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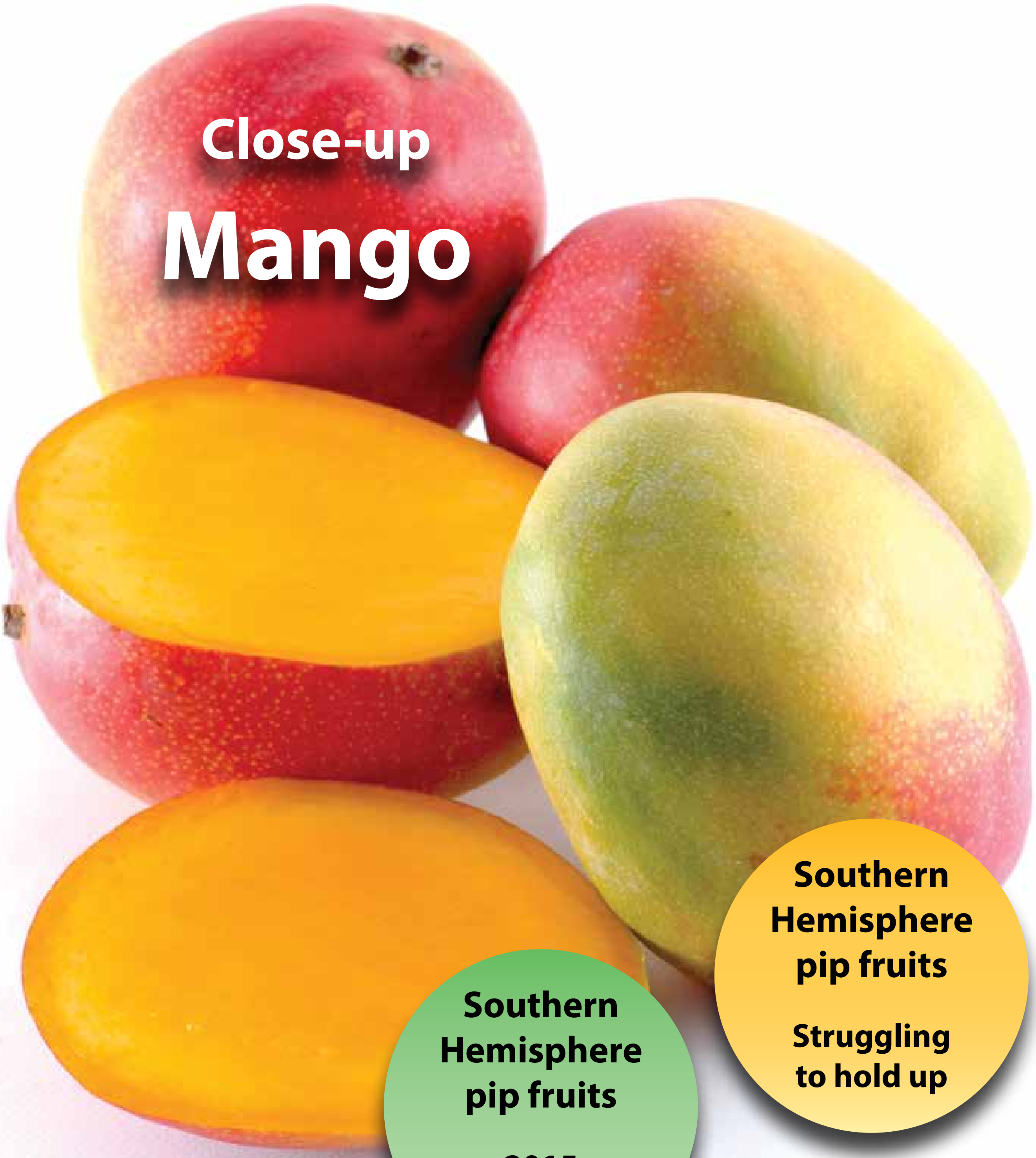
FRuiTROP

English edition



Close-up
Mango

Southern Hemisphere pip fruits

Struggling to hold up

Southern Hemisphere pip fruits

2015 campaign

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Another myth busted… *Research is not a place where altruism, sharing and selflessness are values upheld by an entire united community devoted solely to the progress of humanity. This might come as a tough blow to citizens, with some of their taxes feeding the worldwide research system. What a disappointment for the public, when they realise that this microcosm is to humility what Google is to free service: an illusion! No doubt because they belong to another age, we retain an idealised image of researchers such as Pasteur or the Curies. But the technical-economic-scientific establishment, along with globalisation, has long since replaced ideals of democracy.*

Yet the veil has been partly lifted with the recent scandal over the lucrative and highly competitive business of scientific reviews. Indeed, all of the world's press has covered problems of honesty in the results of certain researchers. Some journals have taken the opportunity to question the motives driving researchers to go as far as falsifying their data to ensure a prominent place in a review with a high impact factor, the Holy Grail of scientists. There are no holds barred: low blows, more or less active corruption, conflicts of influence, pack behaviour, etc. Again, the reality does not live up to the fiction. Actually, to find out anything about the progress of mankind, you would need to ask the students. The researchers are too busy writing their next articles.

Denis Loeillet

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FRuiTROP

Contents

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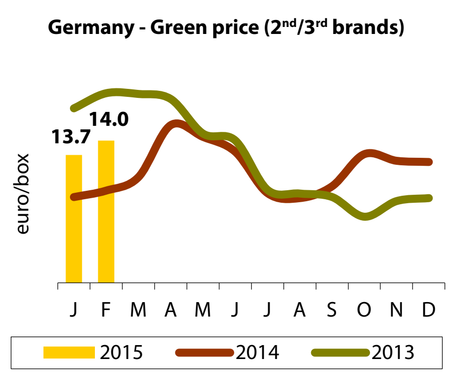
Banana

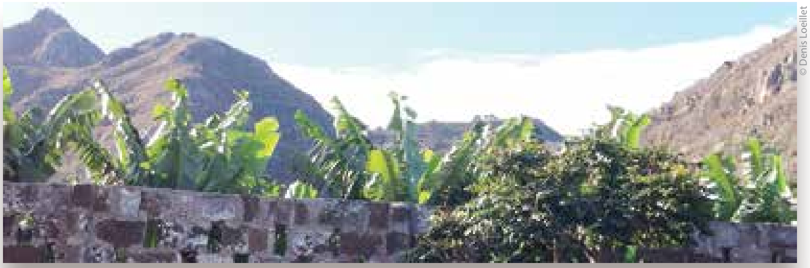
January-February 2015

The banana market proved highly dynamic in the early part of 2015. On the one hand, the supply remained moderate in January, because of smaller shiploads during the holiday period and some logistical problems. On the other hand, demand picked up thanks to promotions, which helped those stocks in place at the beginning of the year to be absorbed rapidly. Yet most of all, the markets started to tighten up considerably towards the end of January because of the intensifying African shortfall (effects of a particularly powerful Harmattan) and the dollar banana supply remaining moderate. However, a Colombian resurgence was observed, with some high levels (+ 12 % in January and + 18 % in February). Costa Rican volumes were slightly in shortfall, as a consequence of cold temperatures at the production stage. Despite overall Ecuadorian imports being similar to last year, the spot supply from this source remained very limited because of the unfavourable euro/dollar exchange rate for imports. Faced with this and with demand picking up, especially in February (ongoing temperatures favourable for consumption and weak competition from other fruits), green banana prices, average since the beginning of the year, steeply strengthened from late January, to reach above-average levels in February. In Spain, the market remained well balanced due to a falling Platano supply, caused by cold January temperatures in the Canaries. In Russia, the situation saw a turnaround: prices rose rapidly thanks to the reductions of import volumes observed since late 2014, and to demand focusing more on the banana.

NORTHERN EUROPE — IMPORT PRICE		
February 2015 euro/box	Comparison	
	previous month	average for last 2 years
13.97	+ 2 %	0 %

EUROPE





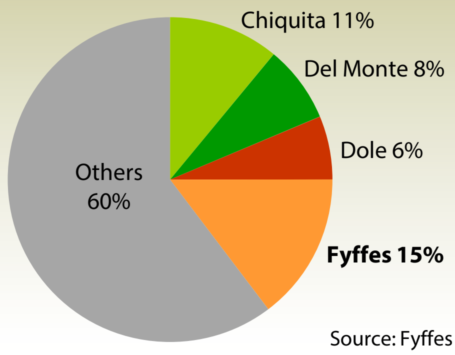
■ **Spanish banana market hyperactive in 2014.** According to Spanish customs figures reported by the blog "hojasbananeras", banana import volumes in 2014 approached the 500 000-tonne mark, up more than 56 000 t from 2013. This rise went hand-in-hand with a consumption boom, since re-exports (as usual targeted practically solely once more at the Portuguese market) increased by 23 000 t to near the 100 000-t mark. The Canaries platano took advantage of this renewed appetite for bananas, with its shipments to the peninsula up by 15 000 t. Yet it was primarily the Cavendish banana which saw the steepest rise, perhaps an effect of the economic crisis. Hence incoming volumes were up by more than 60 000 t, peaking at approximately 260 000 t. The figures from Eurostat, though not yet finalised, confirm these trends. Could there be a cause & effect link in the decision by Canaries producers to relaunch a big promotion campaign for "El sabor de lo nuestro", involving TV adverts showing the platano alongside the most iconic Spanish specialities such as olive oil or serrano ham?

Source: www.hojasbananeras.blogspot.fr

■ **European banana market: and the winner is… Fyffes!** So declared the Fyffes group itself in the presentation of its 2014 results: the Ireland-based multinational is the leading European banana distributor, with volumes of approximately 44 million boxes, ahead of Chiquita (33 million boxes), Del Monte (23 million boxes) and Dole (19 million boxes). Yet the tables are turned if we switch to a worldwide scale. Chiquita is dominant with 125 million boxes, ahead of Del Monte (117 million) and Dole (110 million). Fyffes is well behind in fourth position, with 54 million boxes.

Source: Fyffes

Banana - European market: 300 million boxes

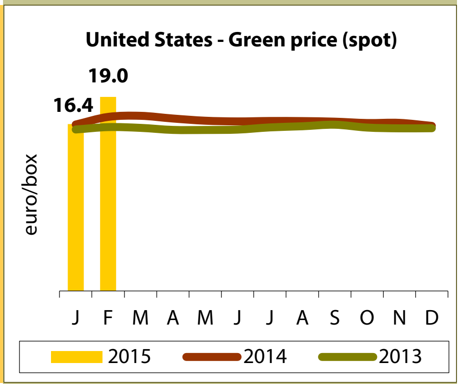


Source: Fyffes

EUROPE - RETAIL PRICE				
Country	February 2015		Comparison	
	type	euro/kg	January 2015	average for last 3 years
France	normal	1.57	+ 2 %	0 %
	special offer	1.26	- 1 %	- 7 %
Germany	normal	1.30	0 %	- 2 %
	discount	1.18	+ 2 %	- 1 %
UK (£/kg)	packed	1.14	- 1 %	- 6 %
	loose	0.72	- 4 %	0 %
Spain	platano	1.98	- 5 %	+ 9 %
	banano	1.29	+ 2 %	- 4 %

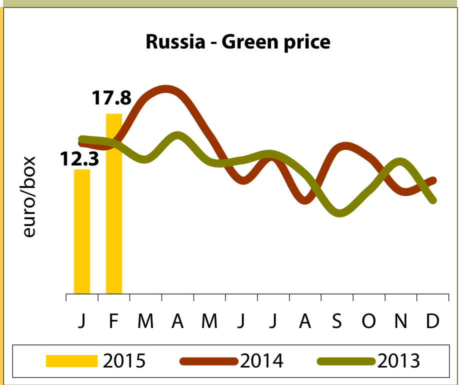
Banana

UNITED STATES



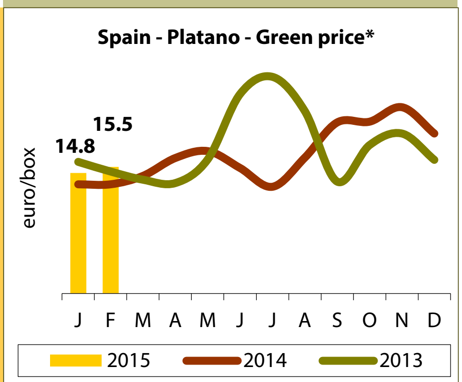
UNITED STATES - IMPORT PRICE		
February 2015 USD/box	Comparison	
	previous month	average for last 2 years
19.00	+ 16 %	+ 15 %

RUSSIA



RUSSIA - IMPORT PRICE		
February 2015 USD/box	Comparison	
	previous month	average for last 2 years
17.80	+ 45 %	+ 19 %

CANARIES



CANARIES - IMPORT PRICE*		
February 2015 euro/box	Comparison	
	previous month	average for last 2 years
15.50	+ 5 %	+ 9 %

* 18.5-kg box equivalent

■ **World banana market down to earth with a bang in January 2015.** It had to happen at some point, since the upward trend could not go on for ever. Consumption in the United States decreased by 9 % in January 2015, a fall of around 30 000 tonnes. Costa Rica (- 43 %), Colombia (- 30 %) and Honduras (- 3 %) were responsible for this poor performance. Mexico, however, did see another steep rise, as did the other minor sources: Peru, Nicaragua and the Dominican Republic. The re-export flow to Canada remained stable. We can also note that the United States imported 20 000 tonnes of organic registered bananas, as opposed to just 12 000 t in January 2014 (market share 5 %).

The EU-28 held up its end; true, its imports did fall, but by just 3 %, i.e. 13 000 tonnes less than in January 2014. Again, it was Costa Rica (- 13 %), on the dollar side, which dragged the market down. Ghana (- 10 %) and Saint Lucia (- 28 %) were the weak links on the ACP side. Conversely, in the ACP group, Cameroon, Belize and Surinam had a very good January. Colombia (+ 8 %) was back to its optimum levels, while Ecuador consolidated its position (+ 1 %). Guatemala was a big hit, going from 55 tonnes of exports to the EU in January 2014 to 3 600 tonnes in January 2015. If we add to the import figures the volumes shipped from the European production zones, EU consumption fell by no more than 2 %. Martinique had an excellent performance, with a rise of nearly 60 %, while the other European sources remained stable.

Source: CIRAD

Banana - January 2015 (provisional)				
000 tonnes	2013	2014	2015	Difference 2015/2014
EU-27 — Supply	**447**	**485**	**476**	**-2%**
Total import, of which	401	437	424	-3%
MFN	322	353	350	-1%
ACP Africa	49	49	42	-14%
ACP others	30	36	32	-11%
Total EU, of which	46	47	53	12%
Martinique	10	10	15	59%
Guadeloupe	5	6	6	0%
Canaries	30	30	30	0%
USA — Import	**378**	**378**	**349**	**-8%**
Re-exports	43	46	46	0%
Net supply	335	332	302	-9%

EU sources: CIRAD, EUROSTAT (excl. EU domestic production) / USA source: US Customs

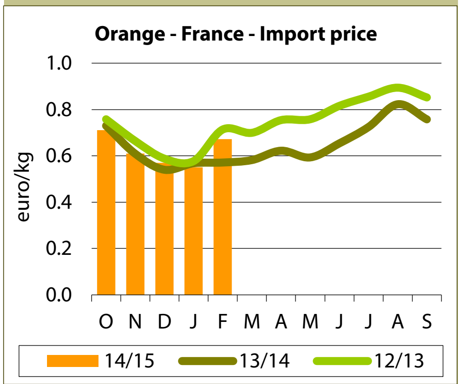
EUROPE - IMPORTED VOLUMES - FEBRUARY 2015			
Source	Comparaison		
	January 2015	February 2014	2015 cumulative total compared to 2014
French West Indies	↘	0 %	+ 16 %
Cameroon/Ghana/Côte d'Ivoire	↘	- 9 %	- 6 %
Surinam	↘	- 11 %	- 6 %
Canaries	=↘	- 13 %	- 7 %
Dollar:			
Ecuador	↘	+ 18 %	+ 28 %
Colombia*	↗	+ 16 %	+ 15 %
Costa Rica	↗	- 19 %	+ 62 %

Estimated thanks to professional sources / * total all destinations

Orange

January-February 2015

The orange market remained under pressure at the beginning of the year, with a difficult end to the Spanish Naveline campaign. Due to quality problems (advanced maturity) and a large supply, rates remained near cost price levels. The switch in late January to the better quality Navelate, and slightly livelier sales due to the decline of easy peelers, helped ease the market and restore rates to a seasonal level. On the juice orange side, the Salustiana supply continued to rise, reaching its incoming shipments peak, though prices remained stable and similar to table orange prices. The Tunisian Maltaise campaign continued to progress, with more fluid sales for small fruits at more competitive prices. Batches of Spanish blood oranges (Cara Cara, Tarocco and Sanguinelli) supplemented the supply in February.



PRICE

Type	Average monthly price euro/15-kg box	Comparison with average for last 2 years
Dessert orange	12.40	+ 4 %
Juice orange	8.89	+ 2 %

VOLUMES

Type	Comparison	
	previous month	average for last 2 years
Dessert orange	➘	+ 19 %
Juice orange	➚	+ 17 %

VOLUMES

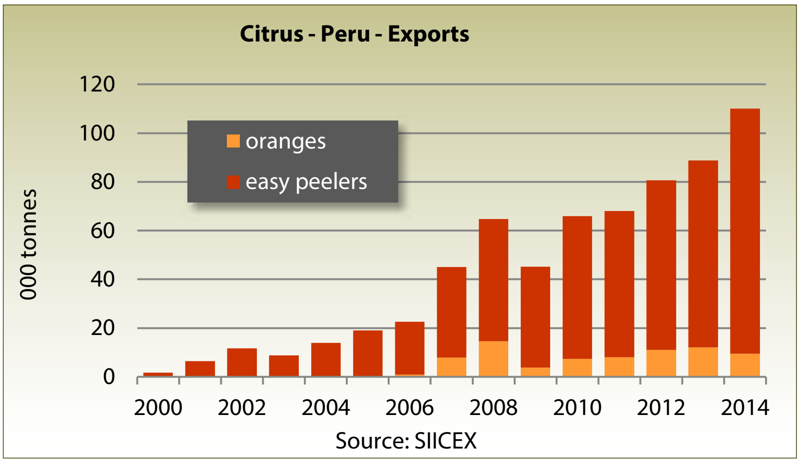
Varieties by source	Comparison		Observations	Cumulative total / cumulative average for last 2 years
	previous month	average for last 2 years		
Spanish Navel	➘	+ 30 %	Campaign on the wane. Quality concerns over the last batches.	+ 33 %
Spanish Navelate	➚	+ 11 %	Navelate progressing rapidly, exhibiting better quality than Navel.	+ 21 %
Spanish Salustiana	➚	+ 17 %	Salustiana volumes on the rise. Incoming shipments peak in February, before the beginning of the seasonal fall.	+ 32 %
Tunisian Maltaise	➚	+ 1 %	Incoming shipments peak. Good size spread.	- 4 %

■ **Threat of greening now tangible in the Mediterranean.** This is among the worst news that the Spanish, and more generally Mediterranean, citrus growing industry could have feared. *Trioza Erytrea*, more commonly known as the African psyllid, a vector of the African form of greening, has been discovered in Galicia, in the Western provinces of Pontevedra and La Coruña. The pest has also reportedly been identified on the other side of the border, in the Porto region. Most fortunately, no tree bacterial infection has been detected so far. Let's hope that what is for the time being nothing more than a serious warning shot results in the threat of greening finally being taken seriously by the sanitary protection services in Spain, and more generally in the other Mediterranean producer countries. It is now high time to take action, and finally develop a Mediterranean epidemic monitoring network for this disease. The European Commission must get things in motion, given the economic, social and environmental challenges represented by this disease. Andalusia has decided to set up a phytosanitary monitoring plan, aimed at detecting emerging diseases such as greening, while a crisis committee has been set up in Valencia.

Source: CIRAD

■ **Peruvian citruses: still on the up!** 2015 should be another growth year for Peruvian citrus exporters. Procitrus, the representative body of Peruvian citrus growers, is predicting an export potential of 120 000 t, up 10 % from 2014. The increase is reportedly due to the young W. Murcott stock reaching its prime. In 2013, this variety on its own represented 12 % of the 70 000 ha Peruvian cultivation area.

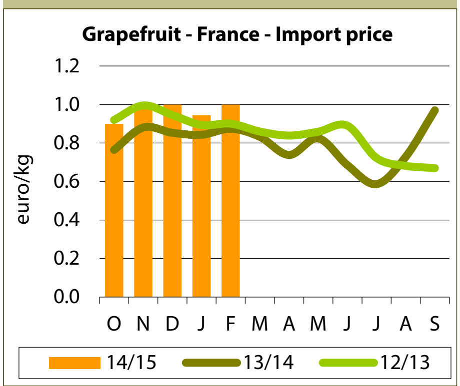
Source: Procitrus



Grapefruit

January-February 2015

Despite quiet demand at the beginning of the year, the grapefruit market remained well balanced. Indeed, after incoming Floridian shipments returned to average in late 2014, the supply fell back into shortfall because of the exchange rate remaining unfavourable for imports. A shortage of size 48 was particularly perceptible. Rates started to strengthen in February, due to the early fall in volumes from this source. On the Mediterranean grapefruit side, sales maintained better fluidity than in previous years, because of certain lines switching over to Mediterranean sources and the Israeli supply shortfall. Rates remained slightly above average, though there was no further price increase, given the presence of Turkish and Spanish batches registering competitive prices.

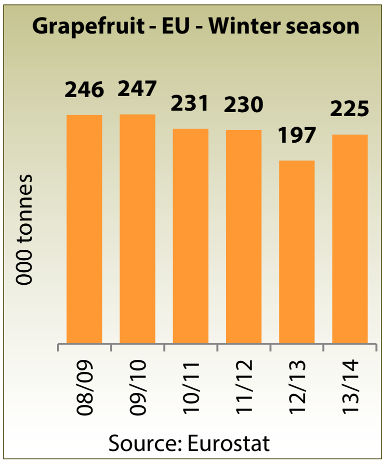


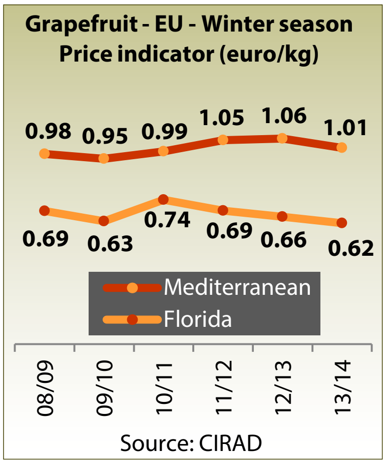
PRICE Type	Average monthly price euro/17-kg box equivalent	Comparison with average for last 2 years
Tropical	19.72	+ 15 %
Mediterranean	9.90	+ 6 %

VOLUMES Type	Comparison previous month	Comparison average for last 2 years
Tropical	↘	- 28 %
Mediterranean	↗	- 5 %

■ 2013-14 winter grapefruit season: better late than never. The significant recovery by European imports to nearly 240 000 t should be put into perspective on two counts. Firstly, it came after plummeting volumes in 2012-13, the worst season ever recorded by the EU in terms of consumption. Secondly, this rise to a perfectly ordinary level came at the expense of prices, which were well below average, or even calamitous during the seven-month season. Furthermore, this lamentable record led to an unprecedented wave of uprooting in Israel. The sole positive point was the stabilisation of the Floridian grapefruit market, after years of waning imports. The current season should end up seeing another decrease in volumes, with all supplier countries besides Spain registering a significant delay to market in March. Conversely, rates should see a recovery, though not necessarily accompanied by better profitability for an import sector weighed down by the rise of the dollar.

Sources: Eurostat, CIRAD





Grapefruit - EU - Winter season supply

Tonnes	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Total	**245 863**	**246 755**	**231 181**	**229 759**	**196 892**	**225 005**
Turkey	64 634	75 004	66 286	81 960	52 786	87 993
Israel	68 502	58 101	48 576	44 170	45 401	41 664
USA	64 548	55 132	52 721	45 988	40 676	41 847
Spain	36 300	47 900	51 825	44 560	46 998	45 033
Cyprus	11 880	10 617	11 773	13 081	11 031	8 468

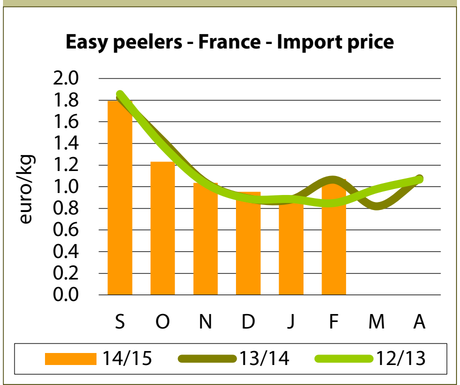
Source: Eurostat

VOLUMES Source	Comparison previous month	Comparison average for last 2 years	Observations	Cumulative total / cumulative average for last 2 years
Florida	↘	- 28 %	Floridian supply falling in February due to the effects of an unfavourable euro/dollar exchange rate for imports.	- 17 %
Israel	↗	- 22 %	Slight increase in volumes since the beginning of the year, with levels still in shortfall.	- 16 %
Turkey	↗	+ 25 %	Turkish volumes up from January, in particular on the North European markets. But production zones affected by the cold spell.	+ 31 %

Easy peelers

January-February 2015

The easy peeler market saw a positive trend, thanks to the early end of the Spanish Nules and Clemenvilla imports, which were experiencing quality problems. In addition, the progress of the Israeli Or was impeded by the bad weather which affected the logistics in January. Prices strengthened throughout the month, and the transition between varieties came in a context of under-supply, to the benefit of incoming varieties exhibiting good quality (Nour and Hernandine). However, in February, the competition between operators resurfaced, with the growth of Israeli Or volumes of heterogeneous quality, and the production peak of Spanish and Moroccan Nadorcott, with high levels for the season. Prices started to fall to seasonal levels.



PRICE Varieties	Average monthly price euro/box	Comparison with the last 2 years
Clementine	0.84	- 13 %
Hybrids	1.17	+ 1 %

VOLUMES Varieties	Comparison previous month	Comparison average for last 2 years
Clementine	↘	+ 3 %
Hybrids	↗	+ 22 %

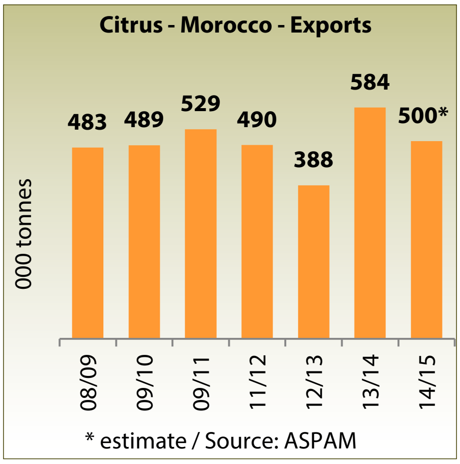
© Régis Domergue

■ Illegal Orri plantation in Spain: dubious alchemy backfires. The Spanish producers who illegally planted the queen of the Israeli easy peeler varieties will need to pay out 66 euros per tree, and 3 eurocents per kg of sales, in order to bring their plantation into compliance; in what we could perhaps describe as a case of gold being turned into lead!

Source: agroinformation

■ Moroccan citrus export season: not as good as predicted. Moroccan citrus exports should not exceed the 500 000-t mark this season, registering a below-forecast level (600 000 t), and also less than in 2013-14 (583 000 t). The decision to delay the start date of the season by one month, in order to improve the fruit quality level, explains only a tiny part of this downturn. The biggest factor was the particularly poor weather in November, particularly in the big citrus growing centre of Souss, as it caused heavy production losses. The local market, usually lucrative and even highly competitive with the export sector, is another reason for dissatisfaction. For this outlet, prices obtained by producers were more than disappointing, at around 10 eurocents per kg for the clementine at the production stage, a level below the cost price. A meeting aimed at better management of the local market is to be held in late March: a must, given the development prospects for production over the coming years.

Source: l'Economiste



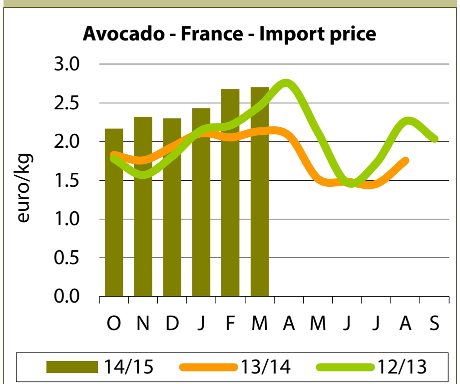
© Denis Loeillet

VOLUMES Varieties by source	Comparison previous month	Comparison average for last 2 years	Observations	Cumulative total / cumulative average for last 2 years
Spanish Clementine	↘	+ 1 %	Early end to the Nules campaign because of quality concerns due to the rains of late 2014.	- 7 %
Corsican Clementine	↗	- 50 %	End of campaign in week 2.	+ 11 %
Moroccan Clementine	↘	+ 24 %	Fluid sales for the last Berkane and Nour clementines.	+ 20 %
Spanish hybrids	↘	+ 13 %	End of Clemenvilla and Hernandine campaigns. Nadorcott progressing, with big volumes.	+ 20 %
Moroccan Nadorcott	↗	+ 68 %	Nadorcott campaign starting with big volumes, reaching its production peak in February.	+ 52 %

Avocado

January-February 2015

Prices continued to strengthen at the beginning of the year. However, demand remained moderate because of high import and retail prices. However, despite a weekly supply of nearly one million boxes, a near-average level, the impression of under-supply persisted due to moderate incoming Hass shipments from Chile and Mexico (volumes earmarked primarily for the USA for the Super Bowl in week 5). Meanwhile, Israeli imports were disrupted in late January by logistical concerns. The supply diversified in February with the shipments peak from Israel and Spain, and the presence of batches from Morocco, Kenya and Colombia. Prices started to drop in week 7. The green varieties strengthened further because of the end of the Spanish campaign and a reduction in the Israeli supply due to bad weather.



PRICE — Varieties	Average monthly price euro/box	Comparison with the last 2 years
Green	7.56	+ 28 %
Hass	10.75	+ 13 %

VOLUMES — Varieties	Comparison	
	previous month	average for last 2 years
Green	➚	- 3 %
Hass	➚	+ 4 %

■ **Mexico: the avocado in all its states…** Michoacán is set to no longer be the only Mexican State able to export its avocados to the United States! Ten districts in Jalisco were officially recognised as free from quarantine diseases in late February. This decision enables exporters in this State to undertake the final step in the access protocol for the world's main Hass market, namely a 180-day public consultation. While the production capacity of Jalisco is much less than for Michoacán, it is far from small-scale. The cultivation area comprises no less than 15 000 ha (i.e. one-and-a-half times the Spanish surface area, and more than twice the Israeli surface area), and its productivity is well above average for the country (high technical level, thanks to the near-universal use of irrigation, high density, etc.). Furthermore, surface areas have seen explosive growth: 10 000 ha were planted between 2009 and 2014. The approval of Jalisco will further reinforce Mexico's hold over the US market, to the detriment of other countries exporting to this destination. This is bad news, particularly for Peruvian exporters, who currently enjoy an advantageous market window to the United States during the summer. Jalisco has its production peak during this period, supplementing that of Michoacán.

Source: Notihass

■ **Peruvian avocado welcomed to two new Asian markets.** Peruvian exporters will be able to access the Chinese market and the Japanese market during the 2015 season. The agreement with the Chinese authorities has already been signed, while the agreement with Japan should be in place by April. Exporters believe that they will be able to send a combined total of between 10 000 and 15 000 t of Hass starting from this season to these two destinations. The Japanese market is the world number three in terms of volume, absorbing approximately 60 000 tonnes per year, mainly from Mexico. China is for the moment just a marginal importer (3 000 tonnes).

Source: Notihass

VOLUMES — Source	Comparison		Observations	Cumulative total / cumulative average for last 2 years
	previous month	average for last 2 years		
Chile	➘	+ 6 %	Seasonal fall underway, though volumes average for the season.	- 8 %
Israel	➚	- 4 %	Rise in Hass volumes, with levels similar to the previous year. Fall in imports of green varieties due to production losses. Logistics disrupted by poor weather.	+ 12 %
Mexico	➚	- 6 %	Mexican supply on the up, with volumes returning to average for the season (shipments to the USA for the Super Bowl).	+ 77 %
Spain	➚	+ 18 %	Spanish production peak, with higher levels than in previous years. Green varieties beginning their fall.	+ 17 %

Pineapple

January-February 2015

Despite a tough start to the year, the situation for the pineapple in January and February was very bright. The market was a bit quiet in the first half of January. The flat demand and the presence of stored batches (left over from the end-of-year holidays) hinted at a sluggish start to the year. Yet clearance sales helped put the market right. Meanwhile, the Latin American Sweet supply subsided. From an overloaded market at the beginning of the month, by the end of the month the market was much less much less swollen. In February, the Sweet supply fell steeply, in the knowledge that it would not be likely to rise for several weeks. Indeed, cargo allocation problems, with the melon supplanting the pineapple, as well as rains at the production stage in Costa Rica, contributed to this heavy reduction in the supply, now a long way down on demand. On a market which had become promising, rates began an increase which kept going throughout the month. Large sizes, which were less available, obtained better value, at prices not seen for years.

The Cayenne supply was too restricted - to the point of being non-existent - to be able to take advantage of the good market conditions.

Slow and listless at the beginning of the year, the air-freight pineapple market gradually livened up as the supply subsided. In early January, the swollen market sought to absorb the influx of fruits received for the end-of-year holidays. Fearing the drop in demand which usually follows the holidays, operators considerably scaled back their imports. Imports fell far more than expected because of the low availability of fruits from Benin and Ghana, as well as quality concerns over certain fruits from Cameroon. The overall Cayenne supply remained small in February, enabling fairly high prices to be charged on a rather buoyant market. The Ivorian supply, of good quality and limited volume, sold on a good footing. The reduction in exports from Benin also affected the Sugarloaf supply, which sold on a fairly stable footing of between 1.85 and 2.00 euros/kg, depending on availability.

During the first two months of the year, the Victoria supply was very limited because of production shortages in Reunion, and rains and cyclone conditions in Mauritius. So rates for those batches that were available were very high, although the quality of fruits reaching the market was not beyond reproach.

© Pauline Feschet

PINEAPPLE — IMPORT PRICE (EUROPE)

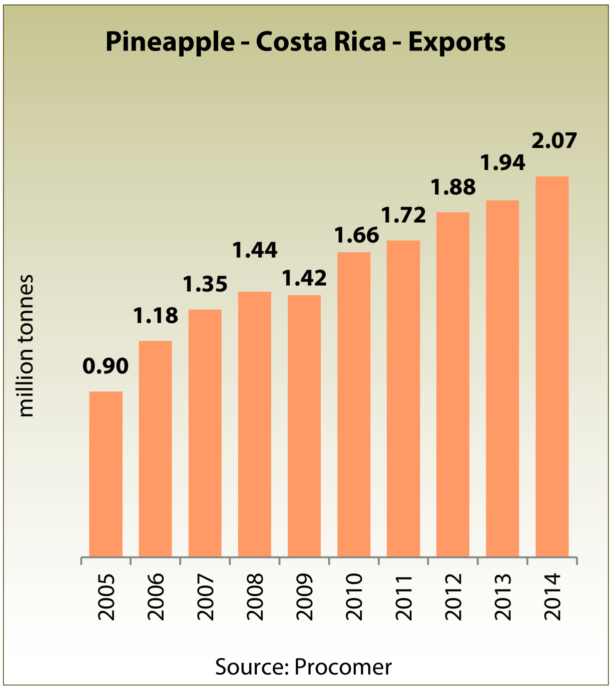
Weeks 1 to 9	Min	Max
Air-freight (euro/kg)		
Smooth Cayenne	1.70	2.00
Victoria	2.50	4.00
Sea-freight (euro/box)		
Smooth Cayenne	6.00	10.00
Sweet	6.00	13.00

PINEAPPLE - IMPORT PRICE IN FRANCE - MAIN SOURCES (EUROPE)

Weeks 2015		1	2	3	4	5	6	7	8	9
Air-freight (euro/kg)										
Smooth Cayenne	Benin	1.80-2.00	1.80-2.00	1.80-2.00	1.8-1.90	1.70-1.90	1.70-1.90	1.70-1.90	1.70-1.90	1.70-1.90
	Cameroon	1.80-2.00	1.80-2.00	1.75-1.90	1.75-1.90	1.70-1.90	1.70-1.90	1.70-1.90	1.70-1.90	1.70-1.90
	Ghana	1.85-2.00	1.85-2.00	1.85-2.00	1.80-1.90	1.80-1.90	1.80-1.90	1.80-1.90	1.80-1.90	1.80-1.90
	Côte d'Ivoire	1.85-1.90	1.85-1.90	1.85-1.90	1.85-1.90	-	-	-	-	-
Victoria	Reunion	2.50-3.50	2.50-3.50	2.50-3.50	3.00-3.80	3.50-3.60	3.00-3.80	3.50-4.00	3.50-4.00	3.00-4.00
	Mauritius	2.90-3.40	2.90-3.40	2.90-3.00	2.80-3.30	3.00-3.50	3.00-3.50	3.00-3.50	3.00-3.50	3.00-3.80
Sea-freight (euro/box)										
Smooth Cayenne	Côte d'Ivoire	6.00-7.00	6.00-7.00	6.00-8.00	-	8.00-10.00	-	-	-	-
Sweet	Côte d'Ivoire	7.50-8.50	7.50-8.50	7.50-8.50	8.00-9.00	8.50-10.00	8.50-10.00	8.50-10.00	9.00-11.00	9.00-13.00
	Ghana	7.50-8.50	7.50-8.50	7.50-8.50	8.00-9.00	8.50-10.00	8.50-10.00	8.50-10.00	9.00-11.00	9.00-13.00
	Costa Rica	6.00-7.00	6.00-7.50	8.00-10.00	8.00-11.00	9.00-11.00	9.00-11.00	9.00-12.00	10.00-13.00	10.00-13.00

■ Costa Rican pineapple: scaling new heights. Or, to parody the description of Cyrano de Bergerac's nose: "Tis a rock! A peak! A cape! No, it's a peninsula"! Costa Rican Sweet exports not only set a new record in 2014, but they exceeded the symbolic threshold of 2 million tonnes. Shipments of the predominant fruit of the Costa Rican agro-industry have risen by more than 1 million in less than ten years, and the dynamic seems to be undiminished. US consumer appetite continued to drive the market upwards, with imports to this destination up nearly 90 000 t, to exceed the one million-tonne mark for the first time. Europeans also continued to purchase this product in a big way, with incoming volumes to the Community up nearly 30 000 t to exceed 920 000 t. As the cherry on the cake, there was an increase in economic returns to accompany the volume increase. The customs values in dollars maintained their levels from previous years, but a favourable exchange rate enabled returns in local currency to approach the heights seen at the end of the last decade.

Source: Procomer



Mango

January-February 2015

In the first half of January, the fall in Brazilian shipments was partially compensated for by the increase in Peruvian shipments, which maintained the market balance between supply and demand, while also consolidating the rate of Peruvian mangoes. The Brazilian mango rate, at the end of the campaign, took advantage of Peru's slow start, and rapidly strengthened. The simultaneous presence of the two sources did not result in an influx of merchandise, as is often observed in January. Conversely, these imports complemented each other, with the majority of large fruits from Brazil, and mainly small sizes from Peru. In this favourable context, the more irregular quality of Brazilian produce did not hinder rates from strengthening. In the second half-month, the supply proved to be less than the natural market demand. This led to a price increase which continued until the end of the period, earning uncommon value for January.

The air-freight market was more mixed. Brazil was coming to the end of its campaign, with produce of variable quality selling on a fairly wide price footing, depending on the stage of maturity. The rates for Peruvian mangoes remained stronger, their good overall quality and higher cost prices justifying the price differences seen. In the second half of January, although certain sales were in excess of 5.00 euros/kg for higher quality Peruvian mangoes, prices dropped slightly in parallel with the increase in quantities on the market. The rise in incoming shipments, and the proliferation of import operators, disrupted the market conditions, making sales more difficult.

In February, Peru very much dominated the European market supply. Abnormally high in January, the rate for Peruvian Kents sagged under the effect of large, regular shipments and moderate demand. The prices charged since the beginning of the year probably deterred certain supermarket sector purchasers from this product. The winter holidays in the second half of the month only intensified this downturn in demand. The price slump, not yet much in evidence at the beginning of the month, was more marked in the second half of February. Certain sales of fruits brought out of more or less extended storage were made at prices below those mentioned above (from 4.50 euros/box). In the middle of the period, the gradual change of harvest zone (from Piura to Casma) was also accompanied by a changing size range. The small sizes, hitherto in the majority, became rarer; conversely, the large sizes made up the bulk of Peruvian shipments. This told on prices, with the minority sizes generally earning better value. Meanwhile, Brazil was shipping more limited quantities, mainly of Tommy Atkins. This produce, primarily aimed at North European countries, sold at prices falling from 7.50 euros/box in the first half of February to 6.00 euros/box thereafter.

The air-freight mango market saw a reverse trend, with prices slumping in early February because of heavier imports, and probably the arrival on the market of sea-freight fruits of air-freight quality. The market recovered its balance to some extent in the second half-month, with Peruvian shipments dipping. The strengthening of rates can also be explained by the increase in cost prices, due to the change in harvest zone, but also to currency rate variations.



EUROPE

MANGO - INCOMING SHIPMENTS (estimates in tonnes)

Weeks 2015	1	2	3	4	5
Air-freight					
Brazil	60	20	10	5	-
Peru	70	60	100	150	150
Sea-freight					
Brazil	1 900	1 100	990	880	950
Ecuador	330	150	110	70	-
Peru	500	1 650	2 370	2 550	3 430

MANGO - IMPORT PRICE ON THE FRENCH MARKET

Weeks 2015		1	2	3	4	5	Average Jan. 2015	Average Jan. 2014
Air-freight (euro/kg)								
Brazil	Kent	3.50-4.80	3.50-4.80	4.50-5.00	-	-	3.80-4.85	3.25-4.15
Peru	Kent	4.50-5.50	4.20-5.00	4.20-5.00	4.00-5.00	4.00-5.00	4.20-5.10	3.65-4.15
Sea-freight (euro/box)								
Peru	Kent	6.00-6.50	7.00-8.50	6.50-8.50	7.00-9.00	7.00-8.50	6.70-8.20	2.30-4.20
Brazil	Keitt	4.00-6.00	-	-	7.00-8.00	7.00-8.00	6.00-7.30	3.00-4.00
Brazil	Kent	4.00-6.00	5.00-8.00	-	7.00-8.00	-	5.30-7.30	2.30-3.80

EUROPE

MANGO - INCOMING SHIPMENTS (estimates in tonnes)

Weeks 2015	6	7	8	9
Air-freight				
Peru	100	80	70	80
Sea-freight				
Brazil	1 010	810	680	1 050
Peru	5 250	5 320	4 930	5 100

MANGO - IMPORT PRICE ON THE FRENCH MARKET

Weeks 2015		6	7	8	9	Average Feb. 2015	Average Feb. 2014
Air-freight (euro/kg)							
Peru	Kent	4.00-5.00	4.50-5.50	5.00-5.50	5.00-5.50	4.60-5.35	3.50-4.15
Sea-freight (euro/box)							
Peru	Kent	7.00-8.50	6.00-7.00	5.00-7.00	5.00-7.00	5.75-7.35	3.75-5.00

Litchi

January-February 2015

Early January saw the sale of the last Madagascan litchis from the second conventional ship. They bridged the gap until the first sea container shipments, received at the end of the second week of January. The sale of the incoming fruits resulted in prices climbing to 2.50 euros/kg. Yet this increase was fleeting, given the fall in demand and the greater qualitative fragility of the fruits. Demand waned more steeply in the middle of the month, with shop footfall down considerably in France following on from the attacks of 7 and 9 January. The rate maintained its slump thereafter, with consumers gradually abandoning the product, and its quality progressively deteriorating. Meanwhile, South Africa stepped up its shipments, and suffered the same lack of interest from distributors in the product, despite the appropriate quality and better size range. However, the pressure from Madagascan litchis was abating, and the rates of South African fruits strengthened at the end of the period. Shipments from South Africa proved considerably smaller than at the same time last year.

The air-freight supply in January dipped. Still substantial at the beginning of the month, the volumes shipped by Reunion dropped rapidly, and disappeared from the market in the middle of the month. The end of this source's campaign was accompanied by a rise in rates from late December, from 6.00 to 7.00 euros/kg for shelled fruits and from 10.00 to 13.00 euros/kg for trussed fruits. In the middle of the month, South Africa shipped on-stem Red McLean variety litchis, with a fine appearance but less laudable taste quality. Shipped in limited quantities, they sold steadily from 7.00 to 8.00 euros/kg until the end of the month.

The first half of February marked the end of the Indian Ocean litchis campaign. The lack of interest by purchasers in Madagascan produce intensified, continuing the trends observed back in late January. The fruits, ageing and of average quality, still sold at between 1.50 and 2.00 euros/kg at the beginning of the month. The following week, the last available stocks were cleared at open prices. The South African campaign also came to an end, though on a more positive note. Thanks to their better size range and freshness, South African litchis sold at prices on an upward trend.

A few air-freight batches of on-stem Red McLean sold steadily at between 7.00 and 8.00 euros/kg, and were aimed mainly at the wholesale markets.

Imports of certain Dominican fruits to the United States suspended. The sanitary authorities of the United States decided to ban imports of certain fruits, following the discovery of fruit flies (*Ceratitis capitata*) in the Punta Cana region. The ban relates to all the citruses and most tropical fruits (except bananas and mangoes treated in accordance with the hot water insect control protocol). The volumes involved are relatively limited, except for the avocado, amounting to approximately 15 000 to 17 000 tonnes of exports per year.

Source: Reefer Trends

EUROPE

LITCHI - INCOMING SHIPMENTS (estimates in tonnes)

Weeks 2015	1	2	3	4	5
Air-freight					
Reunion	60	20	1	1	-
South Africa	5	2	2	10	10
Sea-freight					
Madagascar	-	1 600	920	-	-
South Africa	100	100	200	200	600

Citrus and tropical fruits — Dominican Republic Exports to the United States

Tonnes	2010	2011	2012	2013	2014
Avocado	14 820	16 686	15 160	16 979	15 161
Pineapple	424	250	1 018	1 711	1 937
Guava, mango, mangosteen	185	204	535	752	867
Orange	1 664	2 084	2 384	2 493	2 305
Lemon	377	979	519	459	448
Easy peelers	-	22	3	6	-

Source: US Customs

EUROPE

LITCHI - IMPORT PRICE ON THE FRENCH MARKET

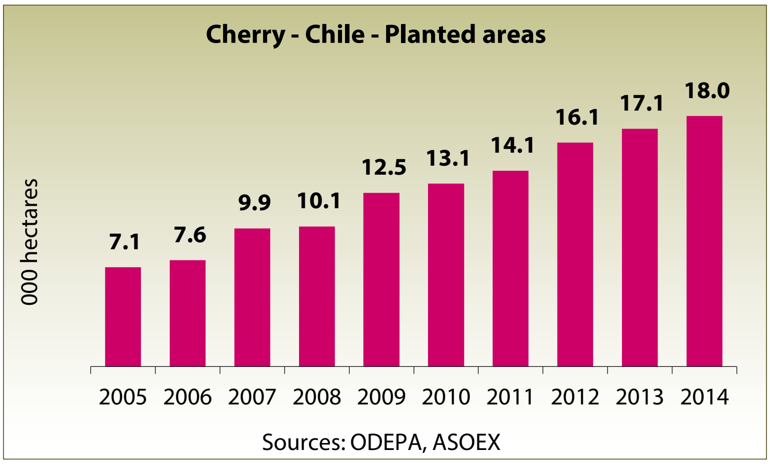
Weeks 2015	1	2	3	4	5	Average Jan. 2015	Average Jan. 2014	6	7	Average Feb. 2015	Average Feb. 2014
Air-freight (euro/kg)											
Reunion v	7.00-12	6.00-10	6.00-13	-	-	6.30-11.65	8.00-11.50				
South Africa v	-	-	7.00-8.00	7.00-8.00	7.00-8.00	7.00-8.00	-	7.00-8.00	7.00-8.00	7.00-8.00	-
Sea-freight (euros/kg)											
Madagascar	2.20-2.30	2.20-2.50	2.10-2.30	2.00-2.20	1.50-2.00	2.00-2.25	1.90-2.05	1.50-2.00	Tout prix	1.50	1.50-1.80
South Africa	3.00-4.00	3.20-4.00	2.00-3.00	2.00-3.00	2.30-3.20	2.50-3.40	2.55-3.20	2.30-3.30	3.20-3.60	2.75-3.45	2.75-3.50

v: fresh on the vine or not sulphur treated

Temperate fruits

■ **New export record for Chilean cherries.** The 2014-15 Chilean cherry season finished with a new record of approximately 100 000 tonnes, according to estimates by the association ASOEX (99 000 t exported in week 5, i.e. + 45 % on 2013-14). The bulk of the volumes were absorbed by Asian countries (83 % of exports), for the vast majority by China. The rest is divided between the United States (9 %), Latin America (5 %) and Europe (4 %). Climate conditions were fairly favourable after a slightly difficult start to the season. Surfaces areas have increased considerably in recent years, now reaching 18 000 ha. The potential will be 150 000 t by 4 to 5 years' time.

Source: ASOEX



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■ **Good export level for South African stone fruits.** The stone fruits season got off to a difficult start in South Africa. The season coming 7 to 10 days' early, the small size range and the early-season rains did not help the marketing process, although the decision was made to ban exports of excessively small sizes, especially of plums. However, the peach and nectarine seasons did live up to their potential, with new varieties such as flat peaches, but also of plums, with the growth in the cultivation area and a highly diversified range. So exports should get back to the 2012-13 level, or even climb further, although certain destinations such as Europe are less receptive. The combined total registered in week 7 seemed to confirm the export forecasts, with a 23 % increase in shipments for the plum from 2013-14, a 20 % increase for the peach and 32 % for the nectarine. Conversely, shipments fell steeply for the apricot (- 17 %), given the falling potential. They were particularly limited to Continental Europe (- 42 %), but registered another gradual rise to the Middle East (+ 20 %).

Source: HortGro

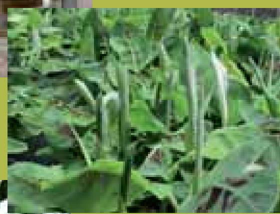
Stone fruits — South Africa — Export forecasts

Boxes	2014-15	Comparison with	
		2013-14	2012-13
Nectarine (2.50 kg)	3 852 233	+ 31 %	+ 23 %
Peach (2.50 kg)	1 928 975	+ 23 %	+ 40 %
Plum (5.25 kg)	11 418 711	+ 9 %	+ 1 %
Apricot (4.75 kg)	810 620	- 17 %	- 27 %

Source: HortGro

■ **Spanish strawberry seeking value.** To claw back the loss of profitability suffered by the industry, the Spanish professional organisations have launched several projects to boost the value of Huelva's production. In spring, the various federations (Interfresa, FAECA, UPA, ASAJA, COAG and Freshuelva), under the aegis of the Andalusian government, created a working group responsible for discussing ways forward for the industry, and for contemplating unification of the companies under a "Huelva strawberries" PGI. A research programme is also underway at the Cerdanyola del Vallés genome research centre (IRTA Barcelona), to decode the genes involved in the flavour of wild strawberries, in order to develop taste varieties in collaboration with Planasa. Finally, a big promotion campaign for Spanish strawberries is set to be launched in autumn 2015 by the Andalusian strawberry interprofessional organisation, Interfresa, for a period of three years and a budget of 3.6 million euros, allocated to measures aimed at promoting strawberry consumption on the internal and export markets. The bulk of the funds is set to focus on Germany and France, with 1.45 million euros each, as well as 500 000 euros for Spain.

Source: Infofruit



Sea freight

January-February 2015

The solid end to 2014 and a lively start to the chartering year did not last long – by mid-January the Ecuadorian exit price had soared on high demand for a short supply of bananas, reducing the demand for Spot charters. Chile was unable absorb more tonnage despite an unexpected peak in table grape supply and discharge issues on the US west coast, while the squid returned to the depths of the South Atlantic after an unusually early foray to the surface.

Although fixture activity was disappointing, the market and therefore monthly TCE average was supported by a generally balanced supply/demand scenario and low bunker prices. The lower bunker price environment this year has a significant role to play in the voyage yield, giving operators greater flexibility to achieve a satisfactory return even if they have had to concede ground against the container lines on headline rates.

This supply/demand equilibrium continued until mid-February, at which time Chile called for more vessels to meet the deadline for the US Marketing Order, and desperate Californian citrus charterers finally bowed to pressure to charter units in order to ship their cargo to equally desperate receivers in Japan and South Korea. With Filipino banana charterers fixing vessels to cover a revival of banana exports and other tonnage sailing south to meet demand in the Falkland Islands, the market shortened quickly and rates increased.

The last week of February saw the TCE average yield on vessels fixed break the 100c/cbft mark for the first time since March 2011. With a heavy squid catch forecast for the South Atlantic, more bananas available east and west of the Panama Canal this year, a total of 55 charters required for a much larger New Zealand kiwifruit crop and 60K MT more Argentinean lemon exports anticipated, there may be a substantial peak to the season.

There may also be some help from elsewhere: although the dispute between the ILWU and PMA on the US west coast is resolved, port officials believe that it could be anywhere between 6-12 weeks before the backlog of containerized cargo is cleared — well into the season for Valencia oranges and past season's end for Navels, the principal export variety for those shippers that have chosen not to take the specialized reefer route to market in Japan and Korea. Should the forecast prove accurate, it may be sufficient to encourage Chilean apple and pear shippers to consider the reefer as a viable alternative to the third-party liner services. Throughout the slowdown reefer ships were able to load and discharge in Hueneme and San Diego with only minor delays.

■ 6th International Banana Congress, and 21st International Meeting of ACORBAT. For the first time, these two big events for the banana and plantain will be held at the same time in San José, Costa Rica, from 22 to 26 February 2016. More than 800 representatives from the international banana community will come together on this occasion. For five days, internationally renowned experts will present the latest advances in research and current trends in the banana market.

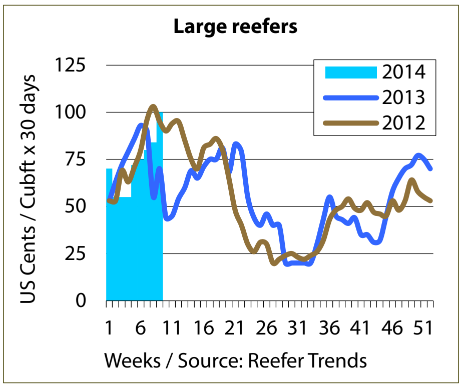
Source: Corbana

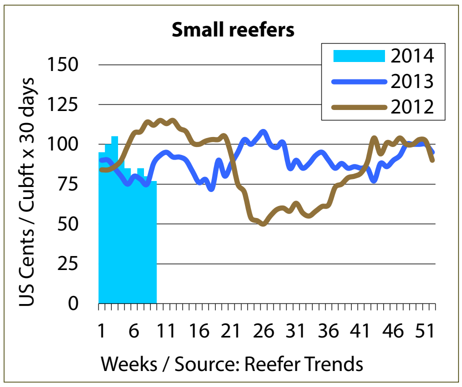
■ Launch of the new site commodafrica.com. This site is dedicated to information and analysis of agriculture and other sectors of the economy which help and contribute to agricultural and agro-industrial development across West African country, in both French-speaking and English-speaking countries. The information is classified by country, industry and sector. The featured industries include the plantain banana, cashew, fruits, market gardening crops and roots & tubers.

Source: commodafrica.com

MONTHLY SPOT AVERAGE (EUROPE)

USD cents/cubic foot x 30 days	Large reefers	Small reefers
January 2015	61	88
January 2014	77	82
January 2013	60	86
February 2015	82	79
February 2014	70	79
February 2013	89	107





2015 Southern Hemisphere pip fruits campaign

Options becoming a necessity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After several years of doubts and questions, the pip fruits divide seems increasingly complete between the Southern Hemisphere sources and the traditional Northern Hemisphere markets, which have withdrawn into their shells. The 2014 campaign only confirmed this trend, intensified at the end of the year by the embargo on the Russian market. The development of shipments to emerging countries, which yesterday still seemed like a means of diversification for Southern Hemisphere exporters, today seems to be a genuine lifeline. These alternative markets helped maintain the apple and grape export potential, but will definitely not be sufficient to prop up pear production, especially since Argentina, the main producer country, has for several years faced a deteriorating internal situation.

With difficult economic prospects, but good production potential, Southern Hemisphere pip fruit exporters have their work cut out to place their merchandise. The historic outlets, whether the United States, Europe or Russia, are less and less receptive, due to local production, economic and political difficulties. So developing the customer portfolio remains a necessity for a number of operators, with these outlets now representing a predominant share of shipments for certain products.

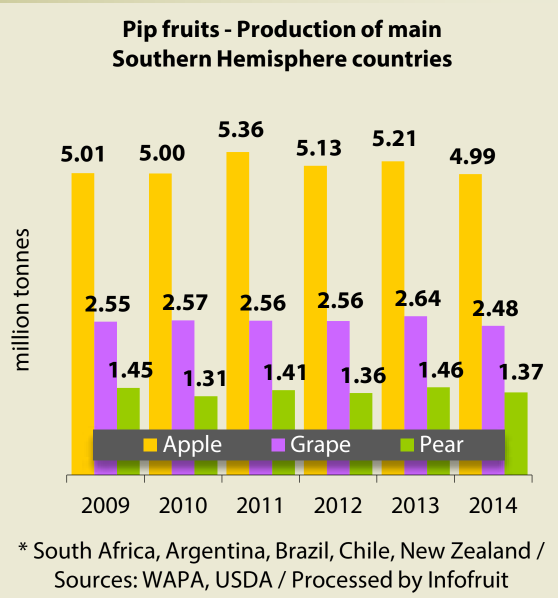
Grape: a quiet market, but with a good tempo

The 2014-15 Southern Hemisphere grape campaign enjoyed good market conditions, with the campaign ending early and high price levels for the last European grapes. So exporters are reckoning on good performances once more after two years of stagnation. With an optimum production potential in most countries, the 2015 vintage should be close to a record level (2.75 million tonnes, i.e. + 11 % on 2014). The export potential could even exceed the 3-year average (1.4 million tonnes) by 14 %, with the return of Argentina, good volumes in South Africa, Chile and Brazil, and the steep rise expected from Peruvian shipments.

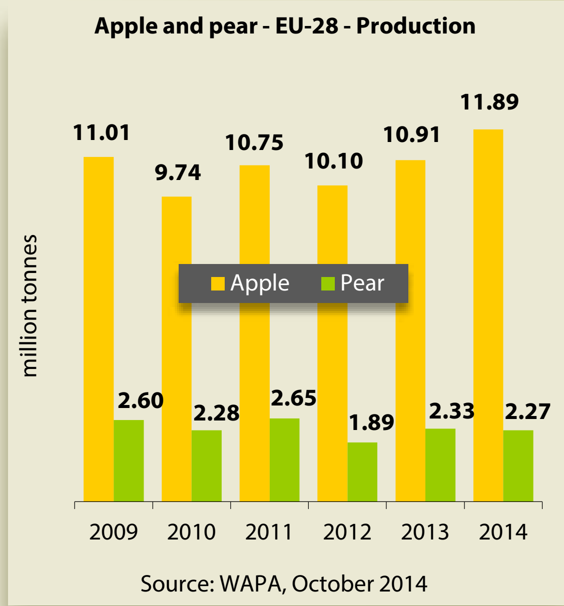
So the campaign got off to an excellent start in Europe for the early sources. Brazil was practically absent in October. The first Peruvian grapes appeared from early November. Prices immediately adopted high levels (4 euros/kg), and remained very strong until late 2014. The cyclical conditions then deteriorated slightly. Rates fell very significantly in mid-January (2.00-2.50 euros/kg), with Namibia, South Africa and Peru coming to the fore, and Argentina making a comeback in view of the Russian crisis.

While sales were slow, there was no real competition due to the absence of Chile, more marked every year. This source is increasingly favouring markets other than the Eurozone at the beginning of the season, especially Asia with the Chinese New Year. So its progress was deferred in Europe, from its planned week 4 start, although the strikes in the North American ports impeded shipments to the United States. The first Chilean volumes were expected from early March, at the same time as from India, but the campaign will doubtless be limited. Prices remained around 1.90 to 2 euros/kg until late February.

So this rearrangement of the calendar is actually a guarantee of stability for the European market, with table grape consumption struggling to get going there in the counter-season. While the Red Globe variety seems to have gained ground on many Community markets, seedless varieties remain especially prized by the North European markets. Furthermore, globalisation is leading to strategic choices by exporters, who are not of one mind in all the distribution sectors, especially in terms of packaging, such as Chile's 8.2-kg boxes.



* South Africa, Argentina, Brazil, Chile, New Zealand / Sources: WAPA, USDA / Processed by Infofruit



Pear: reduced market absorption capacity

The apple and pear market calendar has seen great disruption on the traditional markets over the last few campaigns, especially in Europe, which has greatly narrowed the import window. This rearrangement is even forcing importers to review their requirements, and is weighing down heavily on export levels of the pear, for which Europe remains an essential outlet. However, after a 2014 campaign slightly in shortfall due to the reduced potential in Argentina (- 12 %), Chile (- 8 %) and New Zealand due to frosts, a good harvest level was expected for 2015. Hence the initial estimates unveiled in late 2014 and early 2015 heralded the return to a slightly above-average production level (+ 5 %).

Yet there are fears that these figures might be revised downward, since while a production return from Chile (+ 9 % on 2014) and New Zealand (+ 30 %) is expected, there were heavy losses in Argentina due to the hail storms, strikes, over-maturity and producers preferring to leave the fruits on the trees in the absence of lucrative outlets. Furthermore, since the harvest of the first varieties ended up being scaled back in South Africa, overall production could ultimately be well below the + 7 to + 8 % announced before the harvest. The export potential could also be reduced since the climate conditions did not favour size, and the European market could be difficult to penetrate due to the good level of the European harvest (2.27 million tonnes, i.e. + 23 % on 2014). Indeed, the stock was still 592 000 t in Europe on 1st February 2015, i.e. + 16 % on the 3-year average.

Moreover, the delay to the campaigns, with the season starting in week 4 for South Africa and in week 10 for Argentina, was rather favourable for sales, with the Italian Williams campaign now ending in early February (week 6). However, with a highly reduced Williams potential for both these sources, price levels were fairly disappointing, with North European pressure to clear the cold chambers before the arrival of the Packham's preventing price level rises (0.95-1.10 euro/kg on import into Northern Europe, depending on size). Conversely, there should be no concerns for the Comice, as the European campaigns ended in late February as per a normal calendar. Yet the market could slow down subsequently, and the leftover European Conference and Abate volumes could well hinder Southern Hemisphere Packham's and Abate sales. The European stock was actually still 18 % above the 3-year average for Conference and 23 % above average for Abate in early February, leaving no hope for the market easing before May and June.

Apple:
salvation outside of Europe

The initial apple forecasts reckoned on most of the Southern Hemisphere countries returning to production, after the drop in potential registered last year (- 4 to - 5 %). So the harvest, estimated at between 4.8 and 5.2 million tonnes depending on sources, was set to be slightly above the 3-year average (+ 2 to + 6 %). On the strength of these prospects, exporters reckoned on good export performances, ranging from + 3 % for the most optimistic forecasts to - 1 % for the lowest (1.3 to 1.7 million tonnes, depending on the sources). However, certain markets such as the United States, Europe or Russia could have little demand, the former because of the leftover produce, and Russia in view of the political and economic situation.

So most operators once more this season will bank mainly on the Asian markets, although the phytosanitary protocols sometimes impede shipments. So exports could intensify out of New Zealand, Chile and South Africa to China, Taiwan but also India. Meanwhile, operators should step up their sales to nearby markets. Hence South Africa is targeting several African countries, especially Nigeria, Angola, Kenya, Zambia and Cameroon, while Chile should step up its presence in Latin America, especially in Peru, Ecuador and Mexico. The Middle East will also remain a favoured target, although the performances of the previous year did not meet the forecasts, with volumes actually down. Brazil could have a bigger presence in Russia, taking advantage of the expected fall from other sources. The campaign is set to be particularly difficult for Argentina, whose main outlets are Europe, Russia and Brazil, especially since this supplier has seen its competitiveness reduced, between the recurrent annual wage increase of 30 % per year and the non-devaluation of the peso. So imports to Europe should be scaled back, especially since the European stock still amounted to 3.7 million tonnes in early February (+ 16 % on the 3-year average).

The beginning of the Southern Hemisphere apple season could again be delayed for most varieties. Indeed, while the first incoming Gala shipments were received in early March last year, the first significant volumes only reached the wholesale stage in mid-April, and the supermarket sector in June. Similarly, Granny sales remained scarce until the second half of June. Certain varieties such as Pink Lady, however, should again enjoy a promising window. The first volumes appeared last year in early May, and rapidly made it to stock rooms. Sales then picked up from mid-May with the end of the European campaign, and the market remained buoyant until mid-July. However, the influx of volumes, the summer holidays and the predominance of small sizes overcame this segment thereafter ■

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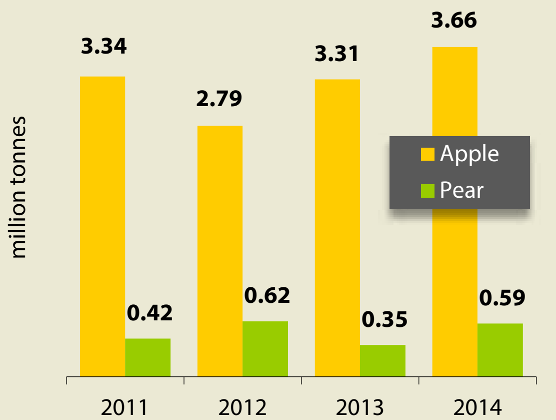
Apple and pear - EU-28 - Stocks in main countries at 1st February



Sources: WAPA and professional organisations
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Southern Hemisphere pip fruits

Struggling to hold up


© Régis Domergue

The cyclical conditions are set to remain difficult for Southern Hemisphere pip fruits, with the risk, at least for the pear and even the grape, of triggering cutbacks in production surface areas. They are still relatively stable in most countries thanks to market diversification and varietal renewal. However, the Russian crisis and strengthening trend of "local consumption" are already weighing heavily on the long-term future of upstream companies and on pip fruit importers, especially in Europe.

A more marked slowdown in table grape exports

Although the 2015 table grape campaign has a more optimistic outlook than the previous two seasons, the general trend remains for a slowdown in shipments, with a fall of 8 % in 2014 (1.2 million tonnes, i.e. - 5 % on the 3-year average). This dip is primarily attributable to the downturn in exports to the United States (- 17 %), which should not conceal the lukewarm results on the other markets. The European and Middle East markets saw stability, or even a slight fall, with variable performances in Asia, depending on the country and suppliers. While Chile and Argentina registered the steepest drops in 2014 due to falling production, the export levels out of South Africa or Brazil did not hold up either, with exporters lamenting the falling profitability of this crop with the decrease in sale prices.

Hence production is now stalling significantly. Surface areas are stable at best in most of these countries, except for Peru and to a lesser degree South Africa. Yet they are already shrinking in Chile and Brazil. The development of seedless varieties, which was to boost sales, does not seem to have fully borne fruit; and it has been on such a scale that these varieties now represent the majority of the stock in certain Southern Hemisphere countries, especially South Africa, Chile and increasingly in Brazil. Conversely, Red Globe remains dominant in Argentina and Peru, though their ranges are also expanding with white and pink seedless varieties.

Apple struggling to hold up despite a diversified customer portfolio

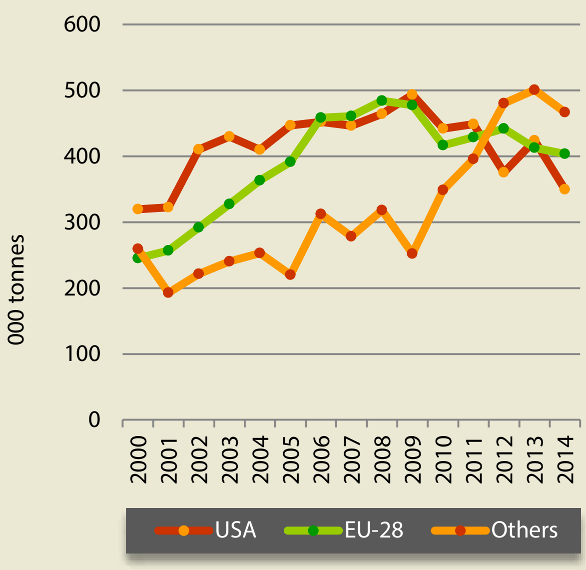
While apple exports from the main Southern Hemisphere countries have maintained a level of around 1.6 to 1.7 million tonnes over the past few years, it must be emphasised that they fell by 7 % in 2014, though this followed a very strong 2013. This drop was particularly sharp on the European market (- 22 %), which

Table grapes - Southern Hemisphere
Main sources exports by destination in 2013-14

Tonnes	Total	USA	EU-28	Others
Chile	**750 000**	314 662	124 978	310 360
South Africa, Namibia	**238 157**	47	181 641	56 469
Brazil	**43 181**	62	36 259	6 860
Argentina	**12 000**	19	5 049	6 932
Peru	**177 000**	35 000	55 705	86 295
Total	**1 220 338**	**349 790**	**403 632**	**466 916**

National sources, professional organisations / Processed by Infofruit

Table grapes - Southern Hemisphere*
Exports by destination



*South Africa, Chile, Argentina, Peru, Brazil
National sources , professional organisations
Processed by Infofruit

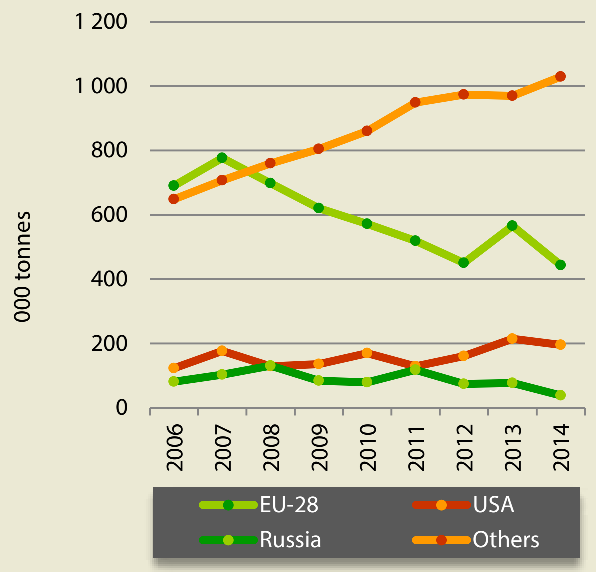
registered its lowest level, below even that of 2012. There was also a significant decrease in the United States (- 9 %), where Chilean apple exports were down significantly. Yet not all the sources had poor results on this market, with improved performances by Argentina (+ 3 %) and New Zealand (+ 3 %).

Hence the 2014 campaign confirmed the need for exporters to find other outlets, especially Asia, since the growth toward Middle Eastern countries is more mixed. This trend is reaffirmed year on year, and the upward curve of volumes imported by the emerging countries is such that these outlets are now predominant. Hence destinations outside of the EU, USA and Russia, i.e. primarily South America, Asia and the Middle East, absorbed 60 % of tonnages as opposed to 26 % for Europe, 11 % for the USA/Canada and 2 % for Russia. The still high shipments to this latter destination also ebbed more sharply last year (- 50 %), under the effect of the crisis, with a marked fall in exports from most sources, with the exception of New Zealand, which registered its best performance to this country.

Thanks to these alternative markets, producers were able to maintain their surface areas in most Southern Hemisphere countries: they were stable in Chile or Argentina, and still growing slightly in South Africa and New Zealand. They dropped slightly in Brazil, with producers uprooting old orchards, and showing little inclination to replant given the high set-up costs and the economic prospects.

The two-tone varieties were the most sought-after on the export markets. Gala remained by far the main planted variety, with a potential of around 1.8 million tonnes (34 % of volumes produced), just ahead of Fuji (794 000 t, i.e. 14 %), whose potential was still growing, especially in Brazil, South Africa and New Zealand. Conversely, production growth was slower for Cripps Pink (nearly 400 000 t, i.e. 7 % of production, 164 000 t of which in Chile and 87 000 t in South Africa) or Jazz (52 000 t in New Zealand), but was still continuing for specific varieties such as the Pacific range (54 000 t in New Zealand). Other varieties such as Braeburn were struggling to establish themselves, seeing their potential wane, especially in New Zealand (112 000 t). Uprooting continued for Red Delicious, which still represented 15 % of volumes harvested (850 000 t), with a marked fall over the past

Apple - Southern Hemisphere
Exports by destination



Sources: National Customs, professional organisations / Processed by Infofruit

Apple - Southern Hemisphere Main sources by destination in 2014					
Tonnes	**Total**	**USA**	**EU-28**	**Russia**	**Others**
Chile	**820 000**	138 428	164 256	15 201	502 115
S. Africa	**397 452**		84 206	3 662	309 584
Argentina	**135 000**	9 216	35 414	11 991	78 379
Brazil	**44 294**		30 437	42	13 815
N. Zealand	**310 500**	48 009	128 904	8 144	125 443
Total	**1 707 246**	**195 653**	**443 217**	**39 040**	**1 029 336**

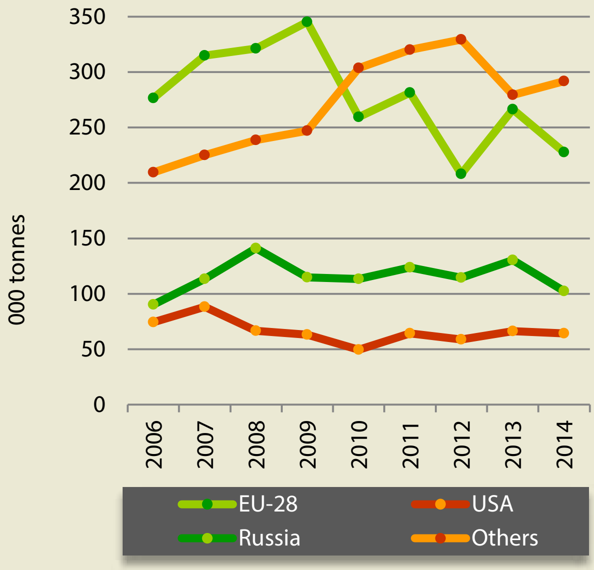
National sources, professional organisations / Processed by Infofruit

few years in Chile. Granny Smith, the number four variety planted, held up at around 740 000 t (13 %), while the potential of Golden was relatively stable (175 000 t, i.e. 3 %).

Pear - Southern Hemisphere Main sources by destination in 2014					
Tonnes	Total	USA	EU-28	Russia	Others
Chile	**100 000**	16 270	40 534	4 610	38 586
S. Africa	**200 600**	1 824	99 045	13 113	86 618
Argentina	**380 000**	43 803	86 972	84 723	164 502
N. Zealand	**5 350**	2 304	1 131	-	1 915
Total	**685 950**	**64 201**	**227 682**	**102 446**	**291 621**

National sources, professional organisations / Processed by Infofruit

Pear - Southern Hemisphere
Exports by destination



Sources: National Customs, professional organisations / Processed by Infofruit

A more marked downturn in pear exports with the staggering of the Northern Hemisphere campaigns

The situation is more worrying for pear exporters. Southern Hemisphere shipments fell below 700 000 t in 2014, i.e. another 10 % fall. A considerable drop in shipments was observed to Russia (- 21 %) and the European market (- 15 %), while other destinations, whether the United States, Africa or Asia, did not absorb any more volumes. However, this drop was primarily due to the fall in shipments from Chile (- 21 %), and to a lesser degree from Argentina (- 7 %) due to the frosts of September 2013. South African exports barely just held up (+ 1 %). Despite quantities on the wane, sales were very slow last year because of the leftover European production, which led to give-away price levels to end the campaigns.

Hence the growth in production surface areas came to a halt, except in South Africa (+ 1 to + 2 % per year), where it has now slowed down (high set-up cost and market uncertainty). In this country, however, growth was still significant for Packham's (+ 7 %), the leading stock variety, Rosemarie (+ 6 %), Forelle (+ 5 %) and Abate (+ 3 %), while it fell for Williams (- 3 %). Nonetheless, we should emphasise the growth of the Early Bon Chrétien supply. Surface areas were stable in Chile, with the clear dominance of Packham's persisting (50 % of production). Over the past few years, growth has been more considerable for Abate (+ 37 % on the 3-year average in 2015). Similarly, the Forelle potential is on the up. Other varieties such as Beurré Bosc, however, are expected to fall. In Argentina, the varietal range has not changed in recent years, still focused on Williams (47 % of stock), followed by Packham's (31 %) ■

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Mango

A report prepared by
Pierre Gerbaud

Contents

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European mango market

Several sources on the offensive

In a global economic context of ongoing crisis, the international mango trade is coping well. While consumption of fruits and vegetables is stagnating, or even sagging, European mango imports are continuing their rise, with quantities more than doubling over the past fifteen years. 2014, with an additional 10 000 tonnes from 2013, was another year of positive trends. Was this caused by production increases by supplier countries, or rising European consumption? The most likely answer is a combination of the two factors.

USA still leading the way in mango imports, despite a cyclical downturn

The international mango trade seems to be set fair, according to the latest statistical data available. European imports are increasing year on year, approaching the 300 000-tonnes threshold. True, this is not a uniform rise if we take global trade, and in particular the world's two main import centres, which in order of size are the United States and Europe (see graph).

While European imports continued to rise, with more than 270 000 tonnes imported in 2014, US imports dipped for the first time for fifteen years. With a population of 320 million, the USA usually used to import around 100 000 to 150 000 tonnes more than Europe, on a regular basis. In 2014, imports registered a downturn of 50 000 tonnes, as opposed to their booming expansion in previous years. This hiccup is apparently attributable to the downturn from the leading supplier to the United States: Mexico. Indeed, Mexican production in 2014 was affected by major meteorological phenomena. Hurricanes and floods heavily disrupted mango production, especially on the West coast of the country, where big production zones are located (Michoacán). Hence Mexican shipments fell by more than 40 000 tonnes. Shipments from Ecuador to the USA were also down, with nearly 12 000 tonnes less than in previous years. The other US market suppliers could not make up for this shortfall, because of a mango shortage, or more likely a calendar difference.

However, taking into account the population, the United States still has a higher mango consumption than Europe. With its 270 000 tonnes of imports (nearly 290 000 tonnes if we add Spain as a supplier) and a population of 507 million, Europe still has potential for development. Making up the consumption gap with the United States would herald a bright future for mango imports to Europe!

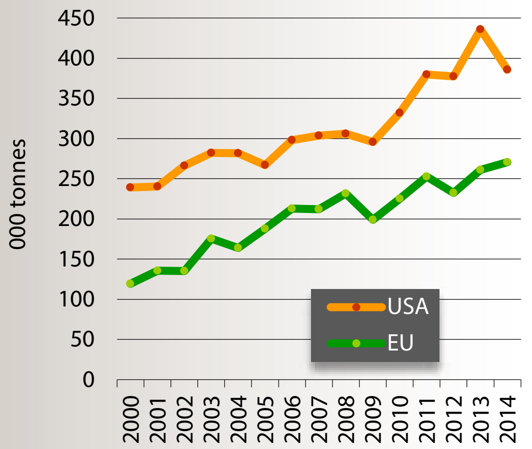
European market in good shape

With an increase of 10 000 tonnes, or nearly 30 000 tonnes if we count Spanish shipments, the European mango market is not doing too badly. The graph opposite is a fairly good summary of the 2014 campaign. It is based on European Union monthly imports and on price averages observed on the French market for sea-freight Kents, from all sources.

At the beginning of the year, the large quantities of fruit from Peru, but also Brazil which was at the end


© Eric Imbert

Mango - Import trend in the United States and Europe



Source: national Customs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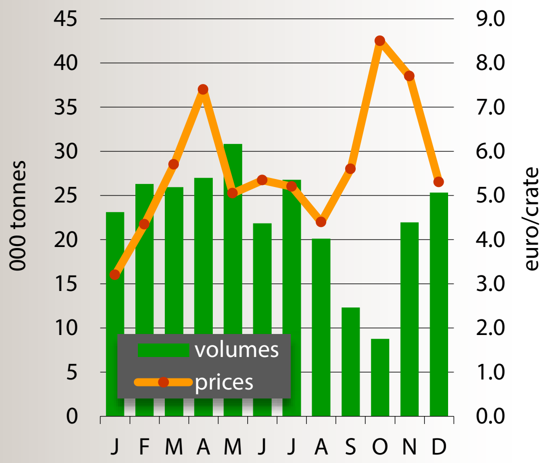
of its campaign, restricted prices to rock bottom. They recovered in February and March, while Peru was still shipping substantial volumes, at the height of the European counter-season, driven by lively demand. Rates peaked in April, a transition period between Peru and the West African sources. The supply remained constant, though demand intensified around the Easter holidays, helping keep prices high. In May, the avalanche of fruits from Côte d'Ivoire, combined with shipments from other African and Latin American sources, resulted in a price drop of more than 2.00 euros/box, while the seasonal fruits were increasingly coming onto the market. June saw a downturn in the supply and demand, with rates stabilising though still at a decent level. Conversely, the combined imports from July and August drove the mango rate into one of the steepest downward trends of the year. The under-supply of September and October, due in particular to the delay to the Brazilian campaign, drove rates to levels rarely reached, over an extended period. The supply increase in November and December caused another price downturn, while demand remained constant.

The 20 000-t import threshold

We will of course recall the two price peaks in April and September-October, which seem to indicate that at these times of year monthly imports of more than 20 000 tonnes can sell relatively readily, without any direct repercussions on prices. Conversely, a monthly load of 20 000 tonnes or more at the beginning of the year or during the summer period has a rapid and direct effect on rate stability. The equation presented to operators involves adjusting imports to the intensity of demand. Unfortunately, this equation has as many unknowns as there are suppliers to Europe. On a market which remains so appealing, how can we limit or increase the supply without impeding the legitimate development of a particular source?

Cyclical weather conditions which affect the starts and durations of campaigns seem to weigh down less on the production of the main suppliers, which see only moderate variation over long periods. Hence an annual supply profile is taking shape, with more or less risks of confrontation between volumes from different sources weighing down on prices. The cases of Peru in Q1 and Brazil in Q4 are fairly clear, insofar as these sources very much dominate the supply over their respective periods. The transition to monthly volumes of more than 20 000 tonnes represents a threshold above which

Sea-freight Kent mango - EU-28
Arrivals and average import prices in 2014



Source: Pierre Gerbaud

prices fluctuate considerably. The spring period, driven by the West African sources, appears more fragile due to competition from seasonal products. Exceeding the 20 000-tonne mark, across all sources, at this time of year leads to more or less heavy price disruption. The situation is even clearer for the summer period (July and August), when demand traditionally shrinks, and when paradoxically more and more sources operate with rising quantities: Israel, Senegal, Puerto Rico, the Dominican Republic, and to a lesser degree Mexico. This increase comes from a multitude of sources, which is characterised by an expanded range of varieties and qualities, is a factor disrupting the mango marketing process. The marked under-supply also causes big price variations in the transition periods (April and September-October). Yet in this case, we often get self-regulation of the market, whereby demand shrinks at a certain price level.

Persistent problems

Outside of the quantitative fluctuations disrupting marketing, there are other remaining weighty concerns. This is the case with the persistent sanitary and phytosanitary problems, which are intensifying as the supply increases. Excess residual levels of treatment products are still in place, though they are apparently moderate. Conversely, the fruit fly problem represents a genuine threat to producer countries. While certain sources, such as Peru, seem to be relatively spared from high parasite pressure, given the pedoclimatic data from the production zones, the same cannot be said for other more exposed sources.

The case of India has a significant lesson. After several alerts and audits of the country's services, the number of border interceptions led Europe to declare an embargo on certain fruits, including the mango. The audit by the EU services concerned also revealed certain shortcomings in terms of inspection. Corrective actions have been planned in order to reduce the previously growing number of interceptions. This is resulting in greater restrictions on imports, which could somewhat modify the logistics practices developed to prevent seizure of batches. African countries are also under tight phytosanitary monitoring by the European Union. The industries and public services of these sources will rapidly need to implement effective management resources, unless they want to compromise the growth of their mango exports to Europe ■

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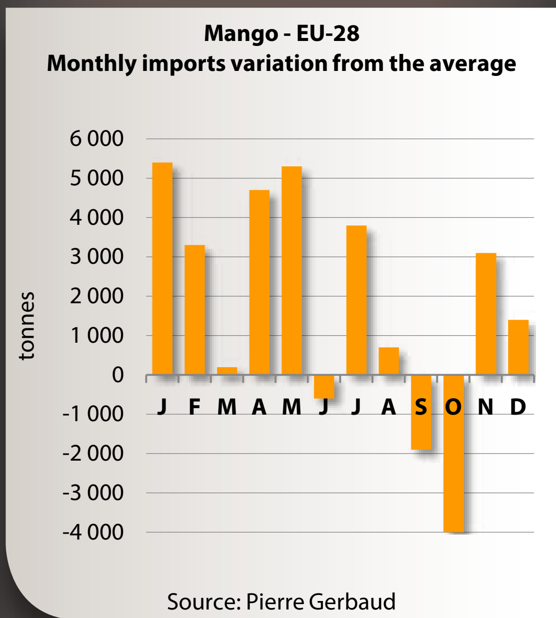
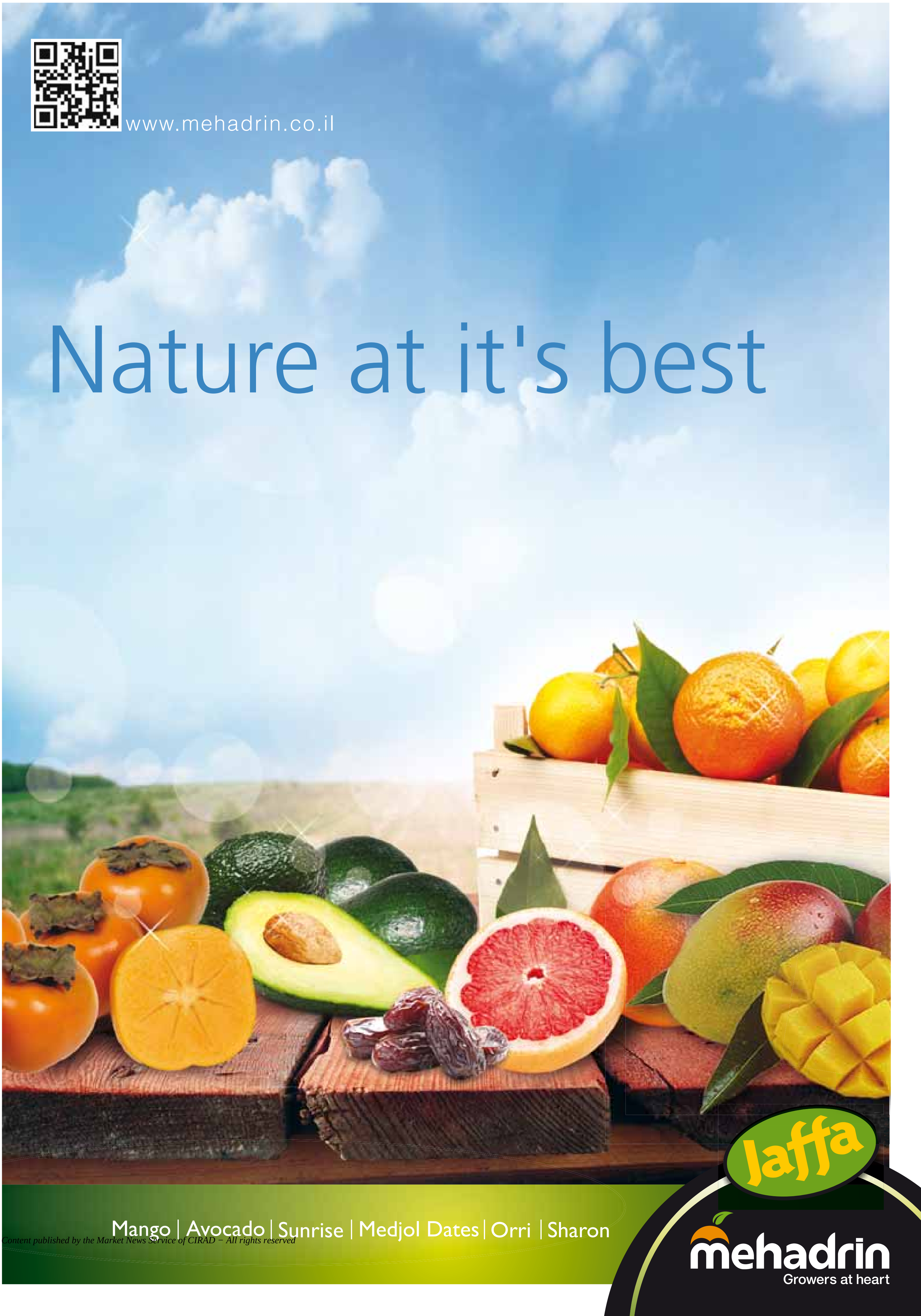


2014 mango campaign
Review by source

Rising tonnages and concentration of campaigns

2014 was characterised by another rise in volumes on the market, both from extra-EU sources and Spain, which consolidated its position at the expense of Brazil, which started its campaign late. The sources operating during the European summer also stepped up their presence at a time when demand is quiet. However, the quantitative development of the mango market found a tough context in which external events sometimes disrupted the organisation of exports from certain sources. Among other events, we can mention the troubles in Mali, the renewed tension in the Israeli-Palestinian conflict at the beginning of summer and the Ebola epidemic in West Africa.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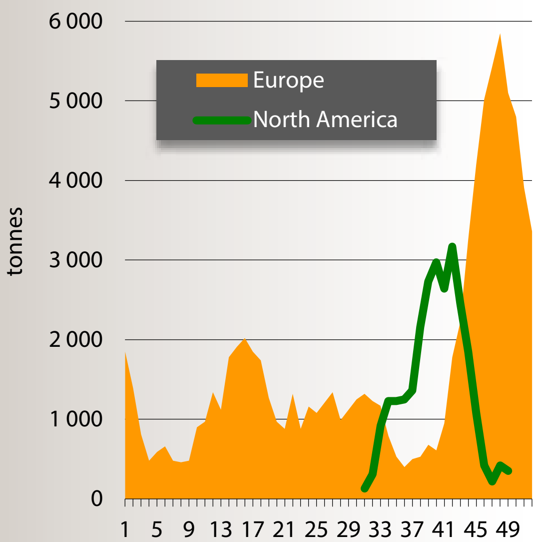
Brazil
Mainstay of the mango supply to the European Union

Sea-freight campaign under control

The slight dip in Brazilian exports to Europe registered since 2010, more like a stagnation rather than a genuine downturn, has not failed to fuel comments by mango market observers over the past few years. Restructuring of the sector, extension of the internal market, dip in competitiveness in Brazilian produce against the competition, there has been no shortage of arguments to justify a fall which some estimated at 10 % of volumes shipped. Yet we should be reassured that the Brazilian giant has not gone away. After levelling out at 90 000 to 91 000 tonnes per year since 2010, Brazilian exports reached nearly 99 000 tonnes in 2014, accompanying the growth in European market imports. The 2014 Brazilian campaign also proved rather positive in aspects besides the quantitative performance. The stutters in the supply from the early 2000s seem to have disappeared in favour of more regulated shipments, taking sale conditions on the recipient markets more into account. Temporary minor surplus or shortage crises were noted, accompanied by a fall or surge in prices. However, these periods remained limited in time, and did not heavily impede the economic results over the long term.

The low prices registered in early 2014 resulted from the confrontation between the large Brazilian supply until the end of 2013, and the early and substantial incoming shipments from Peru. The drastic reduction in Brazilian volumes, with the end of the Kent campaign, helped prices out of the rut. From late January shipments returned to their annual low. Furthermore, Peruvian competition was prevented thanks to Kent shipments being stopped. Tommy Atkins, which have come to dominate the shipments again, helped satisfy a different market sector with limited quantities. Rates, which were less than 4.00 euros/box until January, recovered gradually to recover a more usual level of around 5.50 to 6.00 euros/box. Still present and with a rise in shipped volumes, Brazilian produce compensated for the supply fluctuations during the transitional period between the end of the Peruvian campaign and the start of the West African campaign. In July and August, the weekly quantities from 1 000 to 1 200 tonnes shipped by Brazil proved to be too big for the low summer demand and the parallel supply from Mexico, Senegal, Puerto Rico and Israel. Rates dropped below 4.00 euros/box, recovering only in September when the campaigns of competing sources came to an end. The Brazilian exports were aimed mainly at the

Sea-freight mango - Brazil - Arrivals in Europe and North America in 2014



Weeks / Sources: Brazil, Pierre Gerbaud

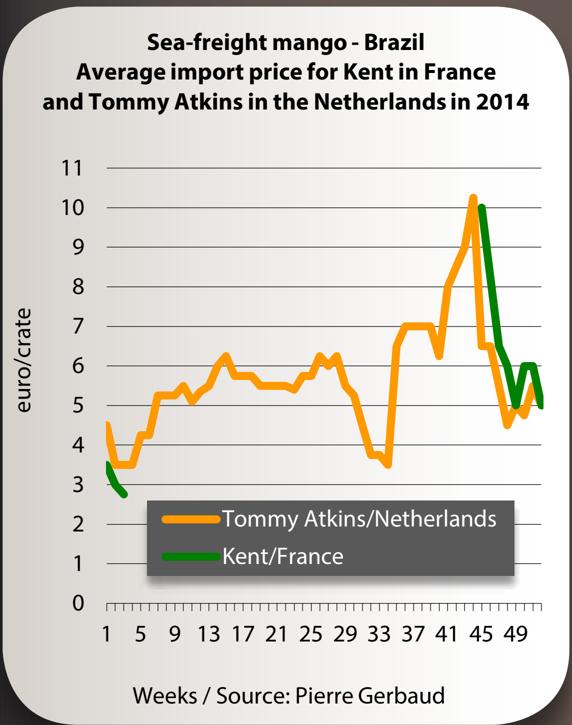
North American markets, with Tommy Atkins and Keitts, abandoning European markets due to the absence of available Kent volumes. The campaign of this variety only started late, creating a marked period of under-supply on European markets, highly profitable to Spanish produce which found an unexpected and extended commercial window. The delay to the Kents caused a surge in the rates of Tommy Atkins, driving prices up to 9.00 to 10.00 euros/box, an exceptional level for this variety. The first Kents in early November were able to find a place on the market on the same price footing. The large, abrupt increase in volumes received gradually weighed down on rates, which dropped to 6.00 euros/box in December. The delay to Brazilian Kents raised concerns of tonnages being deferred to January, when the Peruvian shipments are on the up. Indeed the previous year the Brazilian supply came up against Peruvian shipments on the rise, causing a particularly steep fall in prices. This scenario did not recur in 2014, due on the one hand to the rapid decrease in Brazilian shipments, and on the other hand to smaller Peruvian production. Quite the contrary, the last batches from Brazil, primarily comprising large sizes, still found purchasers at the beginning of 2015 in spite of more haphazard quality. These fruits proved useful in supplementing the abnormally scarce Peruvian supply at the beginning of the year, comprising mainly small sizes.

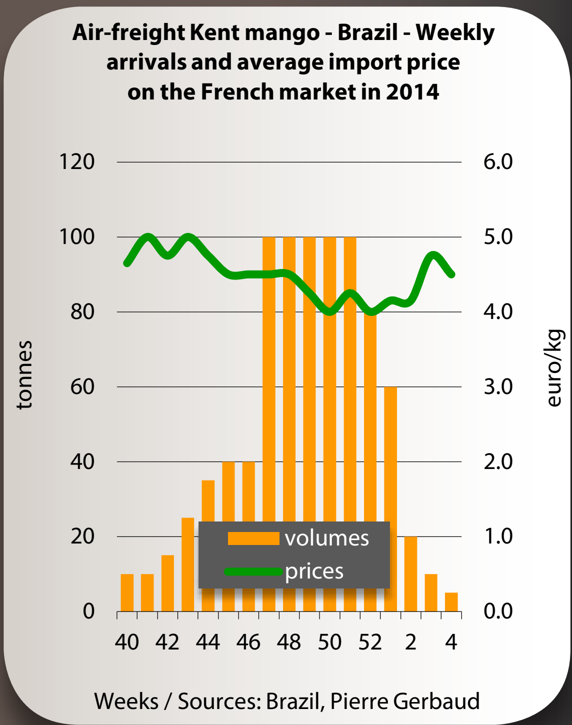
Air-freight campaign marked by a variation in quantity and quality

Brazilian air-freight Kent exports started in early October, and finished in late January. Given the quantitative shortfall at the beginning of the campaign, the rate of Brazilian fruits was set at around 5.00 euros/kg, while low availability persisted. The first shipments comprised fairly green fruits, though at a satisfactory stage of maturity. In the first half of November, the supply expanded and the number of import operators grew, leading to a fall in rates stabilising at around 4.00 euros/kg in the second half of December. The influx of merchandise of variable quality did not enable a price re-evaluation for the end-of-year holidays, in spite of livelier demand. It was not until January that rates recovered, due to dwindling incoming shipments and moderate competition from Peruvian produce, which was embarking on its season.

Compatibility with international demand

In 2014, Brazil assumed its role of the leading mango supplier to the European market. We can note that its exports remained mainly aimed at Europe, and that its presence on the North American markets was limited to August and September. On these markets, competition from the Latin American sources proved more intense, with produce from Mexico and Ecuador among others. Peru also grabbed some market share in the North American consumption





centres, having overtaken Brazil around a decade ago.

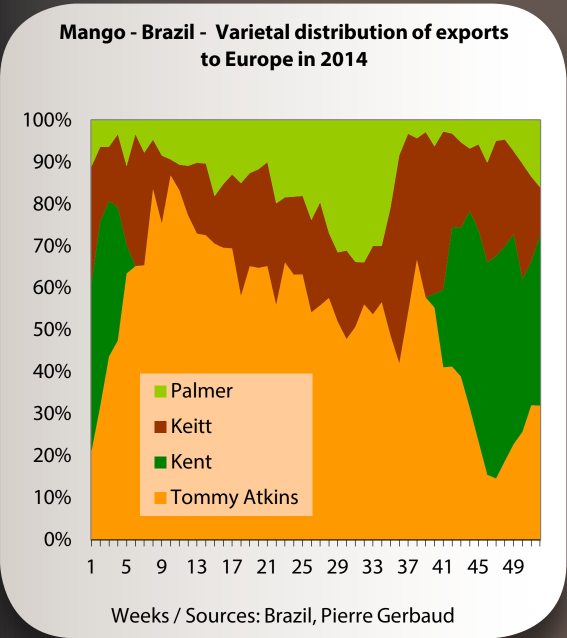
The abundance of Brazilian mangoes on the European market was based on the scale of production, taking advantage of favourable pedoclimatic conditions in the various parts of the country. However, the consolidation of flows to Europe was not down to chance. The source has a considerable internal market, and a processing industry with the ability to harness its non-exportable produce. These assets are backed up by better structuring of the industry for the past decade, which has curtailed the crises of the early 2000s. Finally, more recently, we have observed better compatibility of supply with the demands of the international market. For Europe, the varietal modifications made over the past few years speak for themselves. In 2010, the varietal breakdown of Brazilian exports was as follows: Tommy Atkins 71 %, Kent and Keitt 12 % each and Palmer 5 %. In 2014, we had Tommy Atkins 43 %, Kent 25 %, Keitt 21 % and Palmer 11 %. The transition from all Tommy Atkins to a wider and more balanced varietal range illustrates the ability of the Brazilian industry to rapidly adapt its stock to the imperatives of trade.

Peru

From low point to high point

The 2013-14 Peruvian campaign got off to a painful start. In late November 2013, the first sea-freight shipments reached Europe and quickly came up against large imports from Brazil, which compensated for the late start of its winter campaign by extending its shipments. This resulted in particularly low rates, in complete contrast with the beginning of the previous season. Under pressure from volumes available and moderate demand, the Peruvian mango rate dipped in January, stabilising at around 3.00 euros/box. In February, the liquidation of the last Brazilian batches left Peru as the sole supplier to the European market. Rates rose rapidly, stabilising in the first half of March at 4.50 euros/box. In mid-March, Peruvian exports dipped rapidly, causing a particularly big price surge with demand picking up in the run-up to Easter. In practically three weeks, rates soared from 4.50 to 7.50/box. In late April, they dropped again to 4.00 euros/box for the last incoming batches.

The Peruvian air-freight campaign fluctuated in line with the scale of incoming shipments and the market demand. At the beginning of the campaign, the novelty effect enabled high prices, above 5.00 euros/kg, though the simultaneous presence of Brazilian mangoes rapidly dragged prices downward. In December, the increase in shipments from both Brazil and Peru dragged prices downward, below 4.00 euros/kg. The gradual cessation of Brazilian shipments favoured a partial recovery of rates in January. Yet this rapidly came to a halt under the effect of a distinct rise in supply, which in January drove prices to their lowest level of the campaign. Rates continued to fluctuate in line with the supply levels, and the state of

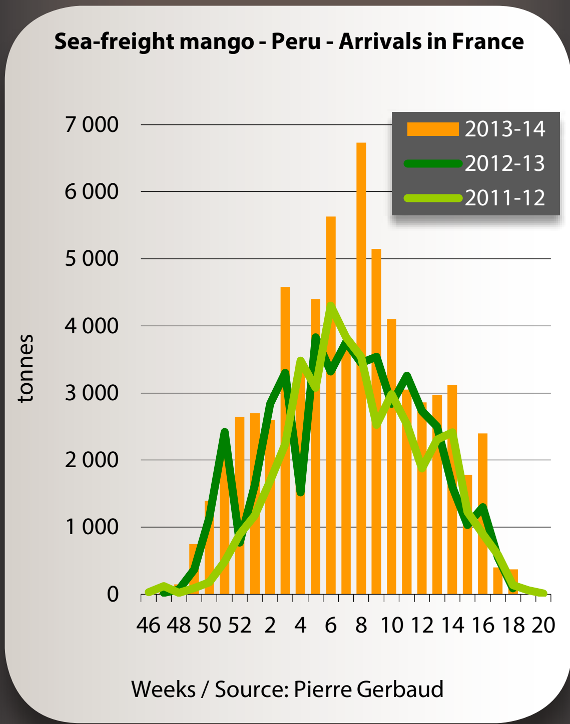


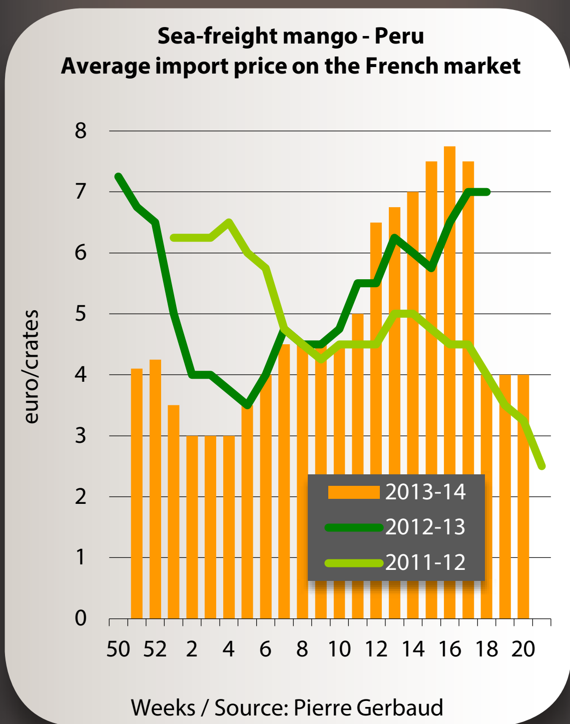
demand. In late February, a temporary decrease in the supply generated a price increase, followed by renewed deterioration caused by a bigger supply surge in anticipation of the traditional Easter demand peak. In April, prices strengthened as Peruvian shipments waned, gradually replaced by West African shipments.

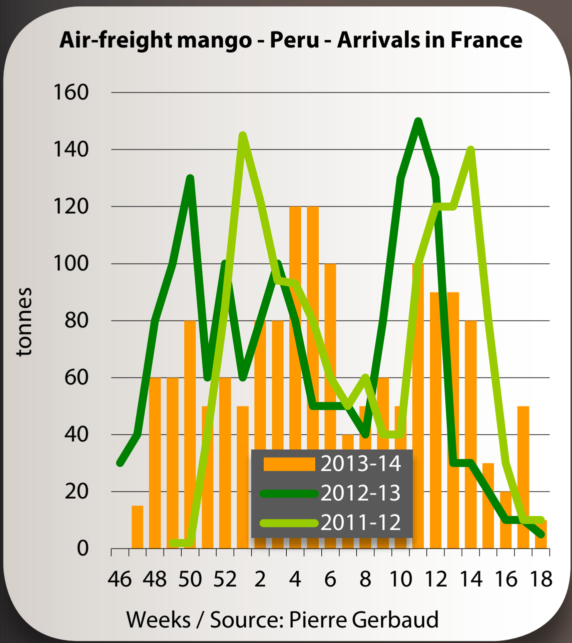
The Peruvian campaign registered fairly lukewarm results, and in any case, was not as good as the previous campaign. First we saw a big rise in volumes shipped to Europe (nearly 72 000 tonnes), intensifying the presence of the source in relation to the previous campaign (approximately 69 000 tonnes). Peru consolidated its number two spot among mango suppliers to Europe, behind its main competitor Brazil. These two sources followed the same trend, with exports aimed at both the North American and European markets. While Brazil remained the number one supplier to the European market, Peru has for several years been ahead of its competitor in North America, shipping in total double the quantities shipped by Brazil.

These two sources can be distinguished mainly by their harvest calendars, which are fortunately staggered, covering six months of the supply to Europe. Yet the transition from one country to the other in December sometimes proves problematic. The accumulation of Brazilian volumes at the end of the year can lead to confrontation between the two suppliers. Peru needs only to start its campaign early, with large volumes. In this scenario, the recipient markets are rapidly saturated, leading to falling or sometimes plummeting rates; and not even the theoretical increase in demand for the end-of-year holidays can halt this trend. This was how the campaign went from late 2013-early 2014, plunging the European market into a slump from which it was only able to emerge after more than one month. Such starts to the campaign are extremely difficult to retrieve, even though prices soared at the end of the season before the massive influx of West African volumes. Indeed, the tonnages shipped in this period have nothing in common with the January-February shipments, which represented 55 % of total Peruvian exports in 2014, compared with the 17 % exported in April-May.

The imbalance in the size range too remains a disrupting factor. The excess of small sizes at the beginning of the campaign, and of large sizes in the second half of the season, represents a variable in setting the sale prices. Opting for medium-sized fruit to satisfy European demand might help limit the overall volumes shipped, and in so doing prevent the big price fluctuations and earn better value for the fruit.






Air-freight mango - Peru - Arrivals in France
tonnes
160
140
120
100
80
60
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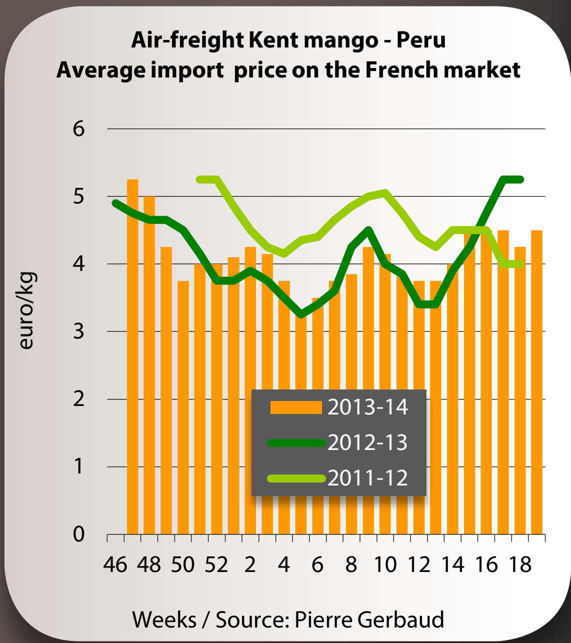
20
0
46 48 50 52 2 4 6 8 10 12 14 16 18
2013-14
2012-13
2011-12
Weeks / Source: Pierre Gerbaud


Air-freight Kent mango - Peru
Average import price on the French market
euro/kg
6
5
4
3
2
1
0
46 48 50 52 2 4 6 8 10 12 14 16 18
2013-14
2012-13
2011-12
Weeks / Source: Pierre Gerbaud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Sunshine

West Africa
Continuing its climb

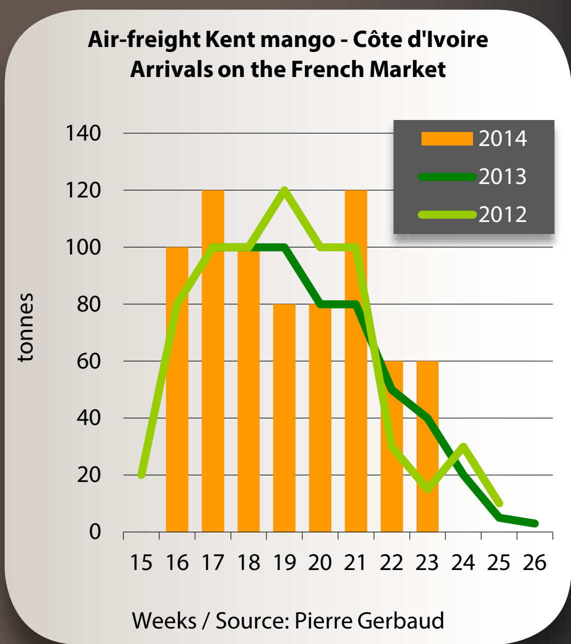
The group of the three main West African sources (Côte d'Ivoire, Mali and Burkina Faso) continued its growth in 2014 on the international mango market, and more particularly to the European Union. The last three campaigns have been marked by a considerable rise in export tonnages, which went from 21 200 tonnes in 2012 to 24 200 tonnes in 2013. The increase in flows picked up in 2014, reaching a total of 27 400 tonnes. The driving factor behind this trend was Côte d'Ivoire, which represented 75 % of the total for the three sources in 2014. Burkina Faso stabilised its exports. Conversely, Malian shipments were down by around a thousand tonnes. The instability of the country certainly did not help trade, although the mango production zones are in the south of the country.

The steep rise in West African exports came in a European trade context distinctly less favourable than the previous year. Winter 2012-13, which was very harsh in Europe, resulted in a one-month delay to European fruit production. Imported fruits, more particularly from West Africa, enjoyed exceptional market conditions. Things were different in 2014, when European production returned to a more normal cycle, which intensified competition on the markets. The economic results of the 2014 campaign were lower, though the wider distribution of West African mangoes probably provided a more solid base for these products on the European markets.

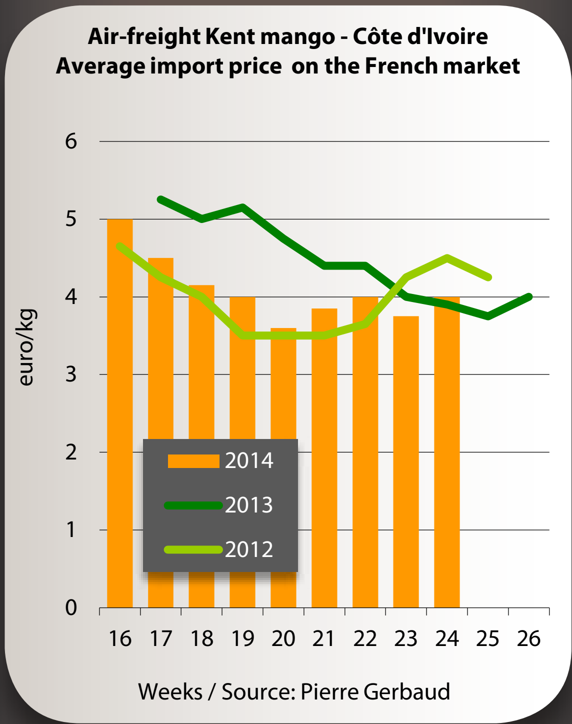
Côte d'Ivoire
Another record broken

Big air-freight campaign

With nearly 20 500 tonnes exported during the 2014 campaign, Côte d'Ivoire consolidated its number three position in the ranking of mango suppliers to the European Union. The campaign began, without getting ahead of schedule, in mid-April for the first air-freight Kents. The Easter holiday, late this year, helped the first shipments sell under satisfactory market conditions, with Peruvian shipments finishing. Produce from Mali and Burkina Faso represented only limited competition. Prices were set along the same lines as the last Peruvian batches, or even higher, due to the novelty effect of the source and the fresher



produce. After the pull from the Easter period, the Ivorian mango rate dipped until mid-May, when it stabilised at around 3.50 euros/kg. This downturn was probably due to a fall in demand, but also to an overladen market given the large volumes arriving in regular shipments within three or four weeks. The latish start to the campaign encouraged operators initially to favour air-freight shipments, to ensure their presence on the European market, pending the arrival of sea-freight mangoes. The market congestion and relatively poor fruit sales led to more or less prolonged storage, causing accelerated maturation of the produce, and its depreciation. The rate recovered to around 4.00 euros/kg until the end of the campaign, in early June, in parallel with the reduction in incoming volumes.



Better distribution of sea-freight mangoes

With an additional 4 000 tonnes on the previous year, and less favourable market conditions, the Ivorian campaign proved more difficult and mixed in 2014. The first Kent containers were received in the last week of April, on a lightly supplied market, enabling fairly high rates of around 7.00 euros/box on average. Yet the massive influx of merchandise in the following weeks, as the seasonal fruit supply progressed, drove the Ivorian mango rate into a downward trend until the end of May. It stabilised at around 4.50 euros/box until the end of the campaign. In late May and early June, sales were made at lower prices for fruits of more fragile quality. Some exports continued in the first half of June with Kents, but also some small quantities of later Keitts. The Ivorian campaign was beset with numerous logistical problems, causing shipping and delivery delays, which constantly undermined the product quality.

This campaign will be remembered for its extreme brevity, a trend observed previously. Indeed, 16 000 of the 20 500 tonnes exported by Côte d'Ivoire went in May, causing an influx of merchandise which forced import operators to store the incoming shipments, or risk seeing quality deterioration. However, rates did not plummet, as was the case a few years ago. One of the possible explanations lies in the better distribution of Ivorian mangoes across the various European markets. For the past several campaigns, interest from European operators outside of France in Ivorian fruits has seemed to be on the rise. The availability of substantial volumes of Kent, of satisfactory overall quality, doubtless represents the best form of promotion. The increasing development of mango triggering processes has also contributed to the relatively fluid sales of quantities entering Europe.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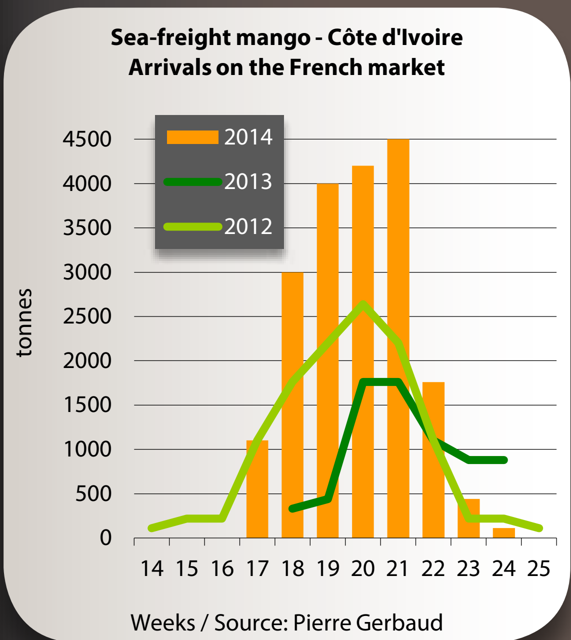
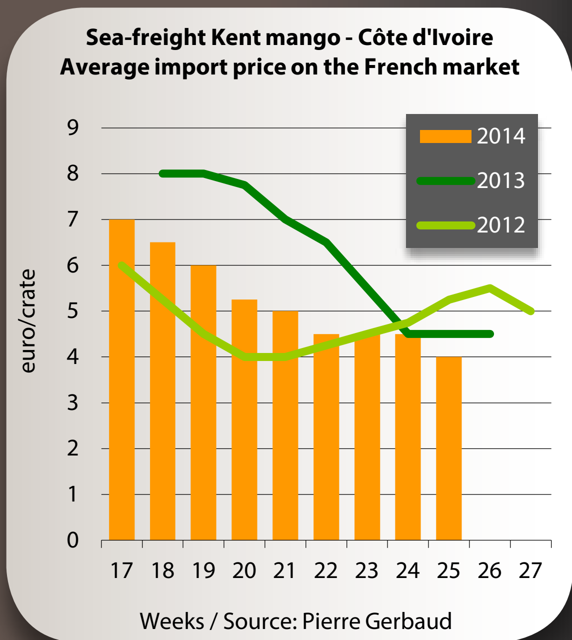
The fact remains that the very short duration of its campaign represents a major handicap for this big supplier. Indeed, it is limited by its fairly late start - which leaves the field open to the expansion dreams of Peru, Brazil and to a lesser degree the Dominican Republic - as well as by the real risks of fungal development on the fruits, generally from mid-May. The constraint on the start of the campaign is difficult to overcome, given the composition of the Ivorian stock. Conversely, actions against fungal development could be contemplated, but would require investment by exporters and producers to which they would not necessarily agree. These actions could be achieved through better orchard maintenance and the implementation of crop treatment programmes to combat parasites. This would all come under actions aimed at limiting parasite pressure by the fruit fly, another recurrent factor which is limiting the long-term growth of exports. A major crisis in the profession, such as that suffered by the Madagascan litchi industry in 2010 with excess residual levels of treatment products, could force the Ivorian mango industry to develop more quickly. Of course, this type of crisis is not desirable, and concerted action by the operators would be preferable and less painful.



Sea-freight mango - Côte d'Ivoire
Arrivals on the French market

Weeks / Source: Pierre Gerbaud



Sea-freight Kent mango - Côte d'Ivoire
Average import price on the French market

Weeks / Source: Pierre Gerbaud

Mali
Back to square one

A more difficult air-freight campaign

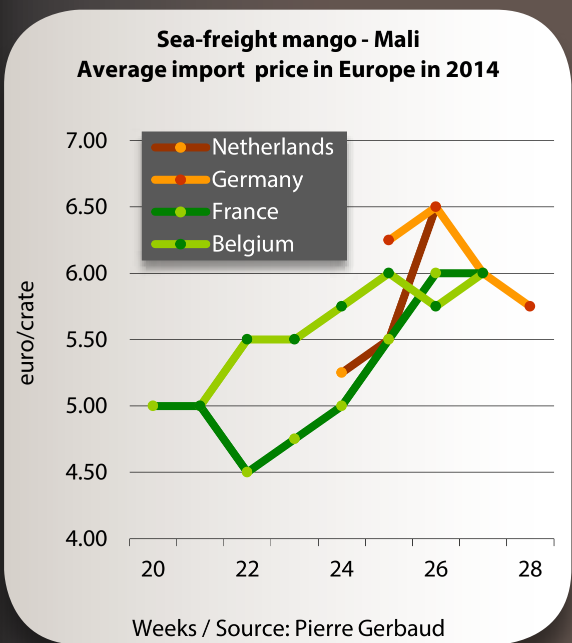
2014 was a more difficult campaign for this land-locked source. Mali ploughed the same furrow as Côte d'Ivoire in 2013, given the particular circumstances of the European market with its shortage of temperate produce at the beginning of the campaign. Its perhaps less abundant production and the weaker pull from European demand explain in part the downturn in Malian exports in 2014. Down by around a thousand tonnes, Mali returned to its usual export quantities.

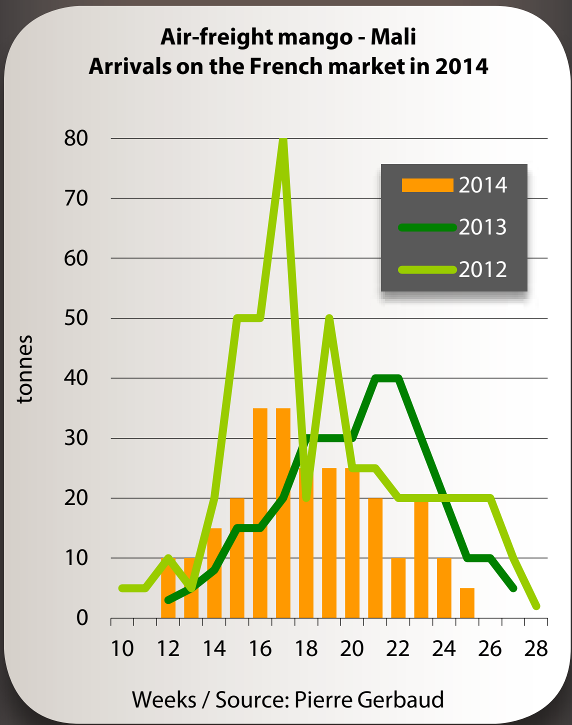
The Malian campaign began in mid-March with near-simultaneous shipments of Amélie and Valencia. While Amélie customers are a determinedly specific group, Valencia retains a wider customer base. The first Amélie batches sold at around 3.00 euros/kg, taking advantage of the fall in Peruvian shipments. Their rates quickly dipped to between 2.50 and 3.00 euros/kg until the end of the campaign in the first week of June. Valencia exports also started in mid-March. Generally, this more coloured variety was in greater demand at the beginning of the season, before the first Kent batches came in. It was also an alternative to the Peruvian supply. Curiously, its flows seem to have been more modest this year. Customers fairly quickly turned from this product, fuelling a continuous price fall. At between 3.00 and 3.50 euros/kg from mid-March to mid-April, prices struggled to hold up at around 3.00 euros/kg until mid-May when shipments came to an end. The average quality and rapid development of the fruits probably contributed to purchasers pulling out.

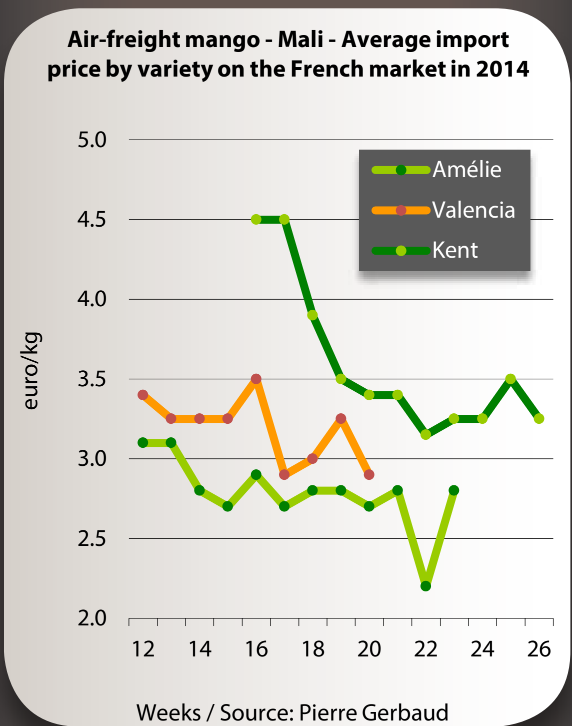
Mid-April saw the start of the Kent shipments. Taking advantage of livelier demand for Easter, this produce sold at around 4.50 euros/kg, given the temporarily dwindling supply at this time. Prices of the other varieties available slumped with the arrival of the Kents, whose fairly high rates dropped rapidly from their third week on the market. The big shipments from Côte d'Ivoire, of more uniform quality, gave the Malian produce some definite competition. The rates of Malian Kents then stabilised at between 3.00 and 3.50 euros/kg, before strengthening slightly at the end of the campaign with the gradual withdrawal of Côte d'Ivoire.

A more fluid sea-freight campaign

Whereas in 2013 Malian sea-freight shipments started at the same time as those from Côte d'Ivoire, they were offset in 2014. The first volumes came onto







the market in mid-May, while Côte d'Ivoire fruits were still abundantly supplying the market although shipments were ending. Malian mangoes suffered from the omnipresence of Ivorian fruits at the beginning of the campaign, particularly on the French market where this produce sold at a falling trend of 5.00 to 4.50 euros/box. Yet from the beginning of June, with available volumes on the decrease, rates strengthened to back above the 5.00 euros/box mark. Thereafter they kept on rising, reaching 6.00 euros/box in the first half of July, which marked the end of the shipments from this source. On the Belgian, Dutch and German markets, the price trend was the same, though at a lower level. Mali, like Côte d'Ivoire, seems to earn better value for its produce due to wider distribution across the various European markets, despite the longer and costly logistics. Exports went on beyond the Côte d'Ivoire campaign, providing Mali with market opportunities both for Kent and Keitt, which extended its market period from June.

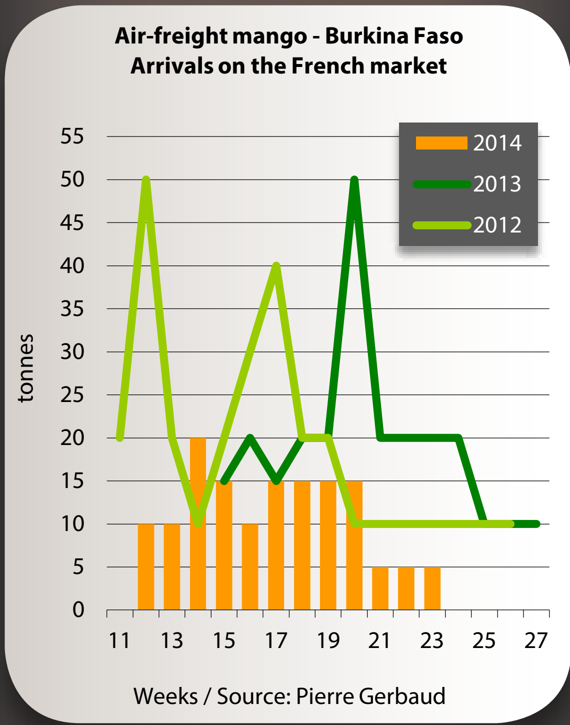
In spite of a quantitative downturn, Mali remains a supplementary supplier to the European market. True, its exports to Europe remain limited in view of its production, though the existing potential represents a considerable reserve on a West African scale. Furthermore, exporters, limited by restrictive logistics, are also turning to the regional market, which is enabling them to sell some of their produce on markets which may be less lucrative, though more accessible.

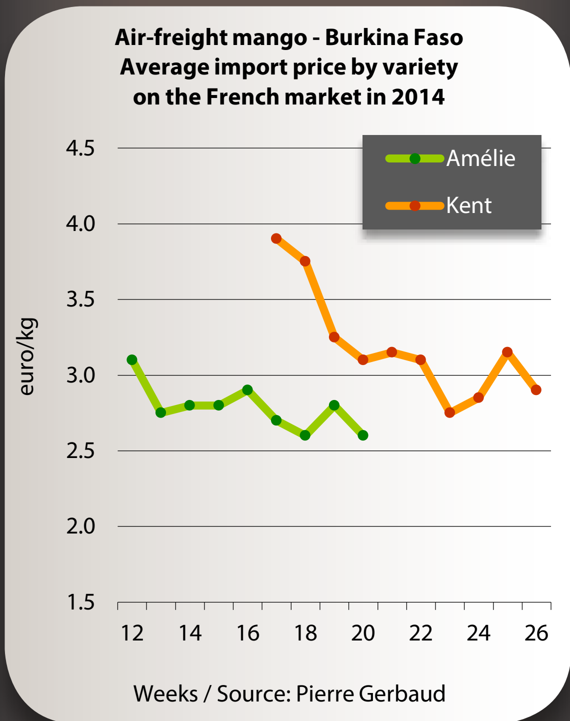
Burkina Faso
As you were

The number three West African mango supplier to the European market, Burkina Faso exported the same quantities as in 2013, to within a few dozen tonnes. As with Mali, its landlocked location restricts it to a supplementary role on the European market. The first exports comprised air-freight Amélie from mid-March, which were sold on the same footing as Malian exports, present at the same time, of between 2.50 and 3.00 euros/kg. Kent shipments took over from late April. The first batches sold at around 4.00 euros/kg, and then the rate dipped, before stabilising at between 3.00 and 3.50 euros/kg until late June.

As in 2013, sea-freight exports were aimed mainly at North European countries, over a short period from late May to the third week of June. Sale prices were at around 5.50 euros/box for good quality produce. Some batches of more fragile quality sold at around 4.50 euros/box.

Burkina Faso is diversifying the sale of its mangoes, with organic certified produce, and is taking targeted trade circuits. The development of outlets toward the West African sub-region and dried mango production have also been more prominent trends for this source for the past few years.





Guinea

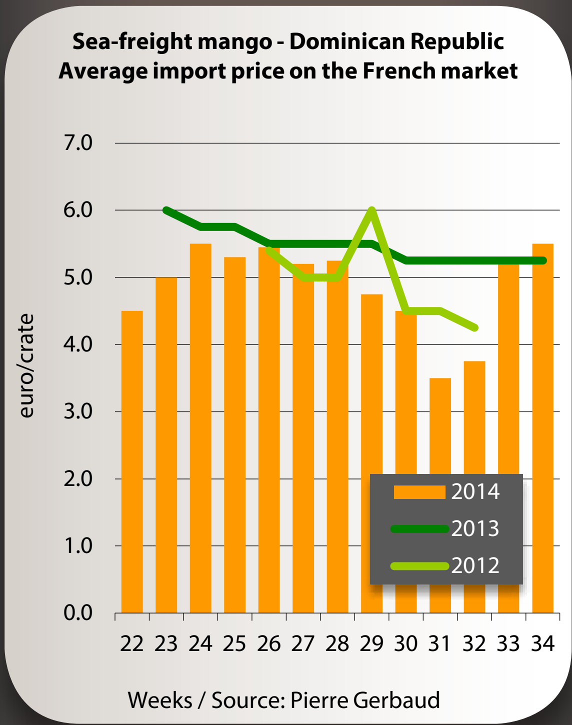
A supplementary source

When we talk about the European mango market, and more particularly the West African supplier countries, Guinea rarely gets a mention. Indeed, this source is not among the main suppliers to the European market. However, it enjoys substantial mango resources, from the region of Kindia to Kankan toward the Malian border. The underexploited Guinean cultivation stock supplies mainly the national and regional markets. The rather archaic structuring of the orchards and major logistical constraints considerably limit exports. Flows to Europe remain moderate and far removed from the production potential. In 2012 and 2013, Guinean exports amounted to around 800 tonnes per year. In 2014, the results climbed to reach around one thousand tonnes. Guinean exports primarily comprise Keitts available from April to June, most particularly aimed at the Belgian and British markets, where customer loyalty has been built over the campaigns. The rise in Guinean exports came under tough conditions, given the Ebola epidemic. The development of the disease, which sprang from this country, led to concern among import operators over the risks of it spreading to the recipient countries. The proof provided by the major international health institutions that the fruits were safe, conveyed by the media and professional organisations, was ultimately able to keep the mango trade circuits open.

Dominican Republic
A source on the rise

From 2008 to 2010, the Dominican Republic shipped approximately 4 000 tonnes of mangoes per year to the European markets, and in 2011 and 2012, it passed the 6 000-tonnes mark. This rise was confirmed in 2013 with 9 600 tonnes. 2014 marked another stride forward, with nearly 11 000 tonnes. The Dominican shipping calendar runs from May to September, with a quantitative peak from June to August.

While the rise in tonnages has confirmed the source's export capacity, the 2014 campaign was tougher than the previous one. The weight of volumes on the market clearly hindered price development. Yet besides the growth of Dominican flows, we should note the overall load on the markets during the shipment period. In May-June, the rate of Dominican Keitts maintained between 5.00 and 5.50 euros/box. Conversely it dipped in July and August, when market demand was lower but an abundant supply in place. The rate did not recover until the second half of August, which saw several competing sources scale back or withdraw their shipments. In 2013, flows were smaller in summer, which helped keep prices steadier for Dominican fruits. The context of 2014 was characterised by a more abundant summer supply, which caused a general dip in prices, across all sources and varieties. Like Puerto Rico, the Dominican Republic exceeded 10 000 tonnes of exports in 2014, thereby expanding the group of the main suppliers to the European market and offering an alternative to operators still seeking a regular supply over the longest possible periods.



Senegal
Another boom

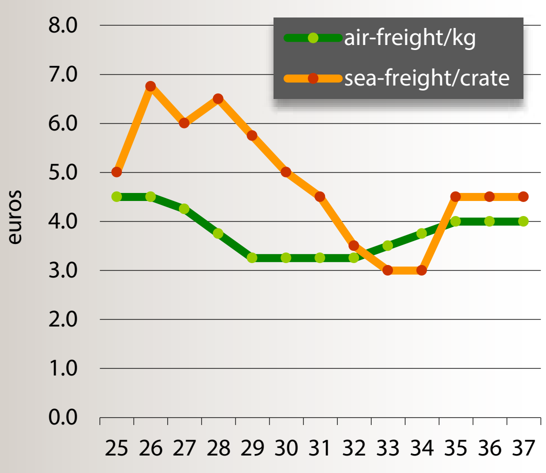
Senegal continued its quantitative surge in 2014. Back in 2013, the source rose steeply, with 8 300 t of mango exports, as opposed to 6 000 t traditionally. For the last campaign, all previous records were broken, with 10 200 tonnes shipped to European markets. Conversely, this rapid and protracted growth is not certain to result in a proportional improvement in economic results.

The air-freight and sea-freight campaigns ran in parallel from mid-June to early September, i.e. the same amplitude as last year. Senegalese air-freight mangoes sold at around 4.50 euros/kg for the first incoming batches. Yet their rate rapidly dropped, before stabilising at around 3.25 euros/kg in the second half of July. This price level lasted until mid-August, when Kent volumes were dipping, which helped rates recover, though to no more than 4.00 euros/kg.

The sea-freight supply saw the same type of trend, though at a different tempo. In June, the first incoming shipments from Senegal sold at high prices (6.00 to 7.00 euros/box), due to the dwindling good quality Kent on the European market, which was being supplied at the time by end-of-campaign West African fruits (Côte d'Ivoire, Mali, Burkina Faso). Yet rapidly the Senegalese mango rate took a downturn and dropped until the second half of August, when it bottomed out at 3.00 euros/box. This big price downturn period coincided with the supply peak, with Senegal packing in 80 % of its total shipments between July and August. These combined with the merchandise from the other sources, which were practically all sending rising quantities. The quality deterioration also explains the price downturn. The heterogeneous maturity and above all the development of fungal diseases made a big contribution to the deterioration in market conditions, paradoxically at a time when the supply was easing off.

Despite their standard presentation and appearance, Senegalese mangoes are often judged to have superior taste quality to fruit of the same variety from other sources. This is a positive point based on which this source could boost its trade outlets in the long term.

Kent mango - Senegal - Average import price on the French market in 2014



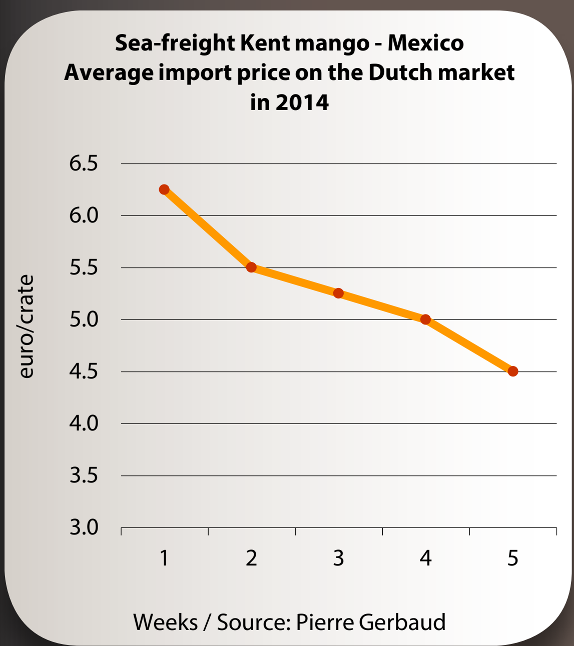
Weeks / Source: Pierre Gerbaud

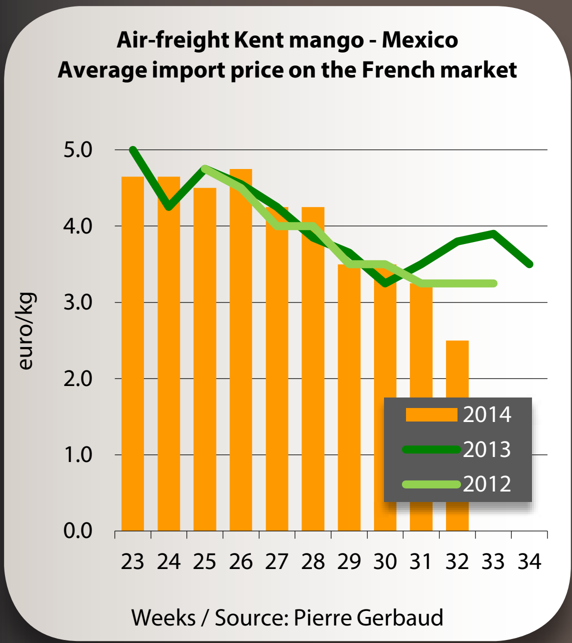
Mexico
A source on the wane?

A mediocre campaign

We are leaving behind the time when the Mexican mango kept conquering the European market, bridging the gap between the end of the West African campaigns and the Israeli campaign. After a considerable rise to 5 000 tonnes per year in 2010 and 2011, Mexican exports to Europe ebbed as the seasons went by. Still at around 3 000 tonnes in 2013, they saw their presence dwindle further in 2014 to 2 200 tonnes. The June-August trade window available to Mexican Kents for the past several years has not widened, as certain Mexican exporters wishing to diversify their outlets might have believed. The attraction of the North American markets, the later batches from West Africa and Senegal coming to the fore seem to have, at least partially, put a stop to Mexican dreams of expansion.

While Mexican air-freight Kents have maintained their trade window between June and August, it has been mainly sea-freight shipments which have declined in recent years. In 2014, they were





packed into July, when demand was dipping rapidly and when the European market was fairly abundantly supplied by Senegal, Israel at the beginning of its campaign, Puerto Rico and the Dominican Republic in mid-season. Faced with this strong competition and unfavourable market conditions, the Mexican mango rate kept falling, which doubtless explained the premature halt to shipments, which in previous years had continued until late August. The multiple storms and hurricanes striking in 2014 also contributed to reducing exports and to the qualitative fragility of the produce shipped.

The air-freight campaign was different. It started earlier in June, when Kent availability was lower. The Mexican mango rate was also fairly stable at around 4.50 euros/kg on average during this period. It saw a progressive and steep deterioration in July due to stiffer competition, demand losing momentum and above all a quality deterioration in the fruit. The prices registered widened considerably because of the highly variable maturity, even leading to clearance sales for the highly mature batches. On top of this the second half of July saw increasingly frequent fungal development, which accelerated the price falls and ultimately led to the suspension of shipments two to three weeks before the end of campaigns from previous years.

Potential intact

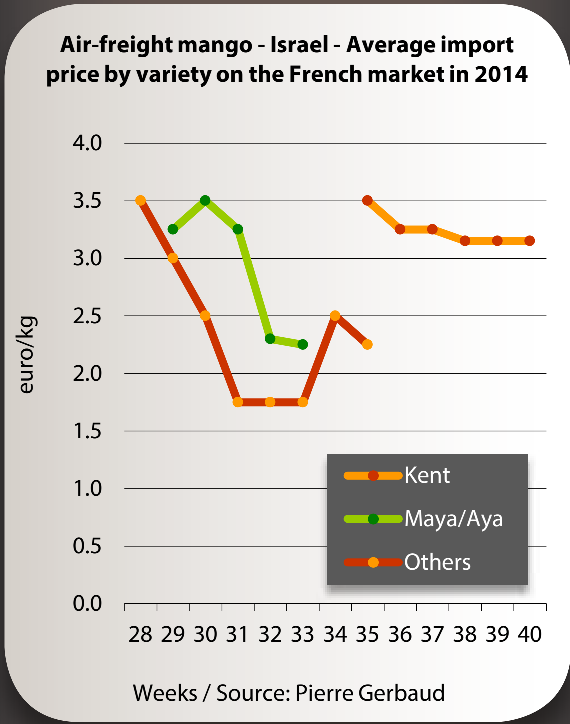
Mexico has seen a real downturn, but this source can make a comeback on the European market if new opportunities arise. Mexico remains the world number one mango exporter, shipping nearly 300 000 tonnes per year, which puts it in a favoured situation with clear potential to direct its merchandise flows. While the North American market remains the main target of Mexican operators for reasons of proximity, profitability and commercial relations, a few thousand tonnes can always be diverted from this captive market. The opening up of the Japanese market to Mexican fruits for the past few years is proof of this.

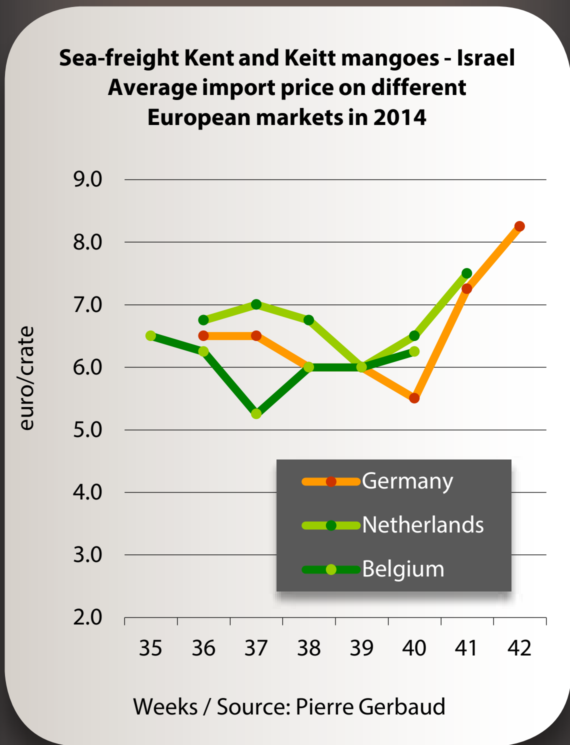
Israel
A big 2014 campaign

With nearly 16 000 tonnes, Israel set a new mango export record to the European Union. We need to go back to the 2007 campaign to find a result close to comparable, of 15 000 tonnes. The previous campaigns fluctuated between exports of 10 000 and 12 000 tonnes. Israeli shipments started in July, before finishing in early October with marginal quantities.

A mediocre air-freight campaign

The air-freight campaign started in early July, with incoming Haden, Shelly, Kasturi and Omer. In the heat of competition with Mexican and Senegalese Kents, these varieties struggled to establish themselves on the markets. Shipments of Aya and Maya were slightly later, arriving in the second half of July, whereas these specifically Israeli varieties traditionally opened the campaigns. These fruits received a lukewarm welcome from purchasers, and their sale price rapidly deteriorated. Approximately 3.50 euros/kg at the beginning of the campaign, the Haden, Kasturi and Shelly price dropped below 2.00 euros/kg in late July. It did not recover until the second half of August, to around 2.50 euros/kg for the last batches on the market. The Aya and Maya rate followed more or less the same trend, though at a slightly higher level. The Kents available from mid-August to September were valued at 3.50 euros/kg to 3.00 euros/kg at the end of the period.

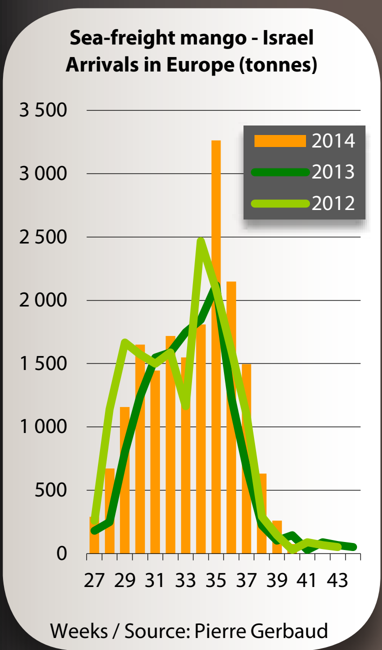


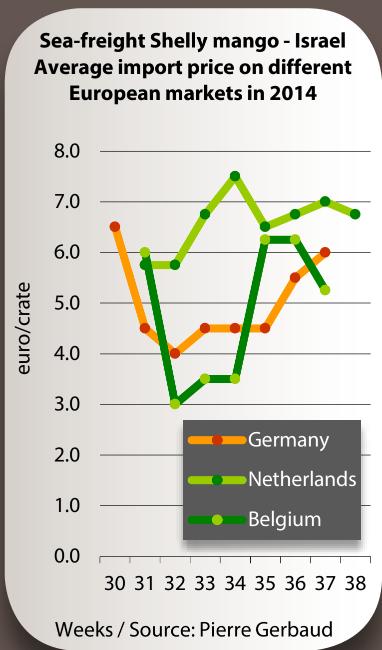


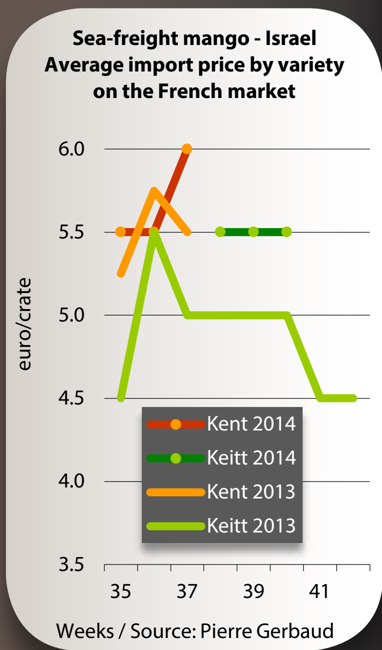
The early-campaign varieties seem to have suffered from competition from Kents from other sources. In France in particular, another factor was observed on the wholesale markets, where the retailers made the bulk of their procurements. This involved a sort of boycott of Israeli produce due to the rising tension in the Israeli-Palestinian conflict. Indeed a number of purchasers abandoned the source, causing poor sales which drove prices downward.

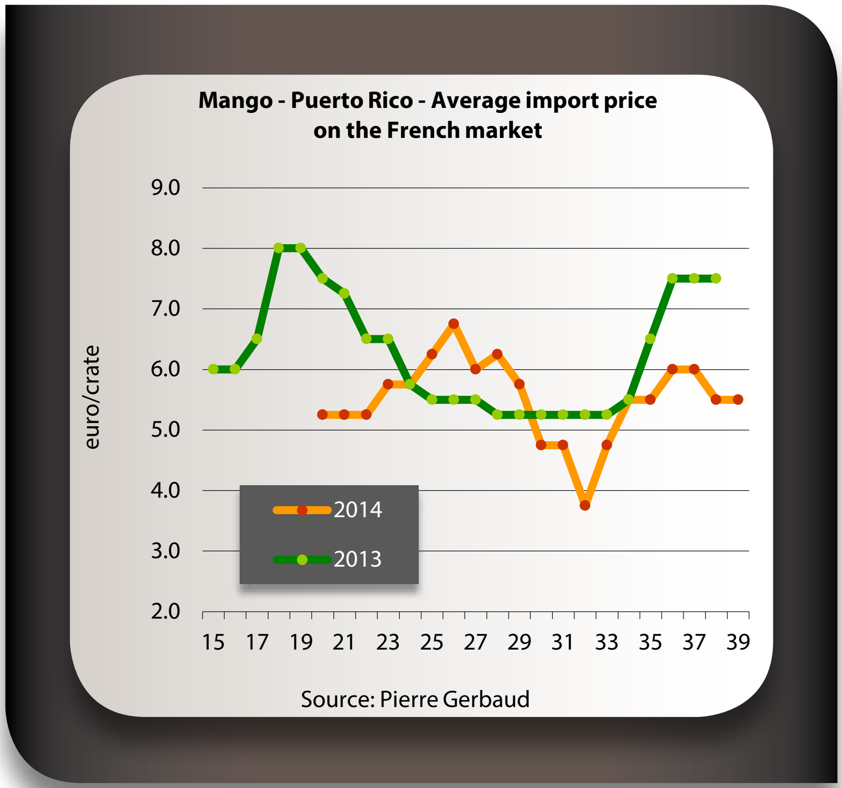
Sea-freight quantities on the up

In parallel with the air-freight export campaign, a big sea-freight campaign took shape. It began in the second half of July with the Shelly variety, and continued from late August with Kents and above all Keitts until early October. Shelly exports were aimed mainly at the North European countries (Belgium, Germany and the Netherlands), while demand rapidly withered and the European market was abundantly supplied by the Dominican Republic, Puerto Rico, Senegal, and to a lesser degree Mexico. While the rate of these mangoes remained fixed at between 6.00 and 7.00 euros/box in the Netherlands, it was considerably lower on the German and Belgian markets, with averages of between 3.00 and 4.00 euros/box characterised by big fluctuations. The more southern European markets favoured Senegalese Kents during the same period. In the second half of August, the Shelly rate recovered as the European supply dipped. At this time, Israel started its Kent and then Keitt shipments, more popular with purchasers and with less competition from merchandise from other sources. Rates rose to between 6.00 and 7.00 euros/box, with a surge for the last batches on the market due to the dwindling overall supply. Kents and Keitts sold at more moderate prices on the French market, already focused on Spanish produce. Despite the pressure from sources operating during the summer period, Israel remained an essential market supplier, with volumes on the increase. The source maintained its place on European markets, though its varietal choices and the proliferation of competition made selling its produce more difficult. The Kent availability period seemed to shrink in favour of Shelly and Keitt, which are not the most popular varieties if there is a Kent supply at the same time.









Puerto Rico
A stabilisation campaign

After the leap registered in 2013 to nearly 12 000 tonnes, from the traditional 7 000 to 8 000 tonnes, the 2014 campaign appears to have been a season of stabilising tonnages, with 11 200 tonnes shipped to the European markets. This slight quantitative downturn probably results from a later season than in 2013, leading to delayed exports. From mid-May to late July, the Puerto Rican mango rate fluctuated between 5.00 and 6.00 euros/box, with some peaks up to 6.75 euros/box in late June, when the supply to the European market was smaller. It then progressively plunged to below 4.00 euros/box in the first half of August, when demand was smaller and when the supply remained substantial, with the combined shipments from Israel, the Dominican Republic, Senegal and Mexico. It then recovered from the second half of August, regaining its initial level in September (5.00-6.00 euros/box) when the source's campaign was coming to its end.

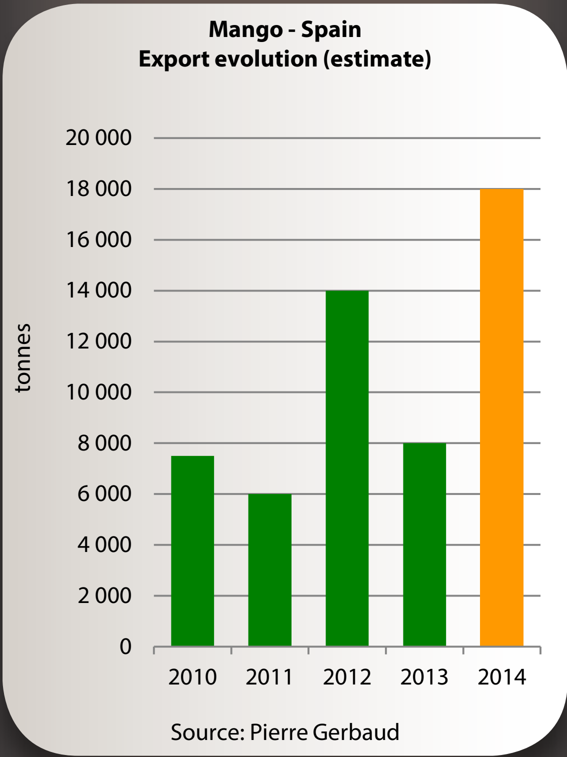
Puerto Rican shipments primarily comprised Keitts aimed at the supermarket sector, which found an alternative of standard and regular quality. The later start this year doubtless contributed to the more compressed results than in 2013, when the early-campaign shipments took advantage of particularly favourable market conditions during the transition between Peru and West Africa. Nearly 50 % of mangoes from this source went to the Netherlands, and 40 % to the United Kingdom. They then underwent intra-Community trade depending on the supply needs of the various EU markets. More than a top-up source, Puerto Rico is gradually establishing itself as a regular supplier to the European Union, and making a proportional contribution to the overall increase in the European mango market.

Spain
Steep rise under a lucky star

With the passing campaigns, Spain has established itself as a major mango supplier to the European market. Its production, mainly based in Andalusia in the Malaga-Grenada region, is intimately associated with production of other tropical or subtropical fruits, such as the avocado, cherimoya, and to a lesser degree the litchi. Over the years, the number of mango orchards has kept on rising, and the positive economic results of the last few seasons plus the political readjustments following on from the property crisis have encouraged producers to step up planting. The 2012, 2013 and 2014 campaigns consolidated this trend, which could eventually cause chronic overproduction and a fall in revenue for the sector. For now, we can note the climb of the source based on supplying a quality product, taking advantage of favourable endogenous and exogenous factors - which helped Spain join the leading group of mango suppliers to the European Union.

From July, the initial export forecasts were set to be particularly abundant, with exceptional production. The clement weather conditions in spring had led to intense flowering with fruit-setting to match. The trees, heavily laden in early summer, hinted at a production to break the already exceptional record from 2012. At the time there was talk of exports of around 24 000 tonnes. Producers and exporters feared for the market's absorption capacities and for maintaining sale prices. Fruit-bearing in July and August was partially stopped by less favourable weather, causing high fruit droppage. However, production remained high, at a level rarely reached by the Spanish cultivation stock.

Spanish production was also early, with the first Osteen shipments coming from the second half of August, in still limited volumes. The campaign penetration price was set at around 8.00 euros/box. The availability of substantial tonnages drove producers and exporters to ship increasing quantities, causing rates to collapse, bottoming out in the second half of September (5.50 euros/box). Curiously, this situation seemed to contradict the state of the European market, with a lean supply and more dynamic in terms of demand. Spanish shipments then came under control, which helped Osteen rates recover until the end of the campaign in the second half of October. This unexpected reversal in trend can be explained by external factors, which created exceptional market conditions. The rapid end to the Israeli campaign in the second half of September,

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with marginal volumes, left the field free for Spanish produce. This market, with no real competition, was extended due to the particularly late start to the Brazilian Kent campaign, with substantial shipments only starting to arrive in early November, when the Spanish Osteen and Kent campaigns had already finished, and the Keitt volumes available proved more moderate. For practically one-and-a-half months, from mid-September to late October, Spain operated on a competition-free market, a particularly favourable scenario for selling big volumes while ensuring stable, high prices.

The estimated tonnages shipped by Spanish operators was around 18 000 tonnes, hauling this source up to 4th place among the mango suppliers to the European Union, behind Brazil, Peru and Côte d'Ivoire. The previous year Spain had enjoyed favourable market conditions, with a smaller Israeli presence and another fairly late start by Brazil, but most of all its own production being less abundant after the harsh 2012-13 winter (around 7 000 tonnes).

The trade window occupied by Spain also enabled small but additional quantities of Kent, Keitt and Irwin to be sold off. The Kent campaign was focused on one month, from late September to mid-October. These fruits, particularly popular since Spain alone was providing them at the time in more limited quantities, sold steadily at around 4.00 euros/kg. This year we can note that certain brands adopted a segmentation of the Kent supply by coloration (coloured, half-coloured and greener), by virtue of the proximity between the production zone and place of consumption. This choice of segmentation, which requires additional work by the shipping facilities, is aimed at optimising the product presentation and price level. The Keitts extended the end of the Spanish campaign until late November, with increasingly limited volumes, and prices dipping from 12.00 to 8.00 euros/box because of more variable quality at the end of the season, and the return of Brazilian competition which was establishing itself on the market.

We can also recall the growth, though to a lower quantitative level, of Irwin shipments alongside Osteen shipments. The smaller sized Spanish Irwins made up for the air-freight mango shortfall in September and October. These fruits, presented in the same packaging as air-freight quality mangoes, were warmly received by tropical produce specialists, obtaining high and strong rates which stabilised at around 4.50 euros/kg. The stronger presence of this variety illustrates the concern for varietal diversification among Spanish operators, and their dynamic in terms of market conquest.

The rise of Spain in the Community mango trade has been impressive and remarkable. While it is based on a clear dynamic of production and quest for quality in the produce, we should not conceal the particularly favourable conditions that this source has enjoyed for the past two or three campaigns. Its weight in the mango trade has been confirmed, but how would things change in a different context, combining abundant production and simultaneous exports from Israel and Brazil? ■

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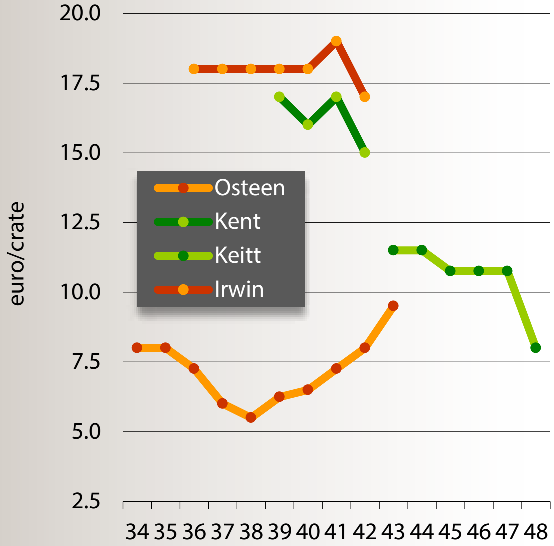
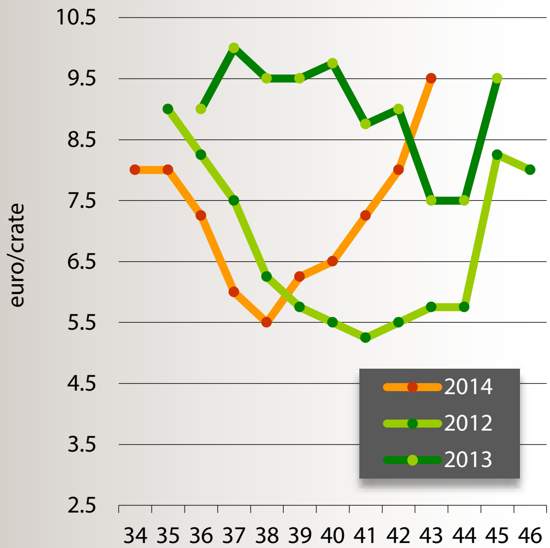
Mango - Spain - Average import price by variety on the French market in 2014



Weeks / Source: Pierre Gerbaud

Osteen mango - Spain Average import price on the French market



Weeks / Source: Pierre Gerbaud

European mango market 2014 monthly review

Short-lived disruption on a steady market

The supply variations were more marked in 2014, doubtless intensified by the overall increase in quantities sold. The Peruvian supply surplus at the beginning of the year was succeeded by lean periods, such as in spring with a late start from the West African sources, or in autumn with the Brazilian shortfall. Conversely, the increase in availability during the summer was another cause of price fluctuations.

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January and February

Market in the doldrums: too much fruit, with supply out of line with demand

In early January, the accumulation of substantial incoming shipments led to the formation of large stocks and an over-supply. In addition, in mid-January, the supply was out of line with demand in terms of size. Prices tended to be based on those charged by the highly predominant Peruvian produce. The Peruvian supply primarily comprised small sizes, little in demand by the distribution sector, which led to very poor sales. It was not until week 6 that bit by bit volumes balanced out between small and large sizes. In late February, the big sizes made up most of the Peruvian volumes, and their price was dipping, while the price of the small sizes was recovering. Furthermore, there was growing concern over the Casma region, affected by heavy precipitation which was compromising fruit quality.

March and April

Distinct recovery by the market in the run-up to Easter

The market was balanced between a still substantial supply and decent demand. The overall supply easily covered demand, with the climbing Brazilian exports representing a considerable supplement, although they were much smaller than the Peruvian exports. In late March, the rates recovery picked up steeply, while the combined volumes from Peru and Brazil remained substantial. This could be explained firstly by the scarcity of seasonal fruits, which intensified demand for imported fruits. Secondly, the announcement of an abrupt end to Peruvian exports and a late start by the West African sources triggered moves in anticipation of a possible shortfall in April. Finally, the precipitation which affected the Peruvian production zones encouraged exporters to speed up the harvesting and shipments, in order to prevent the risk of quality deterioration at the end of the campaign.

In April, the increasingly marked dip in Peruvian volumes, plus a livelier demand in the run-up to Easter, led to a genuine price rise. Indeed, the abrupt end of the Peruvian campaign meant that the supplementary imports from Brazil, though rising, were no longer enough to meet demand. This under-supply promoted steady, or even rising, rates.

Late April and May

Market on a tightrope during the transition between Peru and West Africa

The market was on a tightrope after the more dynamic period of demand around the Easter holidays. The more restrained volumes available after Easter created a relative under-supply, which helped keep rates high. However, the considerable downturn in demand and the progress of seasonal fruits put the market on a downward trend.

In early May, the dip in demand, the more abundant arrival of seasonal fruits and the substantial shipments from West Africa led to a distinct market depression, especially marked since prices had hitherto been high. The first rains affecting the Côte d'Ivoire production zones encouraged several operators to close their packing stations and end their export campaign, in order to prevent fungal attack and fruit fly infestation of batches.

Thus the European market was in a way left floating, with demand still decent but less lively. West African mangoes seemed to be more widely spread across the European markets than during the previous campaigns, when flows were more focused on French importers.

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Late May and June

Diversification of sources

The market was mainly supplied by the West African sources, and more particularly Côte d'Ivoire. Nonetheless there were mangoes from Brazil, Puerto Rico and the first incoming shipments from the Dominican Republic. The rise in seasonal fruits, abundant and sold at attractive prices, led to gradual loss of interest in imported produce. The proliferation of sources, quality and varieties disrupted sales due to lack of uniformity.

However, the slight under-supply fostered strong and high prices. In June, the supply matched the natural market demand.

July and August

A quiet and sluggish summer …

In July, the rising imports from Brazil, Puerto Rico, the Dominican Republic and Senegal were easily sufficient. In August, the proliferation of sources, varieties, sizes and qualities made sales particularly difficult, in the face of lean demand. The influx of seasonal fruits, which sold slowly, contributed to the sluggish market conditions for the mango. Operators repeatedly pointed to the lack of demand.

The political situation in the Middle East disrupted incoming Israeli shipments, as well as sales of fruit from this source in certain market sectors. The export restrictions to Russia also contributed to the lack of market fluidity.

September

Business picking up

The European market underwent a gradual change under the effect of a reduction in available quantities, and a still barely perceptible recovery. Brazilian shipments, shared between the North American market (2/3) and European market (1/3), proved to be well down on the same period of the previous year. Senegal and Puerto Rico, which were approaching the end of their export campaigns, had a smaller presence. Hence the European market was primarily supplied by Brazil and Israel. The dwindling supply helped prices hold up, or even rise slightly. Spanish fruits became a genuine alternative.

October

A spectacular shortage!

Week 41 saw a distinct change in the European market trend. The late progression of Brazilian shipments, the end of the Israeli campaign and the gradual start by Spain contributed to an under-supply to the European market, which looked like a cyclical shortage. In this context prices across all sources and varieties boomed, temporarily exceeding 10.00 euros/box, a level rarely reached. The knock-on effect of this uncommon situation was certain distributors abandoning the mango. In late October, the product shortage in relation to the natural market demand generated spectacular price inflation, which was down more to speculation on fruit shortage than the real value of the merchandise.

November and early December

A late return by Brazil

The market was nearly exclusively supplied by Brazil, with a surge in incoming volumes. This considerable increase influenced the prices, which gradually dipped though maintaining high levels. The enlargement of the supply seemed to be accompanied by an increase in demand, which helped keep prices high. Brazil really was late in embarking on its end-of-year campaign. In late November, the accumulation of large incoming shipments from Brazil drove the market into a perceptible downward trend. A substantial part of the supply comprised large sizes, unsuitable for supermarket sector demand, which caused more marked price falls for these products.

December

Awaiting the Peruvian changeover

From week 50, the European mango market seemed to stabilise with the run-up to the Christmas holidays. The downward trend was halted by a moderate invigoration in demand. Incoming Brazilian shipments dipped, which also contributed to rates strengthening on certain markets. There were often wide price differences, depending on the fruit quality and suitability of the sizes available, especially in terms of supermarket sector demand. The European market remained fairly stable at the end of the year. Some upward or downward price variations were observed nonetheless. Temporary increases were primarily attributable to rising demand for the end-of-year holidays. Price falls illustrated the uneven quality of Brazilian merchandise, which dominated the supply. The transition from Brazil to Peru proceeded bit by bit ■

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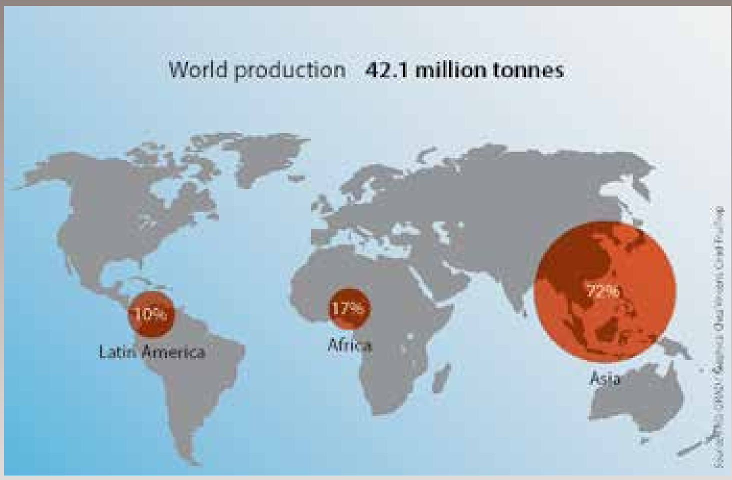
MANGO - Production (2012)



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

Sources: FAO, professionals

MANGO - Exports (2013)

Mango - The 6 leading exporter countries	
tonnes	**2013**
Mexico	338 169
India	263 918
Thailand	252 904
Brazil	122 178
Peru	126 815
Pakistan	98 926

Sources: National Customs, professionals

MANGO - Imports (2013)

Mango - The 6 leading importer countries	
tonnes	**2013**
United States	436 085
China	190 182
Netherlands	154 122
Canada	60 290
Saudi Arabia	57 858
Malaysia	55 000

Source: National Customs

USA - Imports - Main supplier countries

tonnes	2009	2010	2011	2012	2013	2014
Total	**295 653**	**332 095**	**379 803**	**377 408**	**436 085**	**385 861**
Mexico	186 807	221 945	241 468	251 321	285 679	242 737
Peru	17 316	32 175	45 223	26 974	41 277	44 653
Ecuador	35 304	25 650	30 364	37 868	45 945	34 483
Brazil	23 193	24 407	24 810	24 215	23 924	22 361
Guatemala	14 706	12 679	17 875	16 986	16 948	20 803
Haiti	9 014	6 502	9 241	8 045	10 262	9 894
Philippines	2 996	2 815	3 989	2 929	2 411	2 220
Others	6 318	5 922	6 833	9 070	9 639	8 710

Source: US Customs

Canada - Imports - Main supplier countries

tonnes	2009	2010	2011	2012	2013	2014
Total	**41 544**	**46 649**	**56 375**	**54 291**	**60 290**	**57 991**
Mexico	27 843	29 501	35 923	35 173	38 940	35 211
Peru	1 627	4 704	6 195	4 346	5 826	6 437
Brazil	3 563	3 529	4 310	4 850	4 706	6 318
Ecuador	3 445	3 568	4 083	3 709	3 979	3 192

Source: Comtrade

Central and South America - Main markets

tonnes	2008	2009	2010	2011	2012	2013
Total	**11 163**	**14 982**	**20 782**	**23 119**	**27 025**	**27 051**
Colombia	5 078	7 277	9 675	13 132	13 132	11 530
Chile	690	766	2 344	3 240	3 421	5 141
Mexico	2 007	2 982	2 300	1 976	2 921	3 307
Honduras	843	970	3 000	1 339	2 565	2 174
El Salvador	987	1 582	665	569	1 966	1 761
Argentina	729	873	1 024	1 353	1 408	1 399
Panama	111	137	173	374	535	464
Bolivia	84	77	105	79	133	426
Paraguay	142	50	105	121	117	375
Guatemala	147	155	201	228	124	277

Source: Comtrade

European Union - Imports - Main supplier countries						
tonnes	2009	2010	2011	2012	2013	2014
Total extra-EU + Spain	**205 378**	**232 495**	**258 521**	**246 267**	**267 186**	**288 421**
Total extra-EU, of which	**198 878**	**224 995**	**252 521**	**232 267**	**260 686**	**270 421**
Brazil	80 670	92 256	91 490	91 093	89 884	98 771
Peru	36 270	60 386	72 350	53 323	68 689	71 827
Côte d'Ivoire	11 680	11 323	10 177	15 245	16 553	20 495
Israel	12 998	10 700	14 016	12 492	11 011	15 784
United States	5 535	4 744	8 475	7 954	12 009	11 198
Dominican Rep.	4 186	4 303	6 357	6 652	9 636	10 948
Senegal	6 240	2 758	5 341	6 197	8 267	10 245
Mali	3 480	3 672	1 795	3 816	4 802	3 899
Pakistan	12 916	10 596	11 745	11 272	12 295	3 871
Costa Rica	5 685	3 429	6 873	3 860	4 027	3 825
Burkina Faso	1 988	3 302	2 129	2 126	2 933	3 049
Ghana	880	428	227	847	1 627	2 380
Mexico	1 596	4 938	5 255	4 512	2 954	2 236
Gambia	1 246	776	1 503	981	876	2 193
Ecuador	2 011	1 406	1 523	2 071	3 311	1 376
Thailand	1 021	1 178	1 101	1 061	990	1 127
India	2 472	3 201	3 016	3 782	6 037	956
South Africa	1 876	1 040	507	681	297	592
Guatemala	1 587	845	1 033	24	597	570
Nicaragua	933	435	947	824	211	465
Venezuela	1 008	729	332	141	182	389
Spanish production shipments (estimate)	**6 500**	**7 500**	**6 000**	**14 000**	**6 500**	**18 000**

Source: EUROSTAT

Other West European countries - Main markets						
tonnes	2009	2010	2011	2012	2013	2014
Total	**10 671**	**13 398**	**14 731**	**14 906**	**17 214**	**18 602**
Switzerland	7 154	8 849	9 730	9 905	11 277	12 449
Norway	3 264	4 249	4 657	4 608	5 516	5 685
Iceland	253	300	344	393	421	468

Source: Comtrade

Russia - Imports - Main supplier countries						
tonnes	2008	2009	2010	2011	2012	2013
Total	**6 123**	**4 480**	**7 416**	**7 488**	**8 091**	**9 429**
Brazil	4 388	3 201	4 893	4 967	5 442	5 863
Peru	546	152	922	876	666	919
Thailand	332	295	393	452	559	750
China	67	200	437	418	435	424
Ecuador	319	195	415	254	87	105

Source: Comtrade

Other East European countries - Main markets						
tonnes	2008	2009	2010	2011	2012	2013
Total	**767**	**488**	**694**	**808**	**922**	**1 172**
Ukraine	681	400	534	694	774	788
Belarus	87	88	110	114	148	384

Source: Comtrade

Mediterranean - Main markets						
tonnes	2008	2009	2010	2011	2012	2013
Total	**5 546**	**4 722**	**8 986**	**8 986**	**11 369**	**11 894**
Palestine	14	4	2 318	3 735	2 905	2 872
Jordan	3 944	2 518	1 765	966	3 271	2 504
Morocco	715	1 174	993	1 372	1 027	2 368
Lebanon	721	843	817	1 344	1 720	2 039
Libya	-	-	2 822	1 309	2 128	1 829
Turkey	151	183	271	260	318	282
Algeria	94	97	130	209	233	236

Source: Comtrade

Japan - Imports - Main supplier countries						
tonnes	2009	2010	2011	2012	2013	2014
Total	**11 103**	**10 391**	**10 055**	**9 741**	**8 588**	**7 354**
Mexico	5 050	3 974	3 446	3 828	3 569	2 849
Philippines	2 720	2 834	2 197	2 113	1 733	1 300
Thailand	1 407	1 520	1 514	1 773	1 309	1 229
Taiwan	990	995	1 155	834	805	759
Peru	-	60	958	339	548	515
Brazil	395	571	551	598	424	334
United States	286	277	172	178	109	100
Australia	187	124	38	57	62	49
India	27	10	11	4	-	5

Source: Japanese Customs

Other Asian countries - Main markets						
tonnes	2008	2009	2010	2011	2012	2013
Total	**180 755**	**322 542**	**322 468**	**297 632**	**349 188**	**301 838**
China	125 576	252 705	240 710	203 184	231 938	190 182
Malaysia	29 767	40 676	42 015	50 960	60 637	55 000
Singapore	18 415	21 485	18 232	20 920	22 716	21 234
Vietnam	489	540	10 677	7 932	8 000	10 000
Nepal	-	1 696	1 964	5 740	6 500	7 117
South Korea	1 666	904	1 351	2 270	3 041	6 494
Bangladesh	697	461	2 332	185	5 269	4 857
Cambodia	2 392	2 441	3 401	3 287	5 734	4 415
Thailand	156	257	69	1 311	3 602	1 408
Brunei	500	500	511	779	658	1 012
Indonesia	1 097	877	1 206	1 064	1 093	119

Source: Comtrade

Persian Gulf - Main markets						
tonnes	2008	2009	2010	2011	2012	2013
Total	**145 870**	**162 741**	**186 573**	**207 204**	**210 683**	**198 835**
Un. Arab Emir.	74 712	69 389	75 519	83 635	97 203	99 728
Saudi Arabia	35 643	38 583	58 250	63 497	70 390	57 858
Oman	15 015	19 407	18 444	19 794	21 283	16 548
Kuwait	7 285	16 347	11 705	13 099	10 022	11 804
Bahrain	2 459	2 515	2 801	5 581	3 134	5 908
Qatar	2 756	3 500	4 184	3 525	4 334	5 482
Iran	8 000	13 000	15 670	18 073	4 317	1 507

Source: Comtrade

Africa - Main markets						
tonnes	2008	2009	2010	2011	2012	2013
Total	**9 203**	**10 304**	**12 179**	**14 612**	**17 079**	**21 279**
Tanzania	1 802	2 866	2 020	4 649	4 003	6 208
Niger	3 474	3 300	4 223	3 274	3 676	3 166
Mauritania	40	41	549	774	890	2 461
Rwanda	218	624	1 000	1 360	1 471	2 290
Djibouti	1 538	1 652	1 956	2 251	1 734	2 111
Kenya	-	-	2	253	2 022	1 629
Uganda	87	91	111	111	1 310	1 542
Botswana	1 531	1 230	1 956	1 369	1 451	1 251
South Africa	514	500	362	571	522	621
Namibia	826	568	444	461	420	513
Swaziland	721	843	847	145	112	61

Source: Comtrade

Oceania - Main markets						
tonnes	2009	2010	2011	2012	2013	2014
Total	**2 711**	**2 659**	**3 779**	**3 758**	**4 330**	**4 272**
New Zealand	1 742	1 994	2 614	2 487	3 217	3 335
Australia	969	665	1 165	1 271	1 113	937

Source: Comtrade

Mango quality defects

Photos © Pierre Gerbaud


Immatuity and spotting


Natural discoloration of the epidermis


Misshapen fruit


Scarred-over insect pricking


Mechanical wounds after picking


Mechanical wounds after picking


Stalk too long


Spotting on epidermis

Anthracnose type fungal infection

Fruitfly larvae

Sun scorching

Misshapen fruit

Discoloration caused by scales

Wounding with wind-caused rubbing

Postharvest sap burn

Postharvest soiling by sap

Stalk rot

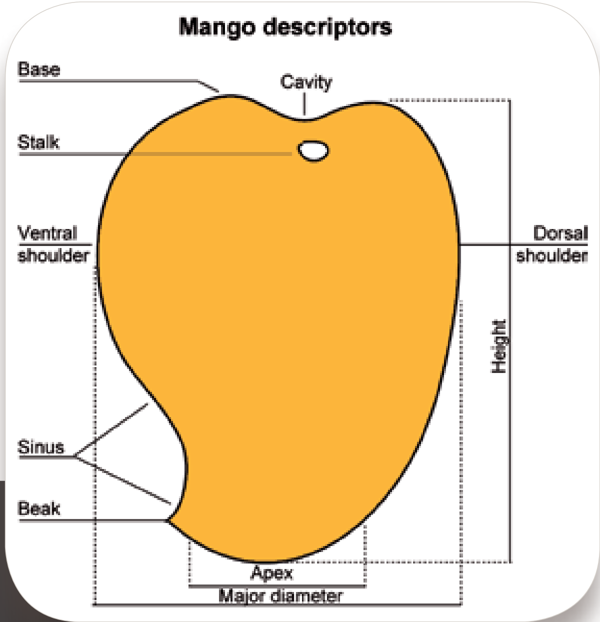
Fungal infection

Overripeness

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

The main mango varieties

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



Requirements of mango

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

Characteristics of the two mango families

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

Tommy Atkins

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

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

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

Average weight: 450 to 710 g

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

Kent

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

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

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

Stone : 9% of total fruit weight.

Average weight: 600 to 750 g

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

Keitt

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

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

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

Stone: 7 to 8% of total fruit weight.

Average weight: 510 g to 2 kg

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

Osteen

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

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

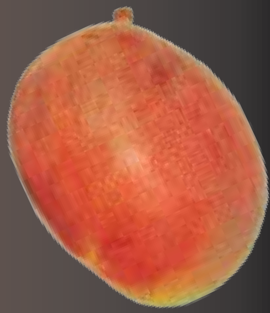
Flesh: lemon yellow, firm and juicy. Very high quality and not fibrous.

Stone: long and flat.

Average weight: 500 to 800 g

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

Haden



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

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

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

Average weight: 510 to 680 g

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

Valencia Pride

Shape: elliptic. Rounded apex, large apical beak.

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

Flesh: deep yellow. Aromatic and practically fibreless.

Average weight: 600 to 900 g

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

Wholesale market prices in Europe

January-February 2015

					EUROPEAN UNION - EURO				
					Germany	Belgium	France	Holland	UK
AVOCADO	Air	TROPICAL	BRAZIL	Box				18.38	
			DOMINICAN REP.	Box			13.60		
	Sea	ARAD	ISRAEL	Box	7.50			7.31	
		ETTINGER	ISRAEL	Box			6.00		
		FINO	ISRAEL	Box	6.25			7.50	
		FUERTE	ISRAEL	Box	6.88		7.00	7.50	
		HASS	CHILE	Box	12.00	11.00	9.13		11.75
			COLOMBIA	Box				11.88	
			ISRAEL	Box	12.00		9.78	10.25	9.06
			KENYA	Box			9.19		
			MEXICO	Box			9.18		
			MOROCCO	Box	12.50	11.00	9.42	11.75	
			PERU	Box	9.00				16.21
		PINKERTON	ISRAEL	Box	6.88	7.25	7.13	8.28	9.45
	Truck	BACON	SPAIN	Box			4.25		
		FUERTE	SPAIN	Box			6.88		
		HASS	SPAIN	Box	12.00		10.44	11.75	7.84
		REED	SPAIN	Box			7.25		
BANANA	Air	RED	ECUADOR	kg				5.19	
		SMALL	COLOMBIA	kg			6.95		
			ECUADOR	kg				5.50	
	Sea	RED	ECUADOR	kg				2.33	
		SMALL	ECUADOR	kg			1.70	2.65	
CARAMBOLA	Air		MALAYSIA	kg		5.00	4.93	5.26	
			COLOMBIA	kg					3.80
	Sea		MALAYSIA	kg					3.86
COCONUT	Sea	NOT DETERMINED	COSTA RICA	Bag		18.50			
			COTE D'IVOIRE	Bag	14.00		10.00	12.02	15.29
			DOMINICAN REP.	Bag				23.30	
			DOMINICA	Bag					13.28
			SRI LANKA	Bag				21.20	10.29
		YOUNG	COSTA RICA	Bag				16.50	
DATE	Sea	KENTA	TUNISIA	kg				1.75	
		MEDJOOL	ISRAEL	kg				7.92	
			PERU	kg				6.00	
		MOZAFATI	IRAN	kg		3.20			
		NOT DETERMINED	ALGERIA	kg					1.42
			ISRAEL	kg					4.33
		RAVIER	TUNISIA	kg					2.07
		STONELESS	TUNISIA	kg				3.00	
GINGER	Sea		BRAZIL	kg					3.66
			CHINA	kg	2.22		3.00	2.73	3.03
			PERU	kg	2.59			2.54	
			THAILAND	kg	2.00				1.55
GUAVA	Air		BRAZIL	kg				6.22	
	Sea		BRAZIL	kg					2.39
			EGYPT	kg					1.86
KUMQUAT	Air		BRAZIL	kg					4.79
			ISRAEL	kg				4.38	7.09
			SOUTH AFRICA	kg					6.53
LIME	Air		BRAZIL	kg			4.00		
	Sea		BRAZIL	kg	1.16	1.25	1.70	1.31	1.44
			HAITI	kg				1.50	
			MEXICO	kg	1.38	1.61	1.90	1.47	1.69
LITCHI	Air		MAURITIUS	kg	4.00				
			SOUTH AFRICA	kg				4.13	
	Sea		MADAGASCAR	kg		2.30	1.88		3.40
			SOUTH AFRICA	kg		3.25	2.41		2.94
MANGO	Air	KENT	BRAZIL	kg			4.20		
			PERU	kg			5.75	5.19	
		NAM DOK MAI	THAILAND	kg				9.10	
	Sea	ATKINS	BRAZIL	kg	1.50		1.20	1.97	
		KEITT	BRAZIL	kg			2.13		
		KENT	BRAZIL	kg			2.13	2.13	
			PERU	kg	2.00	2.00	2.42	2.06	
		NOT DETERMINED	BRAZIL	kg					2.28

					EUROPEAN UNION - EUROS				
					Germany	Belgium	France	Holland	UK
MANGOSTEEN	Air		INDONESIA	kg				8.12	
			MALAYSIA	kg				8.48	
MANIOC	Sea		COSTA RICA	kg			1.25	1.15	
MELON	Air	CHARENTAIS YELLOW	DOMINICAN REP.	kg			4.65		
			SENEGAL	kg			2.60		
	Sea	CANTALOUP	BRAZIL	kg				0.98	2.16
			COSTA RICA	kg					0.93
			HONDURAS	kg				1.60	1.76
		CHARENTAIS	BRAZIL	kg				1.38	
		CHARENTAIS GREEN	MOROCCO	kg			2.40		
		GALIA	BRAZIL	kg			1.00	1.08	1.44
			HONDURAS	kg				1.52	1.08
			ISRAEL	kg			0.97		
		HONEY DEW	BRAZIL	kg			0.83	0.75	1.07
			COSTA RICA	kg			0.70	0.90	0.96
			DOMINICAN REP.	kg					1.01
		PIEL DE SAPO	BRAZIL	kg			0.75	0.73	1.02
		SEEDLESS WATER	BRAZIL	kg			1.10	1.21	1.07
			COSTA RICA	kg				1.45	
		WATERMELON	BRAZIL	kg				1.12	1.04
			COSTA RICA	kg				1.20	
PAPAYA	Air	FORMOSA	BRAZIL	kg	2.96			3.22	
		NOT DETERMINED	BRAZIL	kg		3.36	3.40	3.31	3.98
			THAILAND	kg				4.88	
	Sea	FORMOSA	ECUADOR	kg				2.65	
		NOT DETERMINED	ECUADOR	kg				2.44	2.17
PASSION FRUIT	Air	NOT DETERMINED	COLOMBIA	kg	4.56	5.63	5.35	5.57	
			ECUADOR	kg				8.75	
		PURPLE	ISRAEL	kg		6.25		6.00	
			KENYA	kg		5.38			4.98
			SOUTH AFRICA	kg			6.20		
			VIETNAM	kg			7.50	7.25	
			ZIMBABWE					4.75	
		YELLOW	COLOMBIA	kg				8.16	
			ECUADOR	kg				7.90	
PHYSALIS	Air		COLOMBIA	kg			9.00	8.74	8.71
			COLOMBIA	kg	5.42			6.46	
PINEAPPLE	Air	VICTORIA	MAURITIUS	Box				14.64	
			MAURITIUS	kg			3.60		
			REUNION	kg			3.90		
			SOUTH AFRICA	Box				12.70	
	Sea	MD-2	COSTA RICA	Box	9.88	11.13		11.27	7.18
			COSTA RICA	kg			2.74		
			COSTA RICA	Piece					1.69
			COTE D'IVOIRE	kg			0.98		
			GHANA	Box					3.92
			PANAMA	Box				12.50	
			PANAMA	kg			0.80		
			PANAMA	Piece					1.35
PITAHAYA	Air	RED	VIETNAM	kg				7.30	
		YELLOW	COLOMBIA	kg				10.24	
			ECUADOR	kg				8.80	
	Sea	RED	VIETNAM	kg				2.39	
PLANTAIN	Sea		COLOMBIA	kg			1.10		
			ECUADOR	kg			1.05	0.93	
			WINWARD ISL.	kg					1.57
RAMBUTAN	Air		INDONESIA	kg				7.75	
			THAILAND					7.00	
			VIETNAM	kg				8.21	
SWEET POTATO	Sea	NOT DETERMINED	EGYPT	kg			0.95	0.98	
			HONDURAS	kg			1.24		1.69
			ISRAEL	kg					1.77
		WHITE	SOUTH AFRICA	kg					0.90
TAMARILLO	Air		COLOMBIA	kg				7.32	
YAM	Sea		BRAZIL	kg					1.60
			GHANA	kg			1.30	1.32	

Note: according to grade

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