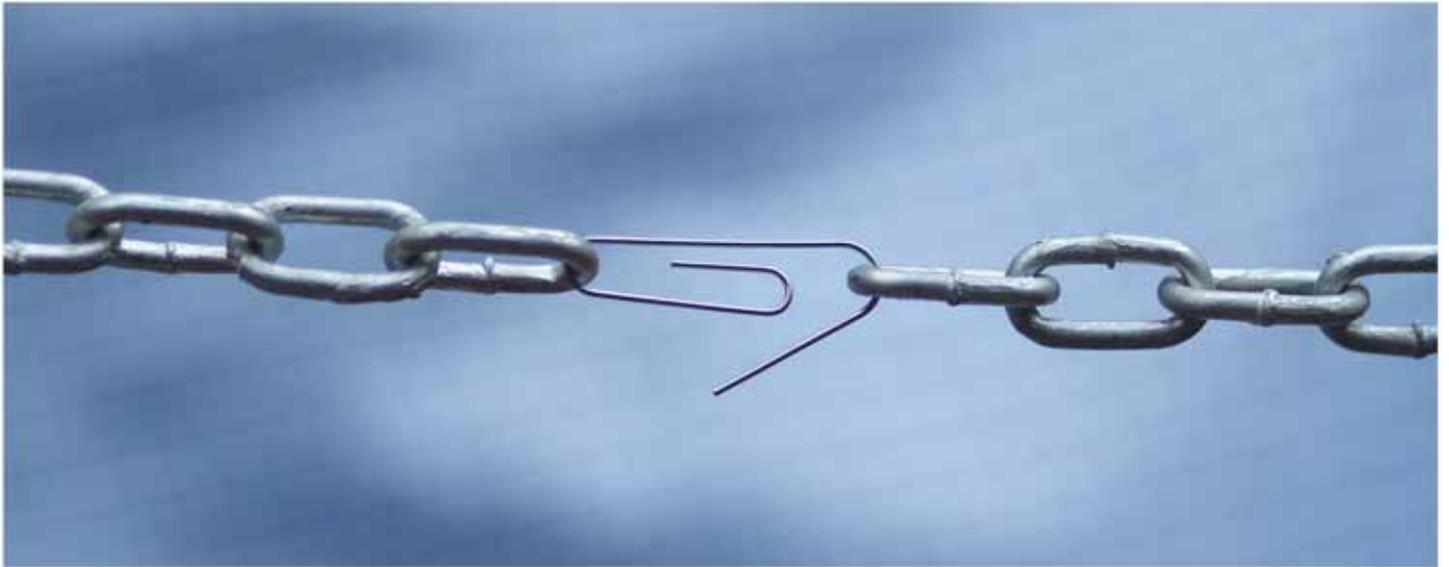
| | | | | | EUROPEAN UNION — EURO | | | | |
|----------------------|------------|-------------------|----------------|-------|-----------------------|---------|--------|---------|------|
| | | | | | Germany | Belgium | France | Holland | UK |
| MELON | Air | CHARENTAIS yellow | DOMINICAN REP. | kg | | | 4.30 | | |
| | | | BRAZIL | kg | | | 1.60 | | |
| | Sea | CANTALOUPE | COSTA RICA | kg | | | 1.40 | | |
| | | | HONDURAS | kg | | | 1.70 | 1.82 | |
| | Air | CHARENTAIS green | BRAZIL | kg | | | 2.00 | | |
| | | | BRAZIL | kg | | | 1.70 | 1.33 | |
| | Sea | GALIA | HONDURAS | kg | | | 1.70 | 1.46 | |
| | | | BRAZIL | kg | | | 1.13 | 1.21 | |
| | Air | HONEY DEW | COSTA RICA | kg | | | 1.18 | 1.27 | |
| | | | BRAZIL | kg | | | 1.13 | 1.00 | |
| | Sea | PIEL DE SAPO | COSTA RICA | kg | | | 1.03 | 1.15 | |
| | | | BRAZIL | kg | | | 1.24 | 1.44 | |
| Air | WATERMELON | COSTA RICA | kg | | | | 1.89 | | |
| | | BRAZIL | kg | | | | | | |
| PAPAYA | Air | FORMOSA | BRAZIL | kg | | 2.85 | 3.50 | 3.14 | |
| | | | BRAZIL | kg | | 3.43 | 3.45 | 3.63 | |
| | | | ECUADOR | kg | | | | 2.26 | |
| | Sea | NOT DETERMINED | THAILAND | kg | | | | 4.81 | |
| | | | BRAZIL | kg | | | | | 2.96 |
| | | | FORMOSA | kg | | | | | |
| PASSION FRUIT | Air | NOT DETERMINED | COLOMBIA | kg | 5.50 | 5.25 | 6.25 | 6.50 | 4.85 |
| | | | ISRAEL | kg | | 5.75 | 6.50 | 5.97 | 3.34 |
| | | | KENYA | kg | | 4.75 | | | |
| | | | SOUTH AFRICA | kg | | | 6.50 | | |
| | Sea | PURPLE | VIETNAM | kg | | | 8.00 | | |
| | | | ZIMBABWE | kg | | 5.25 | | 6.00 | |
| | | | COLOMBIA | kg | | | 9.00 | 8.97 | |
| | | | YELLOW | kg | | | | | |
| PERSIMMON | Sea | | ISRAEL | kg | 2.27 | | 2.07 | 2.91 | |
| PHYSALIS | Air | PREPACKED | COLOMBIA | kg | 5.42 | | 9.50 | 8.80 | |
| | Sea | | COLOMBIA | kg | | | | 6.21 | 6.07 |
| PINEAPPLE | Air | SMOOTH CAYENNE | BENIN | kg | | | 2.15 | | |
| | | | MAURITIUS | Box | | | | 13.50 | |
| | | | MAURITIUS | kg | | | 3.45 | | |
| | | | REUNION | kg | | | 4.00 | | |
| | Sea | VICTORIA | SOUTH AFRICA | Box | | | | 12.35 | |
| | | | BRAZIL | Piece | | | | | 0.91 |
| | | | COSTA RICA | Box | 9.25 | 7.56 | 8.25 | 7.42 | |
| | | | COSTA RICA | Piece | | | | | 0.89 |
| Air | MD-2 | COTE D'IVOIRE | kg | | | 0.95 | | | |
| | | PANAMA | Piece | | | | | 0.97 | |
| PITAHAYA | Air | RED | THAILAND | kg | | | 8.00 | | |
| | | | VIETNAM | kg | | | 8.00 | 6.34 | |
| | Sea | YELLOW | COLOMBIA | kg | | | | 9.33 | |
| | | | ECUADOR | kg | | | | 8.20 | |
| PLANTAIN | Sea | | COLOMBIA | kg | | | 1.04 | 0.84 | |
| | | | COSTA RICA | kg | | | | | 1.35 |
| | | | ECUADOR | kg | | | 0.90 | 0.94 | |
| RAMBUTAN | Air | | INDONESIA | kg | | | | 7.80 | |
| | | | VIETNAM | kg | | | | 7.85 | |
| SAPODILLA | Air | | THAILAND | kg | | | | 8.34 | |
| SWEET POTATO | Sea | | EGYPT | kg | | | 0.95 | | |
| TAMARILLO | Air | | COLOMBIA | kg | | | | 7.09 | |
| TAMARIND | Air | | THAILAND | kg | | | 3.08 | 3.07 | |
| YAM | Sea | | GHANA | kg | | | 1.30 | 1.25 | |

Note: according to grade

These prices are based on monthly information from the Market News Service, International Trade Centre UNCTAD/WTO (ITC), Geneva.
MNS - International Trade Centre, UNCTAD/WTO (ITC), Palais des Nations, 1211 Geneva 10, Switzerland — T. 41 (22) 730 01 11 / F. 41 (22) 730 09 06

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

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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.

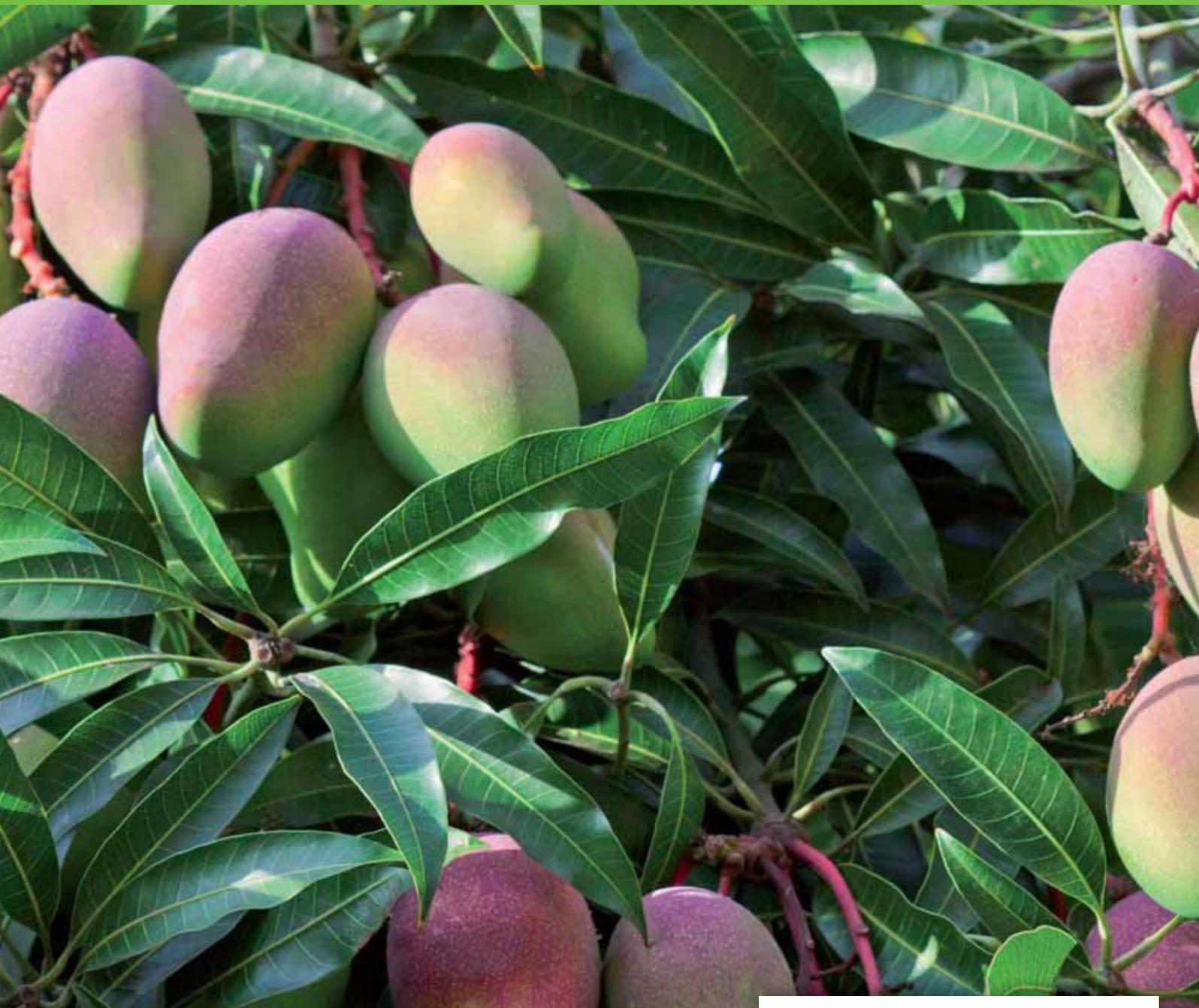
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UNIVEG Katopé France is a major actor of production, packaging, export, storage, ripening and distribution of fresh fruit and vegetables. Each of these services was established to preserve the quality and taste of its products. In association with its Fruit Partners, UNIVEG Katopé France offers multi-origins mangos receiving all the know-how of the ripening European leader.



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