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SO WHERE'S THE CLEMENTINES?

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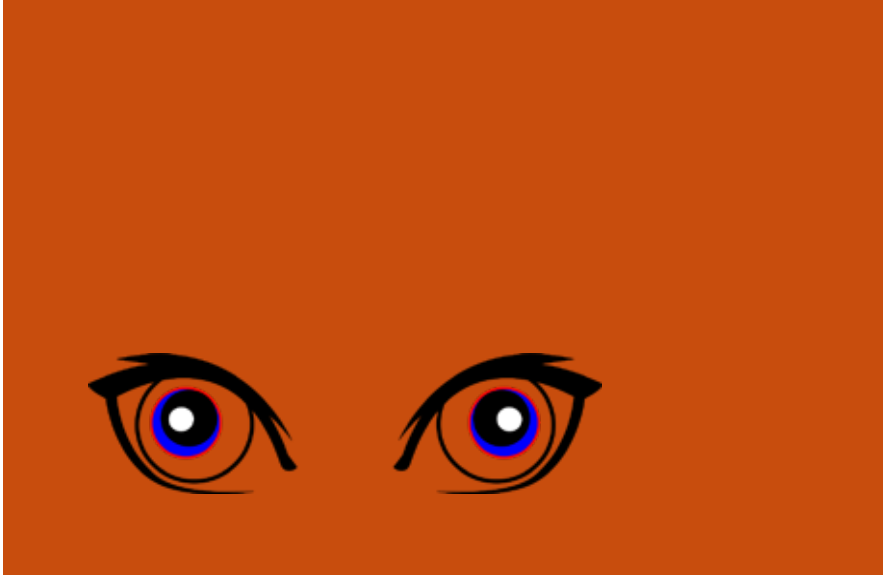

Editorial

"They sleep while awake"

As often happens when we reread the Ancient philosophers, we can understand a great deal in the world of today. We might even think that the marketing wiz-kids have truly mastered the teachings of these pre-Socratic philosophers, such as Heraclitus. How else to explain the short gap between the High Mass of combating climate change, COP 26, and the High Mass of consumerism, Black Friday and its secret channels? Because the philosopher really did understand human nature when he said: "They sleep while awake". Heraclitus saw that contradiction is a part of human thinking. What a boon! It clears consumers of their inconsistencies. It enables us to our lives better, since we can't do anything about it. In the end, it's quite handy - a kind of inevitability. It's as if we are all possessed. On this basis, it releases our most consumerist instincts that the aforementioned wiz-kids are able to stimulate. As proof, a famous brand of ingredients for amateur bakers is suggesting that we celebrate "half-birthdays"!

So one of two things is going on: either the magic of marketing has managed to defer our awareness of climate change to tomorrow, or industry has understood that it only had a few years left to take advantage of the world as it used to be. In either case, the "Northern" countries will still have just as little credibility when they order developing societies to tighten their belts in terms of often essential needs, while at the same time, they add several holes to their own belts to put on a few more kilos of gratification. Which brings us neatly back to our starting point of contradictions.

Denis Lœillet

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Contents

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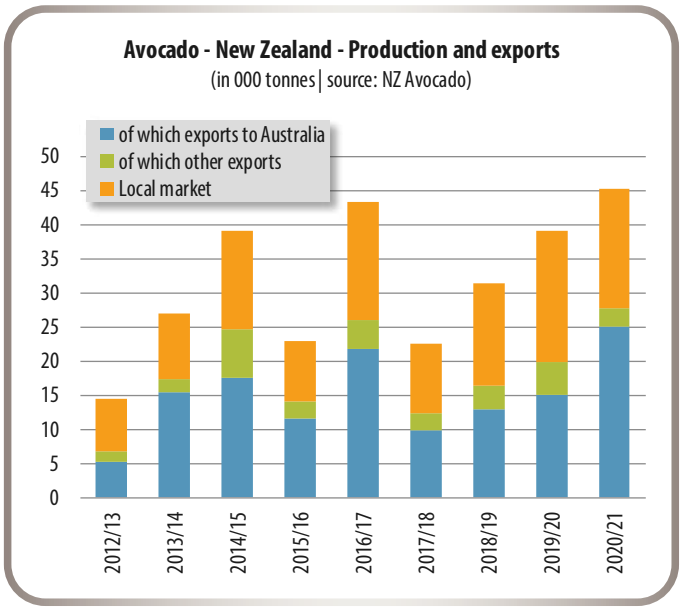
New Zealand avocado: "caught in a perfect storm".

These are the words used by a grower based in Bay of Plenty, as reported by the local press, to describe the current 2021-22 season. These are explosive words after a record-breaking 2020-21 campaign, not only in terms of volumes produced and exported, but also turnover on the local market. There is a good harvest level (fairly similar to 2020-21), but demand is not following suit. The problem is not due solely to the idling local market, because of the impact of the Covid control measures on the catering segment. It is more structural in nature, due to the contraction of the Australian market, where local production is rapidly coming into its own, in particular in the Western Australia region, which has a similar harvesting calendar to New Zealand. And this destination is a major variable in the economic equation of New Zealand's industry, taking in more than three-quarters of total exports, and 40% to 50% of total production. In this darkening context New Zealand's industry is working on developing its shipments to Asia (4 300 t in 2019-20), and the local market, where 30% of the population does not consume avocados.

Source: Otago Time

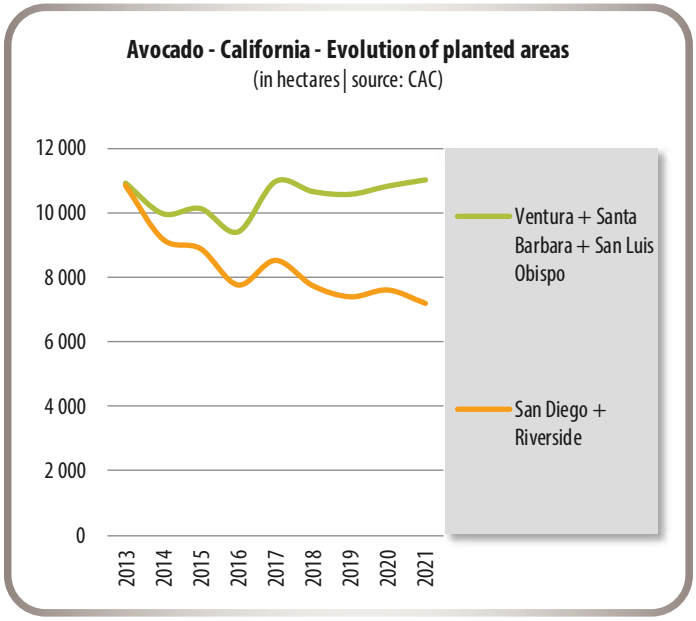


Photos © Régis Domergue

Californian avocado: probably heading for an average harvest in 2021-2022.

According to the initial information gathered, and pending the official forecast, the Californian avocado harvest should return to a near-average level in 2021-22 (approximately 130 000 to 140 000 t), after a below-average 2020-21 campaign (approximately 120 000 t). While no major climate incidents have occurred, unlike in the previous season, conditions have nonetheless not been optimal (with in particular high thermal amplitude in certain zones), while water stress remains a major factor, particularly in the south of the State. Furthermore, the latest planted area survey published in October showed that surface areas were continuing to decrease in the San Diego zone, with nearly 500 ha lost between 2020 and 2021, taking the fall to approximately 1 200 ha since 2017. Conversely, the production area situated north of Los Angeles (Santa Barbara, San Luis Obispo and above all Ventura), where the cost of agricultural water is less exorbitant, is continuing to make slight gains (approximately +500 ha between 2019 and 2021). It now encompasses nearly two-thirds of the cultivation area, as opposed to approximately half a decade ago.

Source: CAC



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Monitoring of banana volumes in the EU27+UK – September 2021: stability.

Another record fell in September 2021, with a net supply of 544 000 tonnes for the EU27+UK. Conversely, over the first 9 months, the European market was stagnant in terms of volumes consumed, remaining just above 5 million tonnes. The dollar group fell by 1.7 %. This fall was not offset by the EC and ACP origins, which at times saw big percentage rises, but small in terms of volume. On a 12-month sliding scale too, stabilisation prevailed, with a market estimated at 6 654 000 tonnes, a figure practically identical to the previous period.

Source: CIRAD


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Banana – EU – Supply from January to September 2021*

000 tonnes	2019	2020	2021	2021/2020
Net supply	**4 860**	**5 050**	**5 020**	**- 0.6 %**
Total imports, incl.	**4 421**	**4 608**	**4 565**	**- 0.9 %**
MFN	3 619	3 841	3 775	- 1.7 %
ACP Africa	442	425	447	+ 5.1 %
ACP others	360	341	343	+ 0.7 %
Total EU production, incl.	**438**	**442**	**455**	**+ 3.0 %**
Martinique	115	103	110	+ 7.1 %
Guadeloupe	33	37	46	+ 23.1 %
Canaries	276	287	285	- 0.9 %

* provisional | sources: CIRAD, EUROSTAT (excl. EU local production)

Monitoring of banana volumes in the USA – September 2021: rise not compensated.

September 2021 was the third month of a rising net supply, with a growth rate of 1.6 %. As a reminder, this came after a big expansion of 9 % in August. Since January 2021, the market has dropped by 0.7 %, and on a 12-month sliding scale by 1.1 %. The shortage of volumes from Honduras and Guatemala is still weighing very heavily on the supply, despite the fact that all the other origins are clearly favouring exports to the US and Canadian markets.

Source: CIRAD

Banana – USA – Supply from January to September 2021*

000 tonnes	2019	2020	2021	2021/2020
Gross supply, of which	**3 551**	**3 572**	**3 544**	**- 0.8 %**
organic	341	401	424	+ 5.6 %
Re-export to Canada	437	435	428	- 1.7 %
Net supply	**3 114**	**3 138**	**3 117**	**- 0.7 %**

* provisional | source: US Customs

Banana contract negotiations for 2022: will the price increase per box of bananas in 2022 be sufficient?

The contract renegotiations for 2022, which started in October between banana suppliers and distributors, have been held in a particularly tense context. One of the sources of discord is derived from the soaring costs at all levels of the banana supply chain, ongoing since the end of 2020: fertilisers, phytosanitary products, packaging materials, as well as the intermediate link costs (sea-freight, port operations). Indeed in the USA the main multinationals (Dole, Del Monte and Fyffes) triggered the "Act of God" clause on 1st November 2021 for the second time in twelve months, enabling them to apply a supplement of between $1.60 to $2.00/box until June 2022, to cope with the increasing costs. In Europe, while negotiations are being conducted much more discreetly, the first noises are also pointing to an increased price per box of bananas negotiated with the distributors, in excess of €13/box, i.e. an increase barely bigger than on the US market. It remains to be seen whether these increases will cover all costs. By way of example, it had been reported that the increase in price per box in the export zones alone could reach $2.00. Hence an increase of between $1.60 and $2.00 would not cover the full costs increase.

Source: CIRAD


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MARKET PROFILE

THE BANANA IN GERMANY

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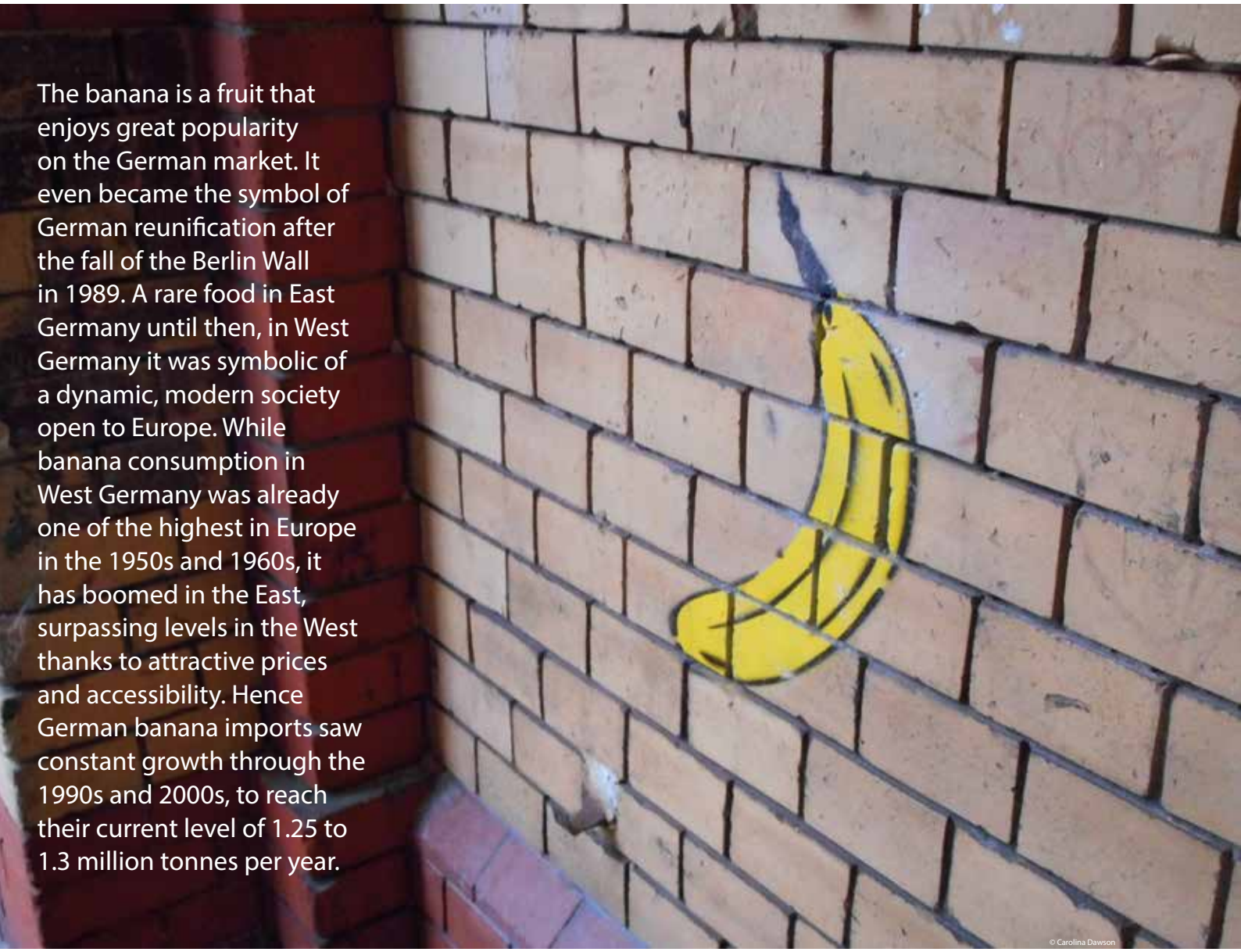

The banana is a fruit that enjoys great popularity on the German market. It even became the symbol of German reunification after the fall of the Berlin Wall in 1989. A rare food in East Germany until then, in West Germany it was symbolic of a dynamic, modern society open to Europe. While banana consumption in West Germany was already one of the highest in Europe in the 1950s and 1960s, it has boomed in the East, surpassing levels in the West thanks to attractive prices and accessibility. Hence German banana imports saw constant growth through the 1990s and 2000s, to reach their current level of 1.25 to 1.3 million tonnes per year.

© Carolina Dawson

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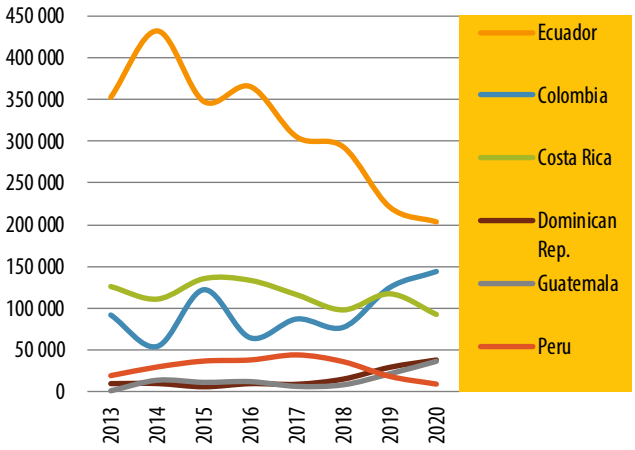
IMPORTS

The German market, the number one European banana import market with annual volumes of 1.25 to 1.3 million tonnes, is supplied primarily by the dollar origins, mainly Ecuador, Colombia and Costa Rica. However, the proportion of re-imports from other Member States remains high, representing 50 % of volumes. Of course this should be attributed to the massive port infrastructures of the neighbouring countries where most of the bananas clear customs, such as Antwerp in Belgium, and Vlissingen or Rotterdam in the Netherlands. Hence for half of the German supply originating from neighbouring countries, we unfortunately lose any concept of origin.

As regards direct imports, Ecuador remains the main market supplier, with nearly 204 000 tonnes in 2020: the reliability of its supply and the constant quality of the fruit represent real assets for the supermarket sector programmes which structure the German market. Meanwhile, by doubling its imports in the space of barely two years, with more than 144 000 tonnes in 2020, Colombia has seized second place in the rankings. This supplier is just ahead of Costa Rica, which has topped out at 100 000 tonnes in recent years. Finally, highly competitive new origins have been emerging for several years, such as Nicaragua which has made a fine breakthrough since 2017, with annual volumes now at around 45 000 tonnes. The rise to prominence of the organic banana has enabled the Dominican Republic to multiply its exports to Germany nearly seven-fold in the space of barely five years, going from 5 000 tonnes in 2015 to more than 37 000 tonnes in 2020.

Banana - Germany - Direct imports from outside the EU
(in tonnes | source: Eurostat)

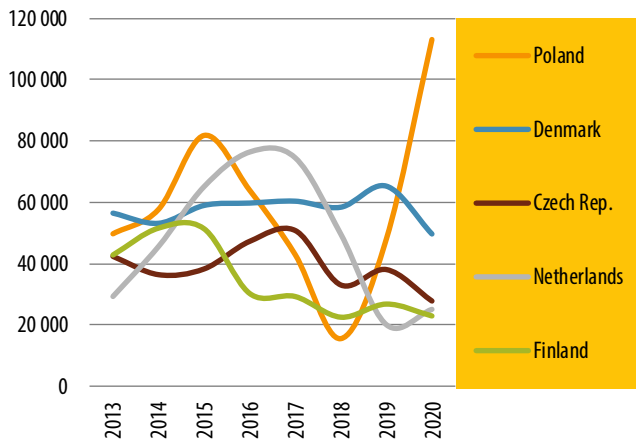


Anecdotally, the signature of the Treaty of Rome (1957) was delayed following a disagreement over the banana, specifically the customs duty that some European countries wanted to impose on imported fruits. West Germany only signed the treaty after obtaining a concession: a zero-duty quota. On his return to his homeland, the first West German Chancellor, Konrad Adenauer, apparently brandished a banana at the Bundestag in a sign of victory.

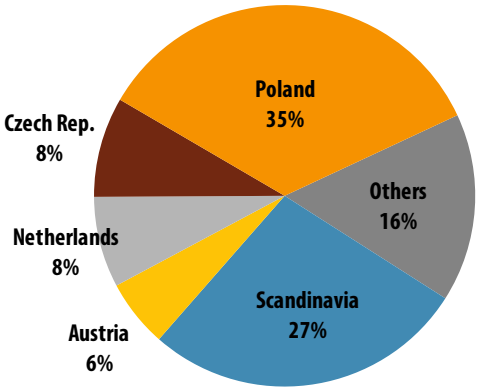
LOGISTICS

Although Germany has its own ports, especially Hamburg or Bremerhaven, where approximately 400 000 tonnes of bananas pass through every year, the main entry ports are Antwerp in Belgium, and Vlissingen in the Netherlands, which act as European hubs. On the one hand, their geographic positioning enables them to supply the west and south of the country, the most densely populated regions of Germany, as well as neighbouring countries lacking port infrastructures, such as Austria, Switzerland or Hungary. Most of all, development of container transport has played a fundamental role in the choice of port of entry. This mode of transport (controlled-atmosphere containers) is now favoured over reefers, which explains the increase in imports via the port of Vlissingen. The establishment of a regular shipping line by Chiquita in 2019 confirmed this trend.

Banana - Germany - Main destinations of exports
(in tonnes | source: Eurostat)



Banana - Germany - Main destinations of exports in volumes
(source: Eurostat)



RE-EXPORTS

With nearly 300 000 tonnes re-exported in 2020, i.e. approximately one quarter of its total imports, Germany is a real hub for the banana in Europe. Its top outlets are Eastern Europe (Poland, Czech Republic, Romania), Scandinavia (Denmark, Finland and Sweden) and Central Europe (Austria, Hungary), for which Germany remains one of the main suppliers. However, the quantities forwarded on to neighbouring countries have decreased slightly over the past decade (after peaking in 2014 and 2015 at nearly 370 000 tonnes). Some local players in Eastern Europe have been developing, and now procure directly.

According to the ripening capacities of the various countries, the fruit can be shipped ripe or green. For example, the bulk of the 100 000 tonnes shipped by Germany to Scandinavia are ripe bananas, given the low ripening capacities of these countries. For countries lacking a maritime outlet, such as the Czech Republic or Austria, we can observe the same scenario: the fruit is ripened in Germany before being shipped by road. Finally, countries with a higher ripening capacity, such as Poland, mainly receive green bananas.

While volumes shipped to Scandinavia are for the most part under contract for supermarket sector programmes, sales to Eastern Europe are still not heavily contractualised, although there is an increasing trend (50 % of programmes). Some yellow banana exports can also be made at highly aggressive price levels (clearances), to keep the stocks level under control.

IMPORTERS AND RIPENERS

The commercial fabric of the German banana industry is concentrated, for the import, ripening and distribution stages. The main import players are big international groups, most of which are integrated from banana production to ripening, such as Chiquita, Dole, Fyffes or Del Monte. Other operators are also present, though few in number, such as Greenyard, AFC or Cobana.

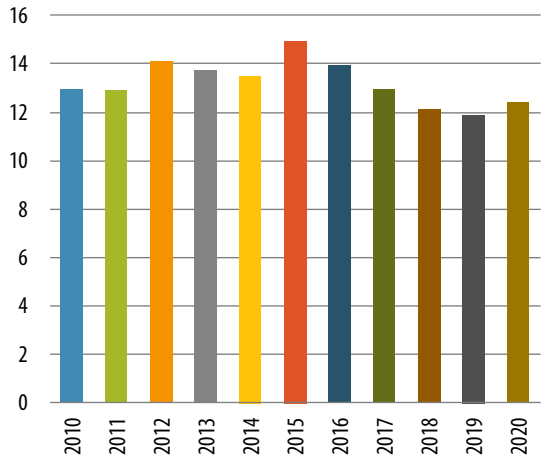
These big groups are generally bound to the supermarket sector via annual contracts, which set the prices and quantities to supply: these are negotiated at the end of the year for the year ahead. The contract market has reportedly accounted for nearly 90 % of sales over the past decade or more. The domestic free market is practically non-existent, with spot sales made mainly via exports to Eastern Europe, in order to offload surpluses in periods of high supply pressure.

The contracts binding importers to the supermarkets are based on green banana prices per 18.14-kg net box. Contract prices have gradually dropped, going from approximately €14/box in 2016 to less than €12/box in 2019. 2020 proved the sole exception, with prices strengthening slightly, because of the increase in the minimum price for the producer, especially in Ecuador, and the increased freight cost due to the low-sulfur standards taking effect at the start of 2020. However, this was only a brief surge, with annual prices for 2021 were revised downward.

On the yellow segment, unlike the South European markets like Italy, Spain or France where the banana sector comprises a vast network of ripeners and retailers, the German market is highly concentrated, with a small number of players. The ripening link is often built into the import link, with few small independent ripeners. If their ripening capacity is insufficient for their programmes, importers can outsource this step to big ripener groups such as van Wylick or Landgard. The quantities are also set by annual contracts between importers and ripeners.

To increase their independence, some big German supermarket chains have started to integrate the ripening step, and have even gone further, by importing their bananas directly. This is the case with Edeka, which is currently the only supermarket running a big ripening network on the German market, and has obtained complete independence thanks to its own import network.

Banana - Germany - Evolution of green price
(in €/box | source: CIRAD)



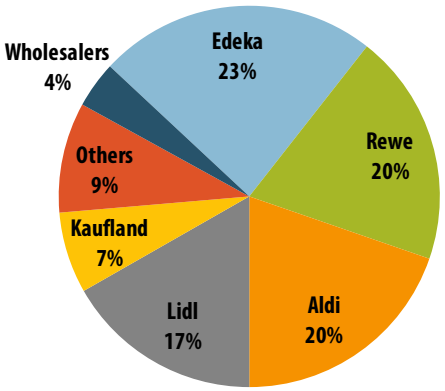
DISTRIBUTORS

The concentration of the players is not solely down to the importers, it can also be found in the distribution sector. While there were 15 to 20 big supermarket chains in the 2000s, playing a major role in banana sales, there are now no more than 5 distribution groups on the German market: Edeka, Rewe, Aldi, Lidl and Kaufland. Approximately 90 % of banana sales are made in the supermarket sector, with the wholesale sector very much a bit player: there are just 18 wholesale markets nationwide, as opposed to 134 in Italy for example. The discount and hard discount stores have their roots in Germany: the main historic players, Aldi Nord, Aldi Süd and Lidl, still dominate the market, holding a 37 % share of banana sales in Germany.

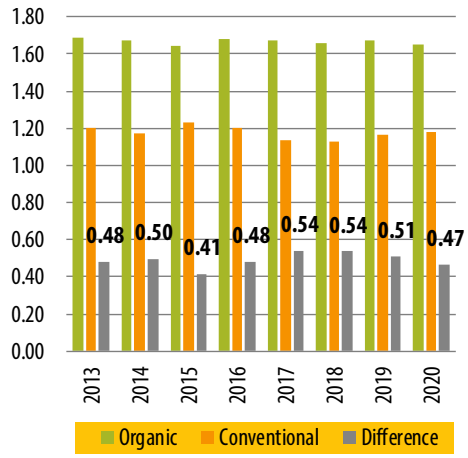
GERMANY – Distributors – Store formats

Formats	Characteristics	Example
Discounters	Limited product diversity and aggressive pricing	Aldi, Lidl, Netto, Penny, Norma
Supermarkets	<5 000m²	EDEKA, Rewe
Hypermarkets	>5 000m²	Kaufland, Real, EDEKA, Rewe centre
Convenience stores	<300 to 1 300m²	Nahkauf, Nah+Gut, Spar
Specialized stores	Specialized in organic products	Denns, Alnatura

Banana - Germany - Main retailers in volumes
(professional sources)



Banana - Germany - Discount retail prices Organic and conventional
(in €/kg | source: TWMC)



CERTIFICATION AND SEGMENTATION

There are several coexisting segments on the German retail market, with one of the main particularities being requirements in terms of certification, which now contribute to the range's diversity.

Basic and essential at European level, GlobalGap certification, which upholds compliance with traceability standards, has been required by all German supermarkets for many years. It was not until 2016 that the big chains such as, Aldi SÜD, Edeka, Lidl and Rewe started to incorporate certification focusing on the environment and social aspects, such as Rainforest Alliance, which is now a prerequisite for suppliers.

Following the emergence of organic banana sales, organic certification, often correlated with the Fairtrade label, became established on German supermarket shelves, leading to further segmentation of the supply. Demeter certification, including concepts of biodynamic agriculture, is also present on the German market. Demeter bananas come primarily from the Dominican Republic, but they are only available from certain chains. Generally, certified organic bananas are sold at higher price levels than premium bananas. However, the price difference between organic and conventional bananas is gradually tending to decrease, with the gap narrowing from €0.54 in 2017 to €0.47 in 2020.

Unlike other European market which have their own production, such as France or Spain, the concept of origin does not seem crucial for segmenting the German market - it is the concept of range. The ranges can be differentiated via brands and category (premium, category I and category II). The premium banana is generally associated with a big universally familiar brand, Chiquita, always positioned as the most expensive on the market. Category I bananas are often sold under the chain's own label, such as "Rewe Best Choice". Finally, category II bananas are used for entry-level offers at €0.99/kg. In addition, highly aggressive promotions, with prices falling as low as €0.85/kg, are also implemented for several weeks in the year. The banana remains the cheapest fruit in the fruits and vegetables section, and is always the most competitive.

CONSUMPTION

Apparent German consumption has been fluctuating around one million tonnes for the past decade or more, given this country's status as the EU's main banana consumer market, along with the United Kingdom. Hence over the past five years, annual consumption per capita has risen to 12.4 kg, i.e. 6 % above the European average (11.7 kg). However, in 2020 – which because of the Covid crisis, can hardly be regarded as a reference year – consumption apparently fell below the European average, to 11.6 kg.

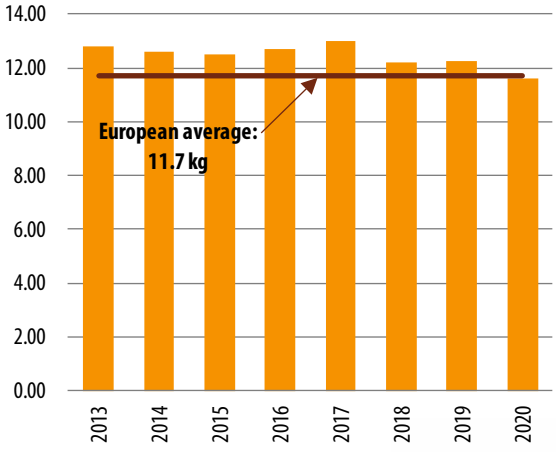
As across Europe, consumption is seasonal, with a peak during winter due to the low diversity of competing fruits. It is in January, February and March that banana sales are at their highest, before gradually falling until the summer, when consumption bottoms out. From September, it is reinvigorated as the year goes on.

While the banana has always been a competitive loss leader for German consumers, the price war in the retail sector seems to have stepped up since 2016. From fluctuating around a level of €1.40/kg in 2016, in 2019 and 2020 annual average prices underwent a distinct plunge to a basement level of €1.29/kg, i.e. a fall of 10 eurocents in four years.

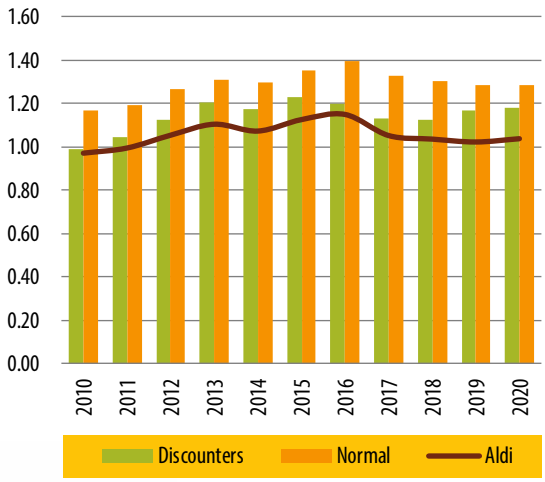
German discount stores, which account for a market share of approximately 37 % in terms of retail, offer consumers even more aggressive prices: annual prices dropped to €1.02/kg in 2019 and €1.04/kg in 2020, a fall of nearly 10 % from 2016. Along with the United Kingdom, the German retail market is one of the most aggressive in terms of price for the banana, because of consumer price sensitivity and the historic presence of the discount stores.

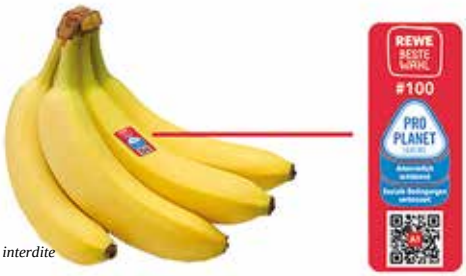
However, fundamental trends have been emerging in recent years from German consumers. Traditionally highly price-sensitive, they now seem to be taking into account environmental and social concerns into their purchases. Germany is seemingly the main European market for the organic banana, which enjoys a 20 % market share. The Fairtrade share is of equal size: Germany holds the number two position in the European consumer countries' rankings, just behind the UK. According to the data published by Max Havelaar, Fairtrade banana sales (70 % of which are both organic and Fairtrade) accounted for a market share of approximately 12% in 2020. Volumes peaked in 2019 at 130 000 tonnes, before dipping to around 112 000 t in 2020 because of the general decline in organic product sales during the pandemic.

Banana - Germany - Consumption per capita
(in kg/capita | source: Eurostat)



Banana - Germany - Evolution of retail prices
(in €/kg | source: TWMC)





demeter

SUSTAINABILITY AND CSR

In recent years, the social and environmental requirements of German operators have increased, and their commitments have been greatly strengthened, like those of the German government.

For example, the German initiative "The action alliance for sustainable bananas" has since 2014 promoted greater responsibility and sustainability throughout the supply chain. Governmental involvement is also significant, with since 2015, the German International Cooperation Agency (GIZ) supporting this initiative on behalf of the German government. GIZ has also, since 2017, been running several projects worldwide on the banana – and other crops – within the framework of its programme "for sustainable agricultural supply chains and standards", commissioned by the Ministry for Economic Cooperation and Development.

The adoption in June 2021 by the German Parliament of an Act on the duty of care of businesses in supply chains, representing an escalation in the government's stated aim of moving toward greater sustainability in all the industries. The act is aimed at obliging German businesses to guarantee their comprehensive responsibility in terms of compliance with human rights and environmental standards in their supply chains, including for the banana.

The main German operators are also active partners in the WBF (World Banana Forum), a multi-player platform run by the FAO, for better practices both in production and sustainable trade.

The big German distributors have also worked on CSR projects with a view to incorporating sustainability criteria into their decision-making, and encouraging best practice throughout the supply chain. Some will go even further, with discussions being held on reducing pesticides, and on wage levels ■

© Catherine Sanchez

Côte d'Ivoire mango

A disappointing 2021 campaign

Virginie Pugnet, consultant
virginiesoleil@yahoo.fr

After a good 2020 campaign, which came under exceptional conditions related to the Covid-19 pandemic, 2021 brought a really mediocre season. Once the effects of lockdown had passed, volumes grew, phytosanitary problems increased, and sale prices in Europe fell considerably.

Are we back to the cycle well-known to Ivorian exporters, with one good campaign very three years?

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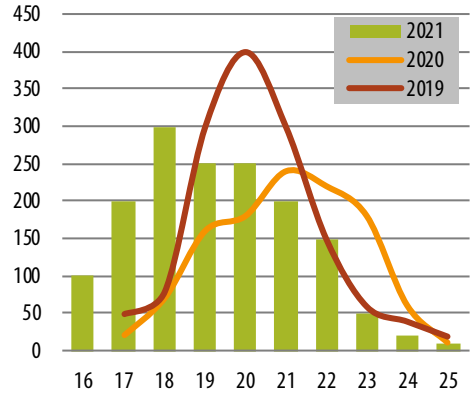
Production early and smaller

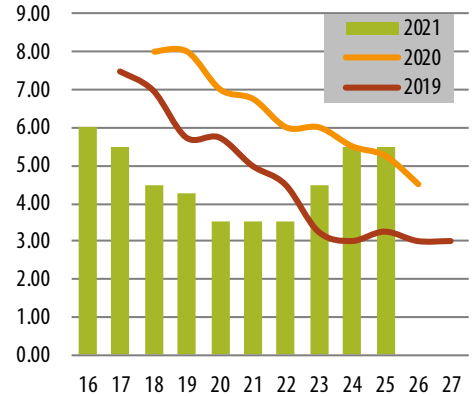
Ivorian mango production is still subject to the alternate bearing phenomenon, with 2021 bringing a downswing. The quantities expected did not materialise, with many plantations not producing. The blooms were earlier than last season, meaning that the fruit from the first bloom entered maturity on around 1st April. Production was characterised by three highly distinct blooms, with big gaps.

The mango campaign opened on 4 April 2021, the date set by Intermangue (Ivorian mango Inter-Professional Association) and the government, thereby providing an additional week's trading compared to 2020, when it started on 10 April. Unlike in previous campaigns, shipments comprised large-sized fruit from the first shiploads.

Côte d'Ivoire sea-freight mango - France
Weekly incoming shipments
(in number of containers | source: Pierre Gerbaud)



Côte d'Ivoire sea-freight Kent mango - France
Weekly average import price
(in euro/box | source: Pierre Gerbaud)



Exports on the increase

With 32 163 tonnes exported to Europe in 2021, Côte d'Ivoire was back to similar volumes to the 2018 and 2019 seasons. The Covid-19 crisis brought down exports to Europe to 27 000 tonnes in 2020. Volumes were bigger during April, since production was ahead of schedule: 7 140 tonnes as opposed to 2 358 tonnes in 2020. Exports in May and June were approximately comparable. The increase in shipments, associated with a production shortfall, aggravated the phytosanitary problems.

Soaring interceptions

For the past few years, Côte d'Ivoire has implemented fruit fly biological management programmes, providing growers with attractants (traps, biological treatment products, etc.). In 2021, it repeated this strategy with SPLAT MAT ME attractants (by Koppert), which were designed to kill male flies. However, the Ministry of Agriculture also requested exporters and growers to apply treatments eliminating female flies, in addition to those allocated by the government.

Did the industry operators really adhere to the application of these treatments? Did the production shortfall not lead to less rigorous sorting at the packhouses? What we do know is that 23 interceptions were registered on Ivorian mangos in Europe in 2021, as opposed to 5 in 2020.

This increase in phytosanitary problems generated enormous losses for exporters. Ivorian phytosanitary services had to intervene at the end of the season to shut down packhouses that had received two notifications from the European Union. This provision was part of the Ivorian government's fruit fly management plan. In 2021, some exporters registered more than three notifications. They should be prohibited from exporting mangos to the European Union for the 2022 season. Interceptions due to fruit flies affected sea-freight mangos as much as air-freight mangos.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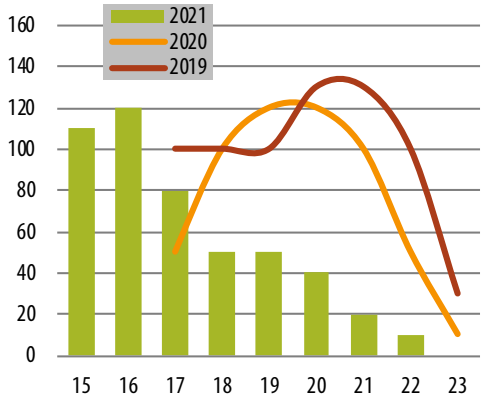
Air-freight mangos still not up to speed

Despite the fall in Peruvian air-freight volumes, the Ivorian air-freight mango struggled to find its place at the start of the season. Volumes shipped were below importer expectations, because of a big shortfall of coloured mangos.

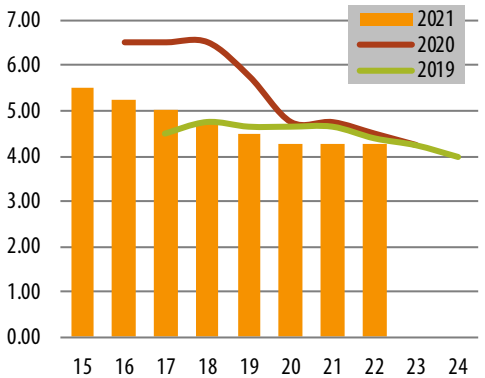
Air-freight exports started toward 10 April, and continued until 25 May, when the 2021 campaign closed. With the opening of air borders and the resumption of normal airport activities, freight capacities were not limited, as had been the case in 2020. The choice of airlines and destinations did not pose any particular problem. Conversely, the Peruvian air-freight mango maintaining its presence over the whole Ivorian export period represents a structural brake on its development.

The phytosanitary concerns due to the fruit fly are also constraints on the quality of Ivorian mangos, with exporters providing fruit that is still hard and to be pre-ripened on the destination markets, to avoid fruit fly detection.

Côte d'Ivoire air-freight mango - France - Weekly incoming shipments (in tonnes | source: Pierre Gerbaud)



Côte d'Ivoire air-freight mango - France - Weekly average import price (in euro/kg | source: Pierre Gerbaud)



Insufficient sea-freight logistics

Although Côte d'Ivoire has considerable sea-freight logistics, there are still constraints associated either with availability of recent containers, or the choice of destinations.

AEL does not have sufficient freight capacity to destinations in Northern Europe. As for traditional companies (MSC, CMA CGM, HAPAG, etc.), they still do not have containers less than five years old, requested by exporters in order to guarantee fruit preservation. Exporting more than 1 400 containers over a period of approximately 30 days remains a major logistical strain.

Much lower sale prices

Beyond sanitary and logistical concerns, it was the fall in sale prices which adversely affected the results of the Ivorian campaign.

Although during the first trading week sale prices above €5/kg were registered, sea-freight mango rates were than €1 to €2 per box lower than the figures from 2020, depending on the trading week. In addition, the mangos were sometimes sold at below cost price, to the great displeasure of the exporters, who were not expecting such a poor campaign.

As for the air-freight mango, prices also dipped, down €1 per kilo from the 2020 campaign.

This fall in prices was not passed on to mango purchases from the growers. Conversely, fruit purchase prices in Côte d'Ivoire increased by more than 15 % in 2021 - another cause of annoyance for the exporters. In addition, cost prices constantly increased, given the fiscal pressure, certification costs and social commitments.

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Ivorian mangos heading for better value outside of the EU

In the face of the uncertainty over the progression of Ivorian mango exports to Europe, with ever increasing competition from Peru and the Brazilian giant, Ivorian operators have become aware of the advantages of accessing other markets.

In the processing segment, Côte d'Ivoire represents the mango production and export hub for the West African sub-regional industry. It supplies Ghana and Burkina Faso, which have developed high-performance dried mango units. Though it is behind in the processing sector (barely 2% of mangos processed in-situ), it is planning to tackle the challenge by setting up new units for dried mango production. Ivorian growers are taking advantage of this opening, and registering fewer post-harvest losses. They are selling their fruit at practically the same price as fruit aimed at the export market, for the EU.

Other opportunities on the North African market are developing, with demand for a substantial supply over the Ramadan period, favourable for fresh fruit consumption and imports. The opening up of exports to the Moroccan market is a windfall for the Ivorian mango, and an interesting avenue for development. Despite some quality requirements, the phytosanitary requirements are less restrictive.

Côte d'Ivoire is experiencing heavy competition from the hinterland countries (Mali and Burkina Faso), which enjoy preferential customs rates and closer geographic proximity. Their exports are made by refrigerated lorries, less expensive than sea-freight via the port of Abidjan. The Ivorian mango remains more highly prized, but it is coming up against pricing obstacles.

Greater role of the inter-professional association

These issues will certainly need to be addressed by Intermangue, the Ivorian mango inter-professional association, created in 2018. Its aim is to increase exports, with the ambitious objective of reaching 90 000 tonnes by 2030, i.e. three times the current export volume. This is a major challenge for which improved production and opening up of new market niches remain the priorities.

In 2021, Intermangue was involved in providing phytosanitary products to combat the fruit fly, and carried out the geolocation of all orchards within the country. Every year, it is involved in setting the campaign opening date.

Intermangue, as an agricultural inter-professional association which comprises growers, traders and processors, coordinates the various support to the industry, and remains a close contact of the Ivorian government.

Côte d'Ivoire is the number three mango supplier to the European market. But, caught between Peru, which is extending its campaign over the start of Ivorian shipments, and the ever-present Brazil, Ivorian exporters are really pessimistic about increasing their mango volumes bound for Europe. Mexico, whose air-freight shipments are eating into the end of the Ivorian campaign, is only confirming the trend.

Holding its position remains a priority for the Ivorian mango, but diversification of its destinations and processing appear to be the main hopes for development ■


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Citruses

A report by
Eric Imbert

Contents

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Mediterranean citruses

2021-22 production forecast for the EU27+UK

A major clementine shortfall

Eric Imbert, Cirad
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Despite an average harvest overall in the Mediterranean, the EC market supply is set to be fairly below-average in 2021-22, especially for the clementine and lemon. Nonetheless, certain variables in the equation are tough to figure out this season: will the Covid pandemic, extending ever longer, continue to give demand for certain products a little boost? Will the boom in sea-freight prices lead to a higher concentration in the supply to the EC market, to the detriment of long-distance markets? FruiTrop brings you this overview.

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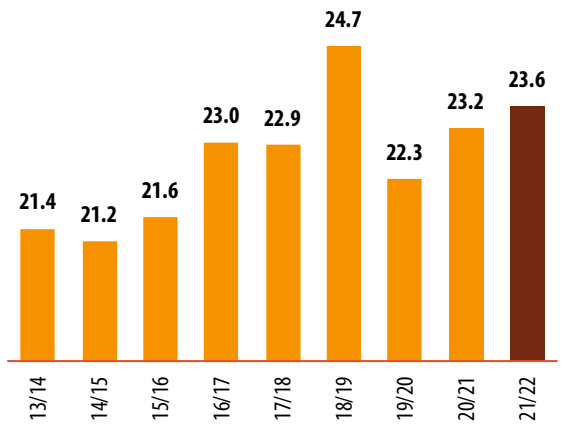
Overall, an average Mediterranean harvest

With approximately 23.6 million tonnes expected, the combined harvest from the main Mediterranean citrus producer countries is registering a near-average level. Nonetheless, this overall figure conceals very different situations between the product families. The available potential level is good for the lemon and easy peelers, with 3.5 and 7.6 million tonnes respectively, confirming the heavy production growth trend for these two groups (allowing for the effects of alternate bearing, explaining the slight downturn from 2020-21 for easy peelers). Conversely, orange production, after peaking at more than 13 million tonnes in 2018-19, really struggled to pick up from the big fall that came in 2019-20, remaining slightly below-average with 11.9 million tonnes. As for the grapefruit, the harvest should remain near-average, at approximately 550 000 tonnes.

Citruses - Mediterranean - Production

* Spain, Morocco, Turkey, Italy, Israel, Egypt, Greece, Cyprus, Tunisia

(in million tonnes | sources: WCO, CLAM, professionals)



Yet suppliers to the EU27+UK rather below average

While the overall Mediterranean harvest is registering an average level, in the vast majority of supplier countries to the EU27+UK, it is slightly to considerably below normal. This is the case for Spain, which on its own controls two-thirds of the winter-season supply to the EC market, across all citruses (3 % below the four-year average). It is also true for Greece (- 11 %), Egypt (- 4 %) and Italy (possibly – 10 % to - 20 %, figure still to be adjusted in light of the deluge which hit Sicily in early November). Only Israel and Morocco are in good shape (approximately + 22 % and + 9 %, respectively). It is Turkey and its record harvest, exceeding 5 million tonnes for the first time, which has raised the overall Mediterranean production level. Should we deduce a supply shortfall to the EU27+UK? Yes, definitely for easy peelers, during the first part of the season, and for the lemon from the end of 2021, with volumes apparently closer to normal for the orange and grapefruit. Nonetheless, the current sea-freight issues could somewhat change the hand.

Citruses – Mediterranean – Production forecast

in 000 tonnes	2021-22	2021-22 compared to	
		2020-21	4-year average
Spain	6 720	- 8 %	- 3 %
Turkey	5 361	+ 23 %	+ 17 %
Egypt	4 471	0 %	- 4 %
Italy	2 632	- 10 %	- 5 %
Morocco	2 380	+ 16 %	+ 9 %
Greece	1 056	- 9 %	- 11 %
Israel	558	+ 27 %	+ 22 %
Tunisia	330	- 22 %	- 14 %
Cyprus	70	- 2 %	- 5 %
France	39	- 13 %	0 %
Total	**23 616**	**+ 2 %**	**+ 1 %**

Professional sources, WCO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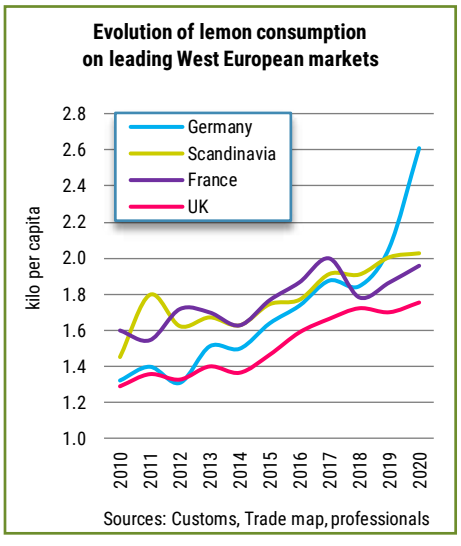
BOOM IN WORLD LEMON TRADE STILL GOING STRONG, WITH THE EC NOT TO BE LEFT OUT!

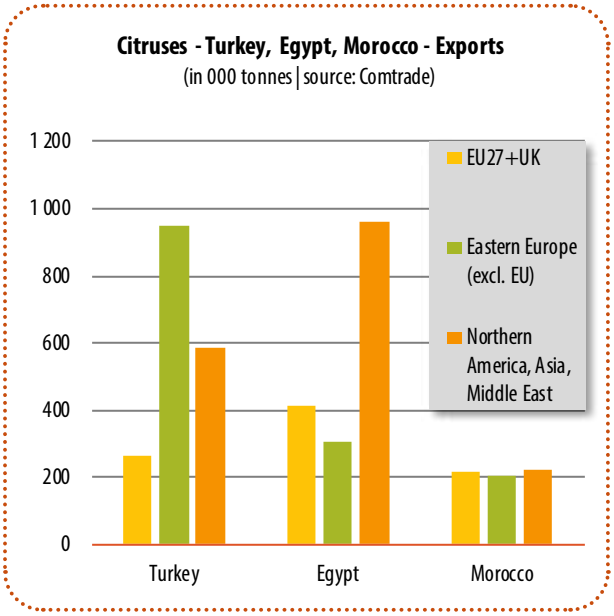
With an international trade of 2.3 million tonnes in 2020, the lemon remains the citrus registering the strongest growth (5% per year on average for the past 6 seasons, as opposed to 1% for the citrus family as a whole). The EU27 and United Kingdom, which together take in nearly 50% of world flows, are among the most dynamic zones, along with North America. The 2020 consumption figures show that this zone maintained a high growth rate, despite the Covid-19 pandemic. The average volumes consumed in non-producer countries in the western EC exceeded 2.2 kg/capita for the first time, up by 270 g from the previous year. We can note a major leap in particular in France (approximately 100 g/capita), and even more so in Germany (more than 500 g/capita), as the graph shows.

"The most remarkable thing about the previous season is that we achieved this figure under a very complicated scenario, with the catering sector down to minimum levels in Europe, and a practically non-existent tourism sector because of Covid-19", said José Antonio García, Director of the Inter-Professional Association for the Lemon and Grapefruit (Ailimpo), which is responsible for representing the interests of these two fruits in Spain.

The Director of the organisation explains that one of the keys to the good results obtained by the European lemon can be found in promotions such as "Welcome to the Lemon Age", a programme financed by European funds and by professionals, extending the standard setting a contribution of 0.6 euros per tonne paid by each lemon producer and distributor in Spain, via the mechanism governed by Ministerial Order 541/2020 of 15 June 2020. This project was developed for the purpose of promoting the positioning of the European lemon in Germany, France and Spain, the main objective of which is to promote characteristics such as its quality, freshness, sustainability, traceability and food safety, to make this citrus more appealing to new generations, and increase its consumption in these countries.

Consequently, Spanish lemon exports boomed throughout 2020, even increasing by 33% at the start of the health crisis, i.e. between the months of March and April. Germany set a historic record for annual imports of the Spanish lemon: 230 614 tonnes, i.e. 13.1% more than in 2019. France did something similar, but with a smaller increase on an annual sliding basis (+1.4%), importing 126 848 tonnes. In addition, this scenario was not restricted to Spain, with Italy (+2.8%), Greece (+26.2%) and Portugal (+47%) also increasing their lemon exports last year.





Some exporter countries to refocus on the EC market?

With the world economy returning to full throttle, there is a clear lack of sea-freight capacity, in particular for basic products. So shipping company rates have soared, and certain lines have actually been eliminated. In this context will exporters take the risk of supplying long-distance markets as much as usual, given the additional costs due to transport, which will probably be largely at their expense? The question is even more pointed given that there is already a generalised major increase in cost prices, for all items in the production process (fertilisers, phytosanitary products, energy, boxes, etc.). This is a major problem for countries such as Morocco (300 000 t to 500 000 t sent to extra long-distance markets such as Russia or North America), Egypt (300 000 to 400 000 t to Asia) or Israel (50 000 to 60 000 t to Asia and North America). Good price levels should probably be available on the North American markets, with Florida and California still distinctly in shortfall (13 % below average for easy peelers and orange in California, with an identical fall for the Floridian grapefruit). They could perhaps cover the additional costs relating to freight. Conversely, the Russian market seems distinctly less buoyant, since there should be high Turkish pressure, and this origin is not affected by the increase in sea-freight costs. The very high Chinese production level is also an additional handicap on certain Asian markets.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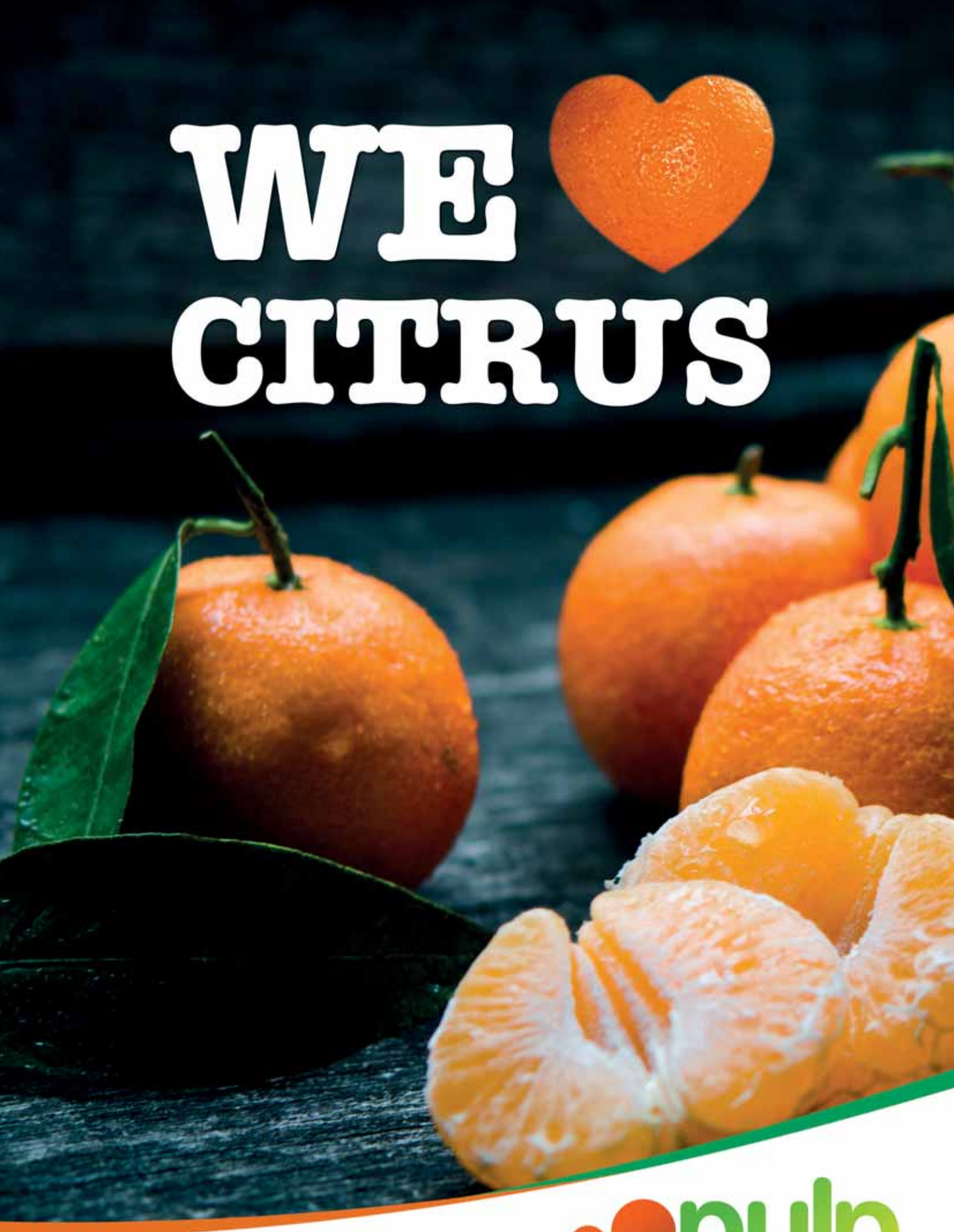

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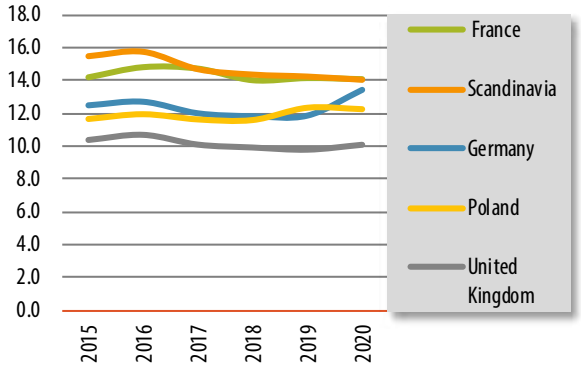
Impact of the pandemic on demand not to be overestimated

Spring 2020 provided plenty of hope for citrus growers. The first months of the pandemic led to a massive return by consumers to citruses, with often two-figure market growth, marking a deep break with the long-running stagnation trend (except for the lemon, the only citrus previously enjoying renewed interest). Some professionals actually believed that for citrus consumption, as well as so many other things, there was a before and an after.

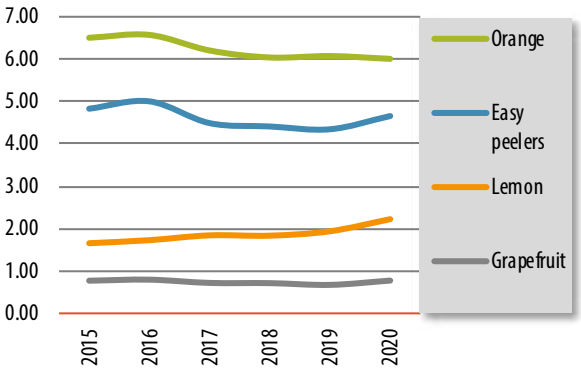
It has to be observed, in light of the latest available consumption figures (2020), that some perspective is needed. There has been a perceptible bounce-back for certain citrus families, such as the grapefruit and easy peelers. In addition, practically across the board, all the big markets of the EU27+UK are registering a rise (excluding Scandinavia for easy peelers). There is also an increase – very much global – for the lemon, but it is hard to know whether the pandemic is playing a role, since the upward trend was already well-established. For this citrus, the consumption growth rate gathered pace considerably in Germany in 2020, though much more discreetly in other EU27+UK countries. Conversely, the orange clearly has not taken advantage of the situation. This product's figures for 2020 reveal stable consumption, in both the western and eastern EC. Looking closer, we can see a considerable fall in France, the UK and Scandinavia, offset by Germany where distributors seem to have really driven consumption of all citrus families (total intake volumes 13.4 kg/capita, as opposed to approximately 12 kg in previous seasons).

While the effects of Covid on demand remain fairly difficult to identify, citruses should benefit from weaker competition than usual from other leading fruits in the section. While the European apple harvest is average, some major markets are registering local production levels well below average (especially France and Italy). The pear harvest is the smallest for the past thirty years. While banana production is set to be somewhat up on 2021, soundings taken of the price negotiations, currently in progress for the 2022 supply contracts, lead us to believe that there will be a considerable rise, to follow the increased production costs.

Citruses - EU27+UK - Consumption in non-producer countries (in kg/capita | source: Eurostat)



Citruses - EU27+UK - Consumption by produce in non-producer countries (in kg/capita | source: Eurostat)



Late start to the winter campaign

The transition between Southern and Northern Hemisphere production is particularly late this season, especially for the orange (two or three weeks), and even more so for the lemon (more than one month). A largely structural phenomenon, although this year it contains a cyclical component (disruptions in South Africa that delayed the season, complex international logistics situation that delayed the last shipments). With the rise in the Mediterranean late and super-late lemon and orange supply, trading is starting increasingly late for the counter-season. Furthermore, the supply is also tending to progress in the Southern Hemisphere, in particular for the lemon and easy peelers. Hence Southern Hemisphere fruits are maintaining commercial routes for longer in September, October and even November, according to the varieties, especially since the taste qualities are generally very good for both easy peelers and the orange. This is an increasingly considerable problem for the Mediterranean.

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Citrus Sector Head

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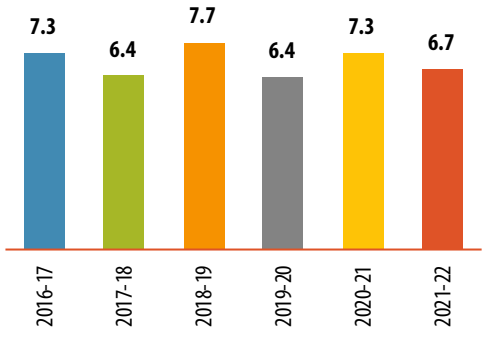
SPAIN

A minor overall shortfall, sometimes concealing major falls

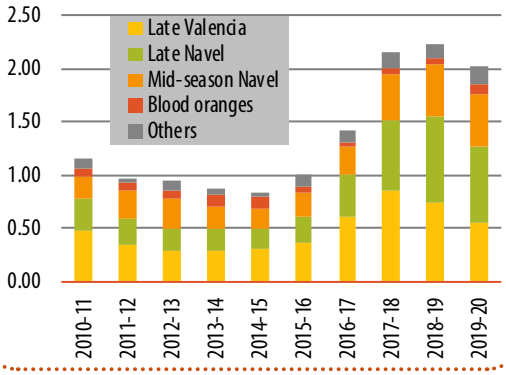
After a 2020-21 campaign that was among the top three in terms of volumes, Spanish production will return to a level slightly below the four-year average in 2021-22, with an expected 6.7 million tonnes. This is a multi-factor fall, with both cyclical and structural components. There was a very rainy spring, detrimental to pollination and fruit-setting for certain varieties, while some isolated extreme climate phenomena also had adverse consequences (hail or heavy rains in certain zones). Furthermore, a South African scale (Delottococcus aberiae, locally known as the "Cotonet"), which causes size loss in the clementine and deformations in the orange by weakening the tree, has grabbed the headlines more than ever. Its attacks have been particularly intense, favoured by a rainy climate context, difficulties applying preventive or curative treatments because of the movement restrictions associated with the pandemic, and the move to milder insect management methods since the end of approval for Chlorpyrifos. Some more structural phenomena relating to changes in cultivation areas also enter the equation, particularly for easy peelers. The clementine planted area is continuing to shrink, losing 8 000 ha for Nules and other seasonal varieties, and 1 500 ha for early and late varieties between 2015 and 2020 in the Valencian Community. Orange surface areas remain stable overall, but with a strong rejuvenation dynamic (between 1 and 1.6 million plants, mainly for Valencia or Valencia like and late or super-late Navel planted per year in the Valencian Community, mainly to replace other varieties). The lemon cultivation area is continuing to expand.

While the overall production potential is near-average, the trends are highly variable between citrus families, with cyclical problems sometimes overtaking the underlying trends relating to planted area. Hence the lemon harvest seems to be distinctly below average, especially during the second part of the season, despite expanding surface areas. Similarly, while the orange harvest seems to be average overall, availability will be slightly higher than normal in the first part of the season, and slightly below-average in the late-season slot, despite the replanting trend mentioned. The grapefruit has an average potential. It is easy peelers that are exhibiting the biggest difference from an average season, despite what a normal production potential across all varieties might lead us to believe. The clementine campaign is clearly in shortfall, in particular for Nules – the main variety – while hybrid production is set for a very good level.

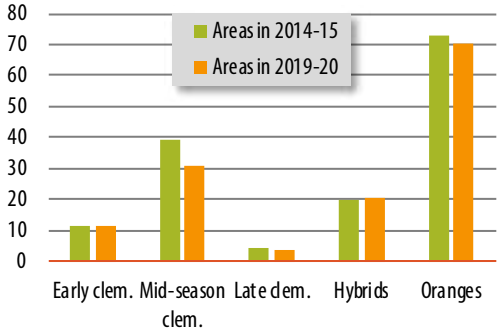
Citruses - Spain* - Evolution of harvest
* Valencian Community, Andalusia, Murcia
(in million tonnes | sources: GVA, AILIMPO, Junta Andalucia)



Orange - Valencian Community
Certified plants sales (in million plants | source: GVA)



Citruses - Valencian Community
Evolution of planted areas (in 000 tonnes | source: GVA)



Citruses – Spain* – Harvest forecast

in 000 tonnes	2021-22	2021-22 compared to	
		2020-21	4-year average
Easy peelers	2 088	- 12 %	- 3 %
Orange	3 511	+ 2 %	0 %
Lemon	1 035	- 25 %	- 15 %
Grapefruit	86	- 4 %	+ 3 %
Total	**6 720**	**- 8 %**	**- 3 %**

* Valencian Community, Andalusia, Murcia
Sources: GVA, AILIMPO, Junta Andalucia

Citruses – Spain – Harvest forecast for Andalusia and Valencian Community

in 000 tonnes	2021-22	2021-22 compared to	
		2020-21	4-year average
Andalusia	2 401	+ 7 %	+ 8 %
Valencian Community	3 187	- 9 %	- 5 %

Sources: GVA, AILIMPO, Junta Andalucia

CITRUS FRUIT

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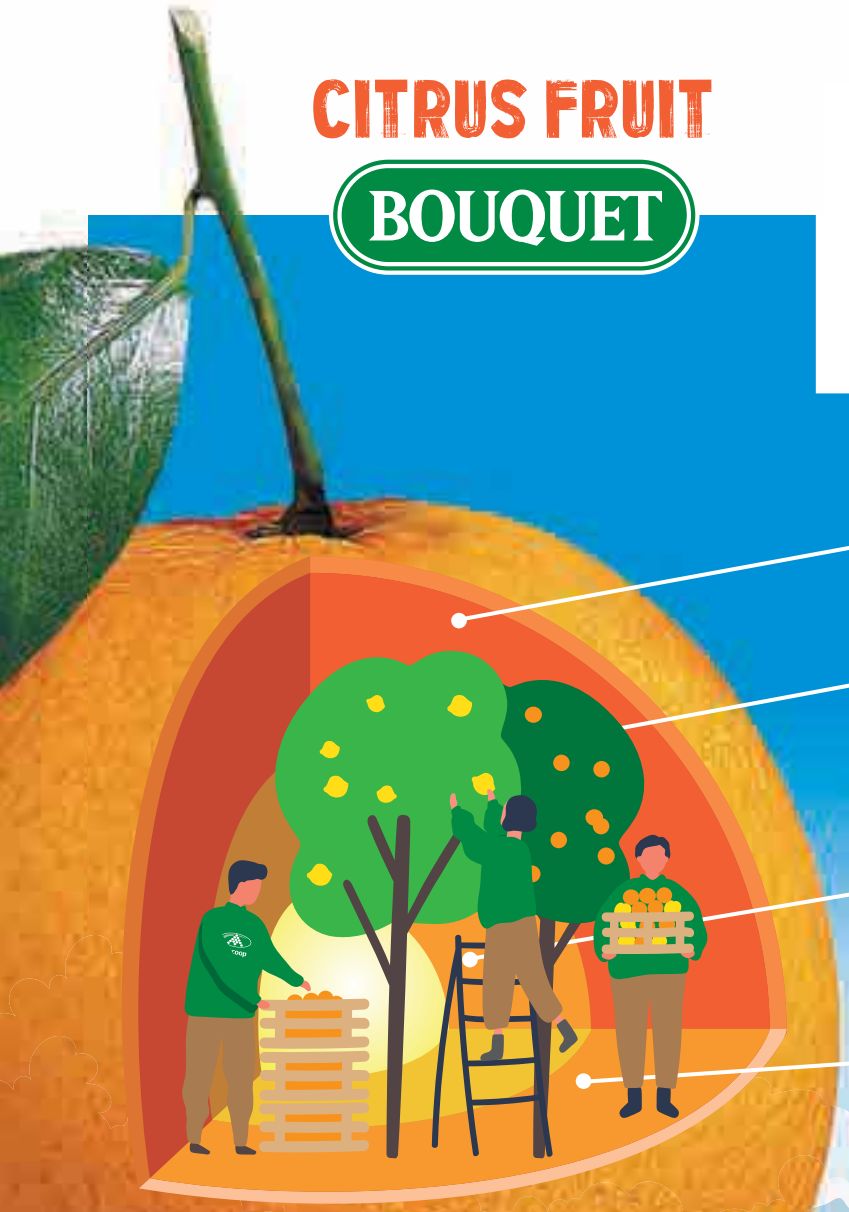

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MOROCCO

Good production level, but plenty of questions over trading

Unsurprisingly, Moroccan production will continue its rise in 2021-22, with an estimated harvest of approximately 2.5 million tonnes (approximately + 15 % on 2020-21). The cultivation area, extending in total over an estimated 130 000 ha, in light of the large-scale planting movement enacted under the "Maroc Vert" plan over the past decade, is maintaining its boom. Conversely, sizing remains relatively limited at the beginning of this season. Water is a major problem, particularly in the south. In mid-November, the overall dam level was as bad as in 2020, at around 35 % (as opposed to 45 % in 2019 and more than 60 % in 2018), with agricultural water retention structures often in an even more critical situation.

While the volumes are there, the issue of trading can be raised again even more pointedly, especially since the industry remains extremely fragile in economic terms. While producers regained profitability in 2020-21, the disastrous campaigns in 2018-19 (poor sales) and 2019-20 (extremely lean production) have left their mark. The competition from Turkey and Egypt, boosted by highly favourable exchange rates, remains a major challenge, resulting in Morocco losing ground on its main market, i.e. Russia (130 000 to 160 000 t exported in the past two seasons, as opposed to 200 000 to more than 300 000 t in the past). Furthermore, shipments to North America are stagnant, or even falling. Africa is an up-and-coming market, though export volumes remain highly moderate (approximately 50 000 t). The boom in sea-freight prices is injecting an extra touch of difficulty this season in operating on the long-distance markets. Turkey, which makes road-freight exports to Russia, appears better placed than ever.

Hence the EC market is more crucial than ever this season. Morocco seems to have the ammunition to win back ground on the markets where Spain too is hampered by freight costs, i.e. Germany, Poland and especially the United Kingdom. Moroccan exporters this year will have access to a new RORO shipping line linking Tangiers to Poole. Professionals are also expecting State support, with extraordinary transport subsidies being handed out, as well as the set-up of a new programme contract, aimed at consolidating the production gains of the "Maroc Vert" plan. In particular, this involves continuing to strengthen the packing facilities, in order to bring the Moroccan supply into step with the expectations of the European market (packed). Morocco is currently losing a significant part of its competitiveness advantage at the production stage to sea-freight and packing at the destination. It also involves being able to make better use of sorting waste through revitalising the processing sector. Thanks to these structural investments, professionals hope to be able to sell 3.3 million tonnes of production in 2030, by achieving a balance of the outlets (1 million tonnes for export, 200 000 t for processing and the remainder for local use).

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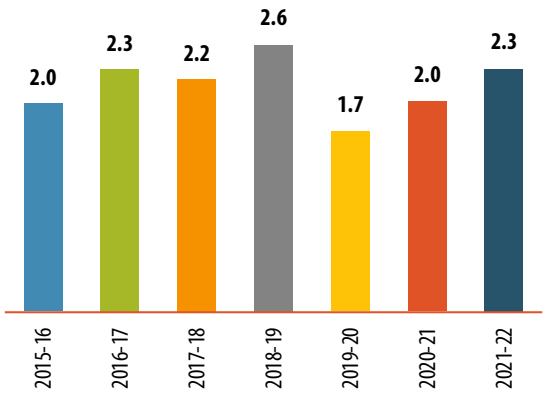
Citruses – Morocco – Harvest forecast

in 000 tonnes	2021-22	2021-22 compared to	
		2020-21	4-year average
Easy peelers	1 265	+ 16 %	+ 10 %
Orange	1 074	+ 15 %	+ 9 %
Total	**2 339**	**+ 15 %**	**+ 20 %**

Source: MarocFoodex

Orange and easy peelers - Morocco - Evolution of harvest
(in million tonnes | source: MarocFoodex)



ISRAEL

Back to more plentiful production

Israel will regain a good production level in 2021-22, contrasting with the previous season, marked by difficult weather conditions. The harvest should reach 560 000 t, the best performance for the past decade (20 % above the four-year average). There were very good climate conditions, and an alternate bearing upswing. All the varietal groups made considerable rises, except for the jewel of Israeli citrus growing, i.e. Orri. At the start of the season the sizing appears to be slightly down for the grapefruit, the Israeli citrus industry's other big export product.

The increase in freight prices is a subject of major concern. It could, at least temporarily, put the brakes on the rerouting of the grapefruit to the Asian markets, more lucrative than Europe (volumes to the Old Continent going from approximately 35 000-40 000 t in the middle of the last decade to 23 000-24 000 t for the past two seasons in favour of China, Japan and Thailand).

The production increase expected this season is not synonymous with any rallying of the sector. Water and labour availability remain constraints, while the high rate of the shekel is increasingly an impediment, in particular in as competitive a field internationally as agriculture. This sector, which was previously a major part of the economy, is continuing to decline, now representing just 2 % of exports in terms of value, in favour of new technologies (currently 10 % of GDP). Nonetheless, the small-scale replanting movement for the grapefruit is continuing (approximately + 1 500 ha since 2017-18), while uprooting of Orri has been halted.

Citruses – Israel – Harvest forecast

in 000 tonnes	2021-22	2021-22 compared to	
		2020-21	4-year average
Easy peelers	178	- 4 %	- 2 %
Grapefruit	147	+ 23 %	+ 7 %
Total	**325**	**+ 8 %**	**+ 2 %**

Source: CMBI

EGYPT

Another season of slight shortfall

With approximately 4.7 million tonnes expected, the harvest of the number three Mediterranean producer should again be slightly below average in 2021-22, another shortfall like the 2020-21 season. At least, this is the view of the country's professionals, with no overall harvest forecast or survey information available. This downturn, breaking with a strong growth trend up till 2019-20, is apparently due to a spring heatwave, in the midst of the blooming/fruit-setting period. The orange, Egypt's big export speciality, and for which it is at the top of the world supplier rankings alongside Spain, should see its production drop to approximately 4 % below average. The fall will be more marked for Valencia than Navel, and could be as much as 25 % to 30 % in certain zones hard hit by the high temperatures.

Although the country retains a major asset in terms of competitiveness, thanks to its production costs and its currency, the high sea-freight costs are a major challenge, in particular for small and medium exporters lacking a financial footing. Trade-offs between markets could end up being disrupted, with a possible refocus on nearby markets such as Europe and the Middle East, to the detriment of more distant destinations such as Asia (between 300 000 t and 400 000 t of exports in recent seasons). So Egypt's surge on the EC orange market could continue in 2021-22 (rise of 200 000 t in 7 years, with a record of 375 000 t in 2020-21).

Citruses – Egypt – Harvest forecast

in 000 tonnes	2021-22	2021-22 compared to	
		2020-21	4-year average
Orange	3 011	- 3 %	- 4 %

Source: WCO

OTHER COUNTRIES IN THE ZONE

A considerable shortfall, except in Turkey

The other Mediterranean producer countries are all registering a significant production shortfall, with one exception: Turkey. Its harvest should be well above average for the lemon, orange and easy peelers, according to professional sources. These trends are partly due to significant surface area expansions: + 22 000 ha between 2016 and 2020, according to TUIK, with a particularly pronounced increase for the lemon and easy peelers, while orange and grapefruit surface areas have instead been shrinking.

Conversely, despite what will probably be an alternate bearing upswing, Italy should have a well below-average harvest, with a proliferation of climate problems hitting the country (frost during the blooming/fruit-setting period, and then high temperatures and summer drought, before a deluge in early November in Sicily). We do not yet have a clear picture of the extent of the fall, with the latest events occurring very recently. It already seems that the Sicilian specialities, such as the orange and to a lesser degree the lemon, are harder hit than the easy peelers. This situation should increase Italy's status as a net importer.

Greek production is registering a downturn of more than 10 % both from last season, as well as being more than 10% below average, due to the frosts of this spring. The Tunisian harvest too is showing a distinct shortfall (14 % below average), due to very rainy weather during pollination and to a highly pronounced lack of water, in particular in the major production centre of Cap Bon. The figure is - 20 % for the m orange, the country's big export speciality.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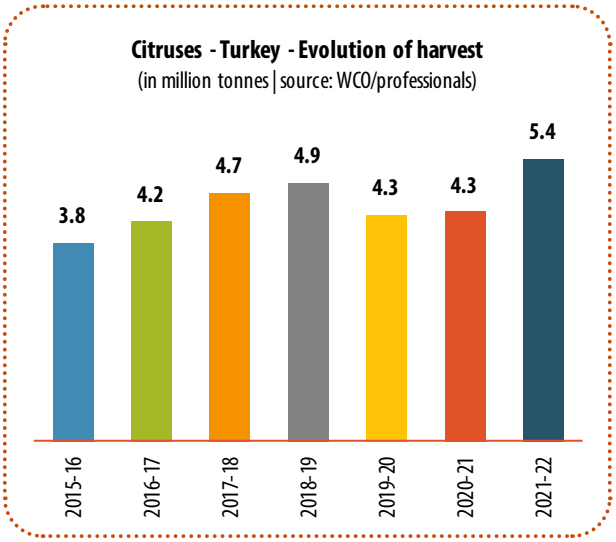
Citruses – Turkey – Harvest forecast

in 000 tonnes	2021-22	2021-22 compared to	
		2020-21	4-year average
Easy peelers	1 819	+ 15 %	+ 18 %
Orange	1 743	+ 31 %	+ 2 %
Lemon	1 550	+ 30 %	+ 46 %
Grapefruit	249	+ 13 %	+ 6 %
Total	**5 361**	**+ 23 %**	**+ 17 %**

Source: WCO



CORSICA

Back to an average campaign for the clementine

Last year was a historic campaign for Corsican citrus growers, with production reaching a record level of 38 000 tonnes for their flagship product, the clementine. This dynamic is due to the expansion in surface areas of approximately 250 ha since 2015, with the cultivation area exceeding 1 600 ha in 2020. This represents a real boom, at Corsican level of course! Thanks to the alternate bearing phenomenon, the harvest will be lighter in 2021-22, returning to approximately 32 000 tonnes, a level close to the four-year average. Grapefruit production should remain relatively stable of around 6 000 tonnes. The downturn in overall production expected in 2021-22 is only a one-off, and the industry anticipates a reasonable surge in the volumes expected in the medium term. Hence some contacts have been made to offer Corsican fruit outside of France. Furthermore, the construction of a processing unit has been signed, and should appear in 2022 ("L'atelier corse fruits et legumes"). The objective is to produce high-quality juices and essential oils from fruit that cannot be sold fresh (small sizes, deformations), amounting to approximately 10 % of production. The investment cost is around 4 million euros, jointly financed by public funds and professionals.

USA

A major shortfall and an open local market

Outside of the Mediterranean, there is a considerable shortfall in the USA. The country's two big production zones are registering production levels distinctly below average. The fall, due mainly to a very big alternate bearing effect after a particularly long 2020-21 season, is approximately 12 % in California. The figure is 20 % in Florida, where greening continues to ravage the crop. Texas, more modest in terms of volumes, continues to suffer from the effects of the winter 2020 frost, registering a level approximately 30 % below average, in spite of a production rise from 2020-21.

Despite volumes to the industrial sector probably below normal, the table citruses market should be considerably under-supplied, for all citrus families (production in zones supplying the fresh market registering - 13 % for easy peelers and orange in California, - 7 % for the lemon in California and – 7 % to - 30 % for the grapefruit, according to the regions). This shortfall could create a rush to supply the local US market (mainly for easy peelers), but also markets to which California exports (Canada for all the citrus families, and Asia for the orange).

The fall in California appears fairly cyclical, although the issue of very high production costs remains a handicap (agricultural water increasingly scarce, labour shortages and general context of additional cost of inputs worldwide). Conversely, it is more structural in Florida, and this may also be the case in Texas, where the frost could have caused structural losses. In Florida, the latest projections from the USDA are very gloomy. For the grapefruit, despite some bounce-back, the replanting level remains well below mortality. Hence the production capacity is continuing to drop, with on the one hand a decreasing number of trees (stock going from 5 million individuals in 2015 to 2.7 million in 2020), and on the other hand tree ageing (60 % of individuals more than 24 years old). Grapefruit production could be between 2.5 and 2.8 million boxes in 2030, as opposed to 3.8 million boxes this season, with the lower hypothesis being the most plausible ■

Citruses – Florida – Harvest forecast

in 000 tonnes	2021-22	2021-22 compared to	
		2020-21	4-year average
Orange	1 919	- 11 %	- 21 %
Grapefruit	147	- 7 %	- 13 %
Total	**2 065**	**- 11 %**	**- 20 %**

Source: USDA

Citruses – Texas – Harvest forecast

in 000 tonnes	2021-22	2021-22 compared to	
		2020-21	4-year average
Grapefruit	112	+ 29 %	- 30 %
Orange	21	- 48 %	- 68 %
Total	**134**	**+ 5 %**	**- 41 %**

Source: USDA

Citruses – California – Harvest forecast

in 000 tonnes	2021-22	2021-22 compared to	
		2020-21	4-year average
Easy peelers	762	- 25 %	- 13 %
Orange	1 579	- 13 %	- 7 %
Lemon	762	- 1 %	- 8 %
Grapefruit	142	0 %	- 7 %
Total	**3 244**	**- 14 %**	**- 12 %**

Source: USDA

EASY PEELERS

Considerable under-supply of clementines to the EU27+UK, despite rising Mediterranean production

Rise across the board, except for the number one Spain

The Mediterranean harvest registered a record level with approximately 7.6 million tonnes expected in 2021-22 (+ 5 % on 2020-21, and 6 % above average). Nonetheless, the situation is highly disparate between the producer countries. Spain, the world no.1 for this speciality, and the leading supplier to the European market, has a rather lean harvest overall (- 12 % on 2020-21, and 3 % below average), and a highly variable level between the varieties. While production is set to be up for end-of-season hybrids, and particularly for the three main club varieties, it is on the other hand well below average for clementines supplying the market until the end of the year (and in particular for the main variety, i.e. Nules). This fall is partly due to cyclical factors (weather and mealybug attacks – Delottococcus aberiae) and more structural factors (Nules cultivation area in the Valencian Community declining gradually from 33 600 ha in 2014-15 to 26 300 ha in 2019-20).

The situation is very different for the other two big Mediterranean citrus exporters, which are expecting very good harvest levels. Turkey reportedly has a record production potential of 1.8 million tonnes (+15% on 2020-21 and 18 % above average), aimed primarily, in terms of exports, at the East European and Middle Eastern markets. The Moroccan harvest is also one of the biggest seen, with 1.3 million tonnes (+15 % on 2020-21, and 10 % above average). The increase is reportedly more marked for Nadorcott than for the clementine. The sizing is currently on the average-low side, given the lack of rainfall once again this season. Among the more minor players, Israel will have a similar Orri harvest to 2020-21 (- 4 % on 2020-21 and 2 % below average), despite the large-scale uprooting carried out in recent seasons (cultivation area down from approximately 5 600 ha in 2017-18 to 4 000 ha in 2020-21). The Corsican clementine will return to average, after a record 2020-21 season (- 16 % on 2020-21 and 3 % below average).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A clear shortfall in the EU27+UK in the first part of the season

The shortfall of Spanish clementines will play a structuring role during the first part of the season on the EC market, with Spain controlling 70 % of the winter campaign supply. In this particular context, the transition between the Southern Hemisphere and Northern Hemisphere campaigns proceeded without any major hiccups, despite the surge from the Peruvian and above all South African hybrids supplies, more significant with every passing year (probably 80 000 t imported from South Africa during September and October 2021, as opposed to 30 000 t in 2017). There should be a clear shortage thereafter, given the very big shortfall of Spanish Nules, a variety representing the bulk of the supply in November and December. The exporters will probably be forced to replace this variety with Clemenvilla in the "value" programmes in order to defer the end of the clementine campaign, though this will come early in any event.

Morocco, which has a fine clementine harvest, should be able to mitigate the shortfall. While increasing freight costs should not have too much effect on Moroccan exports to the USA (Californian clementines well below average, and use of reefers), the Turkish competition could be stronger than ever in Russia (record Turkish production, exchange rate even more favourable than in previous years, and road-freight cost increase not as big as for sea-freight, used by Morocco). There should be a really significant rise in volumes aimed at the European market, particularly the United Kingdom, strategic for Morocco since it is less easy to access for the Spanish competition, particularly due to Brexit, and even more so since a direct shipping line was set up between Tangier and Poole (southern England) in October.

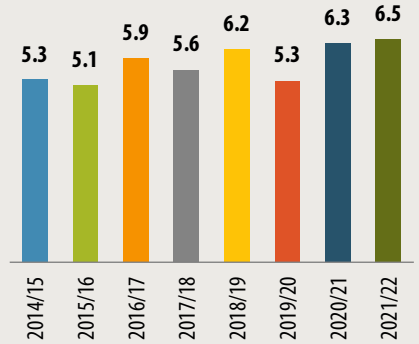

© Eric Imbert

Bigger supply in the second part of the season, though in a very clear context

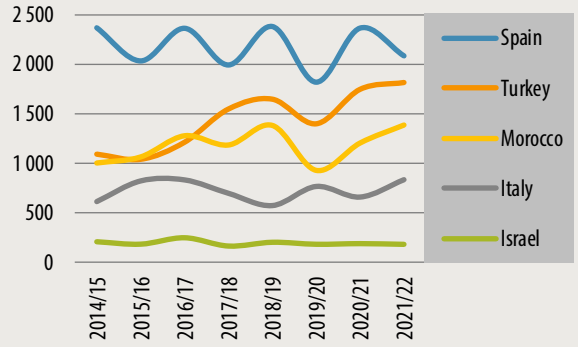
The second act of this winter season is set to be very different to the first, with a supply potential significantly up on 2020-21, and above average (probably + 10 % to + 15 % on last season, across all varieties and origins, i.e. 20% to 25% above average). There is a general increase for all players on this market, primarily comprising club varieties now, except for Israel, though it is maintaining an average potential. Spain reportedly has a similar potential to 2020-21 for Orri (mature stock and stabilised surface area), but with a rise for Tango and Nadorcott, thanks to a really fine harvest in Andalusia and Murcia. Similarly, the Moroccan Nadorcott production level appears to be very good. The overall rise in the supply seems to be distinctly within the reach of EC demand, especially since the season should start early because of the shortfall in the Spanish clementines supply. The extra trading weeks for the clementine in January will contribute to significantly reducing the available potential, with consumption remaining particularly strong at this time of year.

Regarding demand, will the return of a new epidemic wave have a positive effect? This was the case in 2020, when consumption, on rather a decline between 2016 and 2019 in non-producer West European countries (after dropping from 5.0 kg/capita to 4.3 kg), bounced back to 4.6 kg/capita. It is too early to say. The Scandinavian and German markets, on a distinctly downward footing between 2016 and 2019, will bear closest watching. Little movement should be expected on the eastern EC markets, in particular in the expected context of high prices. This consumption area has appeared highly mature since 2017, despite a much more modest consumption level than in the west of the Continent (consumption stabilised at 3.4-3.5 kg/capita).

Easy peelers - Mediterranean - Production
(in million tonnes | sources: WCO, CLAM, professional estimate)



Easy peelers - Mediterranean - Production
(in 000 tonnes | sources: WCO, CLAM, professional estimate)

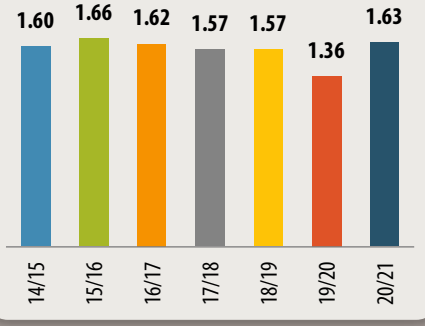


Easy peelers – Mediterranean – 2021-22 production forecast

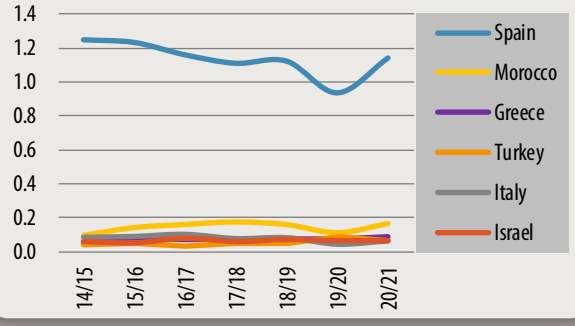
in 000 tonnes	2021-22	compared to	
		2020-21	4-year average
Spain	2 088	- 12 %	- 3 %
Turkey	1 819	+ 15 %	+ 15 %
Morocco	1 386	+ 15 %	+ 17 %
Italy	830	+ 26 %	+ 23 %
Israel	178	- 4 %	- 2 %
Greece	157	- 10 %	- 11 %
Total	**6 458**	**+ 2 %**	**+ 9 %**

Sources: WCO, CLAM, professional estimate

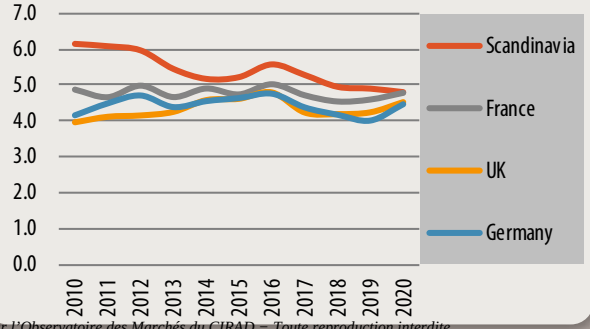
Easy peelers - EU27+UK
Winter season supply
(in million tonnes | source: Eurostat)



Easy peelers - EU27+UK
Winter season supply - Main suppliers
(in million tonnes | source: Eurostat)



Easy peelers - Evolution of consumption
on the leading West European markets
(in kg per capita | sources: Customs, Trade map, professionals)



Easy peelers - Evolution of consumption
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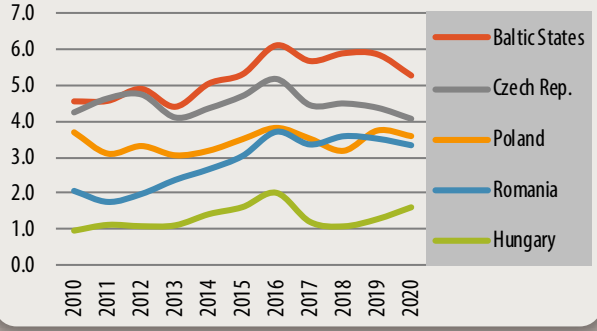


ORANGE

A perfectly average campaign, in an average consumption context


© Catherine Sanchez

Average is indisputably the watchword to characterise the Mediterranean orange production potential this season. With approximately 11.9 million tonnes, the harvest level is similar to the 2020-21 season, and completely average! The very same adjective that emerges if we analyse the harvests in most of the big countries in the zone, with just a few exceptions.

Production potential average everywhere

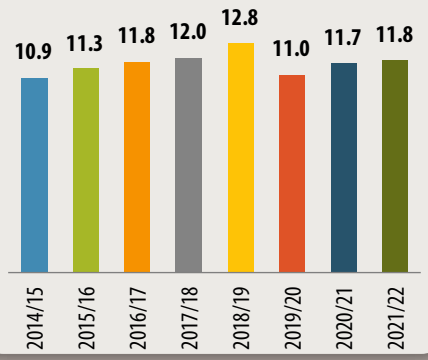
Despite a considerable rise from 2020-21, the Spanish harvest is only average, though with a slightly uneven level according to the period in question. For the first part of the season, availability appears very high for Naveline/ Navel table oranges (7 % above average in the Valencian Community), but rather light for Salustiana juice oranges, in both the Valencian Community and Andalusia (6 % and 12 % below average, respectively). The scenario is the opposite for the second part of the season, when the production potential for Navel late table oranges is below average (- 6 % in the Valencian Community, and an average harvest in Andalusia), while the Valencia juice oranges harvest is reportedly average (clearly below average at -14 % in the Valencian Community, but with a rise in Andalusia). This bucks the trend for all these late orange varieties, given the planting trajectory and the ongoing rejuvenation of the stock (annual planting rate of between 1 million and 1.6 million units between 2016-17 and 2019-20). Egypt, which along with Spain shares the title of world number one exporter, with volumes of around 1.4 million tonnes placed on the international market, reportedly has a slightly below-average harvest (- 4 %). Valencia, the main export variety, should have a more marked downturn than Navel. Turkish production is set to be barely average, unlike for other citruses, which have very high harvest levels. Three countries, with production in excess of one million tonnes but which are not among the leading exporters, stand out from this pack of average performances. Morocco apparently has a very good harvest level, especially for Valencia late. Conversely, the Italian production level, now in shortfall, could well be revised downward again after the flooding which battered Sicily in early November. Similarly, Greek production is below average due to the frosts of this spring.

Slightly imbalanced distribution of supply, but with moderate pressure

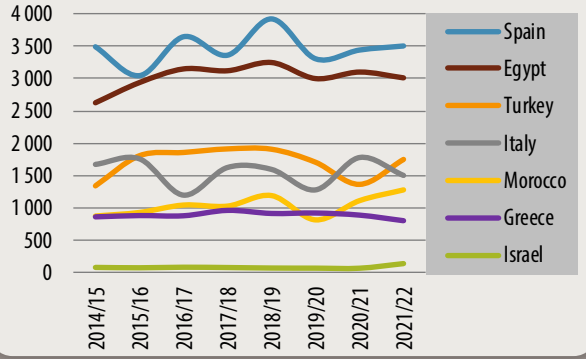
The Mediterranean season is starting late on the EU27+UK market, as a result of the considerable extension of the Southern Hemisphere campaign. The trend, less marked than for the lemon but fairly structural, is due to an increase in volumes delivered at the end of the summer season, especially in September and October (shift due to extension of the Mediterranean season, delaying the start of the summer season). As usual, the scenario will be closely linked to the profile of the Spanish season, the origin which controls nearly two-thirds of the EC supply during the winter season. While availability appears higher for table oranges during the first part of the season, and the start is behind schedule, we nonetheless need to take into account the downturn in juice oranges production, and the lack of easy peelers. Furthermore, the second part of the season is relatively light in terms of volume. We also need to reckon on the shortfalls from Italy and Greece, minor though still significant market players. Conversely, we must not overestimate the impact of the fall in Egyptian production. Increasing freight prices could lead to a downturn in shipments to distant markets (300 000 to 400 000 t for Asia alone!), in particular from "small exporters", and further increase the flow to the EU27+UK. Few surprises can be expected from demand, stabilised at an average of 6.0 kg to 6.1 kg/capita since 2018 in non-producer western EC countries. Unlike with the other citruses, Covid has not even caused a slight renewal of interest, except in Germany. The same can be said for the eastern EC markets, which have levelled out at an average of 4.3-4.4 kg/capita since 2017.

The industry should be able to pay higher prices than in 2019-20, in view of the upwardly mobile concentrate market (+ $300 to $2 100/tonne of 65°Brix concentrate into Rotterdam). This trend appears solid in view of the moderate production levels of the two protagonists (294 million field crates expected in Brazil, i.e. 12 % below average, and 47 million in Florida, i.e. 21 % below average). Furthermore, Brazilian concentrate stocks at the end of June 2021 registered a lower level than in 2020, at a near-average level (311 000 t). Nonetheless, the fresh market should remain more attractive.

Orange - Mediterranean - Production
(in million tonnes | sources: WCO, CLAM, prof. estimate)



Orange - Mediterranean - Production
(in 000 tonnes | sources: WCO, CLAM, professional estimate)

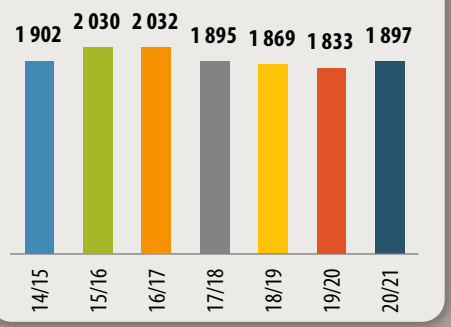


Orange – Mediterranean – 2021-22 production forecast

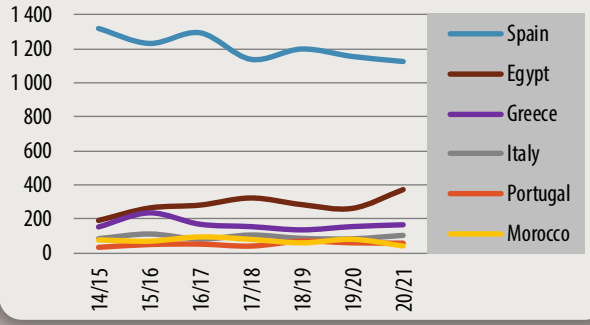
in 000 tonnes	2021-22	compared to	
		2020-21	4-year average
Spain	3 511	+ 2 %	0 %
Egypt	3 011	- 3 %	- 3 %
Turkey	1 743	+ 28 %	+ 2 %
Italy	1 500	- 15 %	- 4 %
Morocco	1 271	+ 15 %	+ 23 %
Greece	800	- 10 %	- 13 %
Total	**11 836**	**+ 1 %**	**0 %**

Sources: WCO, CLAM, professional estimate

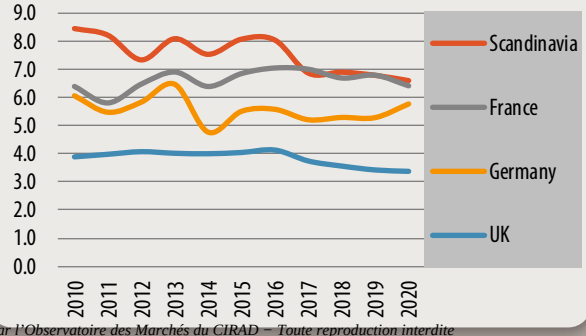
Orange - EU27+UK
Winter season supply
(in 000 tonnes | source: Eurostat)



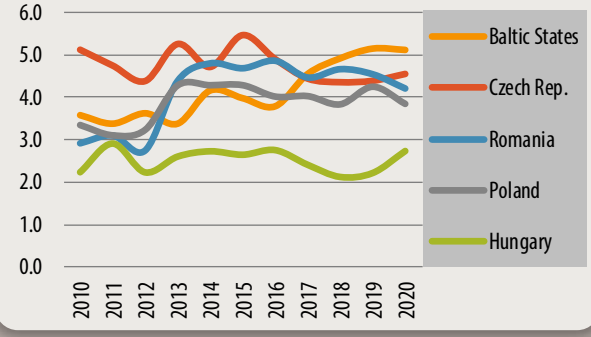
Orange EU27+UK
Winter season supply - Main suppliers
(in 000 tonnes | source: Eurostat)



Orange - Evolution of consumption
on leading West European markets
(in kg per capita | sources: Customs, Comtrade, professionals)



Orange - Evolution of consumption
on leading East European markets
(in kg per capita | sources: Customs, Comtrade, professionals)



GRAPEFRUIT

Hesitant Mediterranean production bounce-back continuing

The expected bounce-back in the Mediterranean harvest for 2021-22 illustrates the small recovery movement in planting which has occurred in recent years in most of the big producer countries in the zone. Nonetheless, this growth is not synonymous with a rise in the overall supply during the winter season, in a context of continuously dropping incoming shipments from North America and a diversification trend in shipments, especially to Asia, from certain major players in the region.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A good Mediterranean harvest level, unlike in the USA

With approximately 550 000 t expected, the Mediterranean grapefruit harvest registered one of its best levels over the past decade (+ 8 % on 2020-21, and 3 % above the four-year average). Turkey, the regional leader in terms of volume, is back to an average production level after an alternate bearing downswing in the 2020-21 season. Conversely, the sizing appears rather limited in the first part of the season. There is a similar situation in Israel, where the combination of an alternate bearing upswing, good climate conditions and expanding surface areas is helping production register its best level since 2015-16 (+ 23 % on 2020-21 and 7 % above average). Spain is the only origin among the leaders to see a downturn in its production from the 2020-21 level, though it is holding up above average (- 4 % on 2020-21 and 3 % above average). This is bucking the trend, in view of its significantly expanding cultivation area. The other producer countries in the zone have only limited production, and are practically absent from the export sector.

The panorama remains really bleak for the North American tropical grapefruit. The decline in Floridian production seems to be restarting, after a period of relative stabilisation until 2019-20. With an expected 3.8 million field crates, the harvest is registering a historic low (- 7 % on 2020-21 and 13 % below average). Furthermore, the sizing appears to be somewhat down at the start of this season. The situation is barely more favourable for Texas, where production is up on 2020-21 to reach 3.1 million field crates, but is still bearing the scars from the frosts of February 2020 (+ 30 % on 2020-21, and 30 % below average).

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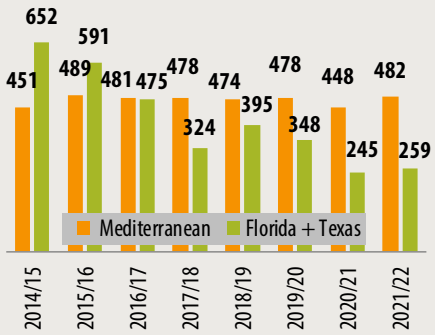
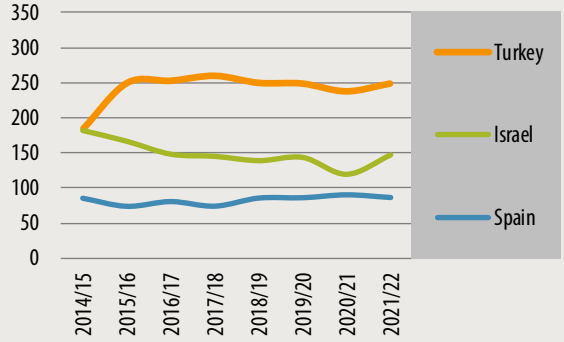
A fairly difficult scenario to understand

Will the increase in Mediterranean production be passed on to the EC market supply? It is hard to get a clear view from the trade-offs that exporters will apply between the markets this season, such is the proliferation of factors, often with opposing consequences, to be taken into account. Will Israeli exports to the EU27+UK, which have collapsed by a half in the space of a decade, in favour of the Asian markets (Japan + China), decline further, as we might expect from the further big depreciation of the euro against the shekel (approximately - 12 % from 2020 in mid-November)? The shortage and very high cost of freight to these distant markets could slow down the movement this season. Furthermore, will Turkey, which mainly has rather small fruit at the beginning of this season, be able to sell its usual big volumes to its number one market, i.e. Russia, which has a preference for large fruits? What would be the alternative for Turkish exporters, when the sanitary controls into the EU27+UK, its number two market, have been stepped up? The tropical grapefruit supply from the USA, which has collapsed in recent years (more than 100 000 t in 2000, and then approximately 50 000 t in 2010, and finally approximately 10 000 t in recent seasons), should remain marginal. Besides the fall in production, the very high freight costs ($850 to $1 000 more per container compared to 2020) could well cancel out the positive effect of the suspension of additional Customs duty implemented at the start of the 2020-21 season. The consumption trends on the EC market are rather reassuring, or less alarmist. The volumes consumed have stabilised at approximately 700 g/capita in the western part of the EU since 2017, after a long period of decline, with Covid actually triggering a minor leap in 2020 (780 g/capita). This "flattening" concerns all the markets in the zone, although some major consumption differences between countries remain (from approximately 400 g/capita in the United Kingdom to approximately 900 g in France). Furthermore, the growth dynamic is prevailing in the eastern part of the EC, where volumes consumed have risen by 200 g/capita over the past five years. All the countries in the zone are highly dynamic, especially the main consumption markets (Poland, Romania, Bulgaria, Czech Republic). This trend augurs well, while the planting carried out in recent years in Spain and Israel raises hopes that Mediterranean production should continue to rise in the coming years.

Grapefruit - EU27+UK
Main suppliers production
(in 000 tonnes | sources: WCO, CLAM, USDA, prof. estimate)



Grapefruit - Mediterranean - Production
(in 000 tonnes | sources: AILIMPO, CMBI, USDA)



Grapefruit – Mediterranean – 2021-22 production forecast

in 000 tonnes	2021-22	compared to	
		2020-21	4-year average
Turkey*	249	+ 5 %	0 %
Israel	147	+ 23 %	+ 7 %
Spain	86	- 4 %	+ 3 %
Total	**482**	**+ 8 %**	**+ 3 %**

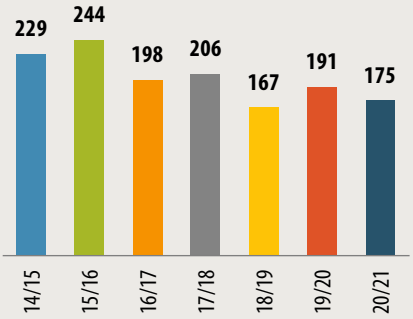
Sources: WCO, CLAM, *professional estimate

Tropical grapefruit – 2021-22 production forecast

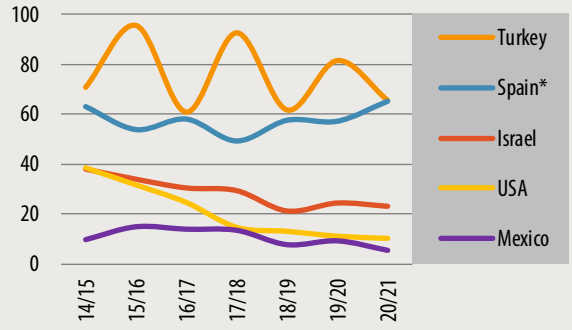
in 000 tonnes	2021-22	compared to	
		2020-21	4-year average
Florida	147	- 7 %	- 13 %
Texas	112	+ 29 %	- 30 %
Total	**259**	**- 6 %**	**- 21 %**

Source: USDA

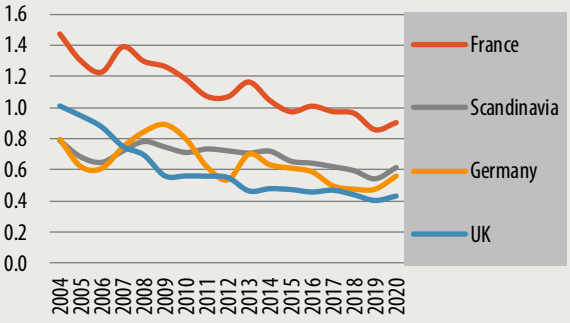
Grapefruit - EU27+UK
Winter season supply
(in 000 tonnes | source: Eurostat)



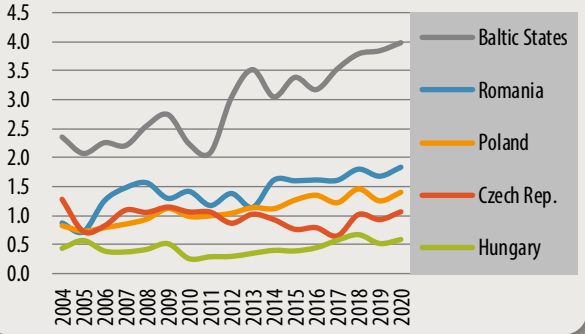
Grapefruit - EU27+UK
Winter season supply - Main suppliers
(in 000 tonnes | sources: Eurostat, *Ailimpo)



Grapefruit - Evolution of consumption
on leading West European markets
(in kg per capita | sources: Customs, Trade map, professionals)



Grapefruit - Evolution of consumption
on leading East European markets
(in kg per capita | sources: Customs, Trade map, professionals)



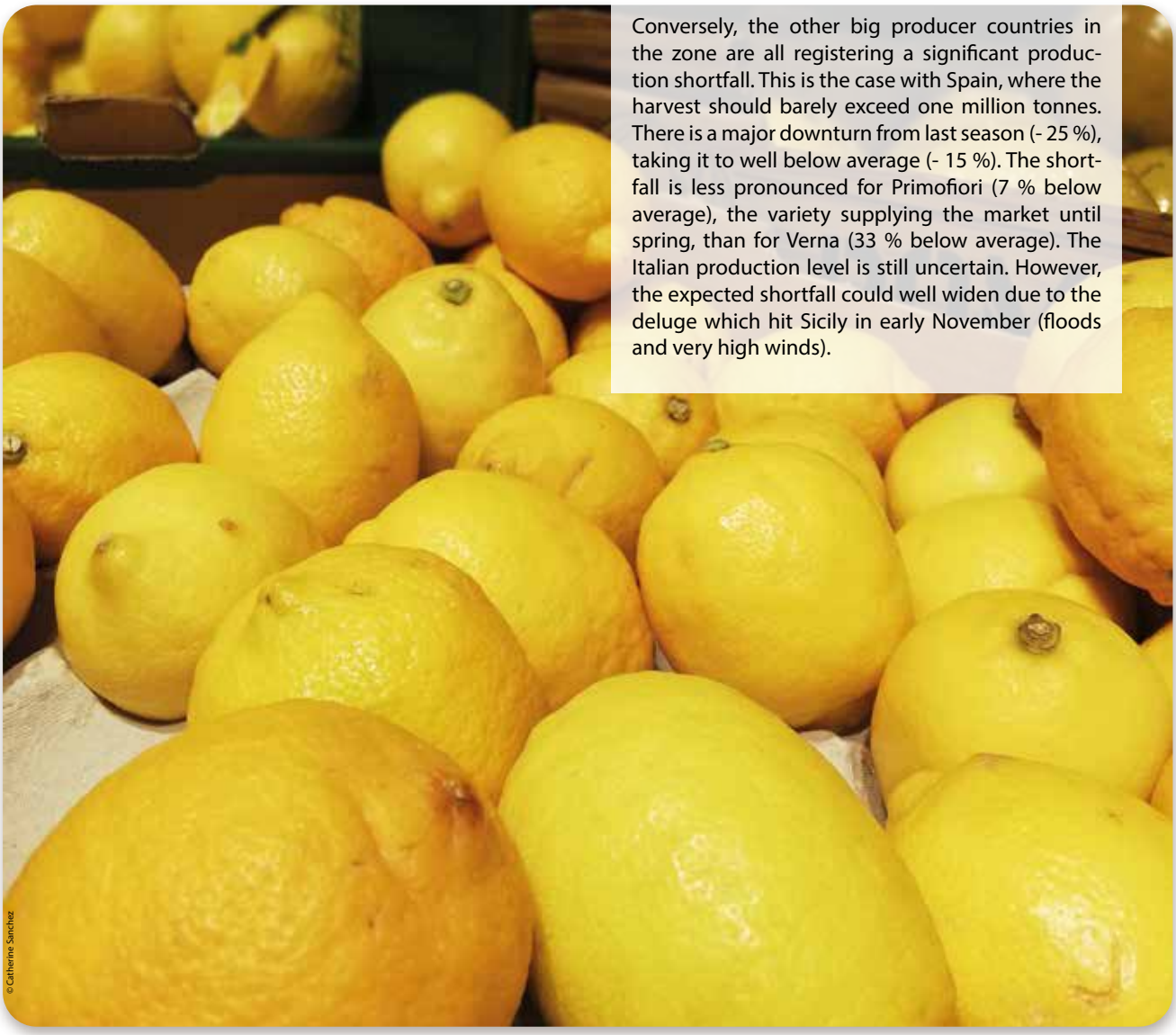
LEMON

Record Mediterranean production, but with a distinct Spanish and Italian shortfall

Another record production season is getting underway in the Mediterranean. The harvest from the world's number one fresh lemon export area should exceed 3.5 million tonnes, a figure marking a rise of approximately 1 million tonnes in barely eight years, due to the major wave of planting over recent years. Nonetheless, the production potentials are set to be highly mixed between countries in the zone.

Turkey in great shape, unlike Spain and Italy

It is Turkey which will drive Mediterranean production upward in 2021-22. It is set for a historic harvest, after a fairly good level in the 2020-21 campaign. Volumes are very good for both Interdonado, trading until the end of February, and Lama, which supplies the second part of the season.



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Conversely, the other big producer countries in the zone are all registering a significant production shortfall. This is the case with Spain, where the harvest should barely exceed one million tonnes. There is a major downturn from last season (- 25 %), taking it to well below average (- 15 %). The shortfall is less pronounced for Primofiori (7 % below average), the variety supplying the market until spring, than for Verna (33 % below average). The Italian production level is still uncertain. However, the expected shortfall could well widen due to the deluge which hit Sicily in early November (floods and very high winds).

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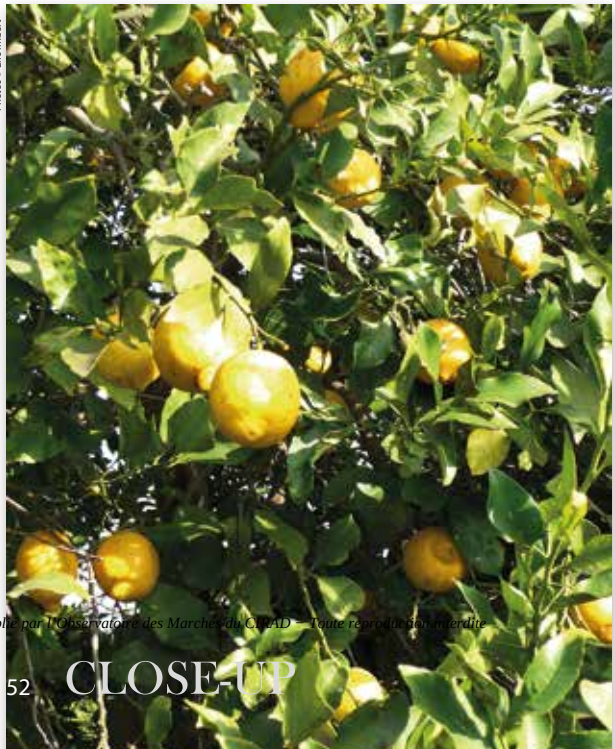


Photos © Eric Imbert

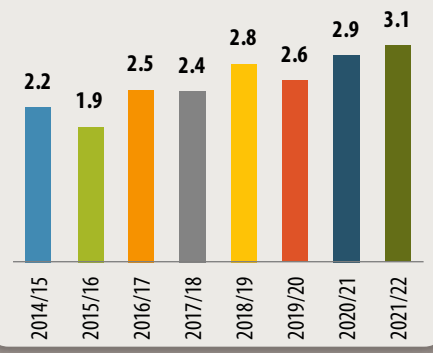
Tension on the EC market, in particular in the second part of the season

The EC market should be tight. Regarding demand, 2020 consumption figures confirm that the lemon remains one of the few citruses to enjoy a real growth dynamic. Regained interest due to Covid has only strengthened an upward trend established since the middle of the last decade (rise of more than 500 g/capita between 2015 and 2020 for the West European markets, and nearly 700 g for the eastern EC markets). The "Welcome to the lemon age" promotion campaign, launched for the Spanish lemon by Ailimpo with the financial support of the EU, on a scale unprecedented in the field of citruses in Europe, will contribute to sustaining this trajectory. Regarding the supply, the shortfall from Spain, which controls nearly three quarters of the winter season supply to the EU27+UK, will play a structuring role. This should only slightly be eased by the trading delay at the start of the season (actual start of trading only in early November, because of the large volumes of leftover lemons from the Southern Hemisphere, available in September and October). The shortage of fruit will deepen. The supply should maintain an average level during the first part of the season, with the fruit from orchards planted with the rootstock Macrophylla (more limited storage life) needing to be marketed fairly quickly. The supply will be much more limited in early 2022, and then above all in spring, with the transition to the well below-average Verna. The compensation options for the Italian lemon appear limited, with Sicily also registering a highly significant production shortfall. The stepped-up sanitary controls on Turkish citruses implemented in early November, following the interception of a record number of batches exceeding the MRL at the very beginning of the season, should also limit Turkish lemon shipments to the eastern EC markets, despite the magnitude of the volumes available from production.

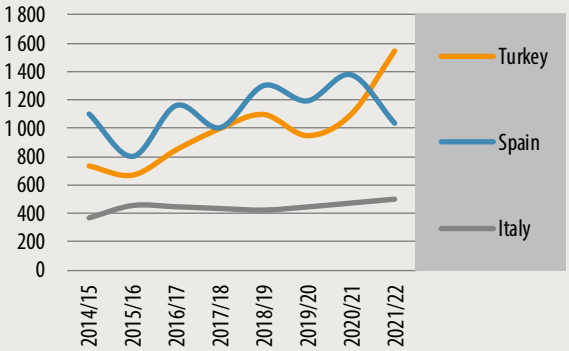
In this context of tension on the fresh fruit market, the share of production going to the industrial sector should see a considerable drop (true, after a 2020-21 season of record processed volumes). Concentrated juice is registering higher prices than at the beginning of last season ($2 000/t of concentrate FOB Argentina in early September, as opposed to $1 500/t one year earlier), but still distinctly less attractive than on the fresh fruit market.

So the campaign is set to augur better for Mediterranean producers, who should see their trading accounts back in the green, after a dramatic 2020-21 season. Nonetheless, the massive planting carried out in both the Northern and Southern Hemisphere, especially during the second half of the last decade, leads us to believe that the supply trough seen this season will be fleeting.

Lemon - Mediterranean - Production
(in million tonnes | sources: WCO, CLAM, prof. estimate)



Lemon - Mediterranean - Production
(in 000 tonnes | sources: WCO, CLAM, professionnal estimate)

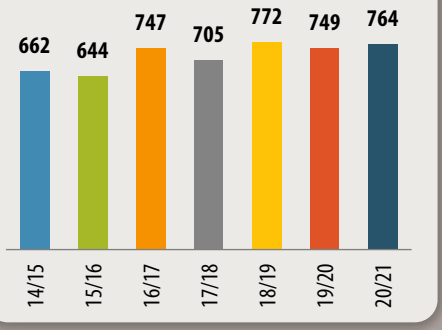


Lemon – Mediterranean – 2021-22 production forecast

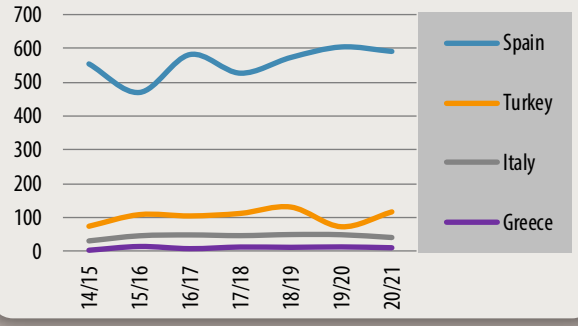
in 000 tonnes	2021-22	compared to	
		2020-21	4-year average
Turkey	1 550	+ 41 %	+ 49 %
Spain	1 035	- 25 %	- 15 %
Italy	500	+ 6 %	+ 12 %
Total	**3 085**	**+ 5 %**	**+ 14 %**

Sources: WCO, CLAM, professional estimate

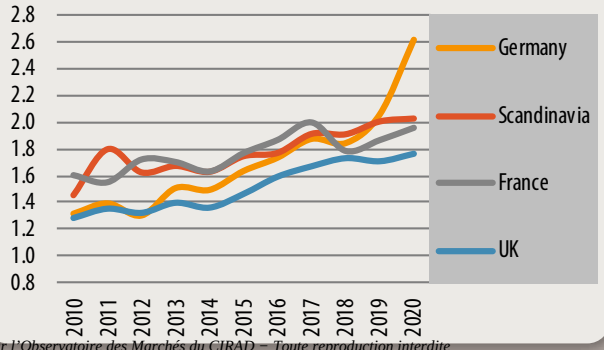
Lemon - EU27+UK
Winter season supply
(in 000 tonnes | source: Eurostat)



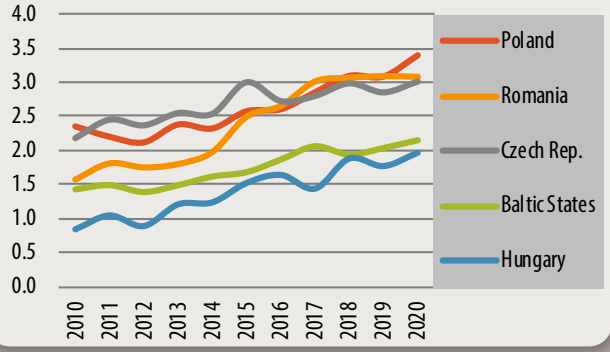
Lemon -EU27+UK
Winter season supply - Main suppliers
(in 000 tonnes | source: Eurostat)

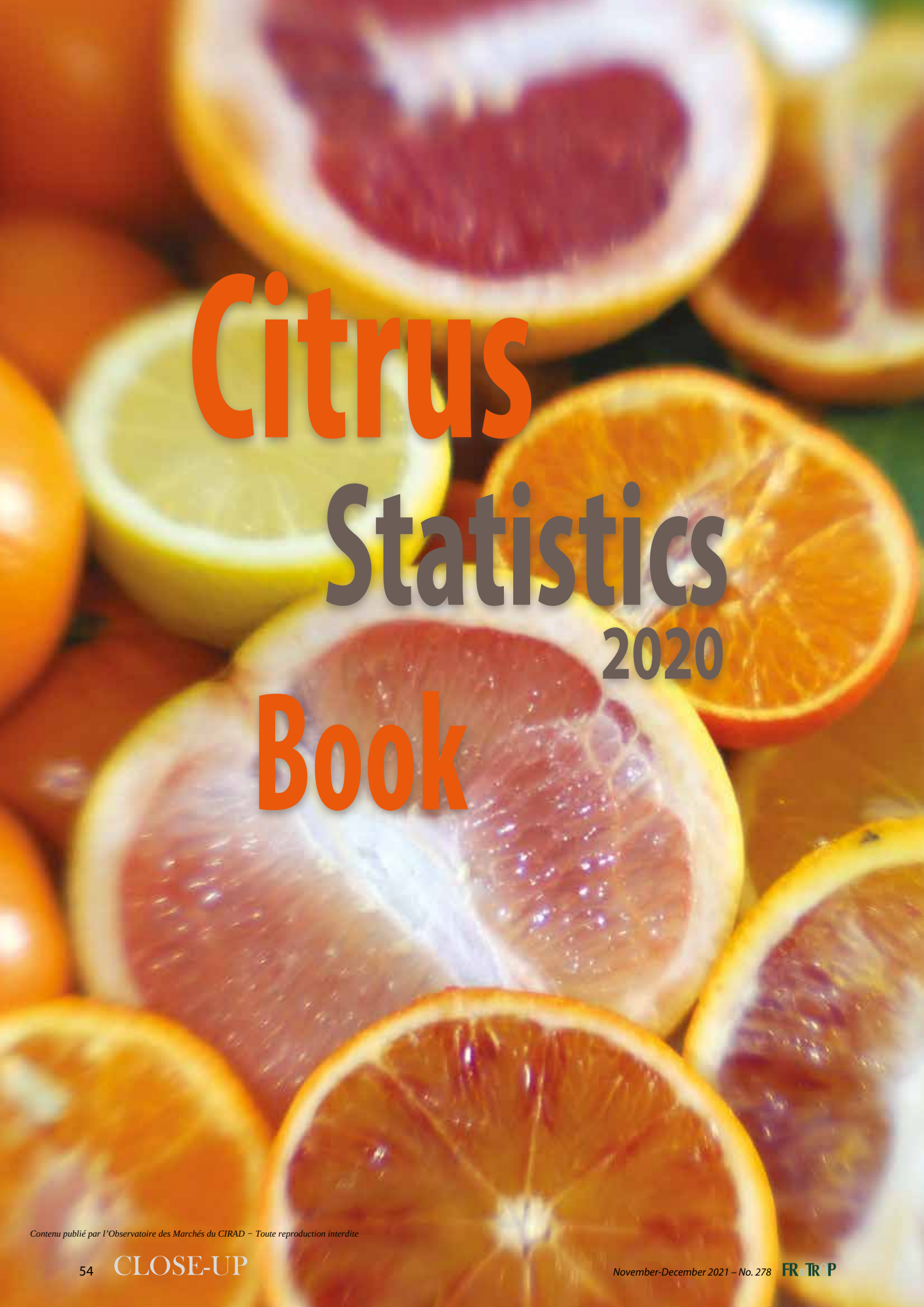


Lemon - Evolution of consumption
on leading West European markets
(in kg per capita | sources: Customs, Trade map, professionals)



Lemon - Evolution of consumption
on leading East European markets
(in kg per capita | sources: Customs, Trade map, professionals)

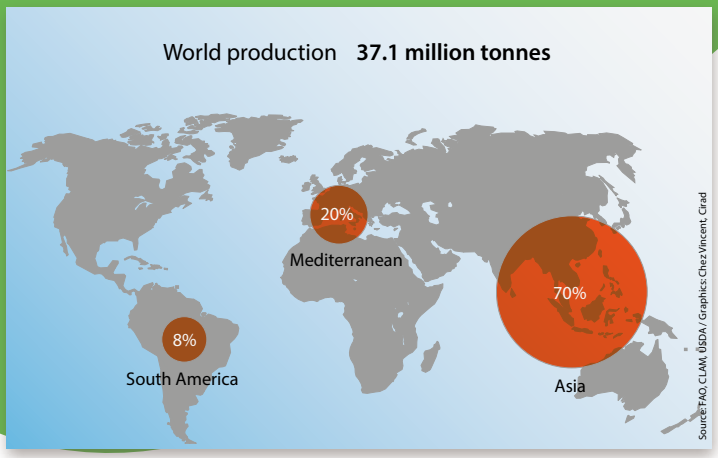




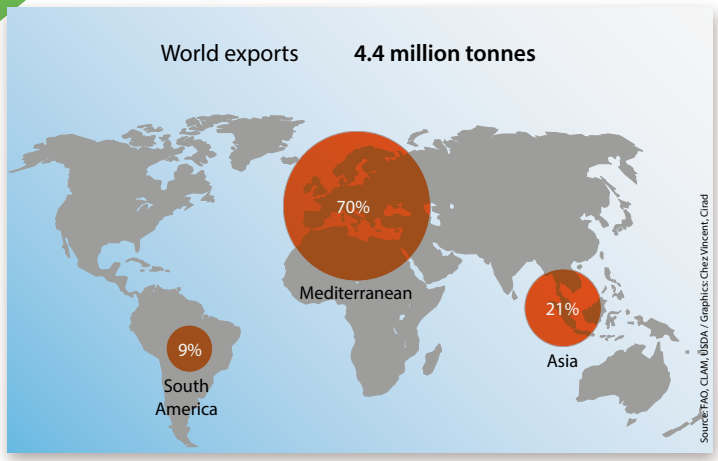
Citrus Statistics 2020 Book

EASY PEELERS

Production (2020-2021)*



Exports (2020-2021)*



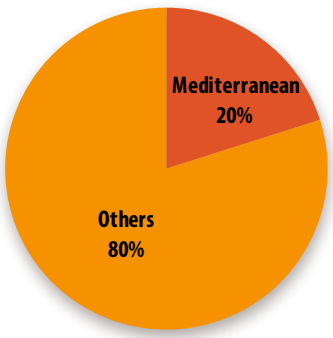
Easy peelers - Top 10 producer countries	
000 tonnes	**2020**
China	23 000
Spain	2 369
Turkey	1 750
Morocco	1 205
Egypt	1 026
Brazil	985
Japan	960
United States	856
Italy	660
South Korea*	631

* Estimate / Sources: FAO, professionals

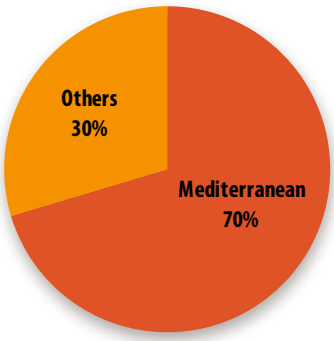
Easy peelers - Top 10 exporter countries	
000 tonnes	**2020**
Spain	1 406
Turkey	899
China	513
Morocco	458
Pakistan	404
South Africa	389
Peru	215
Chile	195
Greece	137
Israel	78

Sources: national Customs, professionals

Easy peelers - World Mediterranean production share



Easy peelers - World Mediterranean exports share



Easy peelers - Mediterranean - Production	
000 tonnes	**2020**
Spain	2 369
Turkey	1 750
Morocco	1 205
Egypt	1 026
Italy	660
Israel	185
Greece	174
Tunisia	80
Cyprus	30

Source: professionals

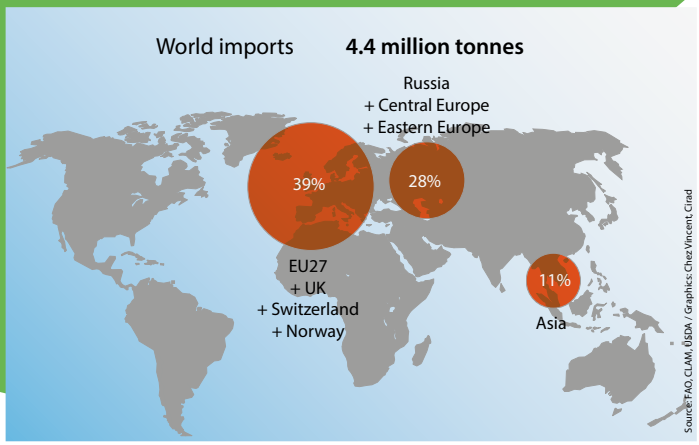
Easy peelers - Mediterranean - Exports	
000 tonnes	**2020**
Spain	1 406
Turkey	899
Morocco	457
Greece	137
Israel	77
Italy	60
Egypt	34
Cyprus	7

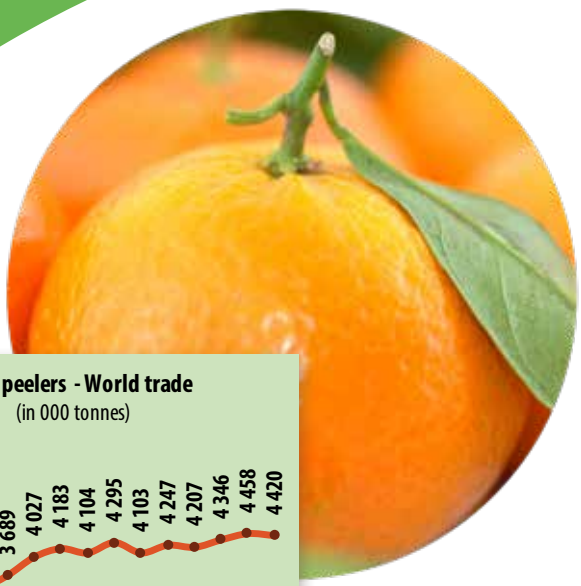
* Estimate / Source: professionals

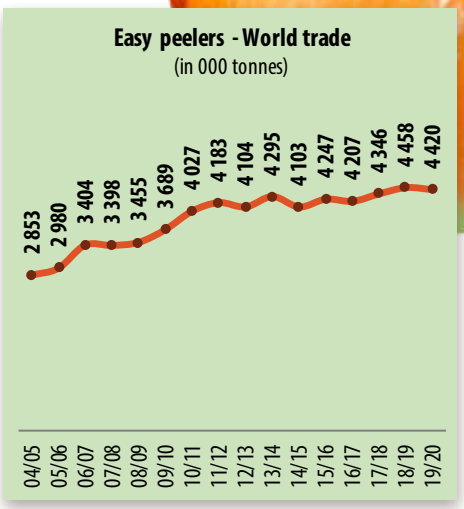
* 2020 for S. Hemisphere, 2019-2020 for N. Hemisphere

EASY PEELERS

Imports (2020)*

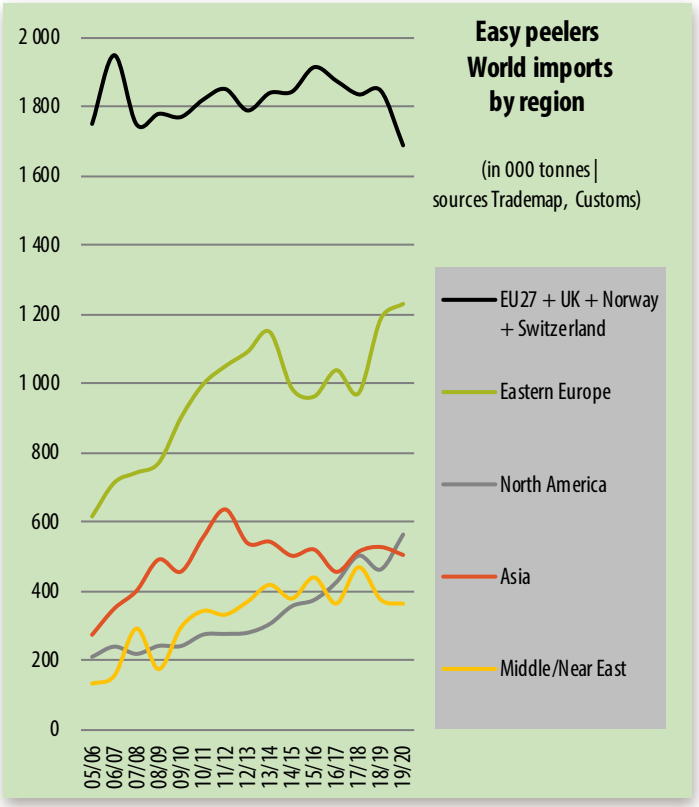






Easy peelers - Top 8 importer countries	
000 tonnes	**2020**
Russia	903
Germany	388
France	360
United States	390
United Kingdom	316
Netherlands	193
Ukraine	190
Iraq	127

Source: national Customs



Easy peelers - UNITED STATES - Main supplier countries

000 tonnes	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Total	**228.9**	**273.6**	**353.1**	**313.5**	**389.8**	
Total N. Hemis., incl.	**70.1**	**74.4**	**84.9**	**76.0**	**51.1**	**50.5**
Morocco	32.2	43.0	56.6	51.3	38.4	41.5
Israel	8.3	9.4	7.5	9.2	7.9	5.0
Mexico	6.3	5.0	5.4	5.4	3.9	3.8
Spain	23.3	17.0	15.4	9.4	0.2	0.2
Total S. Hemis., incl.	**158.8**	**199.2**	**268.2**	**237.5**	**338.7**	
Chile	90.6	111.5	164.5	135.7	174.1	
Peru	41.7	54.4	67.1	64.6	104.2	
South Africa	9.8	10.9	12.4	16.6	30.5	
Uruguay	13.3	17.0	17.5	14.7	23.8	
Australia	3.4	5.3	6.7	5.9	6.1	
Local production (tangerine, tangelo)	**864**	**934**	**729**	**1 005**	**857**	**1 058**
California	787	864	697	962	813	1 020
Florida	77	70	32	43	44	38

Source: US Customs, code 080520

Easy peelers - CANADA - Main supplier countries

000 tonnes	2015	2016	2017	2018	2019	2020
Total	**146.0**	**145.8**	**152.8**	**149.6**	**149.5**	**165.3**
Total N. Hemis., incl.	**119.6**	**116.3**	**121.0**	**111.8**	**114.6**	**122.2**
Morocco	53.4	58.6	68.5	57.3	53.5	59.5
China	19.8	21.4	17.2	13.8	9.0	14.4
USA	18.9	15.8	13.6	12.5	23.9	19.6
Spain	16.6	14.2	12.0	18.8	19.5	17.3
Japan	1.8	1.2	0.9	0.1	0.8	0.1
Total S. Hemis., incl.	**26.4**	**29.5**	**31.8**	**37.8**	**34.9**	**43.1**
Peru	11.3	12.4	14.4	14.7	13.1	16.9
South Africa	5.9	6.1	7.0	10.3	10.8	16.0
Argentina	4.1	3.9	4.8	4.5	5.1	4.0
Chile	3.6	3.3	2.5	6.0	3.8	4.1
Brazil	0.1	1.9	1.0	0.2	0.3	0.2
Uruguay	1.4	1.9	2.1	1.1	1.8	1.9

Source: COMTRADE, code HS 085020

* 2019-2020 or calendar year 2020

EASY PEELERS

Easy peelers - EUROPEAN UNION - Main supplier countries (September to May)

000 tonnes	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Total	**1 836.5**	**1 796.6**	**1 761.0**	**1 772.7**	**1 608.5**	**1 626.2**
Total N. Hemis., incl.	**1 659.1**	**1 616.6**	**1 568.8**	**1 572.2**	**1 357.2**	**1 626.2**
Spain	1 234.2	1 161.2	1 111.1	1 124.1	936.2	1 142.6
Morocco	140.4	157.5	170.8	156.8	112.9	162.0
Greece	76.5	70.0	72.0	72.9	73.6	84.3
Turkey	48.5	34.4	51.2	46.1	83.3	65.8
Italy	86.4	97.5	75.0	79.7	44.8	62.2
Israel	48.8	75.2	56.5	68.2	62.4	61.7
Egypt	1.2	1.8	5.7	4.5	24.2	27.5
Portugal	17.8	12.9	20.3	15.8	14.6	17.1
Cyprus	5.4	6.2	6.1	4.2	5.2	3.0
Total S. Hemis., incl.	**177.4**	**180.0**	**192.2**	**200.5**	**251.3**	**-**
South Africa	115.9	116.0	129.5	139.0	183.0	-
Peru	47.8	53.7	53.5	52.4	64.1	-
Uruguay	6.1	4.7	3.8	2.8	2.5	-
Chile	2.9	3.2	2.0	4.1	1.1	-
Argentina	3.9	1.6	2.7	2.0	0.6	-
Australia	0.8	0.8	0.5	0.2	-	-

* Extra-EU imports and shipments from main EU producer countries (Spain, Italy Greece)
Source: EUROSTAT, code 080520 until 2017, after 2017 code 080521, 080522, 080529

Easy peelers - OTHER WEST EUROPEAN COUNTRIES - Main markets

000 tonnes	2015	2016	2017	2018	2019	2020
Total	**75.2**	**76.4**	**76.6**	**73.2**	**71.8**	**78.4**
Switzerland	44.7	44.3	44.0	41.0	40.6	45.3
Norway	29.2	30.9	31.5	29.6	30.1	32.0
Iceland	1.3	1.2	1.1	2.6	1.1	1.1

Source: COMTRADE, code HS 080520

Easy peelers - RUSSIA - Main supplier countries

000 tonnes	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Total	**684.9**	**799.6**	**688.5**	**879.6**	**903.2**	**869.3**
Total N. Hemis., incl.	**635.9**	**749.0**	**638.1**	**827.8**	**845.4**	**869.3**
Turkey	167.4	328.2	250.9	276.8	461.5	496.9
Morocco	190.7	214.5	212.6	281.1	150.2	154.5
Pakistan	97.8	65.3	68.9	88.5	95.6	92.0
Georgia	43.2	29.3	21.1	53.7	70.5	77.6
Egypt	16.4	6.5	0.5	18.8	50.0	35.7
Others	5.5	3.7	-	4.3	7.2	6.6
Israel	16.8	13.2	1.3	7.7	6.3	4.5
Belarus	7.6	5.6	16.1	7.9	1.3	1.5
China	90.5	82.7	66.7	89.0	2.8	-
Total S. Hemis., incl.	**49.0**	**50.6**	**50.4**	**51.8**	**57.8**	**-**
South Africa	14.3	19.6	26.4	27.0	31.6	-
Peru	3.6	7.0	7.8	9.1	13.4	-
Argentina	24.3	20.0	13.7	13.8	11.3	-
Uruguay	6.8	4.0	2.5	1.9	1.5	-

Source: COMTRADE, code 080520

Easy peelers - UKRAINE - Main supplier countries

000 tonnes	2015	2016	2017	2018	2019	2020
Total, incl.	**112.5**	**145.4**	**132.9**	**164.6**	**180.3**	**190.0**
Turkey	62.3	92.5	81.3	102.7	120.9	115.8
Egypt	1.7	1.3	5.1	15.2	11.4	22.5
Greece	6.5	10.7	8.3	10.0	12.0	13.1
Pakistan	9.6	5.2	5.6	4.1	6.3	10.7
Italy	12.1	13.9	14.4	14.2	9.6	9.9
Spain	15.4	9.8	8.8	9.5	11.3	9.6
Georgia	3.3	6.5	4.4	4.8	5.2	4.7
Israel	0.3	-	-	-	1.0	0.9

Source: COMTRADE, code HS 085020

Easy peelers - JAPAN - Main supplier countries

000 tonnes	2015	2016	2017	2018	2019	2020
Total	**11.6**	**17.4**	**18.5**	**18.6**	**18.7**	**22.0**
Total N. Hemis., incl.	**9.3**	**14.5**	**14.4**	**14.0**	**13.8**	**12.9**
USA	8.8	14.0	13.0	13.0	12.8	12.4
Israel	0.6	0.4	1.4	1.0	1.0	0.5
Taiwan	-	0.1	-	-	-	-
Total S. Hemis., incl.	**2.3**	**2.9**	**4.1**	**4.6**	**4.9**	**9.1**
Australia	1.6	2.6	4.1	4.6	4.9	7.5
New Zealand	0.7	0.3	0.0	-	-	-

Source: Japanese Customs, code HS 080520

Easy peelers - SOUTH-EAST ASIA - Main markets

000 tonnes	2015	2016	2017	2018	2019	2020
Total	**413.2**	**430.2**	**382.4**	**404.2**	**432.3**	**419.7**
Philippines	52.6	77.1	67.8	95.3	95.5	129.6
Thailand	125.2	135.6	88.2	84.3	57.8	103.3
Indonesia	82.3	39.6	43.5	62.7	103.5	57.1
Malaysia	72.3	74.7	80.9	73.7	73.9	49.5
China	40.1	58.6	52.3	52.5	64.3	47.7
Singapore	22.1	24.7	28.1	19.2	21.1	16.3
Sri Lanka	8.9	9.6	7.0	8.6	8.7	8.7
Vietnam	9.8	10.3	14.6	7.8	7.5	7.5

Source: COMTRADE, code HS 085020

Easy peelers - CENTRAL ASIA - Main markets

000 tonnes	2015	2016	2017	2018	2019	2020
Total	**75.3**	**70.4**	**52.6**	**89.2**	**74.4**	**62.3**
Kazakhstan	63.7	56.9	43.5	68.2	57.5	49.8
Azerbaijan	-	2.3	2.7	9.8	9.2	9.3
Kyrgyzstan	11.5	11.2	6.4	11.2	7.7	3.2

Source: COMTRADE, code HS 085020

Easy peelers - PERSIAN GULF - Main markets

000 tonnes	2015	2016	2017	2018	2019	2020
Total	**378.8**	**439.4**	**364.8**	**468.5**	**375.4**	**364.1**
Saudi Arabia	65.5	91.9	76.5	88.0	82.8	113.2
Iraq	168.4	202.8	183.9	239.9	159.5	110.7
United Arab Em.	101.7	87.1	60.0	76.1	76.7	76.0
Kuwait	16.8	27.8	22.3	26.0	17.2	25.7
Oman	9.8	12.3	10.6	17.6	17.0	17.0
Qatar	9.2	9.9	8.9	13.3	14.6	13.9
Bahrain	6.2	7.7	2.6	7.6	7.6	7.6
Iran	1.3	0.0	-	-	-	-

Source: COMTRADE, code HS 085020

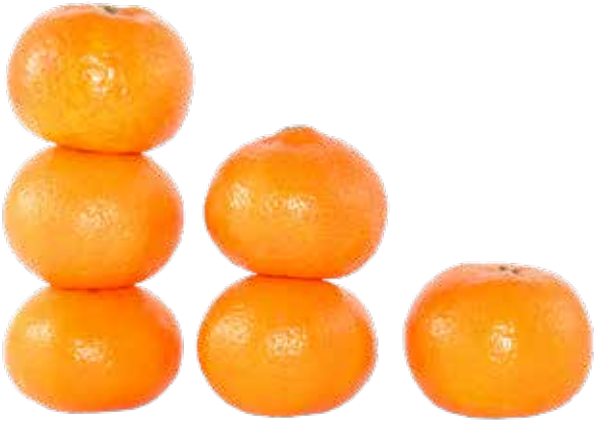
Easy peelers - OTHER EAST AND CENTRAL EUROPEAN COUNTRIES - Main markets

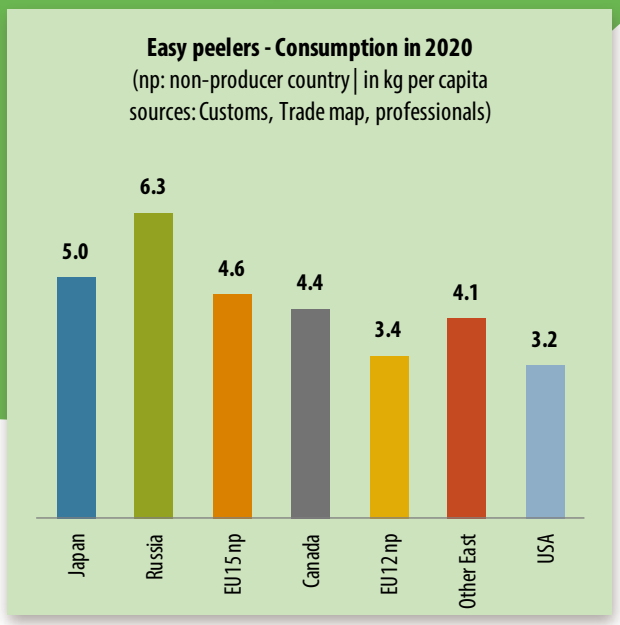
000 tonnes	2015	2016	2017	2018	2019	2020
Total, incl.	**116.0**	**129.7**	**103.4**	**116.6**	**125.0**	**134.3**
Belarus	53.5	47.6	40.3	43.5	37.9	36.2
Serbia	21.1	27.3	21.2	21.3	28.5	33.0
Bosnia	15.6	22.3	15.9	20.4	19.2	20.7
Armenia	2.6	6.2	5.6	7.2	12.8	15.8
Moldova	9.1	10.2	8.9	11.6	13.0	13.9
Macedonia	8.9	10.8	8.1	9.8	9.4	11.6
Albania	4.5	3.2	1.7	2.1	2.1	2.0
Georgia	0.7	2.1	1.7	0.7	2.1	1.1

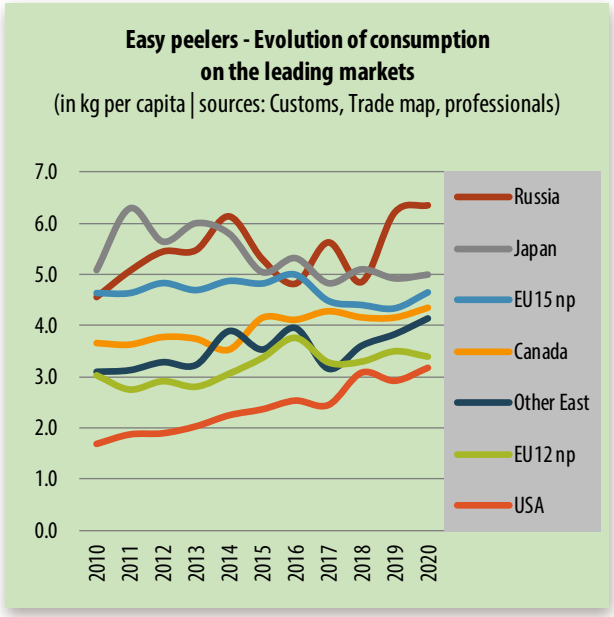
Source: COMTRADE, code 080520

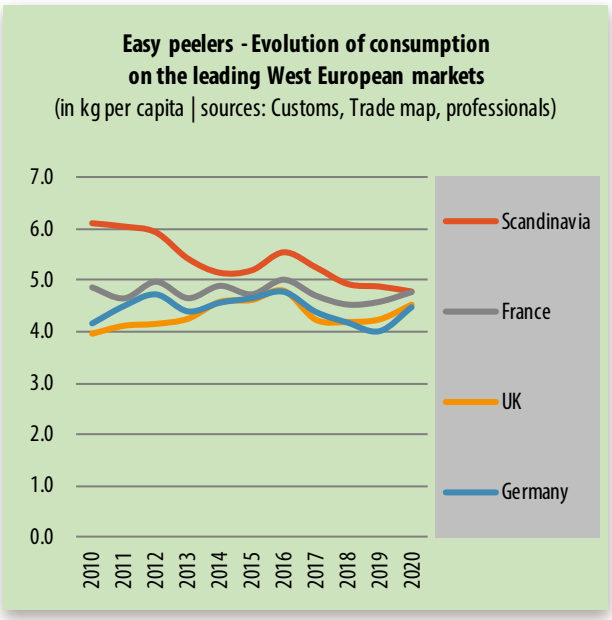
EASY PEELERS

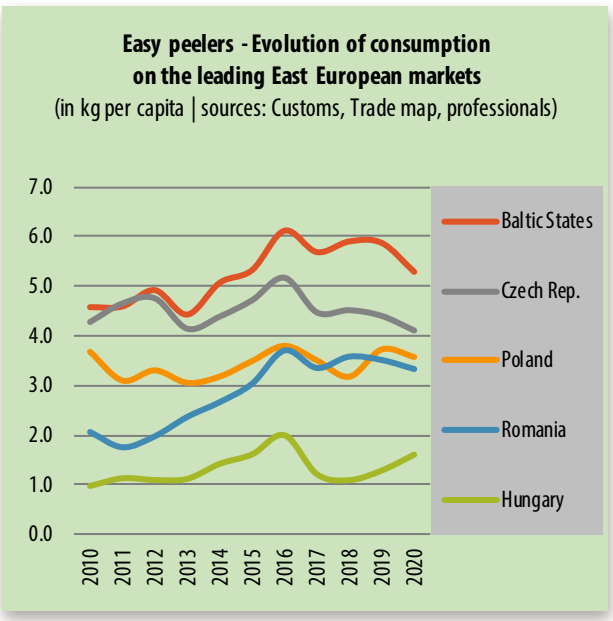
Consumption (2020)





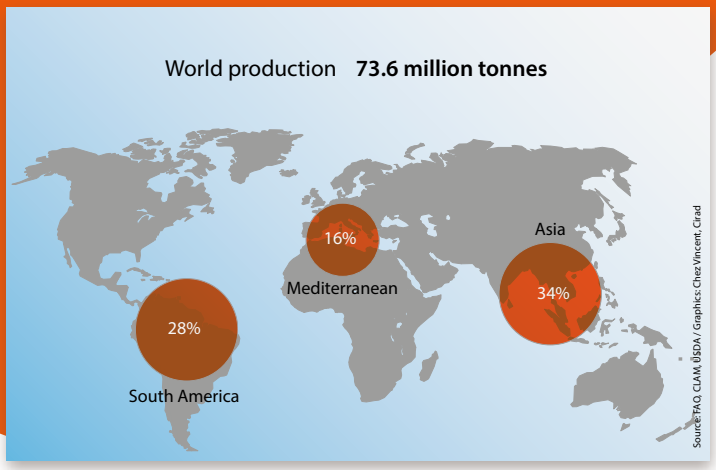




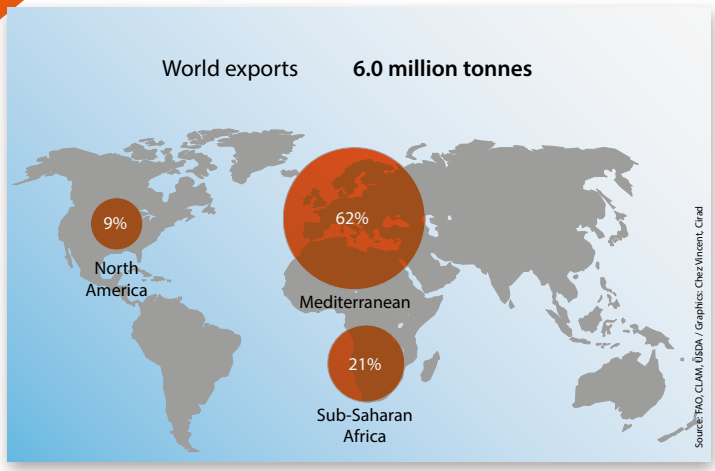


ORANGE

Production (2020-2021)*



Exports (2020-2021)*



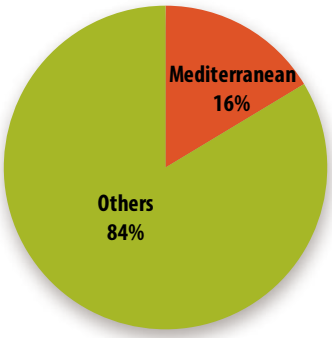
Orange - Top 10 producer countries	
000 tonnes	**2020-2021**
Brazil	16 932
India	9 509
China	7 500
USA	4 133
Mexico	4 010
Spain	3 448
Egypt	3 100
Indonesia	2 563
Iran	2 309
Italy	1 773

Sources: FAO, professionals

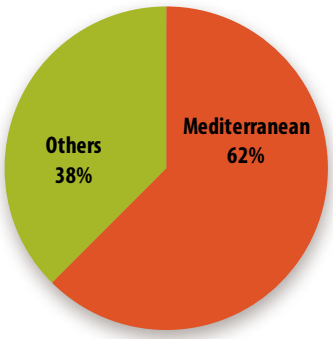
Orange - Top 8 exporter countries	
000 tonnes	**2020-2021**
Spain	1 556
Egypt*	1 420
South Africa	1 260
USA	501
Greece	331
Turkey	203
Italy	121
Morocco	73

* Estimate / Sources: national Customs, professionals

Orange - World Mediterranean production share



Orange - World Mediterranean exports share



Orange - Mediterranean - Production	
000 tonnes	**2020-2021**
Spain	3 448
Egypt	3 100
Italy	1 773
Turkey	1 360
Morocco	1 105
Greece	887
Tunisia	293
Israel	65
Cyprus	20

Source: professionals

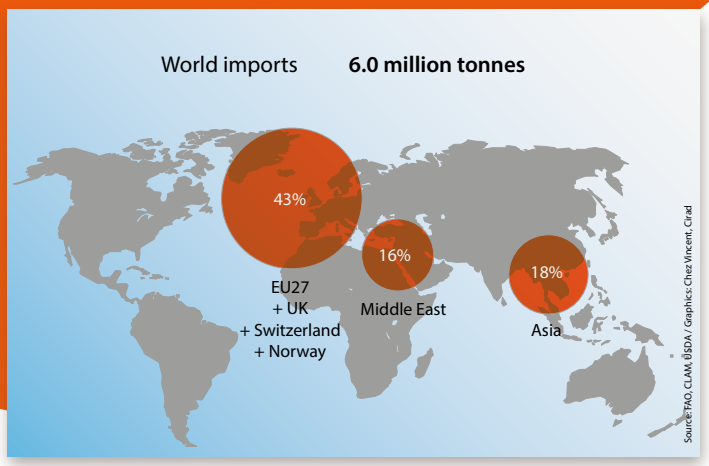
Orange - Mediterranean - Exports	
000 tonnes	**2020-2021**
Spain	1 556
Egypt*	1 420
Greece	331
Turkey	203
Italy	121
Morocco	73
Tunisia*	9
Cyprus	7
Israel	2

* Estimate / Source: professionals

* 2020 for S. Hemisphere, 2020-2021 for N. Hemisphere

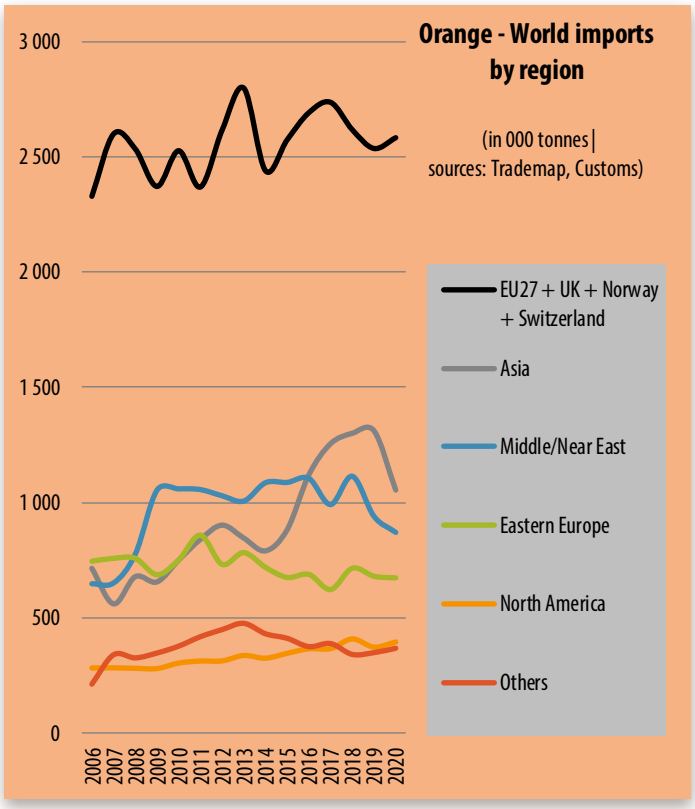
ORANGE

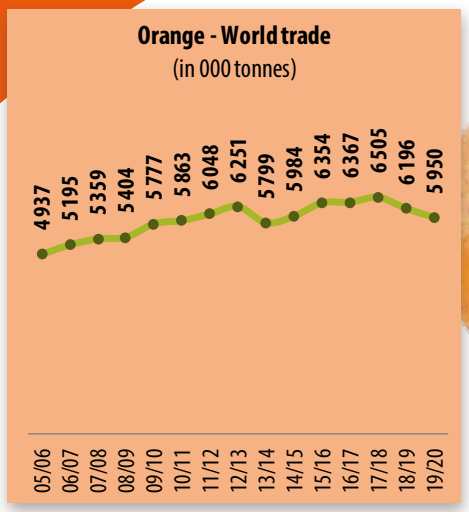
Imports (2020)*



Orange - Top 8 importer countries	
tonnes	**2020**
China	558 800
Netherlands	539 030
Germany	502 556
France	478 724
Russia	436 806
Saudi Arabia	404 576
United Kingdom	267 052
United Arab Emirates	200 000

Source: national Customs





Orange - UNITED STATES - Main supplier countries

tonnes	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Total	**161 165**	**186 744**	**222 870**	**191 953**	**199 471**	
Total N. Hemis., incl.	**49 167**	**75 897**	**79 769**	**66 435**	**61 152**	**68 621**
Mexico	47 073	71 096	66 000	57 157	56 297	63 167
Morocco	51	3 284	11 264	6 138	2 318	2 905
Dominican Rep.	1 842	1 339	2 112	2 273	2 334	2 528
Total S. Hemis., incl.	**111 998**	**110 847**	**143 101**	**125 518**	**138 319**	
Chile	66 142	66 864	92 553	92 102	82 892	
South Africa	37 926	36 400	41 639	29 289	49 342	
Australia	5 663	4 608	5 371	2 583	4 169	
Uruguay	2 267	2 823	3 359	1 306	1 603	

Source: US Customs

Orange - CANADA - Main supplier countries

tonnes	2015	2016	2017	2018	2019	2020
Total	**187 019**	**204 188**	**179 435**	**185 340**	**182 823**	**195 868**
Total N. Hemis., incl.	**143 032**	**160 905**	**136 708**	**140 772**	**144 131**	**142 807**
USA	124 344	153 301	114 196	102 053	96 394	108 989
Spain	13 644	6 450	16 075	28 646	35 210	24 064
Morocco	4 413	601	6 329	9 587	11 973	9 272
Total S. Hemis., incl.	**43 987**	**43 283**	**42 727**	**44 568**	**38 692**	**53 061**
South Africa	38 250	32 285	32 050	35 623	29 137	37 117
Australia	2 780	4 823	4 905	5 298	3 692	4 564
Argentina	416	1 565	1 949	631	1 237	2 504
Chile	2 098	2 334	2 362	1 841	3 394	2 292
Peru	46	154	97	276	138	1 456

Source: COMTRADE

Orange - SOUTH AMERICA - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**187 784**	**218 161**	**224 629**	**210 846**	**210 632**	**226 782**
Costa Rica	34 851	57 533	67 992	73 306	58 313	71 404
Guatemala	23 522	36 451	35 162	35 162	31 939	31 939
Paraguay	30 215	12 324	29 644	18 399	25 495	31 875
Mexico	25 418	32 564	16 563	21 156	28 602	30 913
El Salvador	34 767	28 773	26 703	15 627	21 056	25 612
Brazil	15 450	18 886	18 234	22 056	30 656	22 145
Chile	1 180	3 141	3 355	2 340	2 845	3 361
Peru	2 818	3 381	3 048	2 819	2 744	2 588
Ecuador	12 059	11 728	14 671	9 954	1 173	1 978
Barbados	1 519	1 523	1 387	1 366	1 658	1 832
Nicaragua	5 131	6 551	4 064	2 340	2 845	1 280
Argentina	21	4 306	3 266	5 050	2 458	1 000

Source: COMTRADE

Orange - OCEANIA - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**28 711**	**26 088**	**31 255**	**26 597**	**23 005**	**25 263**
Australia	17 701	14 750	20 435	17 208	13 728	17 330
New Zealand	11 010	11 338	10 820	9 389	9 277	7 933

Source: COMTRADE

* 2019-2020 or calendar year 2020

ORANGE

Orange - EUROPEAN UNION - Main supplier countries

tonnes	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Total	**2 578 478**	**2 628 470**	**2 511 537**	**2 430 562**	**2 474 479**	**-**
Total N. Hemis., incl.	**2 030 351**	**2 032 262**	**1 895 043**	**1 869 339**	**1 832 576**	**1 897 020**
Spain	1 233 704	1 297 293	1 138 728	1 200 403	1 155 688	1 125 703
Egypt	265 830	283 013	325 055	285 926	263 667	374 667
Greece	236 559	168 650	154 438	135 078	154 749	*165 529*
Italy	115 493	81 111	108 528	86 216	83 289	106 207
Portugal	47 559	49 844	38 994	66 361	57 067	55 118
Morocco	68 153	92 537	78 388	58 404	78 801	40 604
Tunisia	15 741	16 592	12 240	13 201	7 562	11 530
Turkey	29 560	24 792	27 420	13 020	21 346	8 785
Cyprus	2 605	2 852	1 734	3 271	5 226	2 420
Israel	4 452	2 820	2 318	1 442	859	653
Others	10 696	12 758	7 200	6 018	4 322	5 804
Total S. Hemis., incl.	**548 127**	**596 208**	**616 494**	**561 223**	**641 903**	**-**
South Africa	403 758	450 911	464 637	417 321	522 408	-
Zimbabwe	28 098	32 773	39 251	34 573	38 025	-
Peru	10 232	15 739	17 600	19 000	26 707	-
Argentina	49 204	39 245	44 415	41 417	24 941	-
Uruguay	27 779	26 351	26 641	28 278	20 395	-
Brazil	23 261	28 639	18 580	17 000	4 964	-
Swaziland	5 070	2 023	4 411	1 900	3 730	-
Chile	547	518	943	904	464	-
Australia	179	10	16	830	268	-

Source: EUROSTAT

Orange - OTHER WEST EUROPEAN COUNTRIES - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**107 511**	**111 035**	**105 323**	**103 775**	**103 979**	**106 543**
Switzerland	69 218	70 465	68 282	69 390	70 109	74 555
Norway	36 311	38 560	35 113	32 506	31 926	30 384
Iceland	1 982	2 010	1 928	1 879	1944	1604

Source: COMTRADE

Orange - RUSSIA - Main supplier countries

tonnes	2015	2016	2017	2018	2019	2020
Total	**463 660**	**451 822**	**428 481**	**465 431**	**447 723**	**436 806**
Total N. Hemis., incl.	**367 641**	**364 503**	**338 920**	**433 610**	**359 043**	**336 898**
Egypt	232 818	269 178	219 979	240 841	266 127	211 311
Turkey	108 572	70 278	103 550	103 477	74 695	112 312
Morocco	21 515	10 933	10 679	83 297	11 384	12 581
China	3 060	4 220	2 981	2 984	4 293	613
Syria	-	-	64	265	-	81
Spain	1 676	9 894	1 667	2 746	2 544	-
Total S. Hemis., incl.	**96 019**	**87 319**	**89 561**	**31 821**	**81 956**	**90 408**
South Africa	89 170	66 101	77 632	83 297	73 332	77 045
Argentina	497	5 306	3 185	2 186	3 663	10 052
Uruguay	1 310	9 405	2 777	593	1 936	1 342
Zimbabwe	252	315	880	953	409	304
Brazil	1 181	736	-	314	-	166
Others	3 609	5 456	5 087	-55 522	2 616	1 499

Source: COMTRADE

Orange - UKRAINE - Main supplier countries

tonnes	2015	2016	2017	2018	2019	2020
Total	**66 323**	**81 096**	**69 887**	**92 088**	**92 351**	**90 161**
Total N. Hemis., incl.	**60 479**	**71 437**	**59 846**	**86 067**	**82 581**	**78 438**
Egypt	31 909	20 709	31 773	41 684	53 893	41 599
Turkey	23 725	46 091	24 458	39 783	23 515	30 639
Spain	4 372	3 392	2 884	3 593	3 676	4 261
Greece	386	1 236	612	899	1 424	1 853
Italy	66	9	28	98	11	50
Morocco	21	-	91	10	59	29
Total S. Hemis., incl.	**11 723**	**11 723**	**11 723**	**11 723**	**9 770**	**11 723**
South Africa	4 944	7 405	6 601	4 157	6 038	7 443
Argentina	94	236	426	60	266	1 968
Brazil	20	312	1 169	3 593	1 972	605
Zimbabwe	625	777	155	31	382	90

Source: COMTRADE

Orange - JAPAN - Main supplier countries

tonnes	2015	2016	2017	2018	2019	2020
Total	**84 113**	**101 543**	**90 593**	**81 593**	**88 123**	**92 909**
Total N. Hemis., incl.	**51 495**	**64 556**	**50 932**	**44 628**	**50 595**	**49 726**
USA	50 824	64 225	49 677	42 795	50 318	49 542
Mexico	670	330	1 255	1 832	277	183
Total S. Hemis., incl.	**43 184**	**43 184**	**43 184**	**36 921**	**37 617**	**43 184**
Australia	27 909	33 222	36 736	33 236	34 164	41 911
South Africa	4 548	3 594	2 799	3 685	3 411	1 177

Source: Japanese Customs

Orange - CENTRAL AND SOUTH-EAST ASIA - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**801 250**	**1 022 061**	**1 167 634**	**1 221 700**	**1 225 802**	**964 259**
China	418 067	523 343	699 764	730 816	762 819	558 800
South Korea	111 743	154 944	141 572	142 443	124 386	115 356
Malaysia	95 661	102 812	97 006	93 745	103 124	89 478
Vietnam	10 570	57 172	46 521	57 595	46 691	49 889
Singapore	45 142	54 108	52 094	42 926	43 768	42 550
India	49 055	56 014	48 881	83 702	72 902	41 534
Azerbaijan	12 131	12 044	12 607	18 098	16 742	20 513
Philippines	17 723	22 404	35 118	19 261	19 786	16 252
Indonesia	14 036	12 212	12 999	11 391	11 410	9 331
Thailand	6 468	9 809	6 688	8 152	8 409	7 543

Source: COMTRADE

Orange - PERSIAN GULF - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**1 090 284**	**1 107 589**	**993 160**	**1 117 205**	**941 206**	**870 994**
Saudi Arabia	400 163	416 818	386 420	402 797	405 376	404 576
United Arab Em.	250 826	237 796	215 242	199 839	202 305	*200 000*
Iraq	211 768	214 266	203 899	300 457	130 072	*107 100*
Kuwait	106 492	81 314	67 539	80 122	75 228	55 359
Oman	42 256	43 494	44 403	52 230	53 854	*33 631*
Qatar	30 972	33 993	31 962	35 089	34 984	30 828
Bahrain	19 029	21 096	23 953	19 538	19 387	*19 500*
Yemen	16 912	5 242	3 812	18 906	10 000	*10 000*
Iran	11 866	53 570	15 930	8 227	10 000	*10 000*

Source: COMTRADE

Orange - MEDITERRANEAN - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**102 703**	**70 713**	**83 383**	**72 101**	**83 527**	**87 696**
Turkey	45 697	36 797	48 743	33 232	42 132	53 104
Jordan	31 913	26 982	27 355	29 931	30 648	24 991
Algeria	19 709	6 084	7 000	7 000	7 000	*7 000*

Source: COMTRADE

Orange - AFRICA - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**93 638**	**62 196**	**51 056**	**42 917**	**44 952**	**39 985**
Côte d'Ivoire	5 068	7 491	6 805	8 319	12 093	10 000
Kenya	18 061	15 380	11 529	11 248	7 110	7 238
Mauritius	4 821	5 128	5 379	4 939	5 591	4 877
Namibia	5 252	4 241	3 404	2 501	4 947	4 481
Senegal	1 668	1 742	2 413	3 529	2 758	3 855
Zambia	8 168	5 811	3 630	4 174	4 070	3 287
South Africa	7 991	3 468	3 326	3 672	3 834	2 147

Source: COMTRADE

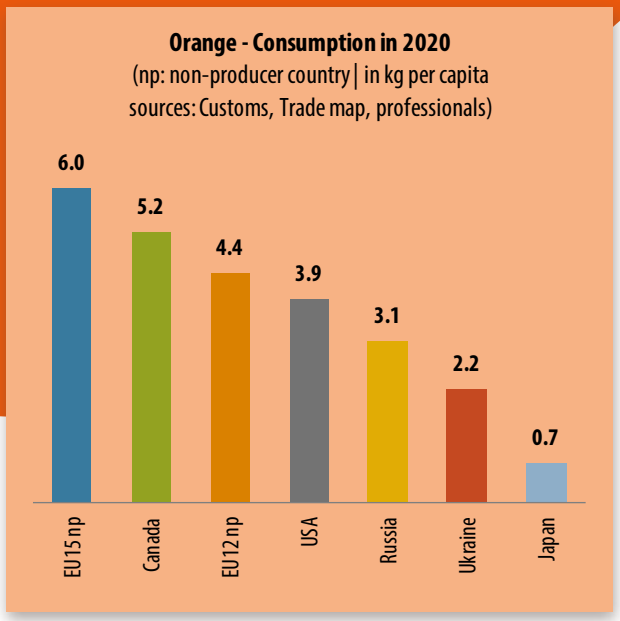
Orange - OTHER EAST EUROPEAN COUNTRIES - Main markets

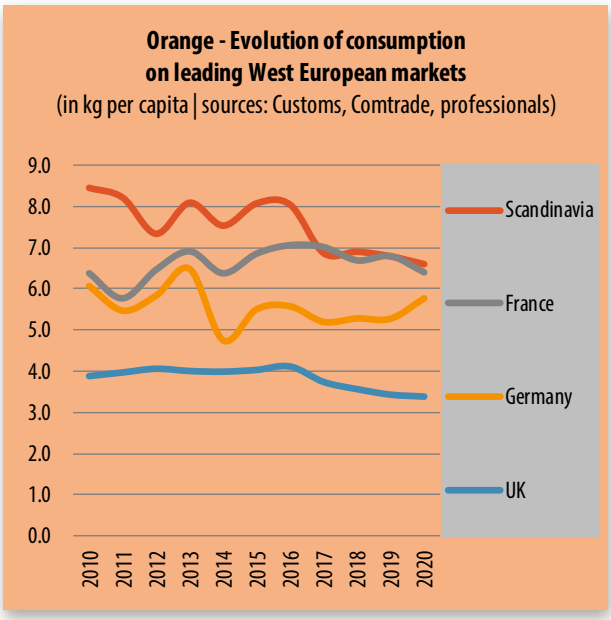
tonnes	2015	2016	2017	2018	2019	2020
Total, incl.	**93 638**	**62 196**	**51 056**	**42 917**	**44 952**	**39 985**
Serbia	5 068	7 491	6 805	8 319	12 093	10 000
Belarus	18 061	15 380	11 529	11 248	7 110	7 238
Bosnia	4 821	5 128	5 379	4 939	5 591	4 877
Albania	5 252	4 241	3 404	2 501	4 947	4 481
Macedonia	1 668	1 742	2 413	3 529	2 758	3 855
Armenia	8 168	5 811	3 630	4 174	4 070	3 287
Montenegro	7 991	3 468	3 326	3 672	3 834	2 147
Moldova	3 506	4 037	4 316	2 255	*2 000*	*2 000*

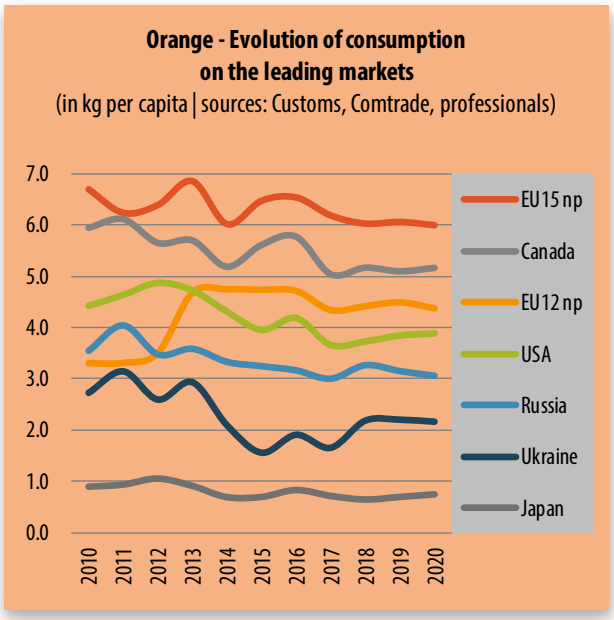
Source: COMTRADE

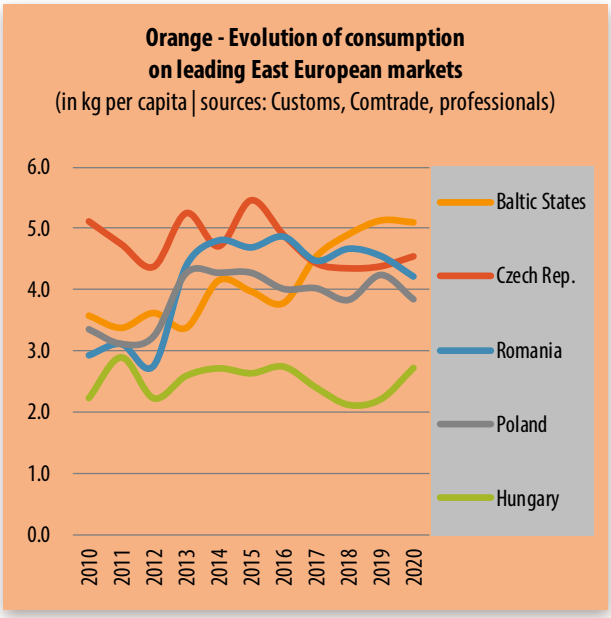
ORANGE

Consumption (2020)



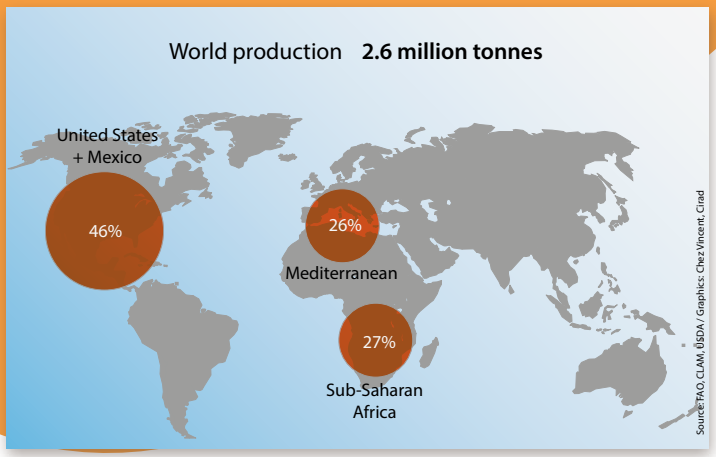




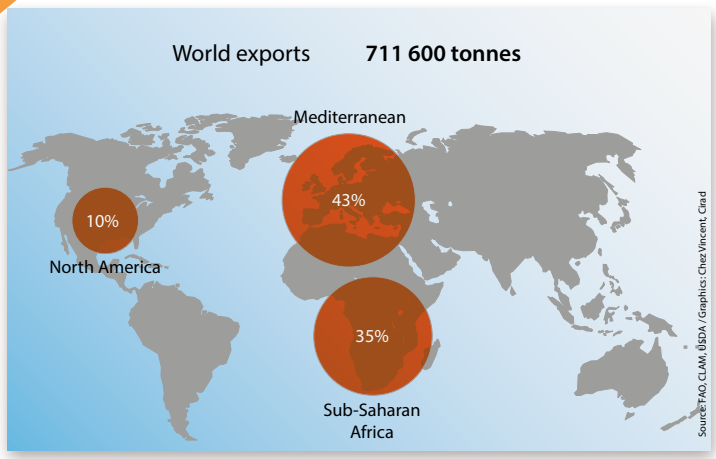


GRAPEFRUIT excluding shaddock

Production (2020-2021)*



Exports (2020-2021)*



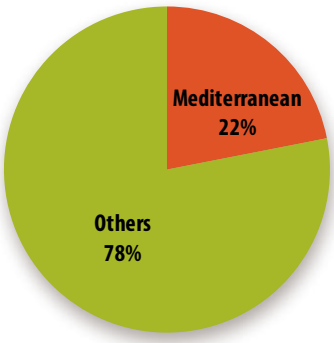
Grapefruit - Top 8 producer countries	
tonnes	**2020-2021**
United States	512 000
Mexico	495 000
South Africa	344 626
Turkey	290 000
Sudan	252 000
Israel	120 000
Argentina	112 630
Spain	90 000

Sources: FAO, USDA, professionals

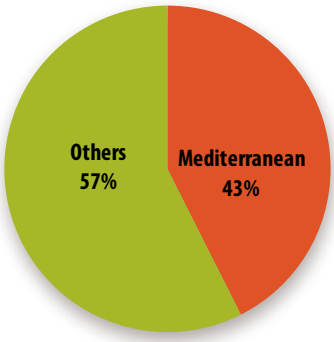
Grapefruit - Top 8 exporter countries	
tonnes	**2020-2021**
South Africa	244 334
Turkey	161 187
Spain	60 477
Israel	57 500
United States	55 599
Egypt	13 172
Mexico	13 065
Eswatini (Swaziland)	10 308

* Estimate / Sources: national Customs, professionals

Grapefruit - World Mediterranean production share



Grapefruit - World Mediterranean exports share



Grapefruit - Mediterranean - Production	
tonnes	**2020-2021**
Turkey	290 000
Israel	120 000
Spain	90 000
Egypt*	39 000
Cyprus*	16 000
Italy	6 000
Greece	3 000
Morocco	3 000

* Estimate / Source: professionals

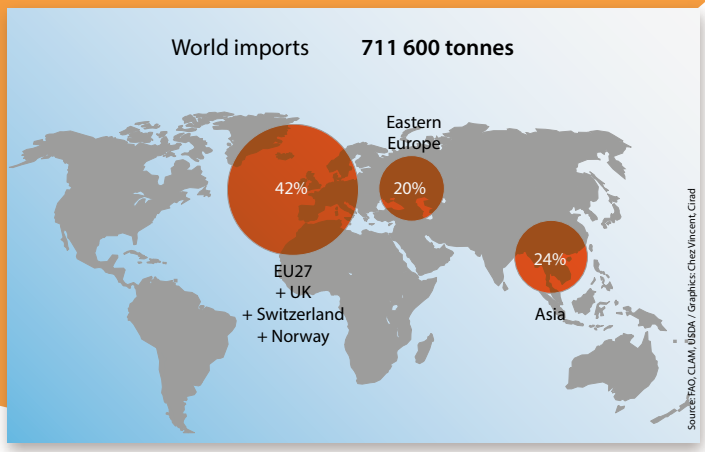
Grapefruit - Mediterranean - Exports	
tonnes	**2020-2021**
Turkey	161 187
Spain	60 477
Israel	57 500
Egypt*	13 172
Cyprus	7 477
Italy	2 473
Greece	617

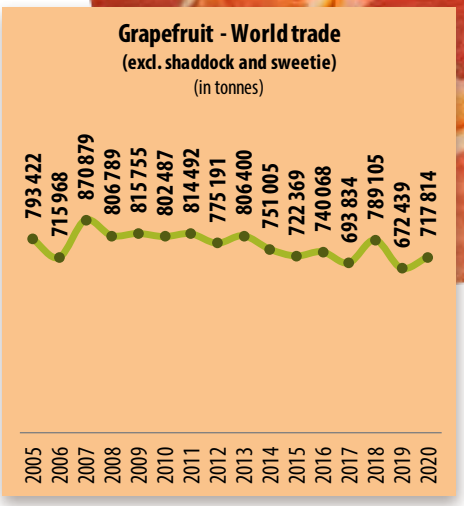
* Estimate / Source : professionals

* 2020 for S. Hemisphere, 2020-2021 for N. Hemisphere

GRAPEFRUIT

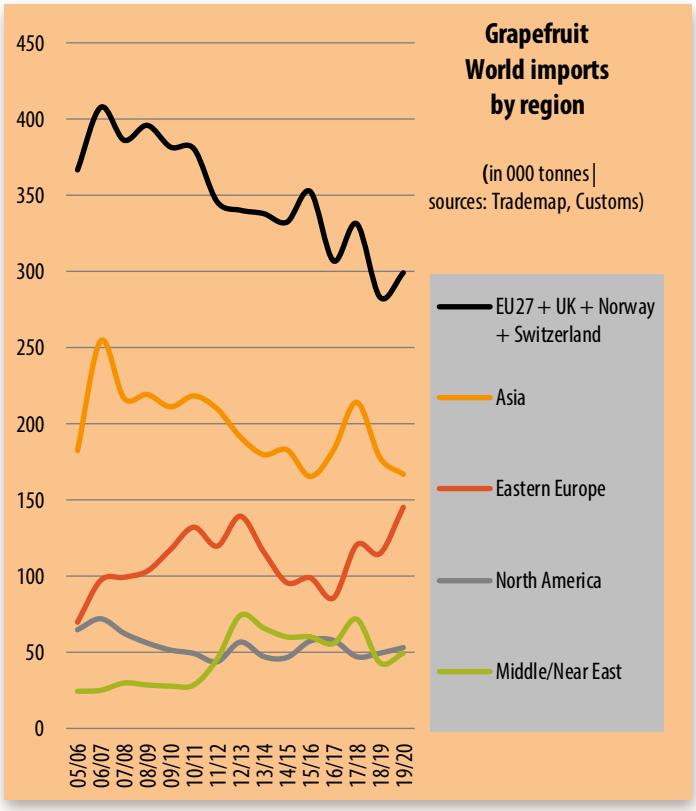
Imports (2020)*





Grapefruit - Top 8 importer countries	
tonnes	**2020**
Netherlands	192 000
China	82 008
France	67 755
Japan	59 927
Russia	59 784
Germany	57 000
Poland	55 000
Canada	38 335

Sources: FAO, USDA, professionals



Grapefruit - UNITED STATES - Main supplier countries

tonnes	2015	2016	2017	2018	2019	2020
Total	**9 500**	**23 798**	**25 268**	**11 239**	**15 848**	**15 015**
Mexico	2 721	4 016	3 900	4 281	6 041	7 992
South Africa	4 977	12 795	12 702	4 512	5 581	4 750
Israel	442	2 099	2 331	1 361	2 613	1 245
Peru	559	4 885	6 335	1 084	1 610	860
Others	801	3	-	1	3	168

Source: US Customs

Grapefruit - CANADA - Main supplier countries

tonnes	2015	2016	2017	2018	2019	2020
Total	**37 276**	**33 875**	**32 872**	**36 073**	**33 819**	**38 335**
Total winter, incl.	**29 287**	**27 850**	**24 470**	**17 077**	**18 772**	**20 835**
USA	27 494	23 077	19 648	13 751	15 577	14 344
Israel	1 089	3 291	3 319	2 904	2 419	4 388
Mexico	617	1 370	1 394	289	653	1 973
Thailand	87	112	109	133	123	130
Total summer, incl.	**7 453**	**5 103**	**6 708**	**9 771**	**6 912**	**7 165**
South Africa	7 451	5 036	6 580	9 769	6 863	7 062
Chile	1	1	1	2	1	103
Argentina	1	66	127	-	48	-

Source: COMTRADE

Grapefruit - SOUTH AMERICA - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**3 612**	**4 339**	**3 777**	**3 451**	**3 444**	**3 222**
Argentina	1 045	2 442	2 446	1 944	1 282	1 722
Mexico	2 567	1 897	1 331	1 507	2 162	1 500

Source: COMTRADE

* 2019-2020 or calendar year 2020

GRAPEFRUIT

Grapefruit - EUROPEAN UNION - Main supplier countries

tonnes	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Total	**344 403**	**298 951**	**323 073**	**274 987**	**290 157**	**-**
Total N. Hemis*., incl.	**243 851**	**198 471**	**205 710**	**167 323**	**190 628**	**174 919**
Turkey	95 573	60 821	92 595	61 660	81 478	65 524
Spain (Ailimpo)	53 780	57 940	49 279	57 457	57 094	65 000
Israel	33 820	30 290	29 215	21 005	24 216	22 896
USA	31 421	24 425	14 507	12 911	10 970	10 107
Cyprus	6 811	5 410	6 668	6 456	7 603	5 737
Mexico	14 612	13 683	13 276	7 815	9 267	5 655
Honduras	37	53	3	19		
Cuba	-	15	-	-	-	
tonnes	2015	2016	2017	2018	2019	2020
Total S. Hemis., incl.	**95 494**	**100 552**	**100 479**	**117 363**	**107 664**	**99 529**
South Africa	90 017	90 464	96 446	109 374	102 704	95 289
Swaziland	647	4 604	1 902	4 485	2 698	2 452
Zimbabwe	2 139	1 939	1 692	2 561	1 521	1 650
Chile	1 660	2 883	174	133	495	43
Argentina	-	375	196	279	127	43
Uruguay	115	-	16	316		-

* Extra-EU imports and shipments from main EU producer countries (Spain, Cyprus)
Source: EUROSTAT

Grapefruit - OTHER WEST EUROPEAN COUNTRIES - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**8 524**	**8 398**	**8 055**	**8 450**	**8 042**	**8 982**
Switzerland	7 158	7 095	6 776	6 935	6 543	7 356
Norway	1 366	1 303	1 279	1 515	1 499	1 626

Source: COMTRADE

Grapefruit - RUSSIA - Main supplier countries

tonnes	2015	2016	2017	2018	2019	2020
Total	**77 906**	**77 906**	**77 906**	**69 567**	**59 784**	**77 906**
Total N. Hemis., incl.	**44 391**	**45 086**	**34 746**	**48 353**	**39 645**	**53 234**
Turkey	39 354	42 184	32 298	47 656	37 921	50 871
Israel	4 668	2 855	2 218	643	1 304	2 343
Morocco	369	47	230	54	420	20
Total S. Hemis., incl.	**24 672**	**24 672**	**24 672**	**21 214**	**20 139**	**24 672**
South Africa	18 027	15 372	18 243	19 630	18 240	22 282
Mexico	1 075	606	515	124	1 003	632
Swaziland	418	668	132	728	397	329
Argentina	-	262	112	169	360	170
Zimbabwe	43	57	57	9	53	-
Others	-	-	-	554	86	1 259

Source: COMTRADE

Grapefruit - OTHER EAST EUROPEAN COUNTRIES - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total, incl.	**32 062**	**37 165**	**32 278**	**51 170**	**55 274**	**67 377**
Ukraine	13 441	18 751	16 938	28 969	32 683	39 062
Belarus	7 021	5 936	5 503	8 282	8 781	11 680
Serbia	4 380	4 875	3 535	5 105	3 786	5 725
Moldova	1 659	1 651	1 480	2 310	3 032	3 480
Armenia	1 028	1 306	1 191	1 568	2 018	1 786
Bosnia Herz.	1 539	1 565	1 285	1 700	1 317	1 743
Macedonia	1 323	1 345	913	1 241	1 007	1 647
Georgia	935	814	721	1 039	1 831	1 417
Montenegro	553	729	593	833	679	594
Albania	183	193	119	123	140	243

Source: COMTRADE

Grapefruit - JAPAN - Main supplier countries

tonnes	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Total	**99 597**	**82 167**	**84 583**	**71 153**	**63 870**	**59 927**
Total N. Hemis., incl.	**55 794**	**50 442**	**45 099**	**33 708**	**33 333**	**32 029**
USA	51 899	44 032	36 030	18 494	18 502	15 846
Israel	1 501	2 937	5 964	9 555	11 206	10 491
Mexico		1 783	3 008	5 479	2 190	4 678
Turkey	2 185	1 684	96	180	1 434	1 013
Total S. Hemis., incl.	**43 803**	**31 725**	**39 484**	**37 445**	**30 537**	**27 898**
South Africa	43 688	30 625	38 669	36 251	29 445	26 428
Australis	-	982	755	935	1 016	1 443
Swaziland	-	116	53	257	75	-

Source: Japanese Customs

Grapefruit - OTHER ASIAN COUNTRIES - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**83 623**	**83 638**	**98 441**	**143 168**	**114 181**	**107 315**
China	51 372	53 518	68 414	114 533	89 228	82 008
South Korea	25 010	23 169	22 998	21 269	17 786	16 522
Singapore	5 568	5 343	5 324	5 223	5 615	6 668
Malaysia	1 673	1 608	1 705	2 143	1 552	2 117

Source: COMTRADE

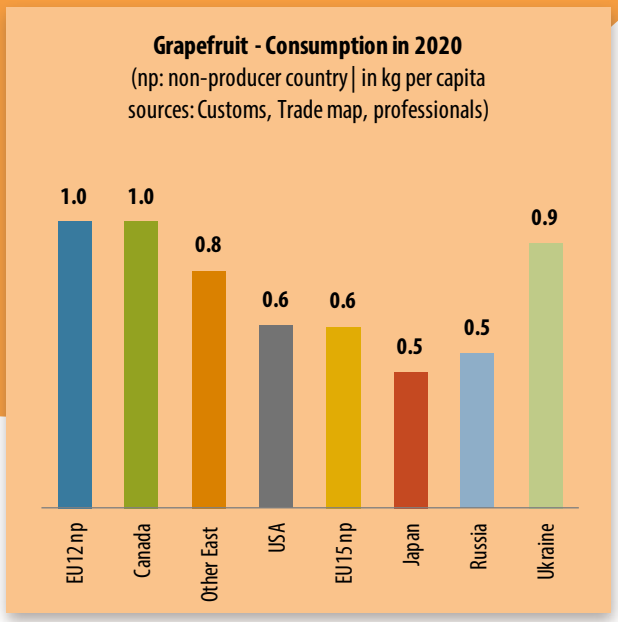
Grapefruit - PERSIAN GULF - Main markets

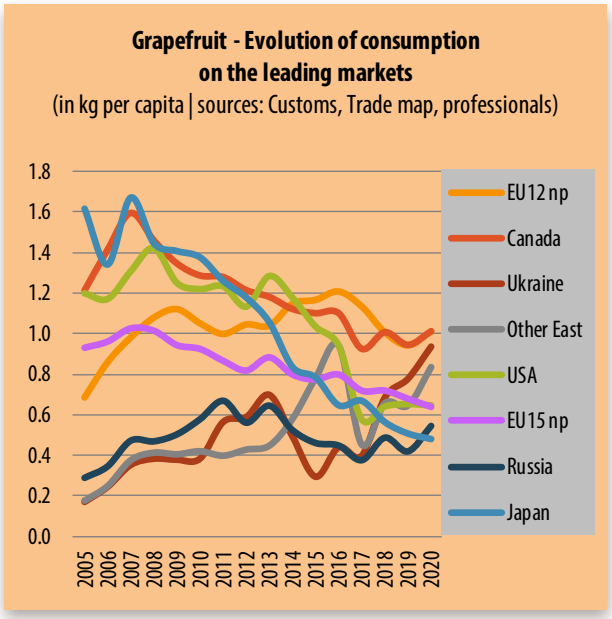
tonnes	2015	2016	2017	2018	2019	2020
Total	**60 162**	**60 234**	**55 804**	**71 760**	**43 191**	**49 578**
Saudi Arabia	32 506	31 449	32 965	33 608	22 730	22 344
United Arab Em.	10 925	10 792	10 535	9 738	9 906	*11 717*
Kuwait	2 648	2 637	2 404	4 571	2 499	7 343
Iraq	*7 826*	*9 856*	*5 027*	*19 110*	*5 467*	*6 448*
Qatar	6 257	5 500	4 873	4 733	2 589	1 726

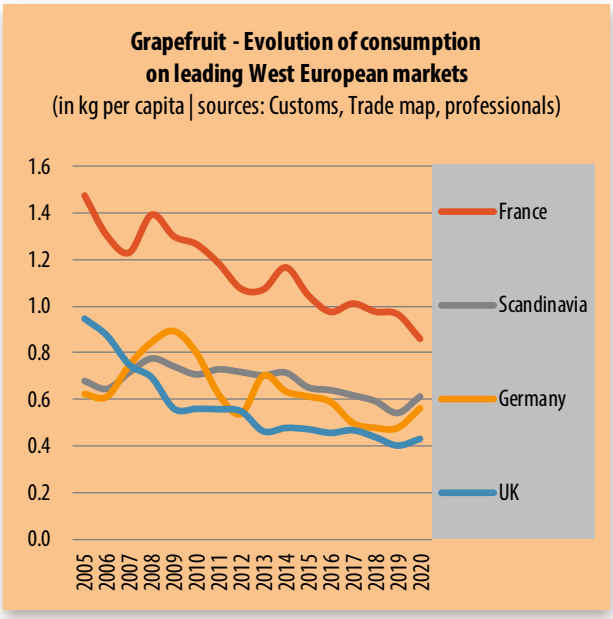
Source: COMTRADE

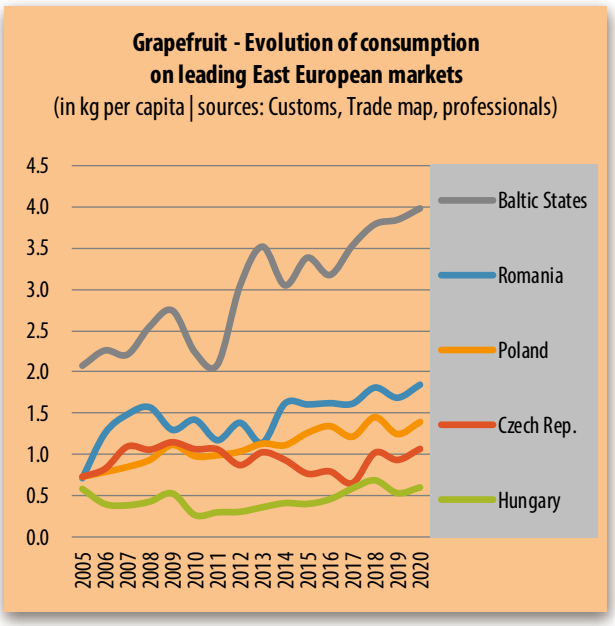
GRAPEFRUIT

Consumption (2020)



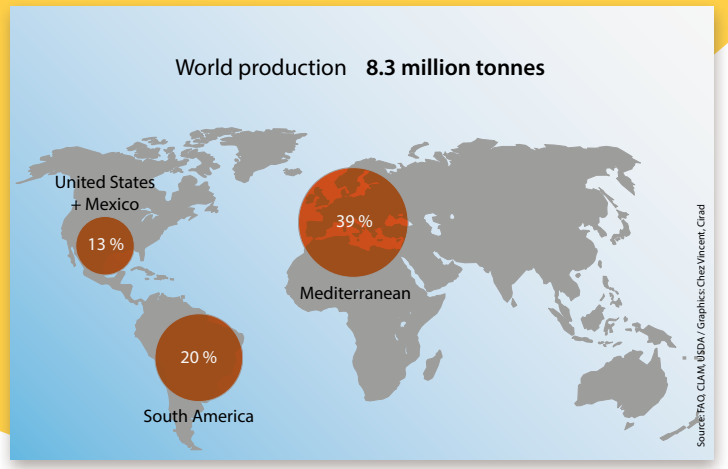




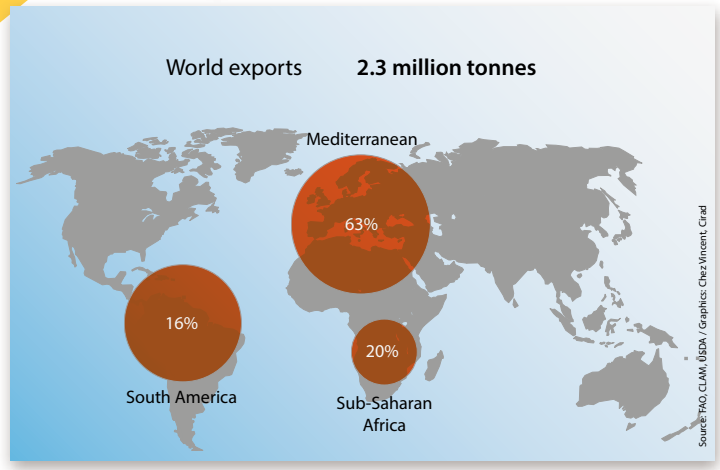


LEMON excluding lime

Production (2020-2021)*



Exports (2020-2021)*



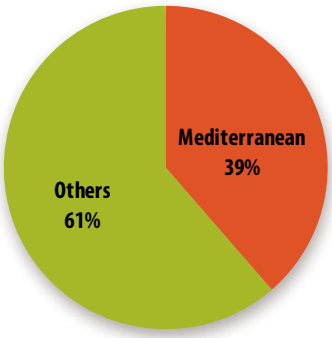
Lemon - Top 8 producer countries	
000 tonnes	**2020**
Argentina	1 470
Spain	1 376
Turkey	1 100
United States	940
South Africa	620
China	520
Italy	473
Greece	100

Sources: FAO, professionals

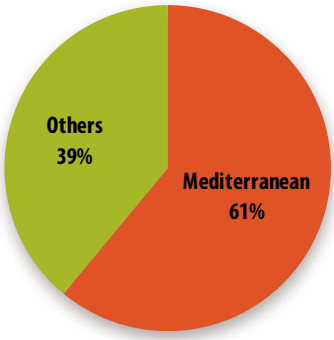
Lemon - Top 6 exporter countries	
000 tonnes	**2020**
Spain	729
Turkey	589
South Africa	457
Argentina	256
Chile	101
United States	80

Sources: national Customs, professionals

Lemon - World Mediterranean production share



Lemon - World Mediterranean exports share



Lemon - Mediterranean - Production	
000 tonnes	**2020**
Spain	1 376
Turkey	1 100
Italy	473
Greece	100
Israel	70
Tunisia	53
Morocco	34
Cyprus	6

Professional sources

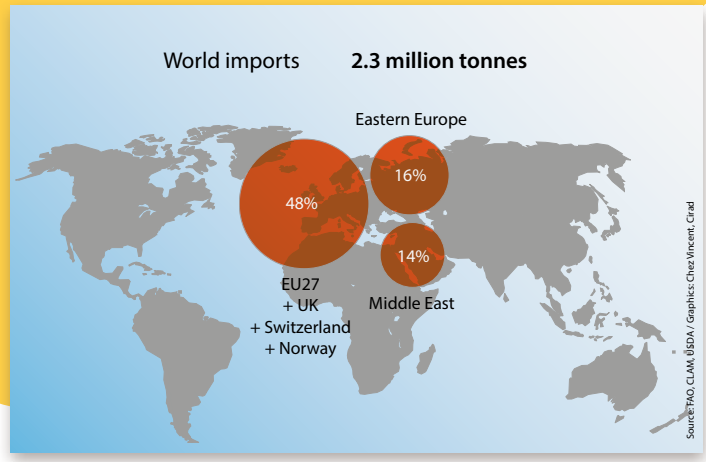
Lemon - Mediterranean - Exports	
tonnes	**2020**
Spain	728 800
Turkey	589 100
Egypt	60 950
Italy	42 600
Greece	16 195
Morocco	10 000
Cyprus	1 163

* Estimate / Professional sources, Customs

* 2020 for S. Hemisphere, 2020-2021 for N. Hemisphere

LEMON

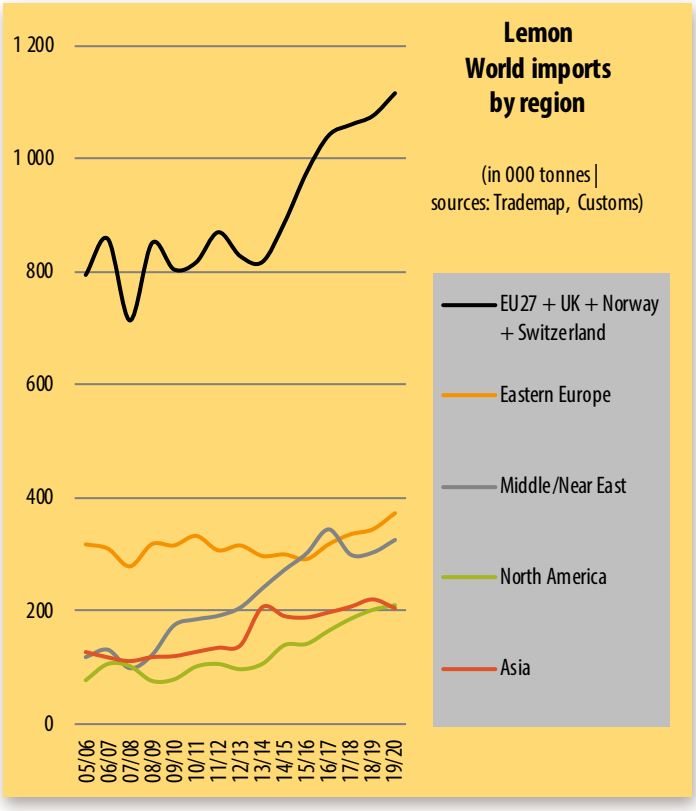
Imports (2020)*



Lemon - Top 8 importer countries

000 tonnes	2020
Russia	234
Germany	216
Saudi Arabia	145
United States	138
France	132
Poland	130
United Kingdom	118
United Arab Emirates	101

Source: national Customs



Lemon - UNITED STATES - Main supplier countries

tonnes	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Total	**78 914**	**97 761**	**115 825**	**134 563**	**150 008**	
Total N. Hemis., incl.	**44 686**	**53 039**	**55 911**	**51 063**	**58 905**	**53 453**
Mexico	42 748	47 375	54 077	42 726	57 472	52 843
Spain	1 690	5 220	1 034	7 212	1 054	188
Dominican Rep.	187	172	129	153	35	68
Others	61	272	671	972	344	354
Total S. Hemis., incl.	**34 228**	**44 722**	**59 914**	**83 500**	**91 103**	
Chile	31 162	41 246	56 461	56 000	54 303	
Argentina	-	-	7 784	24 000	34 107	
Others	3 066	3 476	3 453	3 500	2 693	

Source: US Customs

Lemon - CANADA - Main supplier countries

tonnes	2015	2016	2017	2018	2019	2020
Total	**59 887**	**62 628**	**67 135**	**71 040**	**68 804**	**72 121**
Total N. Hemis., incl.	**41 762**	**41 525**	**39 347**	**41 680**	**40 491**	**40 243**
USA	30 099	33 542	29 781	24 595	27 786	31 873
Spain	10 735	7 094	8 468	13 396	10 919	6 809
Turkey	928	889	1 098	3 689	1 786	1 561
Total S. Hemis., incl.	**16 820**	**20 069**	**25 042**	**26 512**	**25 545**	**29 996**
South Africa	9 118	8 351	12 642	14 005	15 133	21 990
Argentina	6 297	10 075	10 708	10 467	8 695	6 718
Australia	328	121	158	608	437	659
Uruguay	677	1 104	1 217	962	730	333
Chile	400	418	317	470	550	296

Source: COMTRADE

Lemon - SOUTH AMERICA - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**14 285**	**15 760**	**23 225**	**21 902**	**29 129**	**45 487**
Chile	5 470	4 378	9 139	10 450	16 413	28 294
Ecuador	3 043	1 749	3 719	948	1 035	4 961
Argentina	137	3 052	2 898	870	710	3 392
Mexico	1 610	2 563	2 928	3 981	3 736	2 718
Bolivia	977	2 004	717	1 233	1 830	2 545
Brazil	2 356	1 442	2 897	3 232	4 025	2 386
Costa Rica	515	497	580	686	634	767
Colombia	177	75	347	502	746	424

Source: COMTRADE

* 2019-2020 or calendar year 2020

LEMON

Lemon - EUROPEAN UNION - Main supplier countries

tonnes	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Total	**939 877**	**1 003 645**	**1 021 032**	**1 036 093**	**1 071 589**	**1 065 642**
Total winter, incl.	**644 722**	**747 074**	**705 139**	**772 496**	**749 837**	**763 912**
Spain	468 583	580 090	525 289	571 565	602 400	589 269
Turkey	108 926	105 179	112 395	130 568	74 277	116 817
Italy	44 568	47 092	45 013	48 251	47 725	39 480
Greece	15 386	8 102	13 621	12 592	14 019	11 173
Egypt	1 264	3 527	4 100	4 470	4 736	5 940
Cyprus	1 205	1 473	3 527	4 100	4 470	828
Morocco	1 886	748	613	559	1 524	304
Tunisia	1 257	463	247	174	-	-
Israel	1 214	299	270	167	26	38
Iran	103	38	49	50	51	63
USA	331	64	15	-	609	-
Total summer, incl.	**295 155**	**256 571**	**315 893**	**263 597**	**321 752**	**301 730**
Argentina	198 344	158 437	185 036	123 194	119 895	77 932
South Africa	63 145	78 631	110 263	118 787	180 059	202 000
Chile	23 910	10 785	9 568	9 986	9 220	9 220
Uruguay	7 948	7 323	8 225	10 996	11 153	11 153
Dom. Rep.	752	970	844	586	1 214	1 214
Zimbabwe	-	0	-	24	102	102
Brazil	1 056	425	1 957	24	108	108

Source: EUROSTAT

Lemon - OTHER WEST EUROPEAN COUNTRIES - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**32 739**	**35 103**	**36 653**	**38 168**	**38 782**	**43 179**
Switzerland	22 804	24 038	25 453	26 899	27 531	31 603
Norway	9 004	10 181	10 279	10 380	10 357	10 807
Iceland	931	884	921	889	894	769

Source: COMTRADE

Lemon - RUSSIA - Main supplier countries

000 tonnes	2015	2016	2017	2018	2019	2020
Total	**193 910**	**188 898**	**209 766**	**217 700**	**220 976**	**233 730**
Total N. Hemis., incl.	**128 763**	**128 260**	**129 708**	**146 214**	**137 326**	**132 438**
Turkey	117 777	105 708	118 653	130 049	100 553	115 200
Egypt	1 400	3 877	1 607	1 783	4 086	7 782
Morocco	5 416	3 710	6 931	3 738	5 291	6 812
China	3 844	14 021	2 438	10 623	27 244	2 624
Israel	326	944	79	21	152	20
Total S. Hemis., incl.	**61 493**	**56 999**	**75 021**	**68 830**	**79 833**	**95 239**
Argentina	29 473	38 738	43 837	40 312	51 348	59 090
South Africa	30 324	16 966	29 916	26 937	28 008	35 975
Uruguay	1 696	1 295	1 268	1 581	477	174
Others	3 654	3 639	5 037	2 755	3 144	6 053

Source: COMTRADE

Lemon - UKRAINE - Main supplier countries

tonnes	2015	2016	2017	2018	2019	2020
Total	**39 818**	**46 286**	**45 569**	**52 245**	**54 267**	**56 729**
Total N. Hemis., incl.	**31 224**	**32 590**	**32 324**	**38 168**	**38 202**	**40 691**
Turkey	25 854	29 914	29 019	37 278	33 543	35 599
Spain	5 352	2 368	3 051	687	1 987	2 691
Egypt	9	299	224	203	2 646	2 401
Israel	9	9	30	-	26	-
Total S. Hemis., incl.	7 627	7 605	11 135	12 380	12 214	12 462
Argentina	4 807	6 647	9 790	10 816	10 536	9 510
South Africa	2 820	958	1 345	1 564	1 678	2 952
Others	967	6 091	2 110	2 025	3 851	3 576

Source: COMTRADE

Lemon - JAPAN - Main supplier countries

tonnes	2015	2016	2017	2018	2019	2020
Total	**47 160**	**49 293**	**50 800**	**54 920**	**56 497**	**46 782**
Total N. Hemis., incl.	**30 503**	**30 374**	**30 487**	**34 042**	**33 386**	**24 193**
USA	30 370	30 215	30 107	31 689	31 168	22 315
Mexico	133	159	380	2 353	2 218	1 878
Total S. Hemis., incl.	**16 654**	**18 805**	**20 275**	**20 558**	**22 786**	**21 976**
Chile	15 486	17 282	18 194	18 069	20 068	18 725
New Zealand	816	1 001	1 292	1 488	1 685	1 849
South Africa	352	522	789	1 001	1 033	1 402
Others	3	114	38	320	265	613

Source: Japanese Customs

Lemon - OTHER ASIAN COUNTRIES - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**143 711**	**139 217**	**146 687**	**152 725**	**164 011**	**158 073**
China	56 460	50 297	62 004	52 734	45 883	36 812
Malaysia	18 278	21 952	18 962	22 046	24 592	27 154
Philippines	3 033	3 245	6 222	11 449	18 311	26 065
South Korea	17 793	15 823	16 234	18 355	19 455	20 372
Singapore	20 432	14 278	13 259	14 966	14 466	15 335
Azerbaijan	9 957	9 223	11 848	14 746	13 941	12 476
Indonesia	9 729	14 066	11 646	11 138	19 845	11 614
Kazakhstan	7 277	6 429	5 882	6 302	6 448	6 836
Kyrgyzstan	752	3 904	630	989	1 070	1 409

Source: COMTRADE

Lemon - PERSIAN GULF - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**273 965**	**303 143**	**345 573**	**300 819**	**304 725**	**326 891**
Saudi Arabia	104 131	120 962	128 074	122 637	126 861	145 174
United Arab Em.	118 098	121 857	144 639	110 130	104 341	104 542
Kuwait	27 351	28 290	39 129	27 849	30 228	31 985
Qatar	9 117	12 403	11 685	12 129	15 692	17 590
Oman	5 866	9 643	11 260	17 488	*17 000*	*17 000*
Bahrain	9 402	9 988	10 786	10 586	*10 603*	*10 600*

Source: COMTRADE

Lemon - MEDITERRANEAN - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**25 389**	**17 667**	**21 684**	**25 672**	**27 357**	**34 041**
Jordan	15 076	14 204	16 836	13 512	14 823	23 205
Syria	5 405	160	486	9 879	10 439	7 472
Turkey	2 982	3 082	4 024	2 185	1 979	3 304
Lebanon	534	121	337	96	109	60
Tunisia	7	32	1	-	*7*	-
Algeria	1 385	68	-	-	-	-

Source: COMTRADE

Lemon - OCEANIA - Main markets

tonnes	2015	2016	2017	2018	2019	2020
Total	**8 570**	**9 425**	**7 756**	**6 285**	**6 042**	**7 853**
Australia	6 754	7 378	5 597	4 185	3 821	6 125
New Zealand	1 816	2 047	2 159	2 100	2 221	1 728

Source: COMTRADE

Lemon - OTHER EAST EUROPEAN COUNTRIES - Main markets

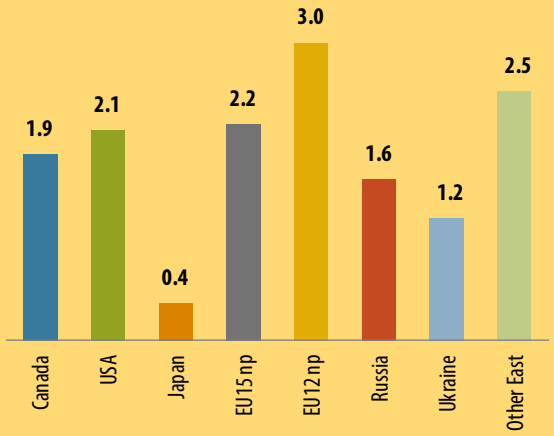
tonnes	2015	2016	2017	2018	2019	2020
Total, incl.	**64 981**	**55 211**	**61 439**	**64 674**	**68 246**	**81 705**
Serbia	16 865	17 600	20 305	22 672	24 045	29 655
Belarus	22 014	10 674	11 094	9 346	9 398	12 943
Bosnia	9 263	9 176	10 312	10 984	11 938	12 483
Macedonia	6 190	6 232	6 623	7 060	7 313	9 186
Moldova	3 752	3 772	3 756	4 277	4 333	5 129
Albania	2 553	2 759	3 866	3 968	4 334	5 097
Armenia	1 624	2 039	2 081	2 792	3 241	3 823
Montenegro	2 720	2 959	3 402	3 575	3 644	3 389

Source: COMTRADE

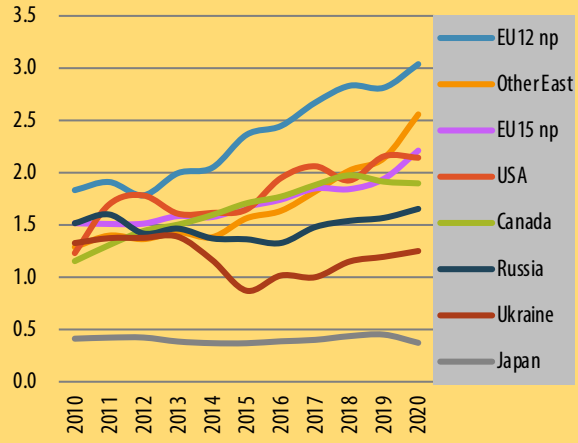
LEMON

Consumption (2020)

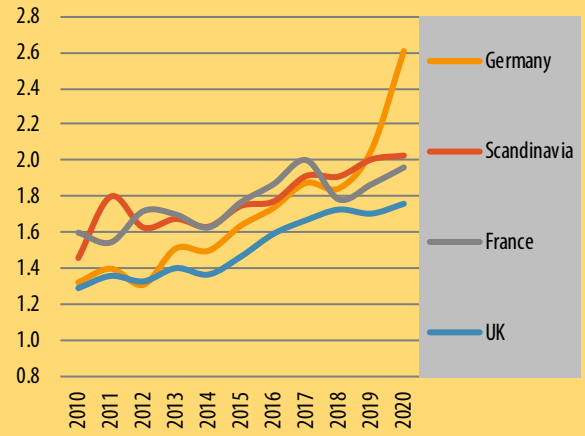
Lemon - Consumption in 2020
(np: non-producer country | in kg per capita
sources: Customs, Trade map, professionals)

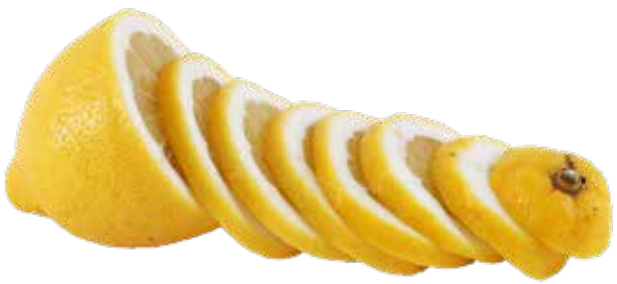


Lemon - Evolution of consumption on the leading markets
(in kg per capita | sources: Customs, Trade map, professionals)

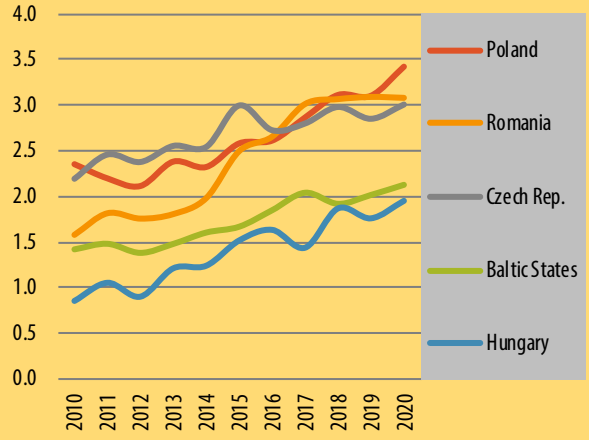


Lemon - Evolution of consumption on leading West European markets
(in kg per capita | sources: Customs, Trade map, professionals)





Lemon - Evolution of consumption on leading East European markets
(in kg per capita | sources: Customs, Trade map, professionals)



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Pineapple

A report by
Thierry Paqui and
Noémie Cantrelle

Contents

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European market

Sea-freight pineapple

Uncertainty hovering more than ever

Thierry Paqui, consultant
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The situation on the pineapple market has never seemed to be as uncertain, and the future never as troubled. Could it be that improvements in revenue, so eagerly awaited by Latin American growers, and taking shape as we move into 2022, are a consequence of Covid-19? Is the pandemic, from which we have still not completely emerged, shuffling the deck and offering Latin American pineapple growers a better hand?

© Catherine Sanchez

The main data on the issue are well-known, and remain pretty much unchanged. The fresh Sweet supply out of Costa Rica, although down in 2020, remained just as impressive, and could not be traded without the help of the supermarket sector. More than ever, the main pineapple importers and the supermarket chains needed to work in concert to sell off the imported volumes as best they could. Covid-19, with the set of disruptions it brought, has already forced importers to revise prices paid to pineapple growers upward, in order to access the fruit; so it is only a question of time before they incorporate these increases into their relationships with the supermarket sector. While the increases in certain incompressible costs is already well-known, other factors, still uncertain and to be clarified, could also have a big impact on pineapple cost price. In view of these increases, it will be difficult for importers to maintain the prices previously allocated to the supermarket sector. The increase in certain costs is such that several importers are refusing for the moment to make any commitments on prices or volumes to allocate to the supermarket sector for the next campaign. More than ever, uncertainty is hovering over the pineapple market.

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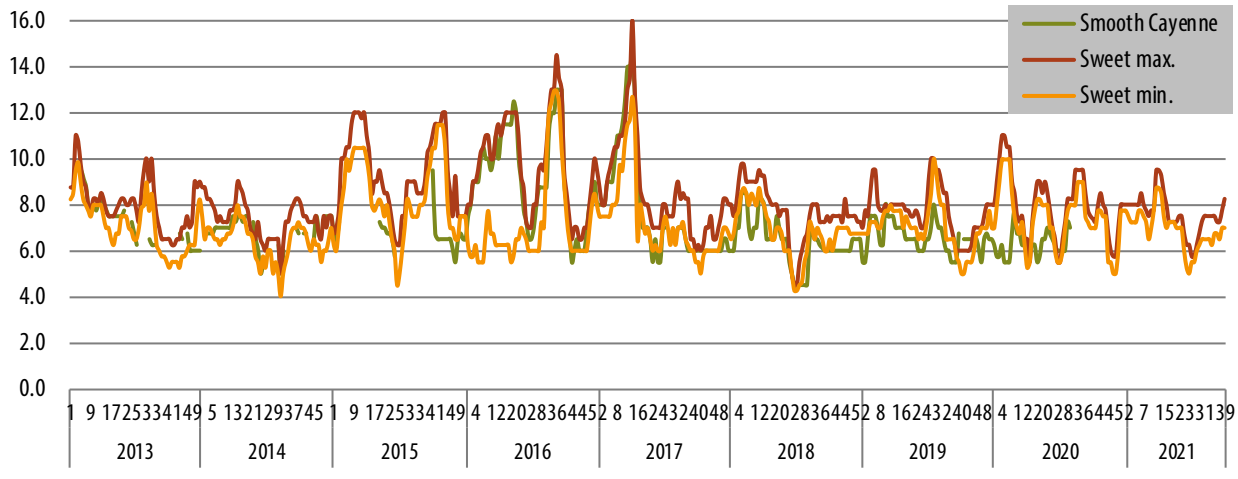
Volumes and prices for the most part contract-based

The relationship of interdependence between pineapple importers and the supermarket sector is being reinforced by the fact that importers need to secure access to the supermarket sector in order to facilitate sales of the impressive volumes placed on the market, while the supermarket sector needs to secure its pineapple procurement, as a mass-consumption product which it uses as a loss leader in its stores. These large pineapple volumes are traded based on contract prices negotiated every year, half-year or quarter, depending on the chain or country. The discussions leading up to the setting of these prices are bitter, and as we can easily imagine, fairly secretive. Although both parties have a mutual interest working in concert, the pressure nonetheless remains higher on the importers, which bear the risks in case of quality problems or fluctuation in demand on the market. Given this state of affairs, the supermarket sector has rather tended in recent years to negotiate fairly hard on contract prices, aided it is true by some operators being prepared to lower their prices a little so as to be listed as suppliers to these chains. It is estimated that over a season (outside of the natural blooming period), just 20% or 30% of volumes imported by the main operators every week fall outside a supermarket sector programme. These volumes not allocated to contracts are commonly known as "spot volumes". If some importers agree to lower their prices in the negotiations, it is in the hope of being able to make up for this as far as possible in the course of the year, by selling spot volumes at a higher price. In this pandemic context, which has increased certain costs, the operators are being forced to review their strategy.

Sea-freight pineapple - European Union - Weekly import price

(in euro/box | source: Thierry Paqui)

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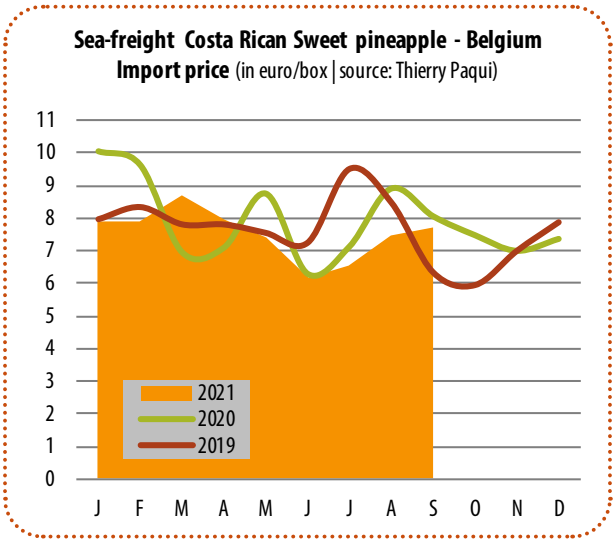
Sea-freight transport prices soaring

The first of the incompressible costs affected by the pandemic is sea-freight. Sea-freight logistics have been heavily disrupted: collecting refrigerated containers has been harder, and caused numerous delays, and a lack of containers for European markets. These delays have been manifested by price increases. After initially announcing a price increase on its containers (+ 1 000 $/container), the shipping company Seatrade flat out suspended its rotations via Costa Rica bound for Europe, proof as if it were needed of the tensions on sea-freight. However, numerous options out of Costa Rica remain (Maersk, CMA/CGM, Lloyds, MSC), and not all the importers are in the same boat in terms of their dependence on sea-freight, availability of refrigerated containers or increased freight costs. This is the case in particular with brands such as Del Monte, Dole and Fyffes, which have their own shipping lines. Nonetheless, they all now have to cope with increasing oil prices, and the impact of this increase on freight costs. The increases to be applied to the price of containers out of Costa Rica are known, and estimated at between $1 500 and $2 000 per box. Compared to the increase in the price of containers out of China (more than 80 % of the price charged before Covid-19), the increase out of Costa Rica remains, in the current context of logistical and energy tension, reasonable all in all, but certainly not negligible! Until the situation returns to normal, the lack of boxes will persist, and continue to step up the pressure on sea-freight costs in a fairly tight context of a still limited oil supply. For the moment, this increase remains under control, but for how long?



Box prices too

The second incompressible cost on the rise is boxes. The pandemic has meant a considerable reduction in the box production and availability, demand for which has boomed in a context of huge growth in Internet sales. The restriction measures taken to stem the pandemic affected the collection and recycling of used boxes (which make up more than 80% of the raw material used for box manufacture). So all the industries using boxes are being affected by this shortage, especially since demand has never been as high. The Costa Rican pineapple industry is no exception, and will have to bear a cost increase varying, depending on the operator and the volumes handled, between 6 and 8 eurocents per box. This may seem a modest sum taken individually, but if we scale it up to the pineapple industry, which in Costa Rica uses millions of boxes, this very quickly becomes an additional cost to be taken into account.

However, operators' greatest fear is that the shortage of boxes, if it worsened, could end up setting in and forcing growers into a bidding war to access the boxes they need. True, we are not there yet, and these are only conjectures which for now have little chance of coming true. At any rate, operators already know two things for certain: box prices are increasing, and the Costa Rican industry might be left short of boxes if the natural blooming episodes were to last and recur over the next campaign.

The increased freight and box costs are more or less short-term, at least we think so, and things could regain a semblance of normality once the pandemic is over. The question that arises is to know when things will return to normal, since at the time of writing this article, Covid-19 cases are on an upturn and some cities (e.g. in China) are reintroducing strict lockdowns.

Other parameters, in no way trivial, could also push up pineapple prices on the European markets in the coming months.

How much availability?

A high degree of uncertainty prevails over the volumes of pineapples that will be placed in the European market in 2022. No-one really knows the impact of the strict lockdowns imposed by the Costa Rican authorities in 2020 on the main pineapple growers in Costa Rica (Del Monte, Dole, Fyffes and Acon group). It would also seem that many medium-sized independent growers, which had ceased trading or sold their business (2018-2019), have gone back into pineapple production in 2020, but with much smaller areas. Hence the pineapple supply in 2022 could still be just as substantial, or considerably smaller.

The uncertainty over fruit availability on the fresh market is being heightened by the fact that at present the juice industry in Costa Rica is fairly dynamic, and capturing increasingly big volumes of fresh fruits. These volumes are not being missed for now on the European market, especially in a context where demand has remained fairly flat overall. Yet importers are keeping a very close eye on changes in production, and on demand from the juice industry. If the latter continued to pay a more lucrative fixed price, and if production were smaller, this could limit availability of fresh fruit aimed at the European markets. The pineapple market saw a similar configuration over the campaign described below, though without this resulting in spectacular price increases on the spot market. Watch this space…

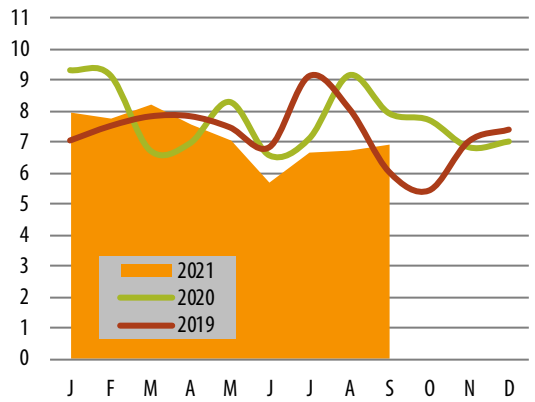
Finally, there is the thorny issue of exchange rate. The euro has been somewhat devalued against the dollar over recent months; if exchange rates maintained their current level, it could force importers to pay their pineapple suppliers more to guarantee their supply, especially if demand took a good upturn on the North American market. With lower delivery costs and a stronger dollar, the US market, if the Costa Rican supply were more limited, could lower availability of fruit to Europe a little further. True, that makes a lot of "ifs", but these are working hypotheses that importers have still not discounted, and which will certainly have an impact on pineapple revenue during the next campaign.

How to regain profitability?

The increase in some of the costs described above has started to produce effects. Importers are already paying their suppliers higher prices to secure their supplies. But because of their contractual commitments, they are unable to pass on these increases on the ongoing contracts, and are for the moment bearing the weight of these increases themselves. So it is fairly easy to understand why they are hesitating to set their contract prices for the next campaign, since the question is not knowing "if" but "by how much" they will need to raise their prices to regain a semblance of profitability, after the losses that they will absorb over Q4 2021. So we already know that growers have started to be paid better. However, better revenue for growers does not necessarily lead to better market profitability for importers. A similar profitability to the 2015 and 2016 campaigns (in a particular El Niño meteorological context) may only be recovered by limiting or regulating slightly better the Costa Rican supply, which on its own continues to represent more than 88 % of overall pineapple imports to Europe. This regulation seems practically impossible in view of the planted surface areas and the potential supply available during natural blooming episodes.

The key operators in the pineapple industry are trying to regain this profitability by developing niches (highly coloured fruit, Premium) aimed at a very limited customer base. Some have even taken the plunge and decided to become owners or co-owners of plantations in Costa Rica. This will enable them, as was the case during this past campaign, to better adapt pineapple export flows to the needs of the markets and their customers. While we cannot yet talk about profitability being regained, we can at least observe that the losses over the past campaign, at least for some importers, appeared to be slightly less huge than they might have been in the past. It is true that the vitality of the Costa Rican juice industry also contributed to reducing the supply during the natural blooming episodes.

Sea-freight Costa Rican Sweet pineapple - Netherlands Import price (in euro/box | source: Thierry Paqui)



The campaign described below covers the period from week 41 2020 to week 39 2021. It came in the context of the pandemic, but was marked above all by flat spot demand over fairly long periods. The average rates charged on the spot market were rather stable, fluctuating between €6 and €8/box. The campaign only had a single period during which average spot rates were rather high, while during previous campaigns these favourable periods were more numerous, and helped set the campaign tempo better.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Crumbling of the pineapple market aggravated by the Covid-19 context

Q4 2020 (weeks 41 to 53) was complicated in more than one respect for the pineapple market. While the average indicative rates charged on the spot market officially fluctuated between €5 and €8/box, it has to be recognised that at the worst point in this period there was no longer a market price to speak of, such was the general free-for-all nature of the sales.

The pineapple market gradually crumbled during Q4 2020. In early October, the situation was still under control. The Costa Rican Sweet supply was limited because of various strikes and social movements, which had contributed to heavily reducing pineapple exports. So the market was rather fluid, absorbing those volumes available fairly easily, without any impression of a shortage. At the end of the month, the implementation in several European countries of strict control measures against Covid-19 (curfew, lockdown, closure of restaurants, limitation on sizes of gatherings) provided an early glimpse of the difficulties that the market would have to face, especially since supermarket demand remained fairly flat, and the end of the strikes in Costa Rica enabled the origin to return to exporting substantial volumes.

In early November, the increase in the Costa Rican supply, while demand remained as flat as ever, weighed down heavily on the market. Poor sales proliferated, especially since the fruit received was of heterogeneous quality (a result of the strikes at the ports). The weak demand and sales forced supermarkets to greatly reduce their orders. Volumes not taken by the supermarket sector were very quickly transferred to the spot market, generating an overload on the latter. While officially at this point in the campaign the spot market price was fluctuating between €4 and €6/box, in reality rates were lower, and there was no longer any market price to speak of, since all the operators had embarked on a downward price spiral, in the hope of offloading their stocks as soon as possible ahead of December. So there were many transactions at post-sale prices (PSPs), though this did not enable the market to rebalance. Unfortunately, the situation remained tight and stocks substantial until the end of the first half of December. The promotions launched by the supermarket sector in week 51 finally helped relieve the stocks pressure, and contributed to restoring a semblance of normality to the market, helped it has to be said by the shipping delays in the last week of the year.

A stable market less impeded by the tougher measures against Covid

From January to early April (weeks 1 to 14 2021), the situation was relatively stable. Average rates on the spot market fluctuated little, maintaining a stable level between €7 and €8/box. The best sales were made around Easter (approximately €9/box).

Overall, the pineapple market was fairly fluid from the start of 2021. The lower rate of operations in Costa Rica over weeks 52 and 53 of 2020 contributed to reducing the supply to the European markets from the beginning of January. Thanks to its numerous promotions, the supermarket sector continued to take in the majority of the supply available. Operators feared that the strengthening of the measures taken to control the pandemic (closure of borders to countries outside the European area, closure of non-food stores and toughening of curfew periods) could affect demand and supermarket sales, but this was not the case.

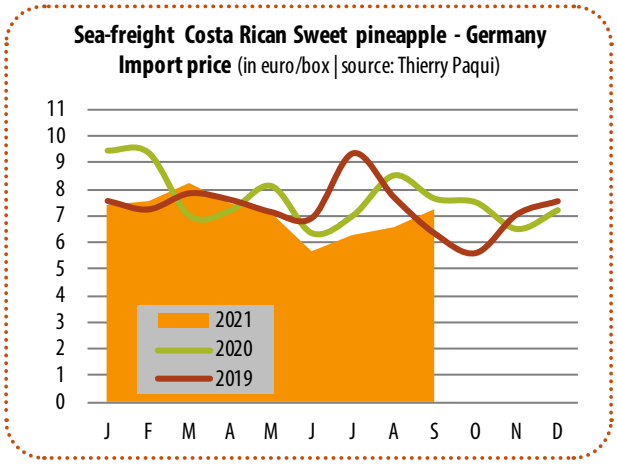
During this period, the supply was often disrupted by the many shipping delays, which depending on their duration, sometimes had an impact on fruit quality. The spot supply represented a minimum risk for operators, since they wanted to avoid having to manage stocks. They took the view that spot prices (between €6 and €8.5/box according to the sizes), without being very lucrative, nonetheless remained decent, especially in terms of the difficult year that they had experienced.

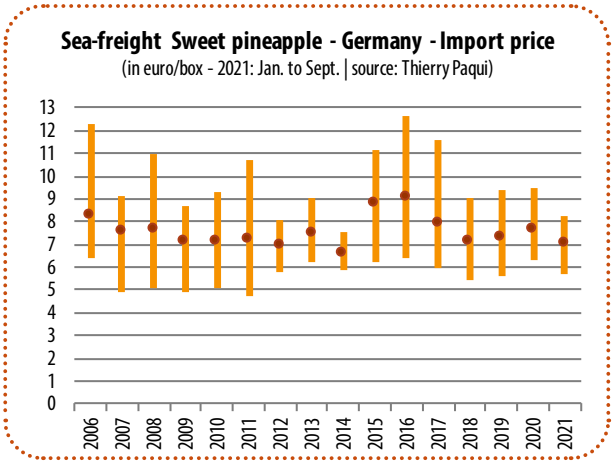
It was in the run-up to Easter that the first logistical concerns started to produce their effects. In a context of increasingly restricted circulation, the shipping companies started to experience refrigerated container shortages. Hence from the beginning of March, some operators knew that they would be short of fruit for Easter. The fall in volumes was estimated at around 15% to 20%, depending on the importers. The tougher measures to combat Covid-19 had little impact on demand in the supermarkets, which remained stable, still sustained by the promotions. The reduction in the Costa Rican supply in the run-up to Easter contributed to strengthening demand on the spot market. However, unlike what could observed during previous campaigns, there was no surge in spot rates, with operators aware of the fragility of the overall situation.

Market relieved by easing of the control measures, and by unexpected support from the supermarket sector

From mid-April to early June (weeks 15 to 22), the Costa Rican supply was bigger, while still being disrupted by shipping delays. Several European countries experienced spells of frost, which affected availability of seasonal fruits. The supermarket sector usually refocuses on these fruits to the detriment of exotics such as the pineapple. At a very early stage pineapple importers were approached by their partners to find out whether it was possible to maintain their supply beyond the agreed programmes. These requests somewhat reassured operators regarding the market evolution, especially when Costa Rica was set for the start of natural blooming. In late April, pretty much across Europe, the authorities started to ease the measures against the pandemic.

The paucity of and delay to the seasonal fruits supply enabled the supermarket sector to continue to organise pineapple promotions, at a time when the supply was substantially bigger because of the natural blooming. Unfortunately, demand and supermarket sales did not follow suit. Purchasers were more on the lookout for seasonal fruits, even though the latter were more expensive, given their limited availability.





Market overloaded in the face of demand favouring seasonal fruits

From mid-June to late August (weeks 23 to 33), a combination of several factors led to a distinct deterioration in market conditions. The Sweet supply was more substantial than initially predicted, because of the natural blooming phenomenon. Shipping delays continued, with more marked consequences on fruit quality, affected by rains in the production zones. While the pineapple struggled to attract interest, the summer fruits supply, now with much higher availability, ended up capturing demand entirely. Poor sales proliferated, affecting all the brands. Some PSP sales were made, without improving the situation. Several batches were sold at clearance prices. There was no longer really a market price to speak of, so big were stocks and so heterogeneous the fruit quality. The operators, which above all wanted to avoid managing stocks of fragile fruit, accepted any price, and so many sales were made at open prices. Although some operators were able to adjust the supply to receive less fruit, the volumes available on the market were not selling.

In July, the Sweet supply was very limited (consequence of natural blooming), but the market took time to clear because of the start of the summer holidays. Demand, still more interested in seasonal fruits, only switched back to the pineapple at the end of summer. Despite the very weak Costa Rican supply, sales remained very quiet throughout August.

From September (weeks 35 to 39), the situation gradually improved since the overall Sweet supply was limited, while the supermarket sector gradually switched back to the pineapple. The lively demand from the Costa Rican juice industry contributed to reducing the supply to the European market. Supermarket promotions facilitated the absorption of those volumes available, while spot demand remained just as flat overall ■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European market
Air-freight pineapple

Cayenne grounded by Sugarloaf and Sweet

Thierry Paqui, consultant
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The measures taken to control the Covid-19 health crisis, which have at times complicated the air-freight pineapples trade, seem to have revealed how things stand on this niche market. The future appears really bleak for Cayenne pineapple air-freight exports. Only a few operators, through particularly careful work, are still managing to sell this variety without losing money, yet they are rapidly dwindling in number. Lack of purchaser interest in this historic variety has intensified since the introduction on the air-freight market of the Sugarloaf variety initially, and then more recently the Sweet variety. This current trend now seems irreversible.


© Régis Domergue

Cayenne purchasers jaded

The air-freight pineapple market is a niche market, small and highly selective. It is reckoned that, across all varieties and origins, it currently represents barely 1 % of sea-freight volumes imported into Europe. France is the leading European importer country for the air-freight pineapple. Its volumes include the main commercial varieties available: Cayenne, Sugarloaf, Sweet and Victoria. While French consumers do not hesitate to pay relatively high prices for air-freight pineapples, they are on the other hand uncompromising on the quality of fruit supplied. The excessive heterogeneity in the quality of Cayenne batches has contributed to gradually putting purchasers off this variety, and driving them a little more towards firstly Sugarloaf, and now Sweet.

Rather than lack of interest, we should see fatigue. The usual Cayenne purchasers seem to have been faced with quality problems fairly frequently. Small growers, especially in Benin, who form the basis of practically all the Cayenne exports from this origin, still do not have the necessary inputs to follow to the letter the technical production procedures developed and issued by COLEACP (Europe-Africa Caribbean and Pacific Liaison Committee). Despite the ongoing appeal of Cayenne, after numerous disappointments purchasers have limited their searches to those brands guaranteeing quality fruit on arrival. Unfortunately the supply of these brands in the Cayenne variety remains very limited.

Air-freight costs being passed on

The Covid-19 pandemic has hit the air-freight market hard. The control measures implemented, which have on occasion led to reduced numbers of passenger flights, the main route for transporting this fruit, have also resulted in distinctly higher freight costs compared to the alternative, cargo flights. Freight rate increases have been passed on to the pineapple prices, making some fruits from fairly remote origins (Ecuador, Costa Rica, Kenya and Panama, to mention just those with the biggest market presence) genuine luxury items, so high are the price levels sometimes paid for this fruit (€2.80 to €3.40/kg at the wholesale import stage).

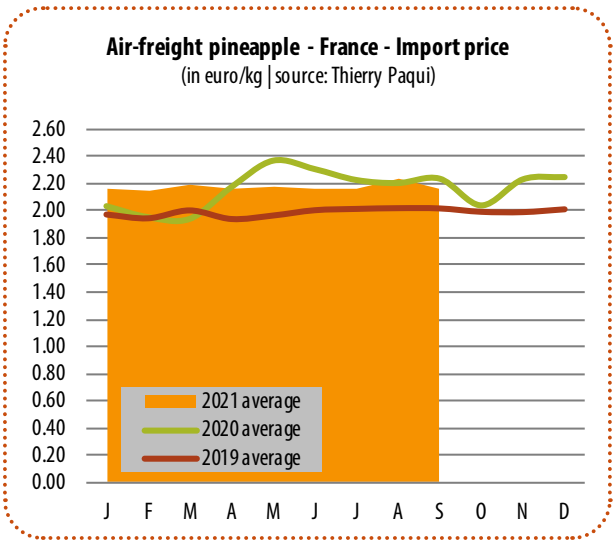
Freight price increases have affected all the origins, forcing importers to pass them on to the imported products. The difficulties encountered by certain importers in passing on these increases for Cayenne imports (especially Benin) have contributed to reducing this variety's presence on the market.

Quality, the ultimate criterion

The Sugarloaf supply (Benin, Ghana and Togo), which for the moment is not encountering any major quality problems, has managed to absorb these cost increases. The same goes for the Sweet supply (Costa Rica, Ecuador, Kenya and Panama), prices of which have seen a considerable increase.

This increase in air-freight costs in some way has helped clarify things on the air-freight market. Batches of lower quality have had more difficulty maintaining their prices, while top-quality batches have continued to sell at very high levels. Under these circumstances, the lower-quality supply has been less viable, with neither growers nor importers able to make money from it. The supermarket sector has continued to play a key role in placing the pineapples. The supply of highly coloured fruit (Sweet), still available in very limited volumes, has mainly been sold via the wholesale markets, aimed at specialist dealers.

The period in question of the air-freight campaign ran from week 41 2020 to week 39 of 2021. The Sweet supply (mainly from Latin America and Kenya), only available in fairly limited quantities, earned the best value. The Sugarloaf supply continued to sell well, with rather substantial volumes. However, because of its dual positioning (a green fruit supply and degreened/coloured fruit supply), sales were more or less fluid according to the target markets. The green fruit supply sold without difficulty in the big stores, while the coloured fruit supply sold mainly on the wholesale markets, where purchasers were pretty intransigent in terms of fruit coloration. While well-coloured fruit sold fairly easily, fruit with middling coloration found it more difficult. Volumes of green fruit, sometimes abandoned by the supermarket sector, struggled to sell on the wholesale markets. Conversely, sales were more complicated for the Cayenne supply, since it was fruit from brands recognised for trading with quality that were the most sought-after.



A difficult end to the year

During Q4 2020 (weeks 41 to 53), sales on the air-freight market were fairly difficult. Demand was particularly flat, forcing operators to scale back their imports heavily, and sometimes even put them on hold, to avoid having to manage problematic fruit stocks over the end-of-year holidays. The rains in Cameroon and Benin hit the fruit hard, and forced growers to be stricter in terms of export batch quality (Cayenne). Sugarloaf sales, usually more fluid, also suffered from flat demand. The fruit placed on the market lacked shine. The situation was hardly any better for Sweet sales. While batches from Latin America were still managing to sell, the situation was more complicated for those from Ghana. Deemed to be less coloured and shiny than batches from competing origins, they often struggled to find a place on the market. Operators had to suspend their Sweet imports from Ghana between weeks 46 and 50. The pineapple market was under tension until the festive purchases got off to their very late start (week 52).

Reduced activity right up to Easter

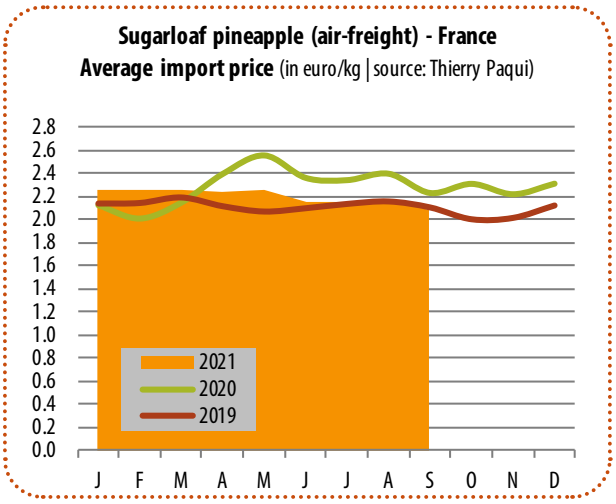
From the start of the year until the week after Easter (weeks 1 to 14 2021), activity on the air-freight market was significantly reduced. Anticipating a fall in demand after the end-of-year holidays, operators very heavily scaled back their imports, though without causing a shortage. The winter holidays, which spread over the month of February, were unable to revitalise demand either. The drought in Benin and Cameroon contributed to scaling back the Cayenne supply a bit further. What little fruit was available was often unappealing because of the dried crowns. The situation for Sugarloaf sales was mixed. The coloured fruit supply was overly dull, and struggled to sell, while green fruit batches enjoyed fairly fluid supermarket sales. On the Sweet market, those batches that came from Latin America and Kenya continued to sell well. Sales were rather more complicated for Ghanaian fruit, which was not really able to take advantage of the paucity of the Latin American supply to sell better. Easter demand was not very high, and the few available batches were more than enough to cover it.

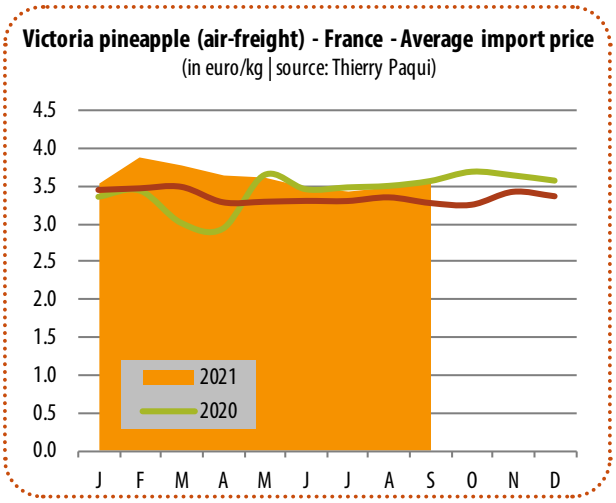

© Catherine Sanchez

Summer lethargy

From mid-April (week 15), the situation gradually tightened up. When the first seasonal fruits appeared, demand started to tread water, and the pineapple started to fall out of favour in purchasing habits. Operators initially tried to use the price lever, before taking more radical measures, ranging from heavily scaling back on imports, or sometimes even putting them on hold. The Cayenne and Sweet supplies continued to sell, since they had very limited availability. Cayenne imports from Benin practically came to a halt from the end of June (week 25). Sugarloaf sales, usually fluid, were also tighter and the operators, overloaded with fruit, often had to resort to PSPs, though this did not really improve the situation. The market had entered its summer phase, during which demand was primarily captured by seasonal fruits. Hence the air-freight market remained flat throughout the summer. Rates did not dip for those few batches available, with operators aware that playing with prices would not help improve demand.

In late September (week 39), the air-freight market remained listless. The end of the school holidays and the reopening of canteens did not generate any more marked interest in the air-freight pineapple ■





European market

Victoria pineapple

Supply disruption, but no real shortages

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© Guy Bréhiner

The Victoria market was once again the private preserve of the Indian Ocean origins: Reunion, Mauritius and to a lesser degree South Africa. The Covid-19 context, and the measures taken to limit its spread, affected the supply, though without creating genuine periods of shortage, despite the irregularity of the volumes and sizes placed on the market. Nonetheless, Victoria remained the small exotic fruit par excellence, with sales once again high at the end of the year and Easter.

A fairly irregular supply, though without overly disrupting the market

During Q4 2020 (weeks 41 to 53), there were several factors disrupting the Victoria pineapple market supply, leading operators to fear the worst for the end-of-year holidays. Initially (weeks 41 to 48), the supply was very small. The cold and drought considerably held back volumes from Reunion. For its part, the Mauritian supply was subjected to the Covid-19 measures taken by the authorities, which caused a distinct reduction in the number of passenger flights from the island, thereby limiting the volumes shipped throughout Q4. The low availability of Victoria caused prices to strengthen for those batches that were available.

The low temperatures on Reunion triggered a natural blooming phenomenon (weeks 49 to 53), which increased the supply from the island over the final weeks of 2020. The arrival of these big volumes onto the market, while demand was still lukewarm, led to fears of the worst, especially since the supply was fairly unbalanced, with less popular size 8 predominating. The price reduction agreed by the operators, along with the paucity of the Mauritian supply, enabled the market to deal with this influx better, ahead of the launch of festive purchases (week 51). Sizes 6 and 7, more popular yet with lower availability, earned the best value.

Supply still irregular in the run-up to Easter

Over Q1 2021 (weeks 1 to 17), the supply remained irregular. After bumper levels because of the natural blooming, the Reunion supply went through a lean spell, as is normal after any natural blooming. At the start of the year, the few batches placed on the market struggled to find takers, since they mainly comprised small sizes. However, in a context of an extremely scaled-back Reunion supply, purchasers ended up agreeing to compromise on those Reunion volumes that were available, despite the occasional unsuitability of the sizes. During this period, it was the Mauritian supply, better suited in terms of sizing and with better availability, which captured the bulk of demand.

In the run-up to Easter, the paucity of the overall Victoria supply enabled those batches on the market to sell at fairly high rates. The fall in demand after Easter did not have any big consequences on sales or rates, since volumes placed remained well below demand.

Victoria marginalised

Upon the arrival of the first seasonal fruits (week 18), Victoria gradually fell out of favour in purchasing habits. Importers very quickly scaled back their imports to better adapt them to the low demand, though this did not really improve sales fluidity. True, interest in the fruit was very lukewarm. Nonetheless, the rates remained relatively stable, since operators knew very well that they had little chance of improving demand via the price level. So the Victoria market sunk softly into lethargy, from which it only started to emerge after week 38 ■

Producer country file

The pineapple in Kenya

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While the Kenyan pineapple industry goes back more than 50 years, with production aimed mainly at the canning industry, a youthful fresh fruit industry emerged in 2017. This was driven by a single operator with great experience in the pineapple industry, Del Monte. Thanks to the Sweet variety (MD2) and the unique local conditions, giving the fruit favourable organoleptic qualities, this group developed fresh pineapple exports initially to the nearby markets of the Middle East, and more recently to the European Union.

© Del Monte

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At Fresh Del Monte, we are farmers at heart and take sustainability to heart – within all corners of our global operations. Our vision is to make a positive and sustainable impact on our consumers, the people who work with and for us, communities around the world, and the planet as a whole. In doing so we want to build a sustainable and resilient business and to positively contribute to the entire agriculture industry.

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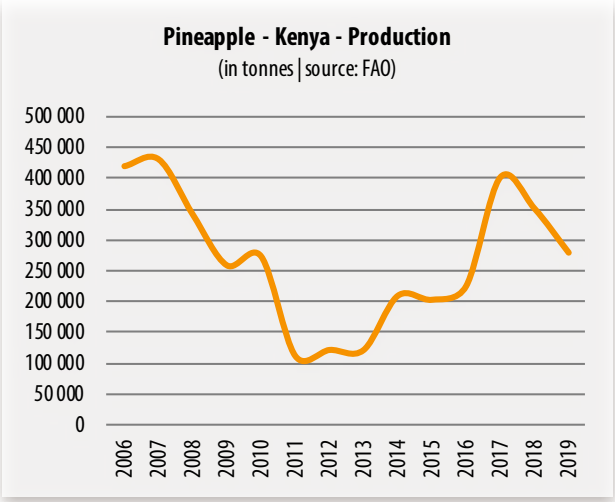
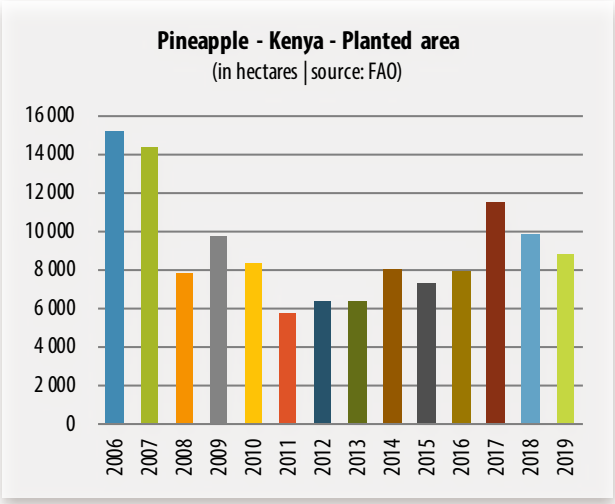
Pineapple
Kenya

History

It was not until the 1950s that the first pineapples were planted in Kenya by South African growers experienced in this crop. The first trials were conducted near the town of Thika, on the outskirts of Nairobi. The pretty conclusive performances of these first plantations soon convinced many other growers to get into pineapple cultivation. Although consumed locally fresh, the fruit quickly became earmarked for industrial use, enabling the opening of the first pineapple cannery in 1957 by the Kenya Canners Factory. Following Kenya's independence in 1963, government policy set out to develop exports, especially of canned pineapples, and offered the US company California Packers (later Del Monte) to become a shareholder in the Kenya Canners Factory, and then the owner of the cannery in the Thika zone. In 1968, Del Monte USA acquired a majority share in Kenyan Canners Limited, and the company took on the name Del Monte Kenya Limited. Large-scale projects were undertaken, such as expanding the cultivation area, setting up on-field mechanisation, irrigation, as well as road building and school building projects, etc.

Initially, production for canned pineapple exports primarily comprised the Cayenne variety. The first Sweet harvest in Kenya dates from 2015, also aimed at the industrial sector. It was not until 2017 that fresh fruit exports began.





Location and production

Kenyan pineapple production is relatively fragmented, and is located in three very distinct zones in the country: the central zone near Nairobi, focused mainly on exports, and the coastal and western zones (near Lake Victoria), which mainly supply the local market.

The historic production area is situated in the central region near Nairobi, in the counties of Muranga, Kiambu and Machakos. The multinational Del Monte is established there, running 4 900 hectares. The traditionally planted Cayenne variety has been replaced by Sweet since 2015. Now practically all the plots grow Sweet. Thanks to favourable climate conditions and well-controlled technical procedures, production continues year-round, with returns per cycle of up to 2.5 per year. This production zone offers highly particular pedoclimatic conditions, unique worldwide for pineapple growing. The plantations are situated at an altitude of 1 500 metres. The climate is tropical with alternating dry and wet seasons. The average annual rainfall is 900 mm, divided between two periods: a so-called long period from April to June (approximately 600 mm), and another shorter period between October and November (300 mm). The dry season extends between January and March, with high temperatures which can fluctuate between 11°C and 29°C. Conversely, between July and August, the temperatures are cooler, between 12°C and 22°C. The soils are ferralitic, with an argillaceous fraction. This fruit grown at altitude has recognised organoleptic qualities, which are regarded as unique. Del Monte's commitment to more sustainable practices has been accredited by "Sustainably Grown" certification, issued by the certifying body SCS. Now all the fruit is certified. In addition, numerous projects have been set up for the local populations, especially in terms of access to education.

The other two production zones are located on the Pacific Coast, near Kilifi, and in the west of the country, near Lake Victoria. According to the latest FAO surveys, they occupy in total nearly 5 000 ha. The climate is also tropical, at a lower altitude. In these regions, it is Cayenne production which is favoured, aimed mainly at the local market.

Pineapple
Kenya

The pineapple in Kenya

approx. 10 000 ha

Sweet production zone
approx. 4 900 ha

Cayenne production zone
approx. 5 000 ha

Pineapple
Kenya

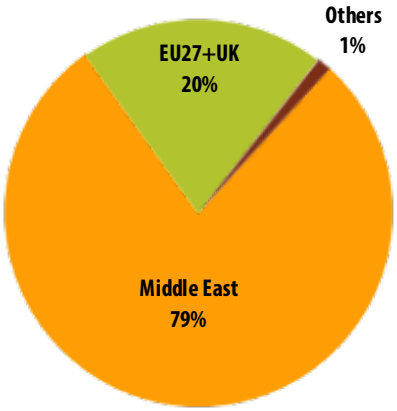
Outlets and exports

Kenya is the world no. 4 canned pineapple producer, with more than 48 000 tonnes exported in 2020. Exports have primarily been made by the multinational Del Monte since 1968. While historically the bulk of volumes shipped by the company was in processed form (canned, juice), a young fresh export industry appeared in 2017, which has made rapid progress.

The creation of a packhouse at Thika has helped support this development, with volumes of fresh pineapple going from barely 524 tonnes in 2018 to 22 000 tonnes in 2020. Nearly 80 % of fresh volumes are aimed at the Middle Eastern markets, with 20 % going to Europe (i.e. just 4 555 tonnes), where the origin is achieving clear success thanks to its organoleptic qualities and marketing actions.

Because of geographic proximity, volumes for the Middle East are sent by sea-freight. However, for Europe, air-freight is still the preferred mode.

Fresh pineapple - Kenya - Exports by destination in 2020 (in tonnes | source: Trademap)



Fresh pineapple - Kenya - Exports
(in tonnes | source: Trademap)

Pineapple
Kenya

Segmentation

There is remarkable segmentation of production for export, in both the fresh and processed sectors:

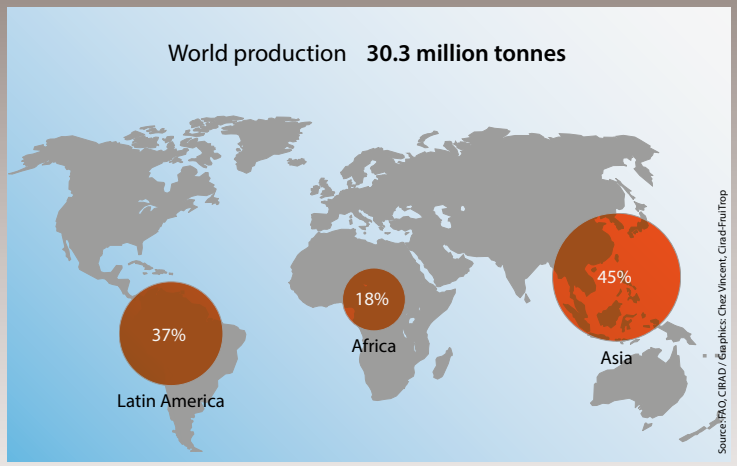
- Del Monte Gold fresh pineapple, Sweet variety;
- canned pineapple, in slices or chunks;
- concentrated pineapple;
- by-products for industry (e.g. purée).

Photos © Del Monte

Logistics

The Achilles heel of Kenyan fresh fruit exports is logistics. The port of Mombassa is very regularly congested, leading to delays. In addition, availability of shipping lines is currently highly uneven according to the destinations. While exports to the Middle East are quick overall, with transport times ranging from 10 to 22 days, this is not the case for shipments to Europe. Direct lines are non-existent, and transhipments are required. Hence transport times are extended and in the best case, it takes between 18 and 25 days between the port of Mombassa and the South European ports. Hence, 80 % of volumes for Europe are shipped by air-freight.

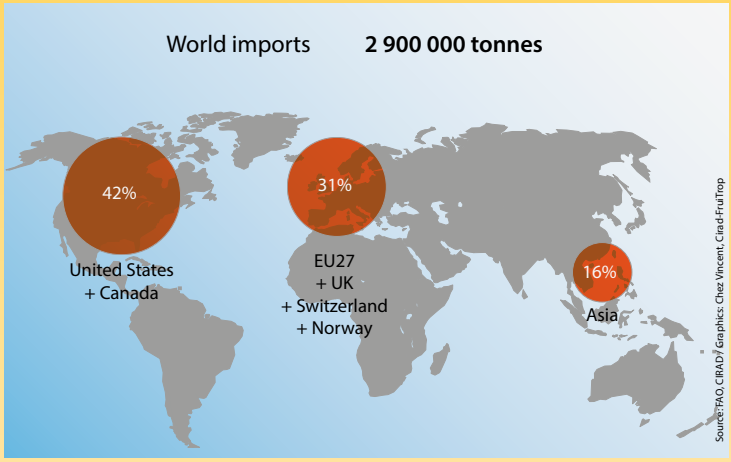
PINEAPPLE - Production (2019)



Pineapple — Top 10 producer countries	
tonnes	**2019**
Costa Rica	3 328 100
Philippines	2 747 856
Brazil	2 426 526
Indonesia	2 196 456
China	2 158 691
India	1 711 000
Thailand	1 679 668
Nigeria	1 671 440
Mexico	1 041 161
Colombia	1 008 687

Source: FAO

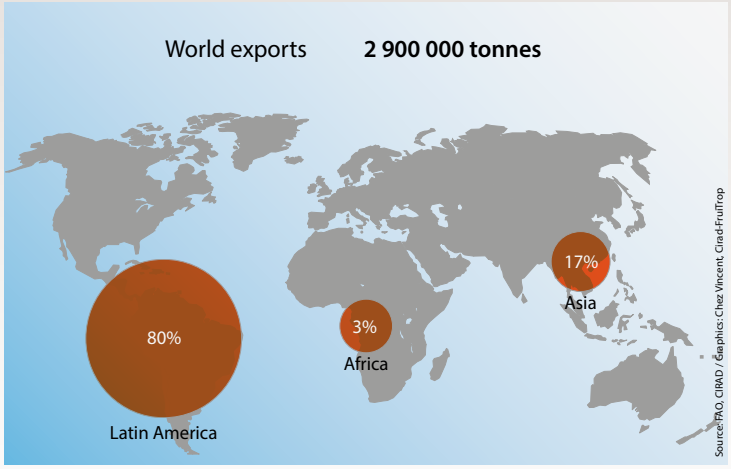
PINEAPPLE - Imports (2020)



Pineapple — Top 7 importer countries	
tonnes	**2020**
United States	1 099 121
Netherlands	252 513
China	218 680
Japan	157 080
Italy	130 251
United Kingdom	124 905
Spain	122 125

Source: national Customs

PINEAPPLE - Exports (2020)



Pineapple — Top 6 exporter countries	
tonnes	**2020**
Costa Rica	2 047 287
Philippines	582 769
Ecuador	84 267
Honduras	81 486
Taiwan	45 623
Mexico	41 517

Sources: national Customs, professionals

USA - Imports - Main supplier countries						
tonnes	2015	2016	2017	2018	2019	2020
Total	**1 028 693**	**1 076 517**	**1 152 953**	**1 164 941**	**1 143 787**	**1 099 121**
Costa Rica	868 779	910 092	976 603	1 001 907	989 451	936 701
Honduras	47 734	48 008	53 790	57 401	62 872	67 625
Mexico	75 165	82 358	85 250	72 888	58 939	54 532
Guatemala	15 956	19 772	23 397	22 588	21 859	23 902
Ecuador	5 972	3 140	542	917	2 859	7 471
Panama	5 276	5 116	6 054	5 829	3 937	2 051
Thailand	2 336	2 759	2 550	1 791	1 879	1 894
Others	7 474	5 272	4 767	1 620	1 991	4 945

Source: US Customs

Canada - Imports - Main supplier countries						
tonnes	2015	2016	2017	2018	2019	2020
Total	**109 493**	**118 539**	**127 600**	**126 506**	**119 823**	**113 016**
Costa Rica	100 461	108 122	112 695	115 455	107 412	100 322
Honduras	1 835	3 007	6 547	4 952	7 218	7 030
USA	2 687	2 365	2 321	1 551	1 594	1 362
Ecuador	1 033	728	695	724	481	540
Others	3 477	4 317	5 342	3 824	3 118	3 762

Source: COMTRADE

Central and South America - Main markets						
tonnes	2015	2016	2017	2018	2019	2020
Total	**90 957**	**98 942**	**109 240**	**86 704**	**93 469**	**100 234**
Chile	35 187	37 496	47 410	55 117	41 278	41 148
El Salvador	20 154	22 184	22 234	26 391	31 339	25 091
Argentina	11 564	13 621	16 689	13 652	14 003	12 752
Uruguay	1 507	1 747	2 211	2 893	2 534	2 238
Paraguay	812	849	805	727	519	1 047
Costa Rica	16 118	18 128	14 859	310	7	9
Peru	1	-	1	1	5	2
Others	5 103	3 607	4 707	4 040	3 730	3 148

Source: COMTRADE

European Union - Imports - Main supplier countries						
tonnes	2015	2016	2017	2018	2019	2020
Total extra-EU, incl.	**836 875**	**847 087**	**941 887**	**1 017 099**	**1 000 304**	**881 875**
Costa Rica	720 418	736 274	817 016	905 773	895 418	782 802
Ecuador	23 540	33 031	40 827	34 009	38 189	34 313
Côte d'Ivoire	24 666	21 624	27 333	24 079	26 168	22 321
Ghana	19 954	13 530	15 134	12 474	12 733	11 691
Panama	23 300	13 991	9 600	9 504	7 988	8 825
Colombia	4 444	8 480	13 945	10 974	5 453	4 256
Honduras	3 905	3 072	2 359	3 259	1 526	3 298
Dom. Rep.	2 267	3 000	1 579	2 022	2 057	2 095
Togo	1 829	1 736	2 825	3 132	2 620	1 589
Cameroon	3 481	3 888	3 931	3 063	2 383	1 381
Benin	3 647	2 949	945	807	748	1 285
Brazil	66	204	146	49	64	28
Others	5 359	5 310	6 249	7 955	4 958	6 806

Source: Eurostat

Other West European countries - Main markets						
tonnes	2015	2016	2017	2018	2019	2020
Total	**26 334**	**25 920**	**26 832**	**25 849**	**24 731**	**22 904**
Switzerland	20 079	20 090	20 841	20 086	18 706	18 262
Norway	5 744	5 231	5 351	5 183	5 496	4 277
Iceland	511	599	640	580	529	365

Source: COMTRADE

Russia - Imports - Main supplier countries						
tonnes	2015	2016	2017	2018	2019	2020
Total	**32 229**	**33 381**	**45 867**	**52 697**	**51 181**	**53 306**
Costa Rica	28 592	28 418	40 101	47 565	43 373	48 374
China	1 252	2 118	3 519	2 994	4 124	1 716
Ecuador	736	1 477	1 022	1 146	2 205	1 240
Panama	312	40	8	40	456	624
Philippines	537	406	267	436	572	142
Ghana	215	111	54	14	60	32
Cameroon	31	39	49	39	16	20
Brazil		26	12	5	-	-
Côte d'Ivoire	398	82				-
Others	156	664	835	458	375	1 158

Source: COMTRADE

Other East European countries - Main markets						
tonnes	2015	2016	2017	2018	2019	2020
Total	**7 698**	**6 786**	**9 494**	**12 885**	**13 893**	**17 420**
Ukraine	2 554	3 022	4 087	6 052	6 052	10 440
Serbia	1 092	1 443	2 169	2 675	3 366	3 163
Belarus	2 957	1 000	1 589	1 985	2 222	1 979
Bosnia	535	742	974	1 157	1 237	1 041
Moldova	560	579	675	1 016	1 016	797

Source: COMTRADE

Japan - Imports - Main supplier countries						
tonnes	2015	2016	2017	2018	2019	2020
Total	**150 598**	**143 173**	**156 992**	**159 040**	**153 070**	**157 080**
Philippines	147 525	135 911	145 724	148 832	146 130	152 974
Taiwan	1 254	1 126	657	682	982	2 144
Costa Rica	770	4 895	7 246	6 362	3 816	289
Malaysia	38	196	900	908	338	92
USA	33	82	1	16	1	-
Others	978	963	2 464	2 240	1 803	1 581

Source: Japanese Customs

Other Asian countries - Main markets						
tonnes	2015	2016	2017	2018	2019	2020
Total	**200 222**	**222 363**	**271 010**	**323 698**	**379 111**	**313 753**
China	102 828	117 295	162 455	201 632	267 070	218 680
South Korea	68 373	77 375	78 998	77 520	70 651	61 839
Singapore	22 060	22 558	22 415	24 242	21 160	19 101
Kazakhstan	2 221	1 848	3 556	3 645	3 452	3 542
Azerbaijan	2 094	963	1 417	1 892	2 373	2 373
Malaysia	2 646	2 324	2 169	2 662	2 788	1 587
Others	10 614	10 877	8 796	12 105	11 617	6 631

Source: COMTRADE

Oceania - Main markets						
tonnes	2015	2016	2017	2018	2019	2020
Total	**8 831**	**9 181**	**9 295**	**11 477**	**9 430**	**8 832**
New Zealand	8 377	8 829	9 148	11 362	9 361	8 762
Australia	454	352	147	115	69	70

Source: COMTRADE

Near East - Main markets						
tonnes	2015	2016	2017	2018	2019	2020
Total	**24 285**	**26 734**	**35 231**	**41 022**	**39 727**	**44 841**
Turkey	14 894	15 948	16 851	19 364	20 973	27 886
Israel	940	1 168	6 908	6 972	6 972	7 448
Morocco	3 493	4 477	6 473	9 169	9 448	6 981
Lebanon	3 694	4 021	3 724	4 248	1 685	1 473
Jordan	1 264	1 120	1 275	1 269	649	1 053

Source: COMTRADE

Persian Gulf - Main markets						
tonnes	2015	2016	2017	2018	2019	2020
Total	**103 974**	**87 677**	**105 447**	**96 180**	**102 882**	**101 375**
United Arab Em.	49 011	42 095	46 630	46 163	43 254	49 742
Saudi Arabia	21 982	18 837	21 922	23 632	27 550	22 781
Iran	13 107	13 450	23 000	8 877	13 346	11 212
Yemen	7 318	608	925	3 828	3 858	5 908
Kuwait	4 757	4 097	5 268	5 431	5 052	4 725
Qatar	5 097	5 000	4 738	4 815	5 153	4 577
Oman	2 702	3 590	2 964	3 434	4 669	2 430

Source: COMTRADE

Pineapple quality defects

Internal browning

Internal browning

Thielaviopsis paradoxa on a lateral blemish

Incipient *Thielaviopsis paradoxa* on peduncle

Thielaviopsis paradoxa external appearance

Sun scald on 'Victoria'

Sun scald on 'Victoria'

Over-ripeness

Scales

Attack by insects

Crack malformation or deformity

Colour variation in the same batch

Damaged, scorched crown

Crown too long and crushed by box lid

Photos © Pierre Gerbaud

Incipient internal browning

Incipient internal browning in 'Victoria'

Thielaviopsis paradoxa

Incipient *Thielaviopsis paradoxa* on a blemish

External symptom of *Penicillium funiculosum* on Sugarloaf

Internal symptom of *Penicillium funiculosum* on Sugarloaf

Translucent

Mould (*Penicillium*) on peduncle after transport

Mould after transport (*Penicillium*)

Micro-bruising

Dry bracts on 'Victoria'

Peduncle cut irregularity

Irregular crown size

Poorly reduced crown

Double crown

Litchi

A report by
Pierre Gerbaud

Contents

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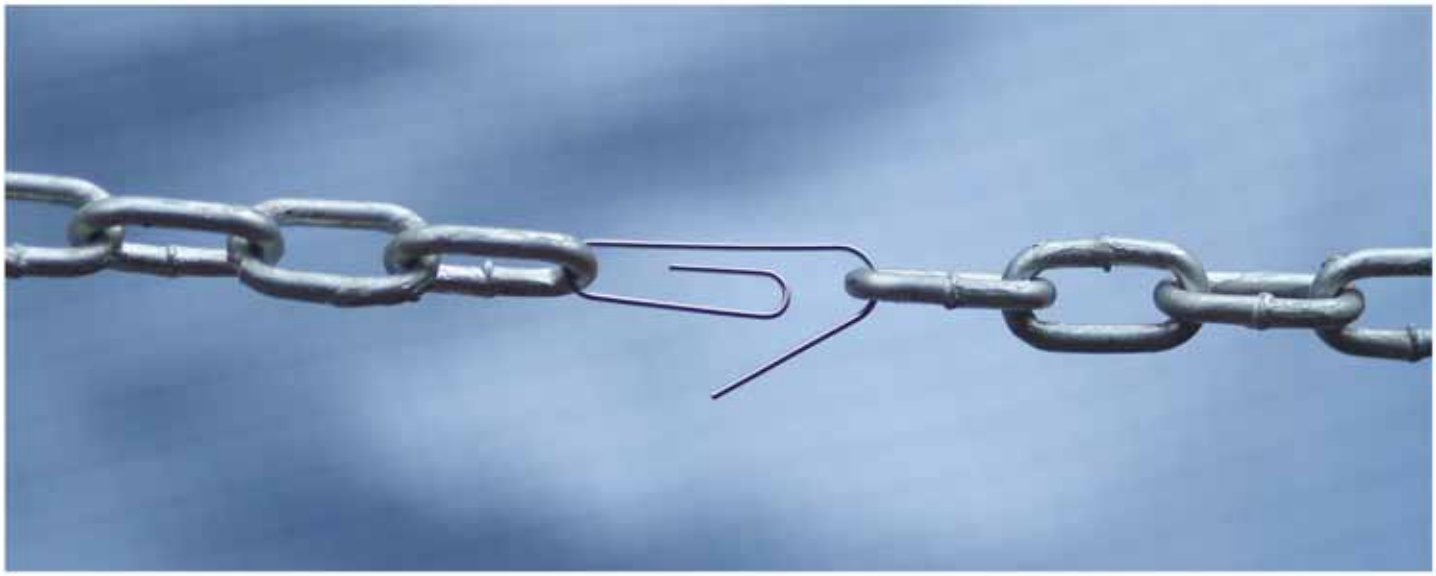
Information... your weak link?



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Madagascan litchi

2020-2021 campaign review

A good campaign

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Every year when the litchi export campaign is taking shape, recurrent questions are raised over its organisation and the context. The relative fragility of the fruit, and the brevity of its production, are the fundamental factors in the deliberations of the industry's professionals. Late or early production, in bigger or smaller quantities, leads to the implementation of variable strategies in terms of the estimated or hoped-for market conditions. And this is without counting the external factors which regularly disrupt the campaign. Hence during the last decade, there were snow storms upon the arrival of the fruit into Europe, hauliers' strikes affecting the forwarding of the litchis, the silting of a ship loaded in the port of Toamasina, delaying its departure, the resurgence of a plague epidemic in Madagascar compromising the harvest and shipment of the produce, the presidential election held in Madagascar at the beginning of the campaign, etc. The 2020-21 campaign was not spared this infernal cycle of obstacles, with the Covid-19 pandemic. How would this trading campaign fare, in a world context that was in upheaval, to say the least?

Against all expectations, the 2020-21 campaign was doubtless one of the best this decade. However, the context of the pandemic meant some uncertainties for the upstream segment, in terms of local harvesting and merchandise transport capacities, labour organisation at the processing centres, packhouses and dispatch units. In the downstream segment, i.e. on European markets, it was really difficult to predict consumer reaction upon the announcement in the summer of the new wave of the pandemic, with its accompanying retinue of restrictions and possible lockdowns.

A few months before the start of the campaign, the harvest was set to be probably early, with the Madagascan litchi industry players laying the foundations of an organisation taking into account the context. They repeated several factors already registered in previous campaigns, concentrating the sea-freight shipments, to take advantage of production coinciding with trade over the end-of-year holidays.

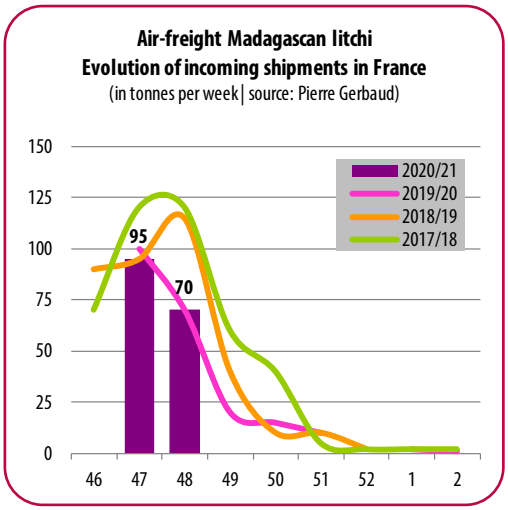
The litchi, an out of fashion product?

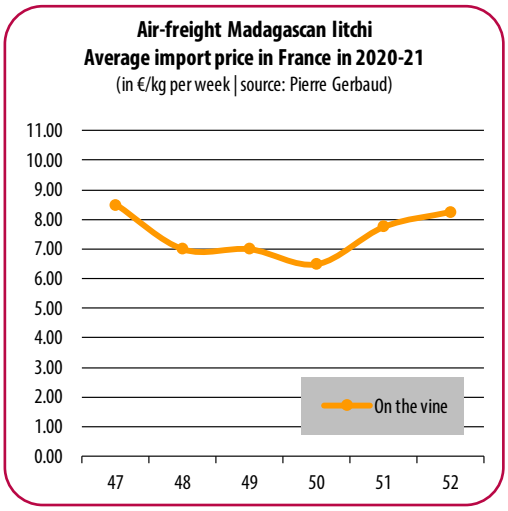
The litchi market has been stagnating for several years. Has the trend that has been driving it since the early 2000s unravelled over time? That is the question that we can ask when we look at the evolution of the statistics over the past few decades. It seems a long time ago that this fruit was available practically year-round, albeit in variable quantities but still there. This supply employed numerous origins, given the product's high seasonality. This production seasonality was converted into consumption seasonality. Hence litchi trading on the European market was concentrated over the end-of-year holiday period, with a calendar extending from November to February. The Indian Ocean production zone (Madagascar, South Africa, Reunion, Mozambique and Mauritius) still supplies large quantities of litchi, but these are in long-term decline. This trajectory is primarily due to the decline in exports from Madagascar, the number one supplier to the European market. The production potential remains high, though the recipient markets are less enthusiastic. The litchi remains a fruit associated with the end-of-year holidays when consumption reaches its peak, but over an increasingly short period. Some restrained volumes are marketed in June/July from Vietnam, China and Mexico. Yet this period is unfavourable for litchi sales, at the height of the European-produced berry season. Hence the litchi found itself priced as an exotic, unaffordable compared to the end-of-year prices. Israel also maintains a summer supply, which also seems to decline year on year. The image of the litchi is being confirmed as a dichotomy between a period of widespread consumption at the end of the year, and a period of elitist consumption over the rest of the year.

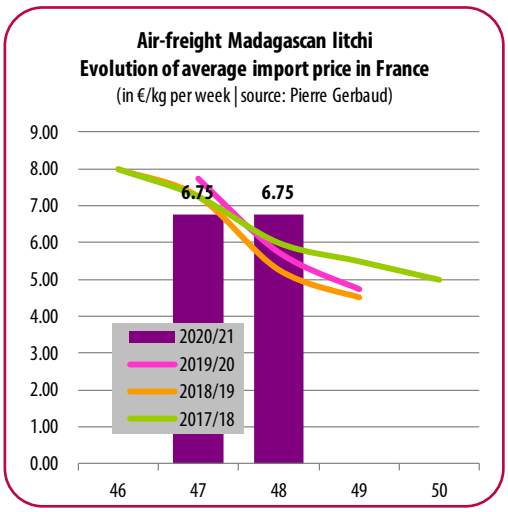
The two conventional ships actually kept to their schedules in the context of a decreasing world reefer fleet. The two selected ships were the same as in previous years. This choice, driven by the dwindling numbers of this type of ship, was also made because of their technical specifications in terms of size, cruising speed and cold production capacity, essential for transporting litchis. Unlike other imported fruits, the short time period between picking and loading the merchandise does not enable prior cooling of the fruit. And the litchi is one of the few tropical fruits that requires transport at low temperatures (+ or - 1°C).

The operators also chose to reduce volumes traditionally shipped by sea-freight, in terms of the trajectory of the European markets, on which Madagascan litchi sales are increasingly concentrated with every passing year. This reduction of approximately 2 000 tonnes provided hopes, under the anxious market conditions, of guaranteed sale prices equal to or greater than in previous years. In a way, this was an adaptation of the supply to the assumed demand at this time of year.

The operators also agreed on the simultaneous start of the harvests, intended on the one hand for air-freight shipments, and on the other hand for loading the scheduled flights, a factor already applied during the previous season. Furthermore, all the measures aimed at guaranteeing fruit safety, implemented over the past several campaigns, were repeated and amplified. The monitoring of the residual sulfur dioxide content was particularly strong, both at the origin and upon receipt of the fruit in Europe.







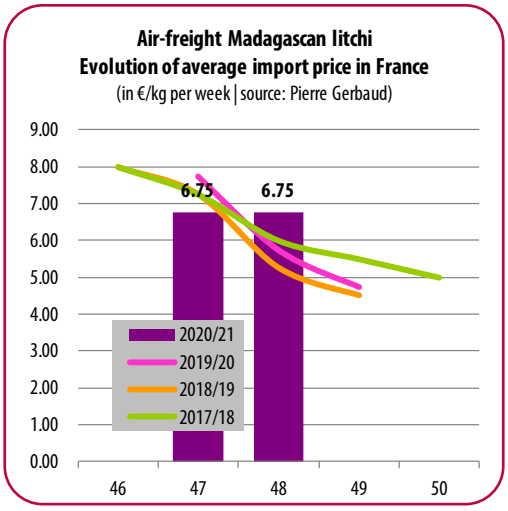
A short air-freight campaign

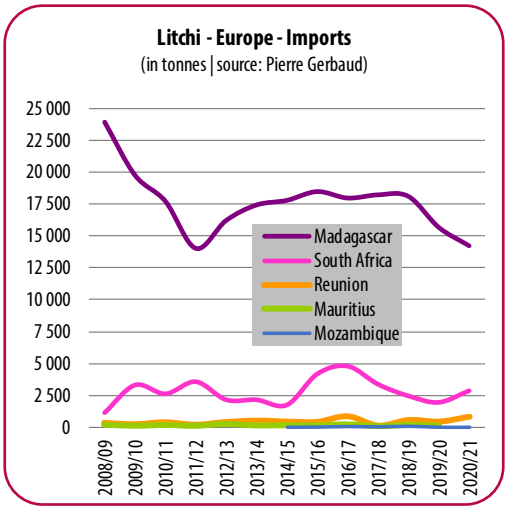
The official opening of the harvest on 13 November 2020, relating both to air-freight and sea-freight fruit, shortened the air-freight litchi trading period, which lasted barely more than two weeks. The previous year, the early start to the campaign had cut back the air-freight campaign to three weeks. On top of being ahead of schedule, there was the competitiveness of the other origins on the European markets. The distortions in cost price between the fruit origins was crucial in market placement. The dwindling air links, due to the context of the health crisis, and the increasing freight and transit prices, also need to be taken into account to explain how this first part of the campaign went. In spite of these constraints, Madagascan air-freight litchis traded rather well. Exports totalled approximately 240 tonnes, slightly up from the previous year, when they reached 220 tonnes. Despite the difficulty accessing air freight, the operators ultimately found solutions to transport their product to the European markets. Of the 240 tonnes counted, 165 tonnes were shipped during weeks 47 and 48, and comprised sulfur-treated de-stalked fruit. The campaign then continued with untreated on-stem fruit, until the end of the year. The tonnages concerned were no longer comparable, at around ten tonnes per week.

Apart from a few batches from Reunion and Mauritius received from week 45, initiating the air-freight campaign, the season only really started in week 47, with the combined arrival of volumes from Madagascar, South Africa and Mozambique. The large quantities suddenly available in week 47 on a fairly sluggish market caused a rapid decline in Madagascan litchi prices. While the first batches traded on a footing of €7.50/kg, prices gradually took a downturn to stabilise at around €6.50/kg at the end of the week. They held up the following week, especially thanks to the good fruit quality. The sizing of the Madagascan litchis, bigger on average this year, as well as their good taste quality (sugar content and flavour) were essential assets. Sales were made mainly to the supermarket sector, enabling it to start communication for this product for the end-of-year holidays. Trading of treated Madagascan litchis wound down at the end of week 48 and the start of week 49, before the arrival of the first scheduled conventional ship.

Meanwhile, fresh on-stem or trussed litchis, like the produce from Reunion or Mauritius, were also available, but in smaller quantities. The first shipments were concomitant with the treated fruit, but instead aimed at the traditional wholesale and retail stores. This also highlighted the good organoleptic quality of the Madagascan litchis, which represented an additional selling point. This year the shippers improved fruit packing, by moving closer to the methods used by the competing origins. Use of micro-perforated bags

helped extend the lifetime of the fruit, though this was limited due to the often advanced maturity, given the earliness of the campaign. This fruit, sold on the same price footing as fruit from Reunion at the beginning of the campaign (€8.00-€9.00/kg), saw a considerable devaluation as shipments from competing origins increased. Prices constantly dropped to €7.00/kg, and even down to €6.50/kg in week 50. They recovered thereafter until the end of the year to between €7.00 and €8.50/kg, while the quantitative pressure from Reunion fruit dipped, and demand remained higher for the end-of-year holidays. Some batches of fresh fruit sold under the organic label were valued at the same time at slightly higher prices (€1.00 to €2.00/kg). During the heaviest laden period in terms of fresh litchis (weeks 48 to 50), organic litchis sold without any premium over real conventional fruit.





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A strategy that paid off for the sea-freight campaign

An early harvest and reduction in tonnages formed the foundations of the strategy implemented by the Madagascan litchi industry operators for the 2020-21 campaign, on top of the good fruit quality. These factors seem to have been pluses this season, one of the best this decade.

The official opening of the campaign on 13 November 2020 enabled loading of the first conventional ship - the Baltic Klipper – to get off to a quick start. Though limited overnight from the 13 to 14 November, the loading operation gathered pace in the following days, in spite of unfavourable weather conditions. A series of storms temporarily halted the site, which slowed down the loading operations. Given the early start to the campaign, a more extended time frame for loading the ship had been considered, enabling the operators to process and pack the fruit in less of a rush. In the end it took four days to load this ship, which put to sea early in the morning of 17 November. It took the northern route, via the Suez Canal, to reach Europe as quickly as possible.

In order to place the sea-freight litchi, the decision was made to stop in the port of Marseille, to feed the big supermarket chains. This was mainly to supply Southern Europe, but also Germany and other countries quickly accessible from the port of Marseille. The previous year, the first stop was made in the port of Sète at the beginning of December, but that option was not adopted this year, because of the increased traffic to this port at this time of year. The Baltic Klipper was received in Marseille on 30 November, the earliest arrival date in the history of the industry. Approximately one third of the cargo was unloaded in this port. This first shipment was primarily to supply the distributors which had scheduled their orders to promote this fruit with their customers. Placement at a price of €2.80-€3.00/kg created an incentive for consumers with little enthusiasm to purchase air-freight litchis, which were distinctly more expensive, especially since the sea-freight fruit had a good taste quality. The lively demand for the litchis unloaded in Marseille actually led to sales being refused due to lack of merchandise, or because of disruptions to post-forwarding logistics.

The Baltic Klipper reached Zeebrugge on 7 December 2020, and finished unloading on 8 December, enabling continuity in the supply for the weekend of 12 and 13 December. The litchi rate declined slightly in week 50 (€2.60-€2.90/kg), as could be expected after the first sales driven by the novelty effect. However it remained high, above the level at the beginning of the previous campaign.

The second conventional ship, the Atlantic Klipper, started loading on the evening of 16 November 2020, following on from the previous ship. The pallets were loaded under better weather conditions than for the previous ship, at a quiet tempo. The Madagascan operators enjoyed longer time frames for packing, especially since the fruit processing tempo had been set with the first ship. Also loaded in four days, this second ship put to sea on 19 November via the southern route (Cape of Good Hope), bound directly for the port of Zeebrugge. This slightly longer trajectory helped place the majority of the first ship's cargo, and receive this new ship, to provide the supply to the distribution sector for the end-of-year holidays.

Hence the Atlantic Klipper docked in Zeebrugge at the end of week 50. It was unloaded under good conditions between 14 and 15 December. Hence the litchis were made available for the weekend before Christmas. The average sale price, previously higher than the previous year, returned to this same level in week 52, in order to maintain distributor interest and aid promotions of the product (€2.45/kg). In week 53, it stabilised at €2.40/kg, as stocks rapidly dwindled. The remainder of the cargo of the second ship was placed at the start of the year, simultaneously with the sea container litchis, marking the final phase of the Madagascan campaign. Given the good fruit quality, some chains continued selling Madagascan litchis in January. Volumes became marginal, and the final shipments arrived in the first half of January 2021. Sales continued until the middle of the month at strong prices (€2.50/kg). True, some faster-developing or lower-quality batches traded at lower prices, but we did not see a continuous fall in prices, as in previous years. The limited competition from South African litchis, in mid-campaign, did not unduly hinder placement of Madagascan litchis.

The early harvest, moderate volumes shipped, adjusted logistical scheduling and good fruit quality represented the main factors behind the smooth running of the Madagascan litchi trading campaign. These various vectors strung together well, without suffering unforeseen obstacles which are unfortunately all too familiar for the Madagascan litchi industry. The 2020-21 campaign will remain a benchmark ■


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Litchi – Indian Ocean – EU estimated imports

Transport	Air-freight		Sea-freight	
Seasons	2020-21	2019-20	2020-21	2019-20
Mauritius	100	120		
Reunion	860	450		
South Africa	350	250	2 900	2 000
Madagascar	240	220	14 240	15 460
Mozambique	40	40	100	80

Professional sources, data and processing P. Gerbaud

Litchi – Madagascar – Sea-freight exports

Conventional vessels	Baltic Klipper		Atlantic Klipper	
Seasons	2020-21	2019-20	2020-21	2019-20
Date of departure	17 November	20 November	19 November	1 December
Date of arrival	Marseille 30/11 Zeebrugge 07/12	Sète 03/12	Zeebrugge 14/12	Zeebrugge 13 /12
Volumes in tonnes	2 400 + 5 200	5 800	5 300	8 800
Seasons	2020-21		2019-20	
Containers	900		1 000	

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South African litchi
2020-2021 campaign review

A mixed campaign

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With estimated exports of 2 900 tonnes in 2020-21, South Africa remained the number two litchi supplier to the European Union for the winter season. This origin exports fairly variable volumes according to the year, generally situated at between 2 000 and 3 000 tonnes, with the exception of a few record years (4 000 to 5 000 tonnes in 2015 and 2017).

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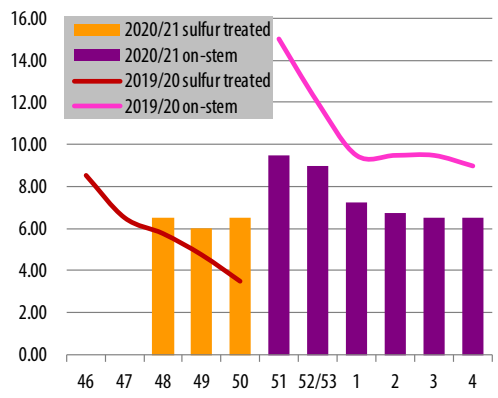
A two-phase air-freight campaign

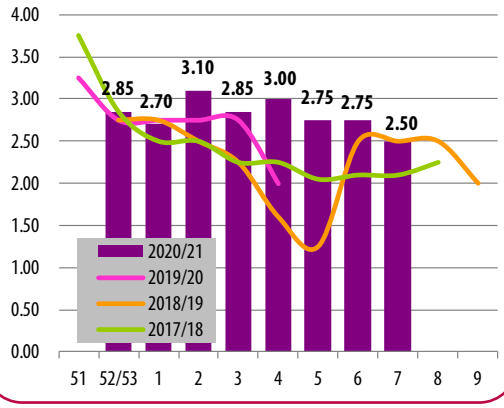
South Africa made its first air-freight shipments from week 48, comprising sulfur-treated destalked fruit, which added to the Madagascan merchandise available from the previous week. They continued until week 50, especially on the French market. Some batches were available on other European markets until the end of the year. The South African litchi rate held up at between €6.00 and €7.00/kg during this short air-freight campaign, and more or less followed the prices applied to all the origins on the market. This trend was aided by the moderate volumes shipped by Madagascar. The two competing origins on this commercial niche both had assets to boost their product's value. The Madagascan fruit enjoyed a unanimously recognised taste quality, while South African fruit had better sizing, a point which remains the origin's privilege.

The early arrival of the first Madagascan sea-freight litchis limited the length of the trading period of sulfur-treated air-freight litchis. From week 50, South African operators modified their shipments, favouring fresh on-stem or trussed fruit. In so doing, they were adapting to demand, following the lead of the Reunion and Mauritian operators. Initially comprising the Mauritius variety, South African shipments diversified at the end of the year, with fresh Red McLean

Air-freight South African litchi
Average import price in France in 2019-20
(in €/kg per week | source: Pierre Gerbaud)



Sea-freight South African litchi
Evolution of average import price in France
(in €/kg per week | source: Pierre Gerbaud)



variety litchis. Both varieties were placed simultaneously between the end of the year and the beginning of 2021, with a dip in quantities for Mauritius and rising volumes of Red McLean, which had the advantage in terms of lateness, enabling exports to continue, and a particularly attractive coloration. Conversely, their taste quality proved less popular among consumers. The transition between the two varieties can be illustrated by a gradual but considerable fall in prices. This price change was not due solely to the varietal aspect. Demand at the beginning of the year was much more moderate, with the litchi remaining a product associated with the holiday period. Moreover, the quality of the produce received was more fragile, a phenomenon which also weighed down on prices.

A contrasting sea-freight campaign

The sea-freight campaign began later, probably in order to avoid direct confrontation with the Madagascan competition during the end-of-year holiday period, which often causes a fall in rates. The South African campaign was also extended by a wider distribution of the production zones, which were not active at the same time. The first South African containers arrived in Europe at the very end of the year (week 53). The placement enjoyed satisfactory conditions, insofar as the pressure from Madagascan volumes proved lower than in previous years. The earliness of the Madagascan fruit harvest, and the reduction in volumes shipped by this origin, allowed the South African operators greater latitude. At the beginning of 2021, Madagascan litchis transported by conventional ships had nearly sold out, and the container campaign that followed was insignificant. As such, South African litchis actually obtained price increases during January. However, in the middle of the month, demand became less insistent, and the quality of the South African litchis turned fragile. The great diversity of fruit coloration, and its variable lifetime, put purchasers off the product. Price ranges widened according to batch quality. The appearance of mould forced incoming handlers to sort the merchandise prior to placement. Experience from previous years has shown that mould on the fruit most often leads to it being withdrawn from sale, since despite sorting, the mould returns to the products very quickly. So the second part of the South African campaign proved inconsistent and unprofitable. Only fruit of decent quality and coloration still found takers until the second half of February, when the supply came to a halt.

The campaign of neighbouring Mozambique, shorter and smaller-scale, ran in parallel with the South African campaign. One week earlier for air-freight shipments, it obtained equivalent sale prices to South Africa. The same applied for the sea-freight campaign, which finished in mid-January ■

Reunion litchi
2020-2021 campaign review
Back to the heights

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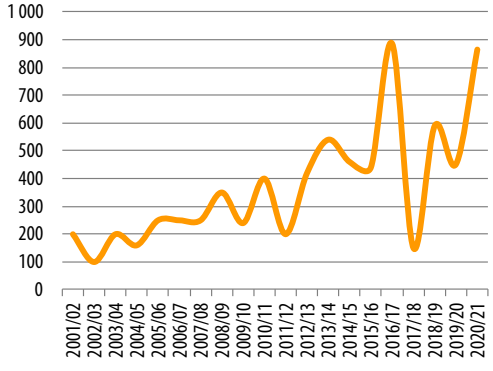
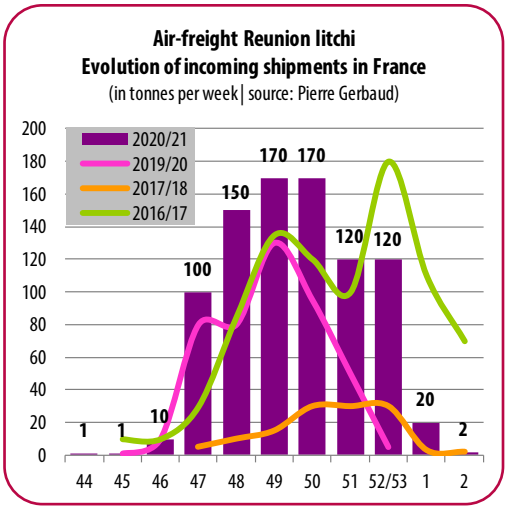
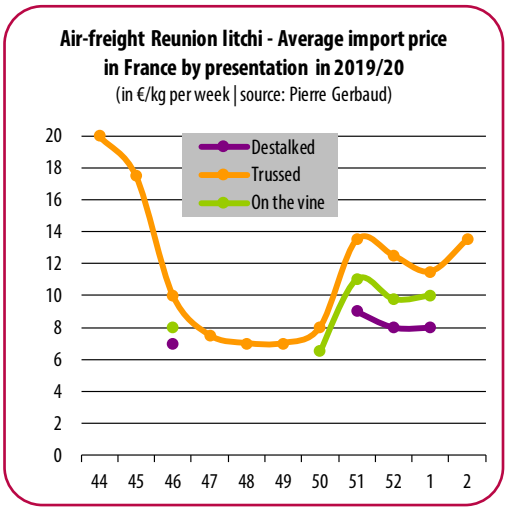
After a particularly lean 2017-18 campaign (125 tonnes), in 2018-19 Reunion regained a shipment tempo more in line with the average from previous years (460 tonnes). Shipments for the 2020-21 season, estimated at 860 tonnes, mark a return to the 2016-17 record (895 tonnes). This surge in volumes came in the context of an early campaign, like the other Indian Ocean origins. The first batches were received in week 44, kicking off this fruit's trading campaign. The quantities (less than one tonne), symbolic at that point, sold "under the table" at high prices of between €20.00 and €24.00/kg. The following week, availability remained extremely low, with the fruit selling at between €15.00 and €20.00/kg on a market still open to festive products. In week 46, the supply stepped up more significantly, accompanied by another fall in prices (€8.00-€12.00/kg). The profile for the Reunion campaign altered considerably in week 47, with massive shipments (100 tonnes), which pushed down prices to €6.00-€9.00/kg, still for trussed fruit, the dominant presentation for Reunion litchis, and often imitated by neighbouring origins. At this period still a long way off the end-of-year holidays, demand for Reunion litchis remained hesitant, given the retail prices. It was during weeks 48 to 50 that Reunion reached the peak of its campaign, with shipments of between 150 and 200 tonnes per week. At this point the origin found the flip side of its early harvest, with the period of massive shipments coming before the traditional take-off in demand for the end-of-year holidays. The accumulation of merchandise, in the face of demand which was there but not yet at its maximum level, caused the price range to widen. The lower sales fluidity caused the formation of stocks, which was detrimental to fruit quality, thereby generating sales at prices lower than stated here.

Reunion litchi
Evolution of exports to Europe
(in tonnes | source: Pierre Gerbaud)







The major concern of the operators at this point was the capacity of Reunion shippers to continue their shipments to cover the festive period. A similar situation, albeit less severe, had arisen in the previous campaign. However Reunion's operators maintained a substantial flow by harvesting from high-altitude orchards, which bear fruit later. From week 51, the volumes received were dropping, as demand rose during the holiday period. In this context of demand/supply imbalance, prices strengthened considerably, exceeding the €10.00/kg mark. The upward trend was confirmed, though this hid inequalities, since the later fruit exhibited a more fragile quality, requiring quick sales and thereby limiting the recovery in rates. The quantities shipped at the beginning of 2021 rapidly shrank, but sold at strong prices for fruit with a good shelf life.

On-stem fruit, scarcer than trussed fruit, generally traded at lower prices (€2.00 to €3.00/kg). On-stem fruit topped up the shipments from Reunion, but this was more aimed at the supermarket sector, presented in 500 g punnets. These products often were subject to programmes pre-established with certain chains for the purposes of on-shelf product promotions. Trade prices below the €8.00/kg average were registered on the wholesale markets.

Reunion remains the spearhead of the air-freight fresh litchi market, still regarded as the benchmark for this product. This image is the result of strict selection of exported fruit, but also innovations. Hence micro-perforated bags, enabling a longer lifetime for this fragile fruit, have increased the volumes on the market. This success has quickly spread among the Indian Ocean producer countries. Later, the trussed presentation, to boost the fruit's value and facilitate the creation of an exotic atmosphere in retail stores, was also imitated by the competing origins. This year, Reunion's operators created a new packaging to further boost the fruit's value. The concept adopted seems to be aimed at a more luxury image for the fruit. These are transparent "crystal" bags containing higher-quality destalked fruit, with a marked coloration and large size. The bags are sealed with tape, as with confectionary. Generally 400 g in weight, they give the fruit a bonbon look, and also represent a good-sized sale unit. This new presentation, though marginal compared to the total volumes shipped, was valued at €11.00-€12.00/kg throughout the mid-campaign period, enabling particular selection of irreproachable quality.

While the earliness of the campaign seems to have been a crucial factor for a country such as Madagascar, we can observe that it was not so favourable for Reunion. It actually triggered the volumes peak at a time when demand was on the rise, but not yet at the heights of the end-of-year holidays. Nonetheless, this year Reunion retook the lead in terms of fresh litchi suppliers to the Metropolitan market. The perishability of the merchandise does not enable forwarding of large volumes to external markets. It is also this factor which is one of the commercial constraints of the product, which limits finer matching of supply to demand ■

Mauritian litchi
2020-2021 campaign review

A top-up origin

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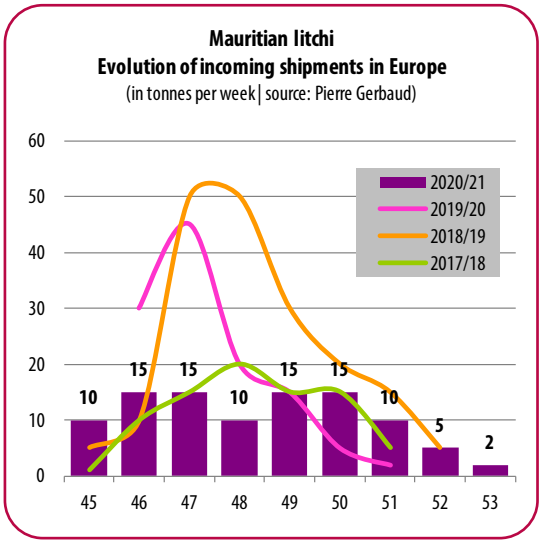
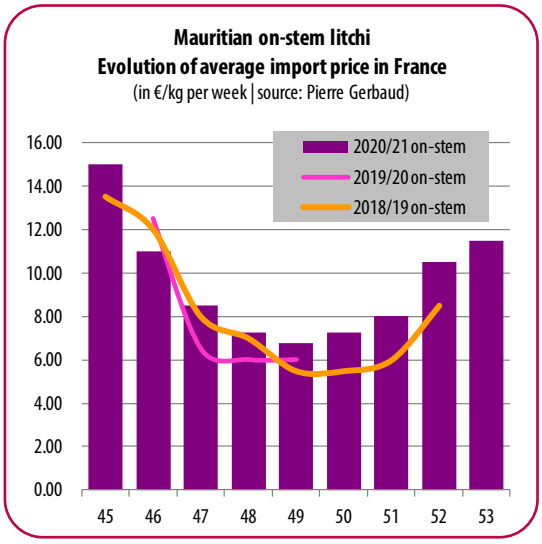
Like the other Indian Ocean origins, Mauritius enjoyed an early litchi harvest in 2020. The first shipments were made at the same time as from Reunion, in week 45. They mainly comprised trussed fruit, a mode of presentation in increasingly common use by the origins occupying the air-freight litchi niche. It seems that this presentation was favoured this year by Mauritian exporters, over sulfur-treated destalked fruit. On the French market, trussed and/or on-stem litchis made up the bulk of Mauritian exports. The sulfur-treated destalked litchis seem to have been aimed instead at the North European markets (the Netherlands and Belgium). Mauritian litchi rates followed the general market trend, with a gradual deterioration as tonnages progressed. From week 45 to week 49, prices halved, going from €15.00/kg to €7.00/kg, due to the competition from Reunion and the air-freight supply peak across all origins between weeks 47 and 49. Prices recovered just as strongly as they had collapsed, back up to €10.00-12.00/kg at the beginning of the year. The rapid decline of Mauritian volumes definitely aided this price recovery during the end-of-year holidays period. The Mauritian campaign finished at the end of the year, with insignificant quantities. Mauritian exports were estimated at about the same level as during the previous campaign, probably between 150 and 200 tonnes.

Mauritius remains a top-up origin on the end-of-year litchi market. While volumes remain moderate, we can note a qualitative improvement in the fruit, in no way inferior to its direct competitor. The adoption of the same type of packaging and presentation as litchis from Reunion enabled them to maintain level terms with this origin. These suppliers are separated only by the differences in volumes shipped. As such, Mauritian litchis will always be exposed to the weight of exports from Reunion, which are distinctly bigger. It is only the timing of the campaigns which might boost or burden Mauritian operators. Their responsiveness to market demand also represents an asset for maximising their product's value. Finally, their competitiveness can also play in their favour, if it is not counteracted by structural modifications to the aid that the various Indian Ocean suppliers to the European market can obtain ■





Litchi quality defects

Photos © Pierre Gerbaud

Ageing fruits – dull appearance – shell browning and drying

Puffy fruits

Fruits picked too early

Ageing fruits – too long a gap between harvesting and sale

Puffy fruits

Unattractive colour resulting from lack of sorting

Oxidation of the shells of non-treated fresh litchis

Aborted and double fruits

Satisfactory colour (for reference)

Uneven colouring resulting from sulfur treatment

Different sizes in the same packaging

Stalk torn off

Moulds (*Penicillium*)

Black rot (*Aspergillus* spp. and *Pestalotiopsis*) and mould

Mould spots (*Penicillium*)

Heavy mould attack (*Penicillium*)

Sulfur dioxide burn damage and double fruit

Spread of mould spots (*Penicillium*)

Black rot (*Aspergillus* spp.) and mould

Sulfur burns as the fruits were wet before treatment

Rots and isolated moulds (*Penicillium*)

Black rot (*Aspergillus* spp.)

Burn caused by sulfur treatment and moisture

Leadership battle between opposite shores of the Mediterranean

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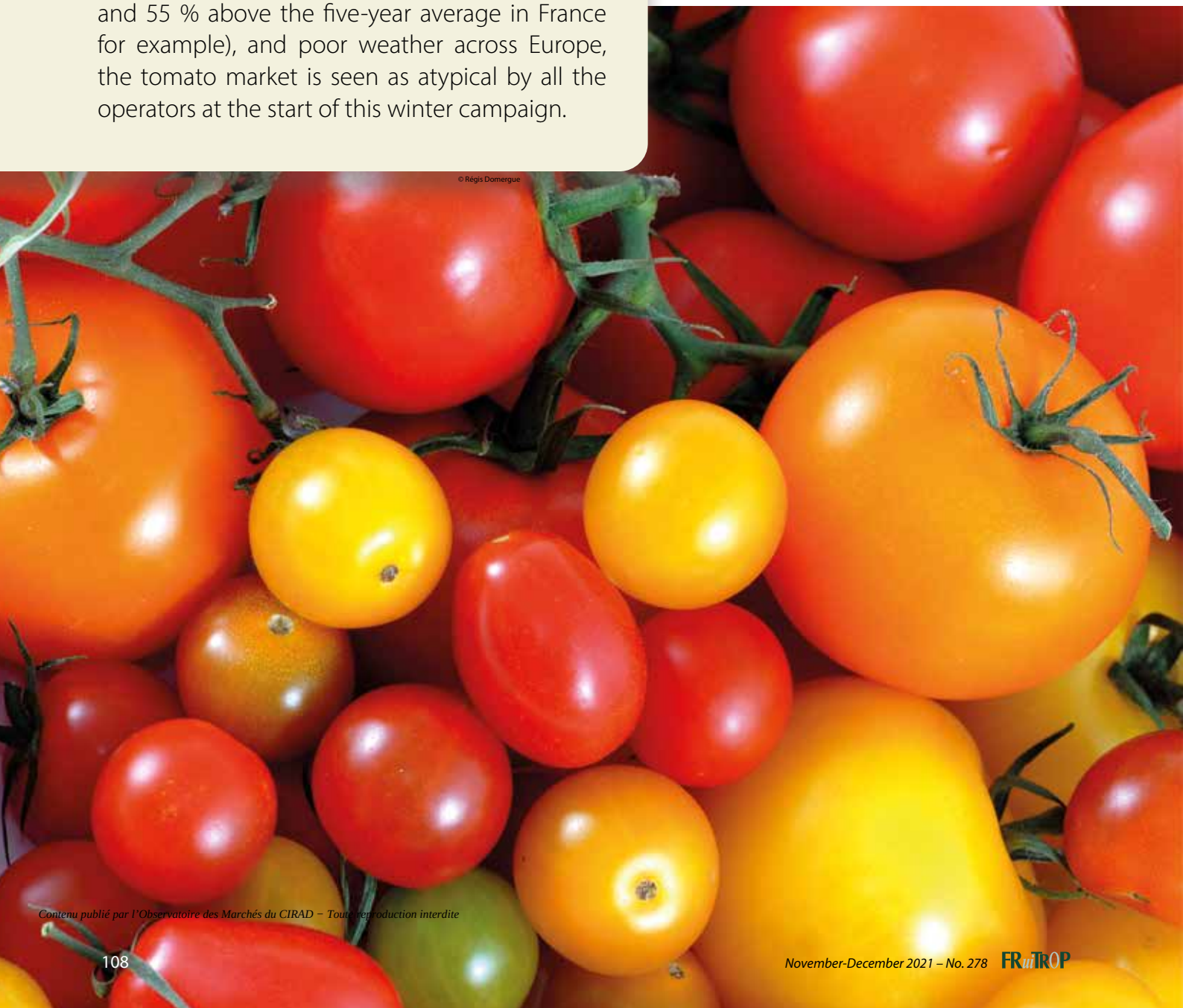
After a complicated summer campaign, with price increases (+ 70 % over one year during August, and 55 % above the five-year average in France for example), and poor weather across Europe, the tomato market is seen as atypical by all the operators at the start of this winter campaign.



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According to a report by the European Commission Fruit and Vegetables Market Observatory, tomato production in the European Union fell by 5.2 % in 2021 from the previous year, while on the other side of the Mediterranean, production rose, resulting in a significant increase in European and British imports.

Spain and Morocco are battling to dominate the European tomato import market. During the 2020-21 campaign, European imports between October and May broke the 630 000-tonnes mark, without counting volumes from Spain, which reached 523 559 tonnes, the majority aimed at Germany, followed by the Netherlands and finally France (nearly 70 000 t) and 67 689 tonnes to the United Kingdom alone. At the start of the campaign, in October, average prices for Spanish tomatoes remained the same as in September, but lower than in August, when they hit the heights due to lack of sufficient production.

Morocco was in second position with 478 949 tonnes exported to the EU, a 6 % increase over one year, and a similar rise to that of the 2019-20 campaign. Moroccan volumes bound for the United Kingdom saw a big increase, from 63 000 tonnes in 2019-20 to more than 78 000 tonnes in 2020-21.

Turkish shipments also progressed, reaching 125 555 onnes, i.e. + 35 % over one year, and 44 % above the three-year average. Tunisia registered an increase in its volumes to the EU to 17 788 tonnes (+ 12 % on last campaign, and 15 % above the three-year average). Senegal registered a big fall, with 16.3 % over one year, to 7 235 tonnes (20 % below the three-year average). While Israeli tomatoes were on the wane the previous season, they made a slight bounce-back, going from 15 tonnes to more than 85 tonnes, i.e. a one-year increase of 454 %, though 67 % below the three-year average.

Counter-season tomato – EU27+UK – Imports

in tonnes	2020-21	2020-21 compared to	
		2019-20	Last 3-year average
Morocco	478 949	+ 6 %	+ 14 %
Senegal	7 235	- 16 %	- 20 %
Israel	85	+ 455 %	- 67 %
Tunisia	17 788	+ 12 %	+ 34 %
Turkey	125 555	+ 35 %	+ 44 %
Others (Egypt)	702	-	-
TOTAL Extra-EU	**630 314**	**+ 12 %**	**+ 15 %**
Spain	523 559	- 10 %	- 17 %

Sources: Eurostat, Comtrade, UK trade

Competition from Northern Europe on the rise?

Greenhouse production in Northern Europe has constantly increased in recent years, especially in the Netherlands and Belgium. Spain has lamented the installation of new ultra-high performance infrastructures at the cutting edge of technology, which have received indirect public aid. And the cropping techniques in these greenhouses, employing energy and LED lighting, can produce more than 40 kg/m2 of tomatoes, as opposed to an average in Spain of no more than 15 kg/m2. Yet this year, the Netherlands and Belgium asserted that with increasing energy costs, greenhouses will produce less than in previous years during the winter campaign. The energy crisis, pushing up electricity and gas prices, could have a major impact in the Netherlands and in Belgium. According to some media, in the Netherlands, one cubic metre of gas exceeded 1 euro, as opposed to 15 to 20 eurocents at the same period last year. Annual consumption of natural gas by Dutch greenhouse operators is approximately 3 billion m3, i.e. 8.2 % of the country's total gas consumption. So many growers finished growing early, and there should be heavy economic consequences for the sector, according to the Glastuinbouw Nederland association.

Iberian Peninsula dominating trade

According to operators, the winter tomato season began in Spain at the end of September, to progress from the start of November. The Almería harvest went a bit slower, since the high temperatures registered at the start of the campaign affected the initial fruit-setting. Yet yields should be similar to those of the previous campaign.

In Almería province, the surface area dedicated to the tomato has significantly decreased and exports dropped steeply in the space of ten years, going from 510 770 tonnes to 398 250 tonnes during the 2020-21 campaign. Despite this dizzying fall, the province remains the tomato export leader, representing 58.3 % of total Spanish tomato exports, ahead of the Murcia region, the number two Spanish exporter province.

On 26 October 2021, the Andalusian phytosanitary alert and information network (RAIF) warned Spanish growers of the presence of the leafminer moth Tuta absoluta in practically all tomato crops in Almería province. Nonetheless, the damage would seem to be very low on the fruit, and should not generate any losses. Conversely, many greenhouses are being converted to receive other more profitable crops.

Shipments from the Canaries to the EU have dropped steeply over the past decade, going from 305 000 tonnes to less than 45 000 tonnes in 2020-21. Tomato cultivation represented just 3 % of GDP in 2020, as opposed to 10 % in 2010.


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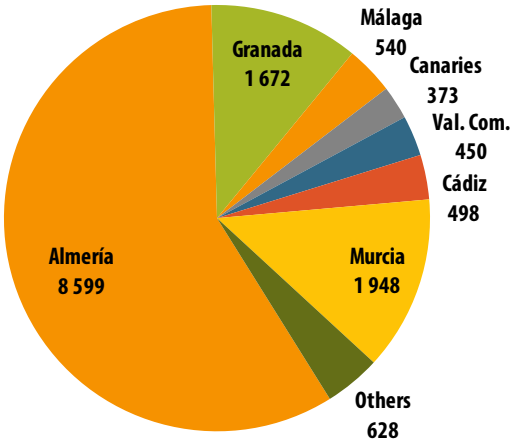
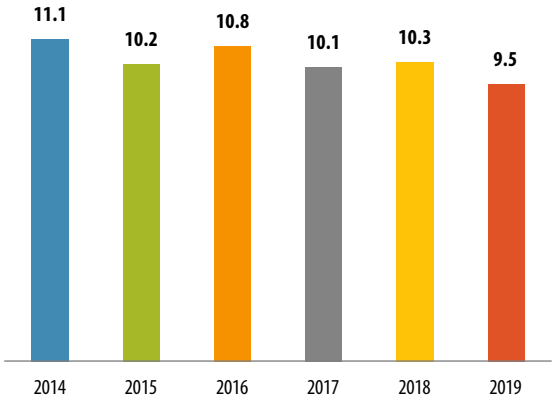
Greenhouse winter tomato - Spain
Planted areas in 2019: 14 700 hectares
(* 01/10 to 31/05 | in hectares | source: MAPA)



Greenhouse tomato - Almería (Espagne)
Evolution of areas
(in 000 hectares | source: MAPA)



Morocco, the number two exporter country after Spain

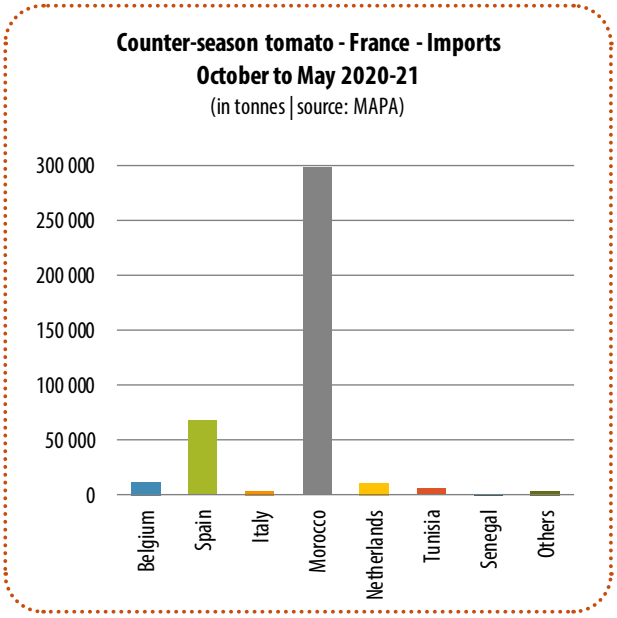
The Alawi Kingdom has a large-scale tomato production for export, which is distributed between nearly all the country's regions, and plays an important socio-economic role. The Souss-Massa region near Agadir has a total of 57 % of the country's vegetable growing surface areas, Kénitra 17 %, Casablanca-Settat 8 % and Tangier-Tétouan-Al Hoceima 5 %, according to data from the Moroccan Ministry of Agriculture.

According to the latest data from EACCE (the Moroccan Exports Control and Coordination Establishment), or from Morocco Foodex, round tomato exports in 2019 amounted to 282 900 tonnes, down 4 % in the space of ten years (295 900 t in 2009). Shipments of segment tomatoes (e.g. cherry tomatoes) totalled nearly 262 600 tonnes, more than double those in 2009 (100 600 t). The round tomato currently represents the hardest-fought market in price terms. It is a low-cost or basic product, but its production in Morocco has subsided year on year, since the number of growers is dwindling in favour of segment tomatoes. They now represent nearly 50 % of total tomato production in Morocco. There are many operators which have completely switched to the segment tomato to meet market demand.

This season they will need to reckon with increasing secondary costs, such as the price of cardboard (+ 9 % over one year) and wood (+ 30 %). Road-freight has also seen a cost increase of 8 %, and sea-freight 31 % on average, across all destinations.

Furthermore, European growers overall are producing over an increasingly long period, which is damaging Morocco's position as an origin, with European markets preferring local production, especially from Sicily or Spain. Nonetheless, some operators are returning to the European Continent, in particular the French market, where Moroccan imports made up 298 091 t out of total counter-season tomato imports of 401 136 tonnes in 2020-21, according to French Customs data. On this market, Spain contributed 67 513 tonnes to the winter campaign, and Tunisia 5 999 tonnes. It was between December and March that import volumes were heaviest, in excess of 50 000 tonnes per month.

In September 2021, the French authorities implemented visa restrictions which affected Moroccan transporters, and the Saint Charles International multimodal hub, with 415 Schengen visas refused to Moroccan hauliers. On 21 November, a strike movement was launched in protest at this measure.



France plastic-free: what impacts on tomato sales this winter?

From 1st January 2022, the new Act on Waste and the Circular Economy will take effect in France. In particular, it imposes a ban on plastic packaging for unprocessed fruits and vegetables weighing under 1.5 kg. Hence tomato imports could be affected this season. It should quite naturally concern round tomatoes. The market will also need to take into account the lack of materials required for cardboard production instead of plastic, and the related additional costs.

Agricultural agreements with Morocco: what's the situation?

On 29 September 2021, the European Court of Justice voided two trade agreements between Morocco and Europe, regarding products out of Western Sahara, at the request of the Polisario Front. One of the issues of the Moroccan competition is due to exports of tomatoes produced in Western Sahara. The EU-Morocco agreement includes Western Sahara within its scope, and tomatoes from this zone are labelled "Origine Maroc". This issue of labelling, raised in 2020, was also discussed at the European Parliament under the INTA Commission (international trade), in July 2021, and under the Agriculture and Rural Development Commission in September 2021.

This agreement stipulated granting customs rate concessions within a quota of volumes, including compliance with an entry price. Until 2014, the importer was free to choose the method of calculating the entry price value: either based on the FOB price of products in the country of origin, plus insurance and transport costs at the borders; or the unit price corresponding to sales in the EU of the imported merchandise; or for merchandise on consignment based on the flat-rate import value (FIV). This is calculated daily by the European Commission, taking as a reference the weighted average of representative prices for product imports for each origin, communicated by the Member States (for France: RNM). Since 2014, the entry price has been calculated solely based on the FIV. But since then, the reference used for calculating the FIV has changed: it is no longer just round tomatoes which are considered, but now also new high added-value varieties, such as cherry tomatoes. Hence the FIV is practically systematically situated above the minimum entry price set at 46 eurocents per kilo, even in difficult market contexts, limiting the specific additional duty set out by the agreement.

Another tomato and pepper disease in Morocco?

On 19 November 2021, ONSSA (Moroccan Office for food safety) detected the presence of a plant disease affecting the tomato and pepper on certain farms, without specifying the name of this disease. Nonetheless, it seemingly has no impact on human or animal health. This disease has reportedly already been present in several parts of the world since 2014, in Europe, the Americas and Asia. Investigations are in progress to determine the traceability of the seeds used, behind the introduction of this plant disease to the farms concerned.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Within the framework of the EU-Morocco agreement on the tomato, Morocco can export 285 000 tonnes per year to Europe, under preferential customs duty. This quota has remained the same despite the withdrawal of the United Kingdom from the EU. And a Morocco-United Kingdom association agreement was signed in October 2019, which has enabled Moroccan exporters, since 1st January 2021, to send 47 510 tonnes at a preferential rate. So European tomato producer countries are requesting a revision of the Moroccan preferential EU customs duty quota, to 237 490 tonnes. With shipments to the United Kingdom increasing, a new shipping line was just recently set up between Tangier Med and the port of Poole (Dorset) on the South Coast of the UK. The voyage, which is made in just three days as opposed to six by road, avoids the post-Brexit checks and other import procedures on merchandise passing via Europe. For now, the first shipment of merchandise arrived at the end of October via this shipping line. There remains the thorny issue of increased sea-freight costs due to the Covid-19 pandemic.

These agreements remain in force for a period of up to two months, according to the judgement. On 20 November, the European Council of Ministers gave the green light to appeal against the decision. Europe has until 16 December 2021 to present the appeal to the European Court of Justice ■

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