May 2015 - No. 232

FRuiTROP

English edition

Date market

A market finally developing!

Indian Ocean litchi

2014-15 campaign

Counter-season citruses

Caution the watchword!

European stone fruits

2015 campaign

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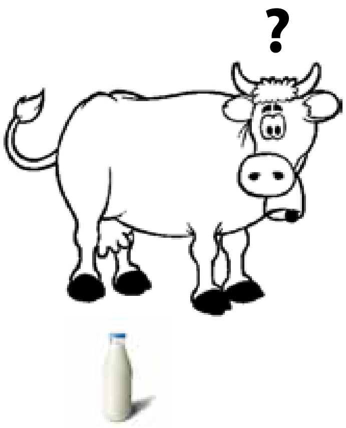

As the results of the UK's big supermarket players are released, *it becomes clear that there is something rotten in Albion. The likes of Tesco, Morrisons, Sainsbury's, etc. have each in turn announced steep decreases in their financial results, or even plummeting losses. The economic model seems, if not outdated, at least weakened. Yet this is not only on the other side of the Channel; this is no "so British" cultural exception. The profitability of the supermarket chains is no longer what it once was. The long crisis period we are going through is evidently dragging down on the trend. Consumption in terms of volume is at best flat, and at worst on the wane - and in terms of value it is tumbling. The spectre of deflation is haunting European and American central banks. The famous growth drivers — the BRICS economies (Brazil, Russia, India, China and South Africa) are out of gas. In short, there is nothing doing for the temples of consumption. Yet the bad news lies elsewhere; in the effects of these poor financial and economic performances on price negotiations between supermarkets and suppliers. True, the shareholders are requesting store closures, modernisation of the networks and development of the range of in-store and web services, etc. Yet what they are asking for above all is savings in purchasing. While the big suppliers are holding their ground and getting themselves talked about in the media during the annual negotiations, suppliers from less strong industries are complying in silence, because they have no other choice. The move toward purchasing centralisation, in France for example, is slashing the number of purchasers. Yet not to worry, the suppliers will exert the same pressure on their own suppliers, and so on. At the end of the chain, no cause for concern, the agricultural producers will ask their trees to yield two harvests a year, their cows to produce bottled milk directly and their hens to lay twice as many eggs, but pre-dated, and if possible scrambled in the morning. The only winner in all this is perhaps agronomic research, at least while there are still any farmers left.*

Denis Loeillet

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

ISSN
French: 1256-544X
English: 1256-5458
Separate French and English editions

Subscription rate
EUR 300 / 11 issues per year
(paper and electronic editions)

FRuiTROP

Contents

Cover photograph: © Régis Domergue

Banana

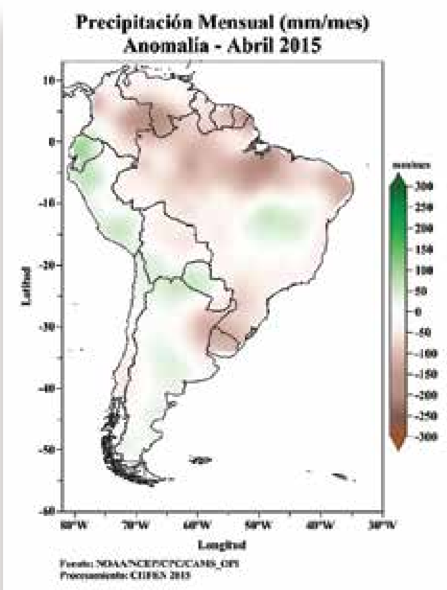
April 2015

The banana market recovered a better balance, in spite of the seasonal fall in demand from mid-April. Indeed, despite the Easter public holidays and school holidays in certain countries, sales maintained good vitality in Western Europe, thanks to cool temperatures favourable for consumption and to weak competition from seasonal fruits (uncompetitive retail prices). Most of all, the banana supply remained limited. Imports from Africa (Côte d'Ivoire, Cameroon) and the French West Indies continued to register an overall shortfall of around 12 %. On the dollar banana side, Colombian volumes started to drop to shortfall levels, though they were offset by a slight rise from Ecuador and stability from Costa Rica. Hence green banana prices dropped slightly, though still registering levels above average for the season. The fall intensified toward the end of the month because of an increase in the spot dollar banana supply following a more marked slowdown on the East European markets. The Spanish market started to weaken because of big shipments from the Canaries, due to rising temperatures at the production stage. Finally, further deterioration in the Russian market came about due to incoming shipments on the rise from the start of the month.

NORTHERN EUROPE — IMPORT PRICE		
April 2015 euro/box	Comparison	
	previous month	average for last 2 years
15.47	+ 7 %	+ 7 %

El Niño: ready to take the floor. All the warning lights are at red. The waters of the Pacific are continuing to warm up. The trade winds are weakening, and are currently one point below average strength. All the forecasting models agree: the El Niño phenomenon is setting in, and will be active over the the coming months, with a high probability of intensifying by the end of 2015. There remains substantial uncertainty as to its intensity. World agricultural equilibria will depend on this issue, so it merits close attention. Make sure to regularly visit the CIIFEN website, renowned for its quality of analysis: www.ciifen.org

Source: CIIFEN

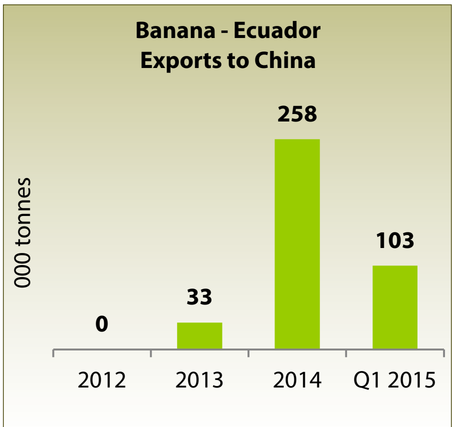


Ecuadorian banana: a solid footing in China. The boom in Ecuadorian banana exports to China does not seem to be a flash in the pan. Volumes imported from the South American banana export giant in Q1 exceeded the 100 000-t mark, a comparable level to Q3 and Q4 2014, though assisted by a drastic fall in local production and production of the main supplier to China, namely the Philippines. Proecuador recently launched a promotion campaign in collaboration with the Chinese importer Goodfarmer to contribute to consolidating Ecuador's market shares in the Middle Kingdom.

Source: ecuavisa

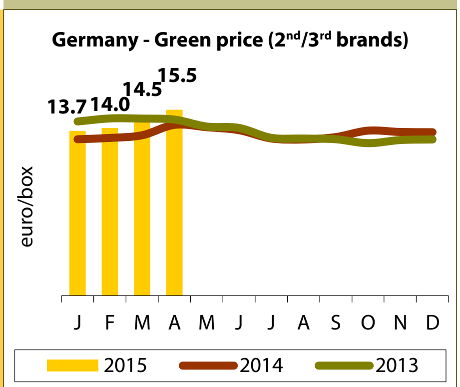
Fair Trade banana market boom in Germany. Sales leapt up by more than 60 % between 2013 and 2014, peaking at just over 50 000 tonnes. The Fair Trade banana apparently now has a market share of more than 8 % in Germany.

Source: Fruchthandel



Source: Ecuadorian Customs

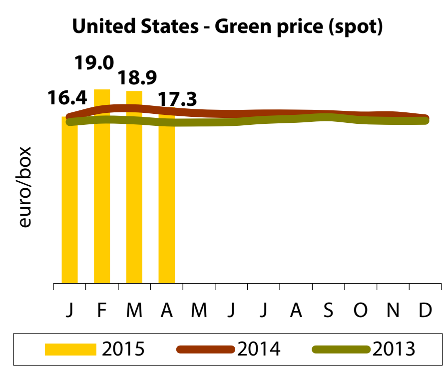
EUROPE



EUROPE - RETAIL PRICE				
Country	April 2015		Comparison	
	type	euro/kg	March 2015	average for last 3 years
France	normal	1.67	+ 3 %	+ 5 %
	special offer	1.42	+ 3 %	+ 4 %
Germany	normal	1.36	+ 5 %	0 %
	discount	1.24	+ 7 %	0 %
UK (£/kg)	packed	1.14	+ 1 %	- 6 %
	loose	0.72	0 %	0 %
Spain	platano	1.94	- 1 %	+ 6 %
	banano	1.34	+ 1 %	- 2 %

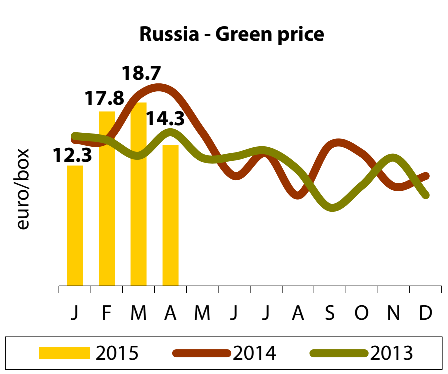
Banana

UNITED STATES



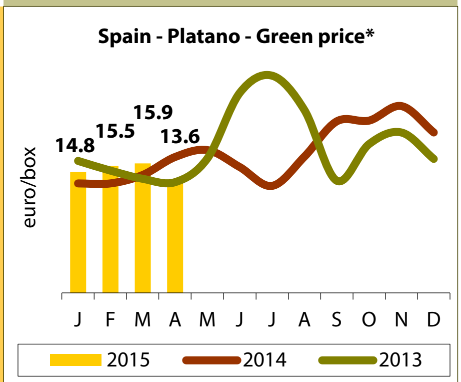
UNITED STATES - IMPORT PRICE		
April 2015 USD/box	Comparison	
	previous month	average for last 2 years
17.29	- 8 %	+ 6 %

RUSSIA



RUSSIA - IMPORT PRICE		
April 2015 USD/box	Comparison	
	previous month	average for last 2 years
14.34	- 23 %	- 19 %

CANARIES



CANARIES - IMPORT PRICE*		
April 2015 euro/box	Comparison	
	previous month	average for last 2 years
13.60	- 14 %	- 10 %

* 18.5-kg box equivalent

■ **March consumption peak has never been as manifest as in 2015.** If the still-provisional results are confirmed, European banana consumption for a March has never been as great, brushing the 530 000-tonnes mark. The absolute monthly consumption record did hold by less than 3 000 tonnes, thanks to a higher peak attained in April 2014. Over twelve months (April 2014-March 2015), EU-28 banana consumption had never been as high: 5 629 000 tonnes. For Q1, the market share of each group of sources remained unchanged: 72 % for the dollar sources, 17 % for the ACPs and 11 % for Community production (excluding consumption in the production zones).

The situation is the same in the United States, where after a hesitant start to the year, the trend is again on the rise. The symbolic one-million tonne mark in consumption was exceeded in Q1.

In terms of suppliers, it should be observed that Costa Rica continued to struggle, both in the EU (- 7 % for Q1) and the United States (- 34 %). Ecuador traded in favour of North America, while Colombia (still in catch-up phase) opted for the EU. Guatemala continued to send its shipments to the United States, and to a lesser extent for the time being to Europe. For the EU, the ACP Africa group was outperformed by the market due to Côte d'Ivoire still being handicapped by climate vagaries. For the Caribbean meanwhile an upward trend prevailed, especially for Belize.

Source: CIRAD

© Denis Loeillet

Banana - January to March 2015 (provisional)				
000 tonnes	2013	2014	2015	Difference 2015/2014
EU-27 — Supply	**1 345**	**1 470**	**1 470**	**0 %**
Total imports, of which	1 195	1 309	1 308	0 %
MFN	957	1 054	1 058	0 %
ACP Africa	133	141	132	- 6 %
ACP others	106	115	118	+ 2 %
Total EU, of which	150	160	162	+ 1 %
Martinique	39	44	46	+ 4 %
Guadeloupe	14	17	16	- 5 %
Canaries	93	94	95	+ 1 %
USA — Imports	**1 111**	**1 122**	**1 144**	**+ 2 %**
Re-exports	129	137	136	- 1 %
Net supply	982	986	1 008	+ 2 %

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

EUROPE - IMPORTED VOLUMES - APRIL 2015			
Source	Comparison		
	March 2015	April 2014	2015 cumulative total compared to 2014
French West Indies	↗	- 17 %	+ 1 %
Cameroon/Ghana/Côte d'Ivoire	↗	- 10 %	- 6 %
Surinam	↗	- 20 %	- 12 %
Canaries	↘	+ 5 %	+ 2 %
Dollar:			
Ecuador	=	+ 8 %	+ 11 %
Colombia*	↘	- 1 %	+ 12 %
Costa Rica	↗	+ 13 %	+ 13 %

Estimated thanks to professional sources / * total all destinations

Temperate fruits

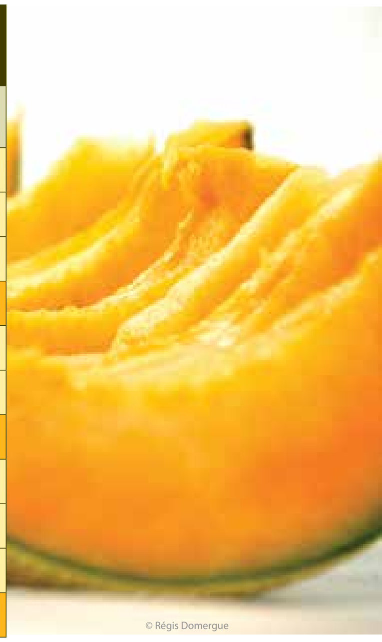
■ **Mediterranean melon: Spain rising to the fore.** The forecasts unveiled in late April at Medfel confirmed the initial estimates for the Mediterranean region. They confirmed in particular the considerable fall in surface areas in the Marrakech zone, with a number of small exporters shutting down, shaken by the poor campaigns of the past two or three years. They also emphasised the expansion of greenhouse cultivation, to the detriment of late crops. Surface areas were also down for Agadir, and barely holding up for Dakhla. Similarly, the forecasts confirmed the strong growth of the Murcia zone with Charentais over the past two years, taking hold in both the early slot (early May) and the late slot (July). Surface areas are reportedly stable overall in France, according to these figures, with a fall in surface areas in the South-East for the early slot, and in the South-West for the late slot.

Source: MedFel

Charentais Melon — Mediterranean Basin Planted areas forecasts

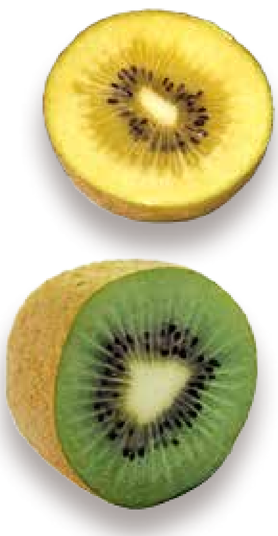
Hectares	2015 forecasts	2014
Dakhla	230-250	260-300
Agadir/Taroudant	100-150	350-450
Marrakech/Kenitra	800-900	950-1150
Total Morocco	**1 130-1 300**	
Almeria	350	300-350
Malaga/Murcia	2 900-3 000	2 500-2 600
Total Spain	**3 250-3 350**	
South-East	5 400	5 400
South-West	3 500	3 500
Centre West	4 800	4 900
Total France	**13 700**	13 800

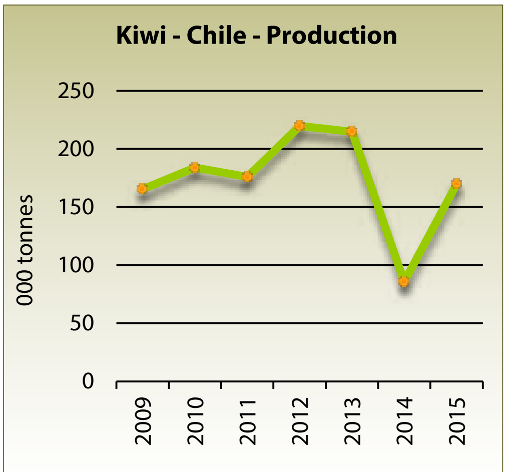
Source: Medfel



■ **Chilean raspberry: three varieties to boost Chile's potential.** The Chilean exporters association ASOEX, alongside its technical partner the Catholic University of Chile, has presented three new raspberry varieties: Santa Teresa, Santa Catalina and Santa Clara. This programme began eight years ago with the support of INIA, FDF and InnovaCorfo, and since 2013 with the support of scientific and technological development promotion bodies. Chile is the third biggest raspberry producer country in the world, yet the bulk of production is still based on a narrow range of varieties. So the objective is to develop a wider range, most especially resistant varieties suited to local conditions in Chile, in order to consolidate production.

Source: ASOEX





Source: Chilean Kiwi Committee

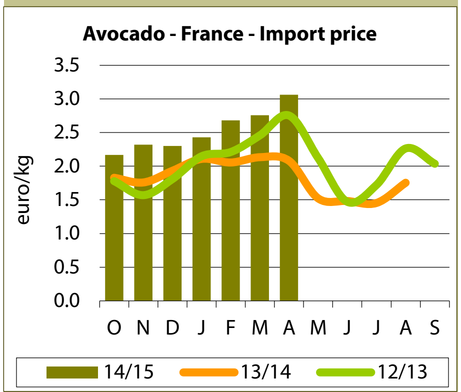
■ **Chilean kiwi: making a comeback, but still convalescent.** The new European season for the Southern Hemisphere kiwi started in early May, with the first volumes from Chile. The prospects are better than in 2014 for this source, hit hard last year by the frost of 2013 which slashed production by 60 %. Carlos Cruzat, Chairman of the Chilean Kiwi Committee, announced the return to a production potential of 170 000 t, which is still 20 % less than a normal potential because of the secondary effects of the frosts of 2013 and 2014. Production could reach 160 000 to 163 000 tonnes for Hayward (- 24 % from 2013), and 7 000 to 8 000 tonnes for the other varieties.

Source: Chilean Kiwi Committee

Avocado

April 2015

The avocado market has continued its historic surge. However, imports from Peru (late start to the campaign) started to progress, with levels returning to average. However, the other sources were lacking (early end from Chile, and Spain, Israel and Mexico winding down), and few stocks were available. In spite of high retail and import prices, Hass demand proved lively thanks to the Easter promotions and to growing consumption in Northern Europe. Hence the availability on the French market was low, where prices continued their historic ascent, reaching levels 27 % above average. Sales of green varieties also picked up, and prices did not fail to rise for South Africa, which has started its season with high volumes.



PRICE

Varieties	Average monthly price euro/box	Comparison with the last 2 years
Green	8.34	+ 16 %
Hass	12.93	+ 27 %

VOLUMES

Varieties	Comparison	
	previous month	average for last 2 years
Green	=↗	+ 12 %
Hass	↘	- 15 %

■ **Doors closing and others opening to the avocado.** The Costa Rican sanitary authorities have announced the closure of their borders to avocadoes from nine countries. This decision, motivated by the risk of introducing Sunblotch virus, is in particular affecting the main supplier to this market, namely Mexico, which produces the bulk of the 12 000 to 13 000 t imported into the country every year. The good news is that Peruvian Hass should be able to take advantage of the opening of the Japanese borders from June or July. Exporters from Jalisco for their part will need to hold on a bit longer, probably until the end of 2015, to be able to feed the appetite of US consumers. This is already the case for Hass exporters in continental Spain, who have been authorised to ship their volumes across the Atlantic since late March.

Various sources

■ **Guatemalan Hass: on its way to the European market.** Guatemalan exporters want to be able to take advantage of the EU-Central America Association Agreement signed in 2012, entitling them to zero customs duty. Its shipments of approximately 3 000 to 4 000 t per year are at present aimed almost entirely at neighbouring countries. It remains to be seen whether the logistics, complex due to lack of a direct sea link with Europe, will follow. The Guatemalan cultivation area, estimated at just over 10 000 ha across all varieties, is packed into the west of the country.

Source: agexporthoy

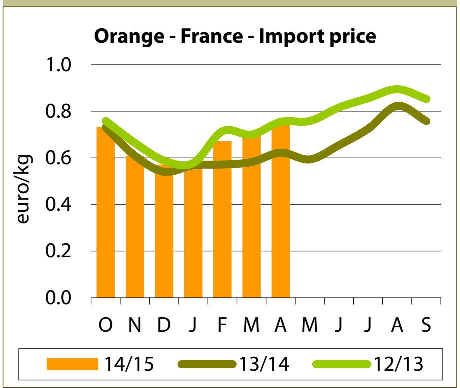
VOLUMES

Source	Comparison		Observations	Cumulative total / cumulative average for last 2 years
	previous month	average for last 2 years		
Peru	↗	+12 %	Campaign delayed, volumes rising though still smaller than in 2014.	0 %
Kenya	↗	- 52 %	Late start to the campaign, with volumes in shortfall.	- 61 %
South Africa	↗	+ 54 %	Volumes rapidly progressing, with high levels.	+ 44 %
Spain	↘	+ 12 %	Imports falling in the run-up to the end of the campaign, with higher levels than in previous years.	+ 10 %
Israel	↘	+ 26 %	End of the Hass campaign, with above-average volumes. End of the green varieties campaign, with average levels for the season.	+ 8 %

Orange

April 2015

The orange market maintained its positive trend. In spite of the seasonal fall in demand, the weak competition from seasonal fruits helped maintain a good sales tempo. The Navelate campaign started to wind down, with average volumes. The last Tunisian Maltaise batches were sold off. Thanks to an uncluttered market context (lively sales which limited stocks), rates strengthened to reach levels above average for the season (+ 11 %). On the juice orange side, the last Salustiana batches were sold, and volumes of Spanish Valencia Late started to progress considerably, reaching higher levels than in previous years, thanks to advanced maturity and good demand. Prices rose to levels near average for the season.



PRICE Type	Average monthly price euro/15-kg box	Comparison with average for last 2 years
Dessert orange	11.55	+ 11 %
Juice orange	10.80	+ 2 %

VOLUMES Type	Comparison previous month	Comparison average for last 2 years
Dessert orange	↘	+ 10 %
Juice orange	↗	+ 70 %

■ Israeli Or: rise to the fore confirmed. Exports of Israel's star crop beat a new record this campaign, exceeding the 6-million boxes mark. This is a spectacular rise from 2013-14 and 2012-13, when shipments were respectively 4.2 and 4.6 million boxes. Nonetheless, this figure does not reflect the full production potential of this variety's cultivation area, which amounted to more than 5 000 ha in 2013. Exports could soon be approaching the 200 000-t mark, if the weather proves more clement than in 2013-14 and 2014-15.

Sources: Reefertrends, CIRAD

■ Garbi and Safor varieties: shooting stars… These two easy peeler varieties developed by IVIA (Instituto Valenciano de Investigación Agraria) were full of promise. Maturing in the highly lucrative end-of-season slot, they also had the advantage of being naturally seedless thanks to their triploidy. They represented a more than interesting alternative for a good many producers facing serious problems of lack of profitability over the heavily laden mid-season. Yet six years after being made available to farmers, it has to be acknowledged that the dream has turned into a nightmare. The vast majority of the fruits have abundant spots, regardless of the production zone, making them impossible to sell. To such an extent that IVIA and the Consejeria de Agricultura de Valencia, also involved in the project, have been obliged to offer compensation to affected farmers. IVIA has also announced the reworking of its assessment protocol for new cultivars.

Source: Las Provincias

■ Lime: increasingly making itself at home in a glass! The Corona lime is a familiar accompaniment to the Mexican beer of the same name, brewed by Grupo Modelo. The German importer Don Limon has adapted the concept by marketing a "Havana Club" lime, in partnership with the famous rum brand marketed by the Pernod Ricard group. The fruits are at present available only in Germany. Part of your five a day… though to be taken in moderation!

Source: Don Limon

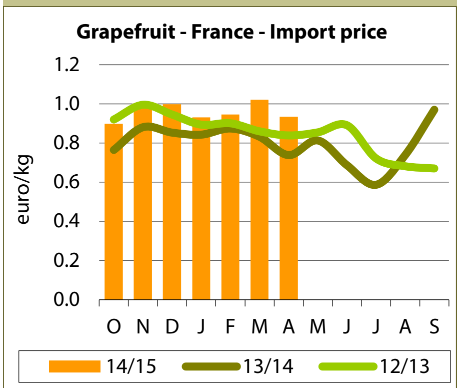

© Régis Domergue

VOLUMES Varieties by source	Comparison previous month	Comparison average for last 2 years	Observations	Cumulative total / cumulative average for last 2 years
Spanish Navelate	↘	- 1 %	Navelate campaign winding down, with volumes near average for the season. Sales fluid, with no stocks.	+ 1 %
Spanish Salustiana	↘	+ 20 %	End of the Salustiana campaign. Last significant incoming shipments in week 15.	+ 18 %
Tunisian Maltaise	↘	+ 117 %	End of the Tunisian Maltaise campaign, with greater volumes than in previous years.	+ 20 %
Spanish Valencia Late	↗	+ 38 %	Valencia Late campaign progressing rapidly. Large volumes because of advanced maturity and good demand.	+ 42 %

Grapefruit

April 2015

While demand began its seasonal fall, the market remained strong and balanced due to the winter seasons winding down. Volumes from Florida waned early, and the final significant batches were received in week 15, with volumes well in shortfall. However, prices remained stable from March given the high level already reached (+ 36 %). Sales of Mediterranean grapefruit, with a supply already in shortfall (end of Turkish campaign, Israeli shortfall), picked up considerably, with rates strengthening from mid-April. In this context the transition between sources proceeded on a decent footing: the Corsican campaign started to progress with high prices, and the first South African fruits were available in week 17 in limited quantities, especially in small sizes (50/55).



PRICE

Type	Average monthly price euro/17-kg box equivalent	Comparison with average for last 2 years
Tropical	22.27	+ 36 %
Mediterranean	14.00	+ 14 %

VOLUMES

Type	Comparison	
	previous month	average for last 2 years
Tropical	↘	- 51 %
Mediterranean	↘	- 22 %

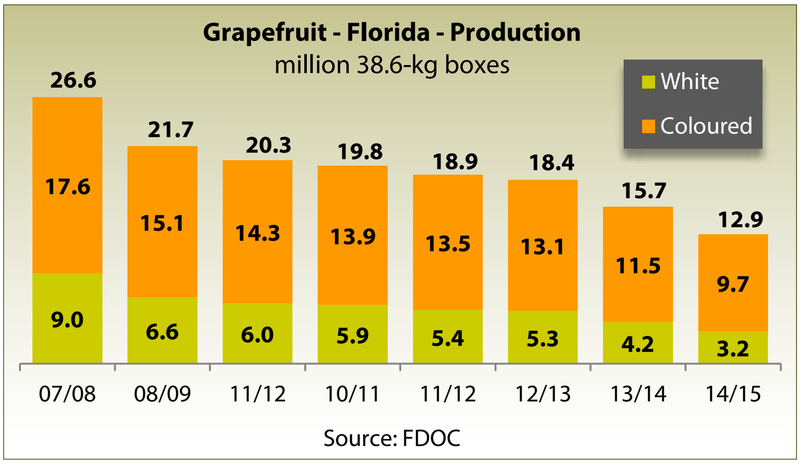
■ **2014-15 review for the Floridian grapefruit: greening worse than hurricanes.** This is the finding of the 2014-15 campaign review, which confirms that the Floridian industry has shrunk yet again. With just under 13 million field crates harvested, production declined to a level equivalent to that seen ten years previously, when the cultivation area was ravaged by several hurricanes in early autumn. In this context it is hard to achieve wonders in the export sector, particularly with the euro collapsing against the dollar and the cost of sanitary management carrying increasing weight in cost prices. Shipments to all markets registered a downturn of 12 to 19 % from last season (12 % of which to Europe, which received just under 2.3 million boxes), with the exception of those aimed at the small South Korean market. The 17 % increase in the average European campaign price calculated by our Market News service (based on France) is good news, though tempered by the knowledge that the dollar appreciated by 11 % during the same period.

Sources: FDOC, CIRAD

Grapefruit — Florida — Exports by destination

by export box	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15*	Comparison 2014-15 with	
							average last 4 years	2013-14
USA	6.1	5.4	5.5	6.0	5.1	4.6	- 16 %	- 10 %
EU	3.5	3.1	2.8	2.9	2.6	2.3	- 19 %	- 12 %
Japan	6.3	5.4	4.8	3.9	2.9	2.4	- 44 %	- 17 %
Canada	1.2	1.1	1.0	1.1	1.0	0.8	- 23 %	- 19 %
Others	0.4	0.5	0.4	0.4	0.5	0.6	+ 41 %	+ 23 %
Total Offshore	10.2	9.0	8.0	7.2	6.0	5.3	- 30 %	- 12 %
Total	**17.4**	**15.4**	**14.5**	**14.2**	**12.1**	**10.5**	**- 25 %**	**- 13 %**

Estimate / Source: FDOC



VOLUMES

Source	Comparison		Observations	Cumulative total / cumulative average for last 2 years
	previous month	average for last 2 years		
Florida	↘	- 51 %	Early end to the campaign, with volumes well in shortfall.	- 18 %
Israel	↘	- 22 %	Campaign winding down, with volumes smaller than in previous years. Lively demand.	- 11 %
South Africa	↗	- 30 %	First limited shipments in week 17, with small sizes (50/55) in the majority.	- 32 %

Pineapple

April 2015

From the beginning of April, the overlap of the delayed ships caused a temporary increase in the Sweet supply after Easter. At the same time, the start of the school holidays had the effect of reining back sales slightly. To maintain fluidity, operators did not hesitate to lower their prices. This downward trend, though still at decent rates, lasted three weeks. The reduction of the supply in the latter half of the month helped stabilise the fall in prices, and even reverse the trend. At the end of the month, the market, although on a more positive trend, was still struggling to absorb extreme sized fruit (sizes 5 and 10 in particular).

In the first half-month, the air-freight pineapple market was reined back. The increase in the supply for Easter once again forced operators to resort to after-sales prices to sell off the fruit surplus. The reduction in volumes, which began from the third week and continued until the end of the month, helped improve the market conditions. However, demand, still affected by the school holidays, was unable to boost sales, so the fluidity should rather be attributed to the scarcity of the supply. The Cameroonian supply, which became more abundant as the month went on, saw frequent quality concerns. The reduction in Sugarloaf volumes helped maintain fairly fluid sales for this fruit, rates of which remained stable at between 1.80 and 2.00 euros/kg over the entire month.

The Victoria supply, more abundant at the beginning of the month, was on the wane from the start of the second half-month. Overall, rates remained fairly stable, despite the widening price range of Reunion produce due to the quantities of small sizes on the market.

Mango

April 2015

Peruvian volumes, which had dominated the European market from January, gradually subsided in April. Still substantial at the beginning of the month, they were drawn by a stronger demand around Easter. In the second half-month, they ebbed more perceptibly, causing an under-supply which was all the more marked since demand remained stable. In this context they sold at high, strong rates, in spite of more unreliable quality. Shipments from Brazil, and then Costa Rica, Nicaragua and Puerto Rico, did not manage to make up for the shortfall. Primarily comprising Tommy Atkins and Keitt, they enjoyed good market conditions and traded on the same price footing as Peruvian shipments. The late start for the West African sources only consolidated the strength of the prices. The first batches from Côte d'Ivoire only reached Europe in late April, with limited volumes helping keep prices strong.

The air-freight market proved buoyant in April. Peruvian volumes traded at high prices, at times reaching 7.00 euros/kg, a level rarely recorded, which was justified by a limited supply, but also by variations in the euro/dollar exchange rate. The Malian and Burkinese campaigns progressed in parallel, diversifying their varietal range, first with Amélies and Valencias sold at more moderate prices than Peruvian mangoes, and then Kents in the second half-month, which were rapidly supplemented by the first Ivorian shipments. These fruits represented an alternative to the Peruvian supply, and enjoyed good market conditions, though without achieving the heights of the Latin American fruits.

MANGO - INCOMING SHIPMENTS (estimates in tonnes)

EUROPE

Weeks 2015	14	15	16	17	18
Air-freight					
Peru	50	40	60	40	-
Burkina F.	40	40	40	30	30
Mali	8	20	40	40	40
C. d'Ivoire	-	-	15	100	80
Sea-freight					
Brazil	1 600	1 690	1 470	1 100	1 470
Peru	4 200	3 300	1 470	680	180
C. d'Ivoire	-	-	-	1 100	2 000

MANGO - IMPORT PRICE ON THE FRENCH MARKET

Weeks 2015		14	15	16	17	18	Average April 2015	Average April 2014
Air-freight (euro/kg)								
Peru	Kent	4.80-5.50	5.00-6.00	5.50-6.50	4.80-6.50		5.00-6.10	3.90-4.80
Burkina F.	Amélie	3.00-3.20	3.20	3.00-3.20	3.00-3.20	3.00-3.20	3.05-3.20	2.70-2.80
Burkina F.	Valencia				3.50-4.00	3.00-4.00	3.25-4.00	3.00-3.50
Burkina F.	Kent			4.00-4.50	4.50-5.00	4.50-5.00	4.30-4.80	3.65-4.00
Mali	Amélie	3.00-3.20	3.20	3.00-3.20	3.00-3.20	3.00-3.20	3.05-3.20	2.70-2.85
Mali	Valencia	3.50	3.50-3.80	3.50-4.00	3.00-4.00	3.50-4.00	3.40-3.85	3.10-3.35
Mali	Kent			4.00-4.50	4.50-5.00	4.50-5.00	4.30-4.80	4.25-4.30
C. d'Ivoire	Kent			5.50	5.00-5.50	5.30-5.50	5.25-5.50	4.25-4.80
Sea-freight (euro/box)								
Peru	Kent	6.00-8.00	7.00-8.00	6.00-8.00	6.00-7.00	4.00-5.00	5.80-7.20	6.20-7.50
Brazil	Keitt		7.00-8.00	6.00-7.00	6.00-7.00	6.50-8.00	6.35-7.50	5.75-6.25
Brazil	T. Atkins	6.00	6.00-7.00				6.00-6.50	4.80-6.50
Puerto Rico	Keitt		7.00-8.00	7.00	7.00	6.50-8.00	6.90-7.50	
C. d'Ivoire	Kent				6.50-7.00	6.00-8.50	6.25-7.75	5.75-7.75

PINEAPPLE — IMPORT PRICE

EUROPE

Weeks 10 to 13	Min	Max
Air-freight (euro/kg)		
Smooth Cayenne	1.80	2.00
Victoria	2.50	4.00
Sea-freight (euro/box)		
Sweet	7.00	12.00

PINEAPPLE - IMPORT PRICE IN FRANCE - MAIN SOURCES

Weeks 2015		14	15	16	17	18
Air-freight (euro/kg)						
Smooth Cayenne	Benin	1.80-1.90	1.80-1.90	1.80-1.90	1.80-1.90	1.80-1.90
	Cameroon	1.80-1.90	1.80-1.90	1.80-1.90	1.80-1.90	1.80-1.90
	Ghana	1.90-2.00	1.90-2.00	1.90-2.00	1.90-2.00	1.80-2.00
	Côte d'Ivoire	1.85-1.95	1.80-1.90	1.80-1.90	1.80-1.90	1.80-1.90
Victoria	Reunion	2.50-4.00	2.50-4.00	3.00-3.80	3.00-3.80	3.00-3.80
	Mauritius	3.00-4.00	2.90-3.60	3.00-3.60	3.00-3.60	3.00-3.50
Sea-freight (euro/box)						
Sweet	Côte d'Ivoire	9.00-12.00	8.00-11.00	8.00-11.00	8.00-10.00	8.00-10.00
	Ghana	9.00-12.00	8.00-11.00	8.00-11.00	8.00-10.00	8.00-10.00
	Costa Rica	9.00-11.00	8.50-10.00	7.00-9.00	7.00-8.50	8.00-10.00

Sea freight

April 2015

Despite the inevitable fall in the monthly TCE average as the charter market transitioned from the calendar 'peak' to 'off' season, the reefer fleet was fully employed throughout the month. The reduction in the average was just as much about the structure of demand as it was about activity levels: with the majority of March business fixed on TC and the majority of April contracts fixed on a voyage basis, the return was always going to be lower, especially as the cost of bunkers started trending higher.

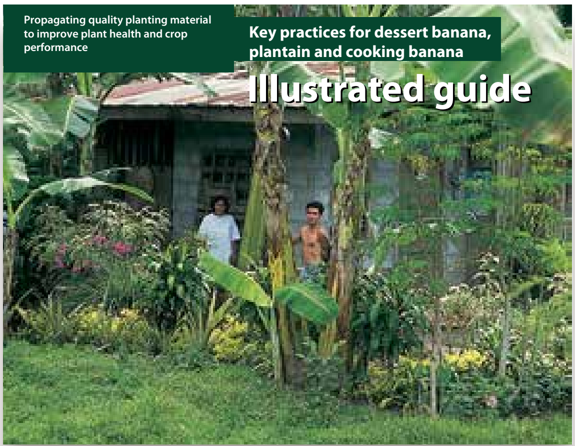
However there were other reasons: after the excitement of Chile, California and the South Atlantic, it was no great surprise to see the level of chartering activity fall away. But despite the reduction in the number of fixtures, there was still enough demand from banana and other charterers to absorb the tonnage that was not positioning for Southern Hemisphere citrus or kiwifruit commitments. The Ecuadorian exit price first fell and then stayed below the official Minimum Reference Price as, unlike last year, there was sufficient fruit in Central America for the multinationals not to need to source supplementary volumes. Indeed there was even surplus fruit in Costa Rica for Chiquita and the traders to charter into the Med.

The small segment benefited from the deployment of the better part of the Alpha Reefer fleet into long-term own business, leaving GreenSea to make the market for a limited number of fish fixtures into West Africa. Despite plenty of speculation to the contrary, Nigeria did not release its import quota for H1. Once licenses are issued, operators anticipate a surge in demand for capacity, which will benefit both large and small vessels.

EUROPE

MONTHLY SPOT AVERAGE		
USD cents/cubic foot x 30 days	**Large reefers**	**Small reefers**
April 2015	79	126
April 2014	65	81
April 2013	77	100

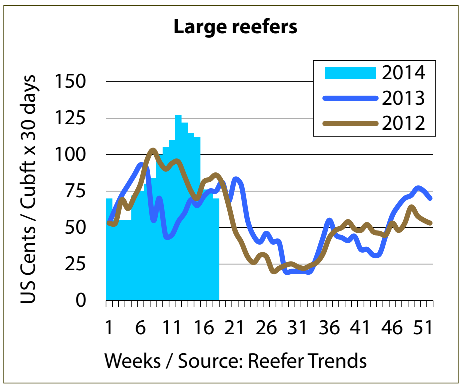
■ **Propagating quality planting material to improve plant health and crop performance, key practices for dessert banana, plantain and cooking banana.** Written by Charles Staver (Bioversity) and Thierry Lescot (CIRAD), this illustrated 56-page guide was published as a .pdf file by Bioversity International, in French, English, Spanish and Arabic versions.

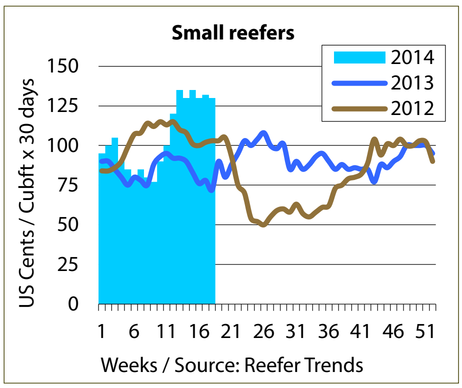


It can be downloaded for free at: www.bioversityinternational.org/e-library

■ **Cyclope report, the reference work on raw materials, has just been released.** This collective work, overseen by Philippe Chalmin, fully reveals the workings of the world markets: financial markets, grains and temperate agriculture, tropical products, seafood, ores and metals, energy, big industrial markets and services. The Cyclope report is now available in French and English, and partly in Chinese.

Cyclope Report 2015, World markets, "For whom does the bell toll?". Editions Economica. 783 pages, 139 euros



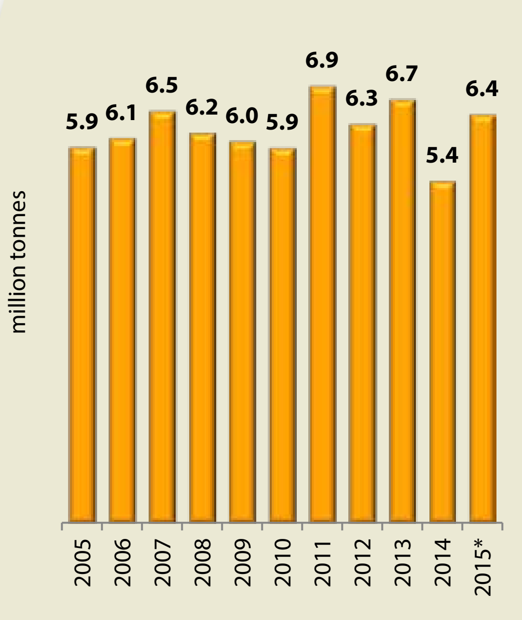


Counter-season citruses

Caution the watchword!

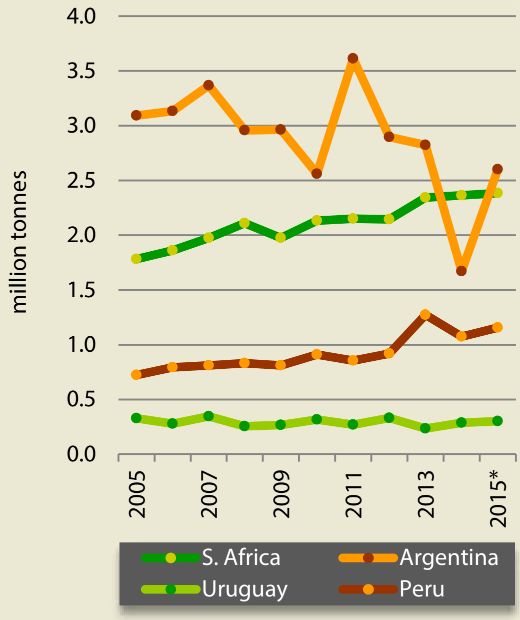
A hard to manage campaign is set to be succeeded by an even harder to manage campaign. The harvest from the producer countries is set to be bigger than last season, while the uncertainties weighing down on the big markets such as Russia and the EU are even greater in 2015 because of the weakness of the rouble and euro. The growth dynamic of extra-European markets and the high rates of lemon derivatives will be precious allies for Southern Hemisphere producers this season.

**Summer season citrus
EU-28 - Main supplier
countries production**



* Forecasts / Professional sources, Freshfel

**Summer season citrus
EU-28 - Main supplier
countries production**



* Forecasts / Professional sources, Freshfel

Extremely high production, especially for the orange and easy peelers

Southern Hemisphere citrus exporter countries are set for high production in 2015. The combined harvest of the main countries supplying the European counter-season market (Southern Africa, Argentina, Peru and Uruguay) is peaking at a near-record level of nearly 6.5 million tonnes, considerably greater than last year's lean season, and slightly up on the average. Two main factors explain this return to a higher level. On the one hand, the shortfall in the Argentinean harvest should be less marked than in the previous two seasons, with the effects of the frosts during the Southern winter 2013 gradually fading. On the other hand, the growth in surface areas of easy peelers and to a lesser extent lemon have continued to maintain the production impetus of these two citrus families. In this context the downturn in Chilean production is just one flat note among the symphony from the other sources. So the Southern orange and easy peelers harvests are registering a record level, while the lemon and grapefruit are climbing but still at a below-normal level.

© Régis Domergue

South Africa, Peru and Uruguay in good shape, though Argentina's export speciality has declined further

South Africa, the flagship source for the counter-season market, is again registering a high production level, similar to 2013 and 2014. The harvest is set to be similar to last season for all the varietal groups, to within a few percent. While there were no major climate incidents to report, with the exception of hail in certain zones of Senwes (south-west of Johannesburg), Western Cape and more recently Hoedspruit, the drought seems to have had fairly big consequences on the sizing, which is set to be rather limited for the specialities of the north of the country (mainly grapefruit and Valencia orange).

Production is looking better than in previous years for the other big player on the counter-season market, namely Argentina. The scars left by the frosts of the Southern winter 2013 and the drought are finally starting to fade after two particularly lean production seasons in 2013 and 2014. Hence the orange and easy peelers harvests are recovering their full potential. Conversely, the shortfall is set to remain for the grapefruit and also the lemon, the big national speciality.

Uruguay seems set for a stable and average orange production, but to maintain its impetus in easy peelers, thanks to the planting carried out in recent years. A similar growth trend can be found for this same varietal group in Peru, which has a low profile on the international market with the other citrus families. The only cloud over the scene is the drought which is continuing to heavily impede Chilean production. Nonetheless, while the combined harvest from the Southern Hemisphere producer countries is set to be bigger than the previous one, the export potential could well barely change. The context appears even tougher than in 2014 on key markets such as the EU and Russia, which together absorb just over half of world trade (41 % for the EU and 11 % for Russia, according to the 2013 figures).

Citrus - Uruguay - Exports

tonnes	2015 forecasts	Comparison 2015 with	
		2014	Average 2011-2014
Orange	62 000	- 17 %	- 1 %
Easy peelers	45 000	- 6 %	+ 12 %
Lemon	17 000	0 %	+ 17 %
Total	**124 000**	**- 11 %**	**+ 6 %**

Sources: MGAP, Shaffe

Citrus - Argentina - Exports

tonnes	2015 forecasts	Comparison 2015 with	
		2014	Average 2011-2014
Orange	40 000	- 47 %	- 56 %
Easy peelers	80 000	- 11 %	- 18 %
Lemon	210 000	+ 36 %	- 21 %
Total	**330 000**	**+ 3 %**	**- 24 %**

Sources: Federcitrus, Shaffe

Citrus - South Africa - Exports

tonnes	2015 forecasts	Comparison 2015 with	
		2014	Average 2011-2014
Orange	1 113 000	- 3 %	+ 5 %
Easy peelers	146 000	- 2 %	+ 18 %
Grapefruit	216 000	- 2 %	- 1 %
Lemon	204 000	+ 3 %	+ 21 %
Total	**1 679 000**	**- 2 %**	**+ 7 %**

Source: CGA

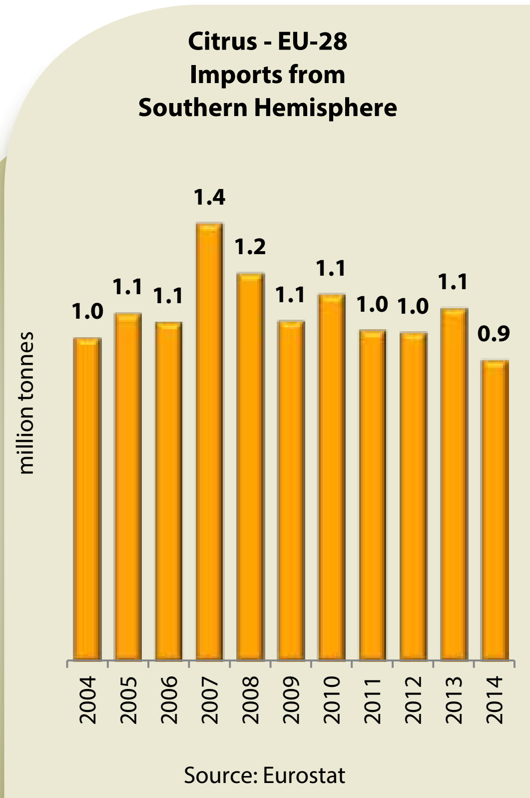
Citrus - Peru - Exports

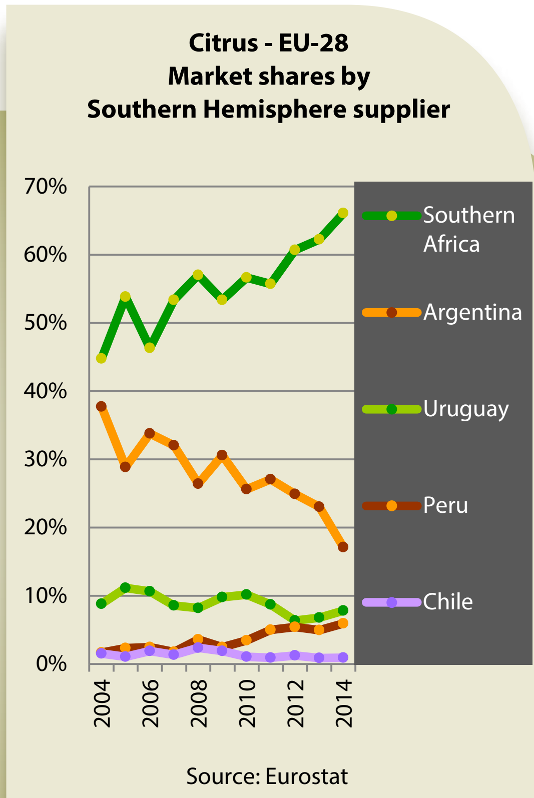
tonnes	2015 forecasts	Comparison 2015 with	
		2014	Average 2011-2014
Orange	9 300	- 7 %	- 9 %
Easy peelers	110 000	+ 9 %	+ 43 %
Total	**119 300**	**+ 8 %**	**+ 37 %**

Source: CGA

A European market slightly more open than in 2014 for the orange, easy peelers and grapefruit...

If we see past the context, the essential Community market seems to offer better prospects than in 2014 on a purely commercial level. True, the competition from summer fruits, just like last season, will be at its peak on the South European markets. In the absence of major climate problems, stone fruit harvests are close to their full potential for the peach & nectarine (5 % above average), with a slight flat note for the apricot (4 % below average). In addition, the 7 to 10-day production delay could lead to greater supply concentration, increasingly attractive thanks to the efforts made in terms of segmentation (flat peach & nectarine, etc.) and renewal (switch to more attractive cultivars for the apricot, in terms of both taste and presentation). However, the Spanish volumes of easy peelers and especially of orange yet to be sold seem to be smaller than last season. The very lively orange sales in Q1 enabled a head start of





an estimated 100 000 t sold, with a reportedly similar production potential for late varieties (Lanelate, Valencia Late and similar). Production and import stage prices in early May registered a level considerably higher than in the 2013-14 season, which admittedly was very poor. We can make the same observation for the grapefruit, as the market was much more uncluttered than in early May 2014 thanks to the early end of the incoming Floridian shipments from early April, with prices culminating at a level well above average for both Florida and Israel. The only cloud over the scene is that the Spanish lemon will be more abundant than in 2014. Production of Verna, a late variety in the Spanish range, should be up by approximately 15 %, climbing to approximately 300 000 t.

...but with an off-puttingly weak euro, on top of the strict sanitary constraints in force since 2014

However, the reinforced sanitary control measures aimed at preventing the entry of black spot remain in force (risk of border closures if more than five positive batches are detected). Yet it is the steep devaluation of the euro from 2014 which is acting as a major threat, such is the risk it poses of undermining the economic returns for all the exporter countries (loss of value of 10 to 13 %, depending on the currencies). Hence citrus imports from the Southern Hemisphere into the EU-28, which had dropped below the one million-tonne mark for the first time in ten years, could well be smaller still this season. The observation is the same, or even more depressing, for the Russian market. Despite climbing since early February, the rouble is really discouraging Southern Hemisphere exporters (loss of 20 to 23 % of its value from 2014, depending on the currencies).

Exchange variation
30 April 2015 compared to 30 April 2014

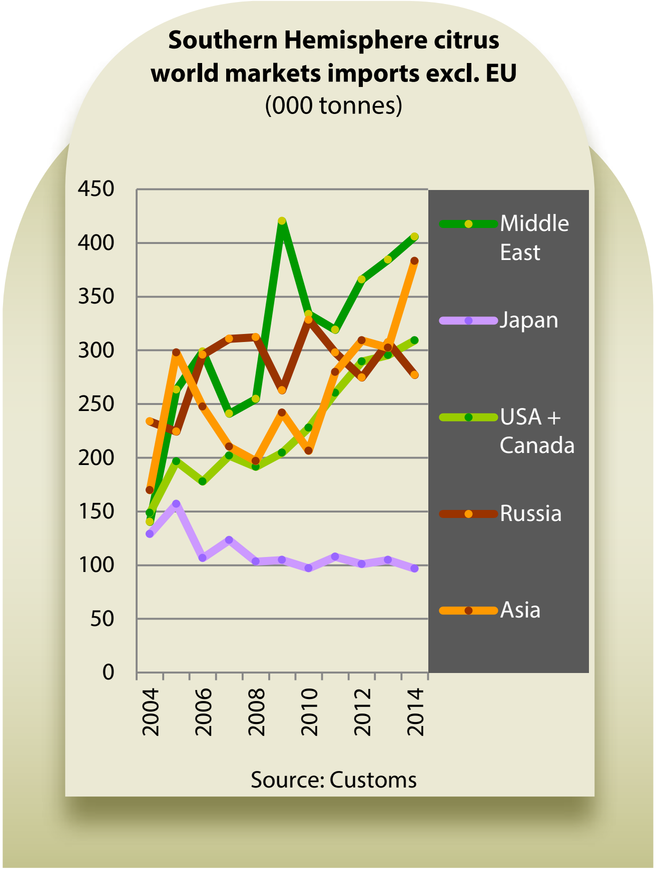
	S. African rand	Argentinean peso	Peruvian nuevo sol
Euro	- 10 %	- 13 %	- 12 %
US dollar	+ 15 %		+ 12 %
Yen	0 %		
Rouble	- 20 %	- 23 %	- 22 %
Pound	+ 3 %	- 1 %	0 %

Source: Oanda

Citruses — Proportion of world supply aimed at sensitive markets (Eurozone and Russia, where the currencies have weakened)

000 tonnes	Easy peelers	Lemon	Orange	Grapefruit	Total
Southern Hemisphere world trade*	424	437	1 355	230	2 446
Eurozone imports	73	197	454	78	801
Russian imports	75	55	126	21	277
Total, sensitive markets	147	252	580	99	1 078
%, sensitive markets	35%	58%	43%	43%	44%

* Excluding Chile and Australia, which export little to the EU-28 / Source: Customs, 2014



Substantial alternatives, at least for oranges

Just like last season, the diversification markets will play a key role for exporters. The first three, namely the Middle East, Asia excluding Japan and the United States, are enjoying a strong growth dynamic: their combined imports went from 650 000-750 000 t at the end of the last decade to 1.1 million tonnes in 2014. So they represent a particularly interesting alternative to Europe this season, especially since their exchange rate has followed an opposite trend to the euro in some cases. This clearly applies to the United States and Canada, with the dollar having risen 12 to 15 % in a year, depending on the currencies of the supplier countries. Nonetheless, the doors of these alternative markets to Europe are not open wide to the whole citrus range. Demand from these countries is primarily focused on the orange (Asia, Middle East), and to a lesser extent on the lemon and easy peelers, two products with more moderate volumes in play. It is the grapefruit which again could be a headache this season for South African exporters, the only large-scale suppliers still in place on this market. On paper, Japan is a particularly interesting alternative, thanks to the yen holding up much better than the euro. However, the small sizing of the South African fruits could be an export limiting factor on this inflexible market, which almost exclusively accepts size 36 or 40 fruits.

Double trouble for Argentina

Not all exporter countries have the emergency option of extra-European markets. This is the case with Argentina, which has still not obtained the green light back onto the US market, and is hindered by distance from serving the Asian markets. Despite real efforts made at diversification in recent years, volumes exported outside of Europe represent barely more than 10 % of the total. In addition, this source must face up to an internal economic situation which is just as tough. Production costs are continuing to rocket, at a higher tempo than inflation which is itself rampant. The cost of labour alone is rising by 30 to 25 % per year, while inflation is at 8 to 10 %. It is most fortunate that processing is more than ever a golden alternative for the lemon, which on its own represents more than half of the country's total citrus production in a normal year. Concentrated juice rates are no longer at their record level of 5 500 USD/t from June 2014, but had maintained an extremely comfortable level of 4 850 USD in late April. Essential oil is still worth its weight in gold, with a record rate in late April of 55 000 USD/t, as opposed to 25 000 to 30 000 t until late 2013.

Viewing the markets as a whole, and going off the beaten tracks

While the campaign is set to be complex, it is not irresolvable. Volumes to the essential Community market will need to be reduced and closely managed, in order to be able to hope to obtain prices 15 to 20 % higher, which production needs simply to cover the exchange loss. In this campaign's high production context, the appetite of diversification markets such as Asia and the Middle East for fresh fruit, and of the industrial sector for the lemon, will be precious assets. In short, an original marketing system, very different from previous years, needs to be set up, which is easier said than done ■

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European market for the Southern Hemisphere grapefruit

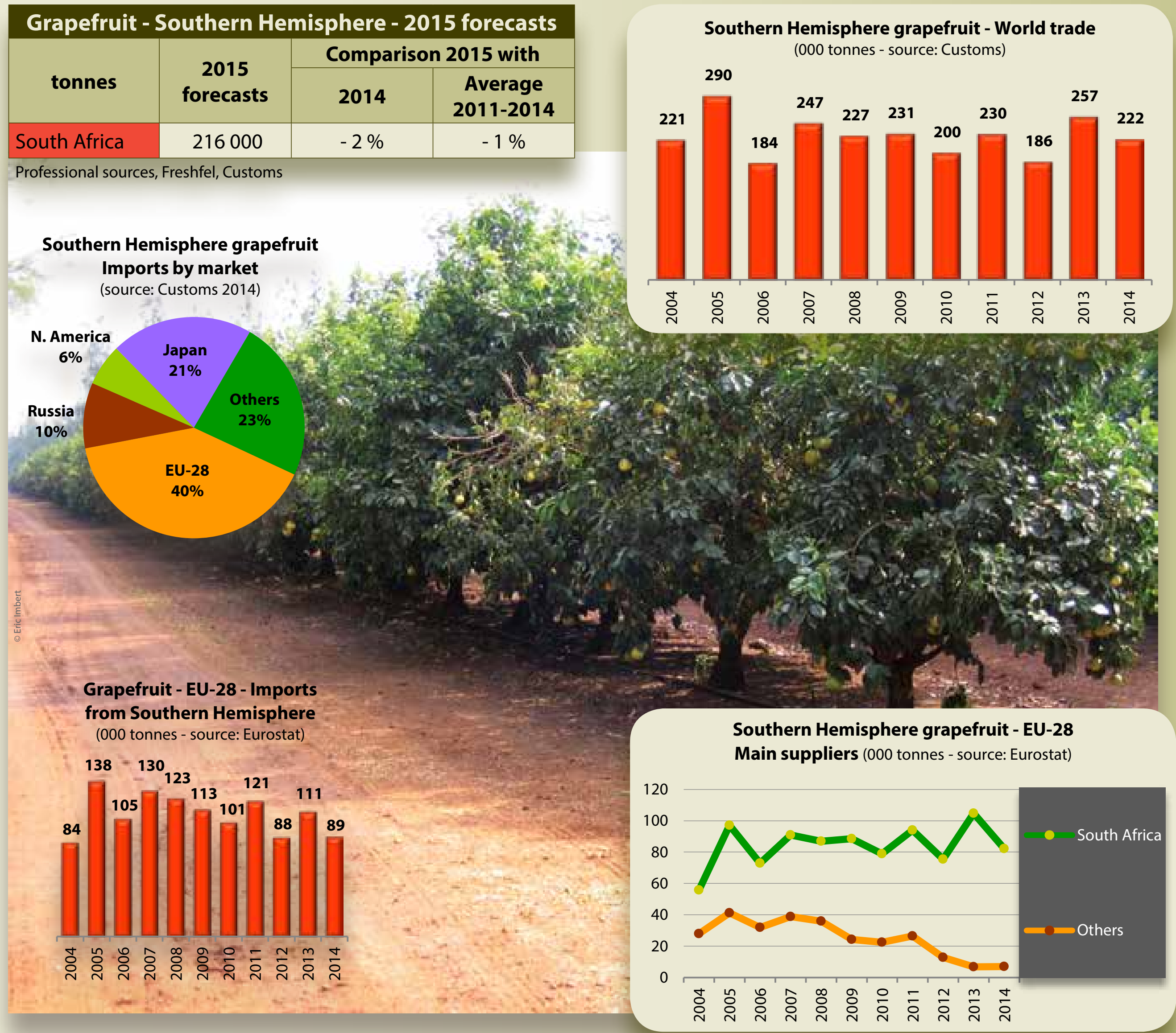
Few alternatives to Europe

At first sight, the context appears more favourable than last season in the EU-28, with a more open summer market at the beginning of the season, thanks in particular to the early end of the Floridian campaign. However, this is the only positive parameter in the equation. On the consumption side, the downturn in volumes sold by all the winter season players (with the possible exception of Spain) will confirm for the umpteenth consecutive season a marked fall on the Old Continent. On the supply side, the production from the only Southern Hemisphere country still active on the international market, namely South Africa, is slightly above average. Furthermore, alternative export outlets seem extremely limited: the industrial sector is saturated with coloured fruits, and concentrated juice rates are low (unlike white grapefruit rates), while the local South African market is under-developed. Downstream, the prospects seem unfavourable in Japan, the only substantial alternative market to Europe. The yen has held up better than the euro, and its parity with the rand is similar to last season. However, the poor sizing could well risk greatly limiting shipments to this inflexible market, which has little acceptance for sizes other than 36 and 40. Europe, with its weak currency and waning consumption, is a last resort, but in spite of everything will remain the core market. Volumes will need to be closely controlled in order to maintain profitable price levels for the upstream segment; this campaign carries a big risk of further encouraging producers to undertake further uprooting.

Grapefruit - Southern Hemisphere - 2015 forecasts

tonnes	2015 forecasts	Comparison 2015 with	
		2014	Average 2011-2014
South Africa	216 000	- 2 %	- 1 %

Professional sources, Freshfel, Customs



Grapefruit — European Union — Imports

tonnes	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Total S. Hemis.	**83 676**	**138 291**	**104 771**	**129 566**	**122 792**	**112 876**	**101 410**	**120 529**	**88 210**	**111 145**	**88 982**
South Africa	55 833	97 170	72 924	90 825	86 852	88 616	78 897	94 006	75 412	104 428	82 080
Argentina	19 583	26 869	17 627	23 186	24 171	14 828	9 129	8 276	1 485	1 078	59
Swaziland	5 369	7 197	7 210	10 085	9 260	6 707	9 906	14 986	8 480	2 327	3 989
Chile	200	474	2 513	959	719	70	363	18	176	104	64
Zimbabwe	1 436	5 001	2 227	3 556	1 409	1 947	2 053	2 228	1 360	2 399	2 241
Uruguay	401	576	2 063	775	298	213	140	-	-	-	-
Mozambique	780	919	120	-	-	240	669	1 016	840	89	-
Others	75	85	87	180	83	255	251	-	457	721	550

Source: Eurostat

LEMON

European market for the Southern Hemisphere lemon

Yellow gold, as in 2014

The lemon was an expensive fruit in 2014, and there is every reason to believe that it will be again in 2015. All the conditions seem to have come together for the Argentinean Eureka supply to the European market to be restricted again this season. On the one hand, while the shortfall from the Tucuman region is not as wide as in 2014, it is considerable nevertheless. The national harvest, estimated at approximately 1 million tonnes, is far from its nominal level fluctuating between 1.3 and 1.5 million tonnes. On the other hand, all the arguments are against exports this season. The extension of the Spanish campaign is not the worst problem. Most of all it is the scissor effect between the recurrent rise in production costs and the depressive effect of the exchange rate on the economic returns expected from the two main markets by which the country is held captive, namely the EU-28 and Russia, which could greatly limit the volumes put on the international market. In this context the derivatives industry seems a much safer outlet, in particular after the heavy spring rains which weakened production. This outlet is much better than a safety option this season, given the still astronomic prices of concentrated juice, and the actually stratospheric prices of essential oil.

So the context seems particularly favourable for South Africa to be able to repeat its fine performance from the 2014 season, when exports, which had struggled to find a second wind since 2009 after previously rising steeply, leapt up by nearly 200 000 t. This target seems to be within the reach of South African exporters in 2015; and they should not stop there in the years to come! Lemon tree sales, which fluctuated between 100 000 and 250 000 plants per year until 2008, literally exploded to reach a level of between 600 000 and 800 000 plants per year in 2010. Surface areas are in the midst of a boom in the traditional production area of Eastern Cape (Sunday's River), but also further north in the hotter Limpopo region. In the space of five years, the cultivation area rose by more than 2 000 ha, to cover 6 500 ha in 2014.

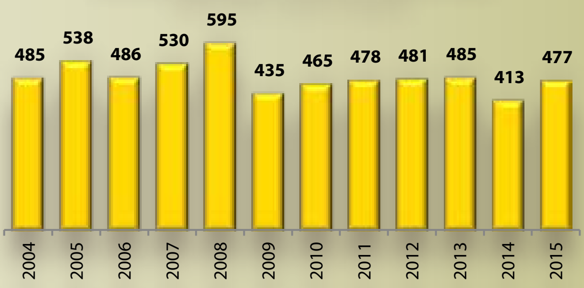
The supplementary Uruguayan volumes should remain modest.


© Pauline Feschet

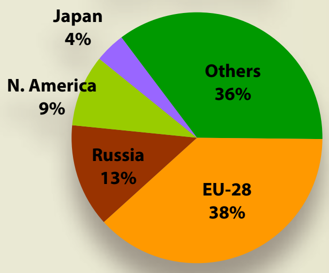
Lemon - Southern Hemisphere - 2015 forecasts			
tonnes	2015 forecasts	Comparison 2015 with	
		2014	Average 2011-2014*
Argentina	210 000	+ 36 %	- 21 %
Uruguay	17 000	0 %	+ 17 %
South Africa	204 000	+ 3 %	+ 21 %
Total	**431 000**	**+ 17 %**	**- 9 %**

* excl. 2014 for Argentina / Professional sources, Freshfel, Customs

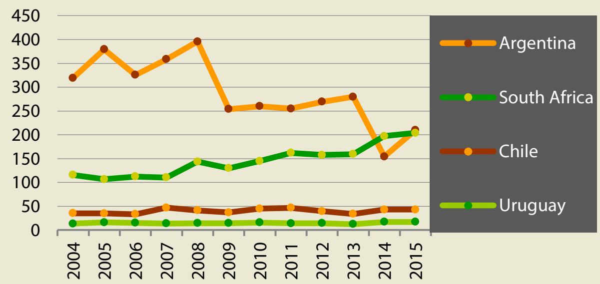
Southern Hemisphere lemon - World trade
(000 tonnes - source: Customs)



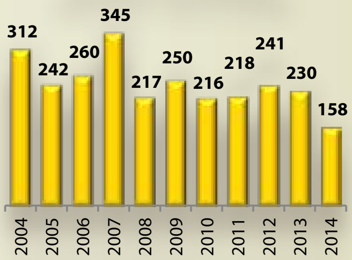
Southern Hemisphere lemon
Imports by market
(source: Customs 2014)



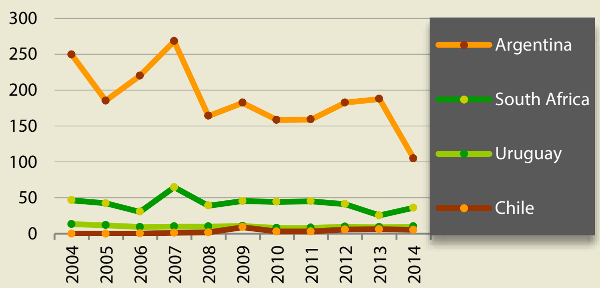
Lemon - Southern Hemisphere - Export from main suppliers
(000 tonnes - source: Customs)



Lemon - EU-28 - Imports from Southern Hemisphere
(000 tonnes - source: Eurostat)



Southern Hemisphere lemon - EU-28
Main suppliers (000 tonnes - source: Eurostat)



Lemon — European Union — Imports											
tonnes	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Total S. Hemis.	**311 618**	**242 182**	**260 389**	**344 793**	**216 854**	**250 009**	**215 532**	**217 737**	**241 025**	**229 847**	**157 683**
Argentina	249 449	185 303	219 942	267 893	163 969	182 387	158 391	159 063	182 580	187 725	104 973
South Africa	46 571	42 466	30 722	64 830	39 007	45 633	44 532	45 233	41 385	25 482	36 088
Uruguay	13 512	11 983	9 342	10 002	10 166	10 762	8 064	8 280	9 959	9 194	10 194
Chile	95	25	187	1 353	1 888	9 275	3 211	3 217	5 751	6 333	5 455
Brazil	1 573	2 366	96	477	652	5	136	-	92	249	190
Zimbabwe	415	-	2	3	-	-	-	-	2	32	120
Dom. Rep.	3	38	99	237	1 172	1 947	1 198	1 943	1 256	832	665

Source: Eurostat

European market for Southern Hemisphere easy peelers

Snubbing the Continental European markets is a possibility for most sources

EASY PEELERS

Prospects in the United Kingdom and North America

The headache due to the steep devaluation of the rouble and euro is not irresolvable in the very specific case of counter-season easy peelers. This is the market where South American or South African exporters are least heavily dependent on Russia and Continental Europe (35 % of the supply shipped to these destinations, as opposed to 43 to 58 % for the other families). The United Kingdom, the flagship easy peelers market in Europe, which brings in more than 50 % of the EU-28's total imports, will be no less of a draw for Southern Hemisphere exporters than in previous years. Unlike the euro, the pound sterling held up well in 2014, with a similar parity to last year with the South African rand, the Argentinean peso and the Peruvian nuevo sol. As for the US market, to which nearly one quarter of the world supply is directed, it has the two-fold advantage this year of a strong dollar and a natural, very rapid growth in consumption.

A fairly stable harvest in the Southern Hemisphere, despite steep increases in surface areas

In addition, the volumes available upstream should be "only" fairly similar to the previous season, with the marked growth trend observed in recent years taking a very temporary break. Peruvian exporters will step up their position on their big citrus export speciality, with a potential up by approximately 10 %. Similarly, Uruguayan production and exports should climb slightly. Conversely, the other players on this market will register stable volumes, or even down slightly. The supply from South Africa, the market leader by volume, will stop growing after three spectacular campaigns in which exports went from nearly 100 000 t to more than 150 000 t. Argentinean exporters should not be able to take advantage of a return to an average production level, after a 2014 season of intense shortfall. The problem of lack of economic competitiveness has been exacerbated by an ageing varietal range, whereas the substantial alternative markets to Continental Europe are closed to Argentinean citruses. While the overall export supply should have a fairly similar level to 2014, its breakdown should continue to evolve toward a larger proportion of late varieties. The early supply seems to be in shortfall in South Africa (stable potential for Satsuma, but down 5 % for clementines), and most of all for mid-season varieties (- 20 % for Nova), though end-of-season hybrids should see their volumes increase by more than 20 %). The situation is the same in Peru, with the cultivation area expanding primarily through varieties such as Tango and W. Murcott. Chile is in the same situation, with the clementine supply distinctly in shortfall because of the drought, while the increase in late-variety surface areas should help increase shipments to the United States.

A general production boom, from South to North

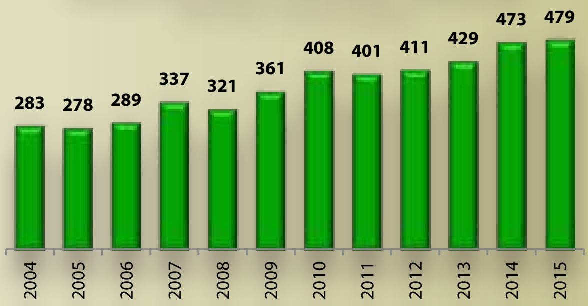
While the 2015 campaign seems manageable, the medium-term prospects appear more difficult. On the one hand, the growth of a competing extra-late supply from the Northern Hemisphere is no longer a pipe-dream. Or surface areas have exceeded 5 000 ha in Israel, while the Spanish cultivation area is now also very significant for this variety (indeed, beyond the expectations of the Israeli rightful owners). In addition, the Nadorcott boom in Spain and Morocco, and the W. Murcott boom in Turkey will probably delay the sale of Or and the other later varieties. On the other hand, there are major surface area expansions with the two leading producers in this family of Southern Hemisphere citruses. The South African cultivation area rose by 2 700 ha between 2009 and 2014. The leap is even more marked for hybrids (mainly late-season), which saw their surface areas practically triple during the same period, to exceed 5 000 ha (two-thirds of the cultivation area) thanks to converting plantations of varieties such as the clementine. From Peru, meanwhile, we can expect literally an explosion in production. The harvest, at approximately 350 000 t now, should approach 700 000 t in 2020 because of the scale of surface areas of varieties such as W. Murcott and Tango (planting rights up to 1 750 ha for this variety). There is also extremely strong growth in Chile, where production of easy peelers other than the clementine should triple by the end of the decade.

Which markets are available for this additional supply? Consumption seems practically stabilised in the EU-28, which currently absorbs nearly 40 % of easy peelers trade during the summer period. Encouraging interest in the product outside of the United Kingdom is a possibility, provided that there is a massive investment in promotion. Meanwhile, they will need to rely primarily on North America and Asia.

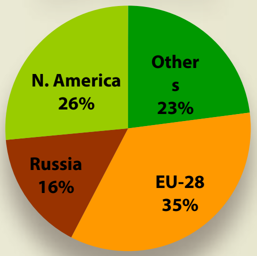
Easy peelers - Southern Hemisphere - 2015 forecasts			
tonnes	2015 forecasts	Comparison 2015 with	
		2014	Average 2011-2014
South Africa	146 000	- 2 %	+ 18 %
Argentina	80 000	- 11 %	- 15 %
Uruguay	45 000	- 6 %	+ 18 %
Peru	110 000	- 9 %	+ 43 %
Total	**381 000**	**- 2 %**	**+ 13 %**

Professional sources, Freshfel, Customs

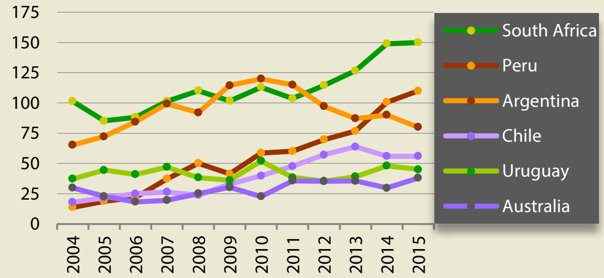
Southern Hemisphere easy peelers - World trade
(000 tonnes - source: Customs)



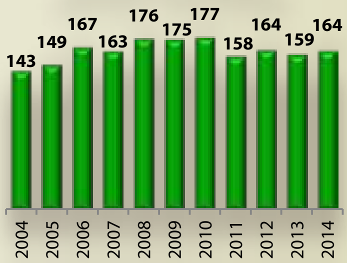
Southern Hemisphere easy peelers
Imports by market
(source: Customs 2014)



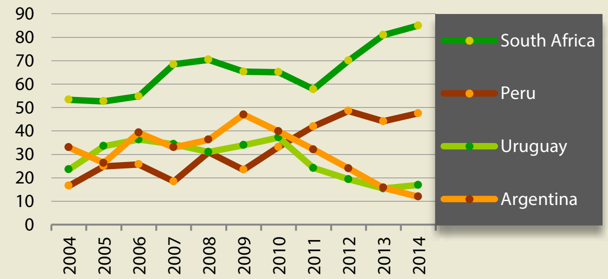
Easy peelers - Southern Hemisphere - Exports
from main suppliers (000 tonnes - source: Customs)



Easy peelers - EU-28 - Imports from Southern Hemisphere
(000 tonnes - source: Eurostat)



Southern Hemisphere easy peelers - EU-28
Main suppliers (000 tonnes - source: Eurostat)



Easy peelers — European Union — Imports											
tonnes	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Total S. Hemis.	**142 647**	**148 776**	**167 143**	**162 971**	**175 929**	**175 157**	**177 400**	**157 853**	**164 109**	**159 344**	**163 543**
South Africa	53 378	52 683	54 790	68 412	70 389	65 261	65 100	57 755	70 030	80 948	84 927
Argentina	33 023	26 403	39 271	33 022	36 243	47 020	39 800	32 130	24 025	15 874	11 965
Uruguay	23 548	33 519	36 336	34 359	31 046	33 948	37 200	24 160	19 431	15 469	16 945
Peru	16 611	24 924	25 728	18 469	30 981	23 414	33 200	41 925	48 536	44 139	47 561
Chile	10 925	6 770	7 618	6 950	4 886	2 249	1 400	1 560	1 314	1 012	1 481
Brazil	2 584	3 288	2 059	93	441	378	200	102	310	112	-
Australia	756	456	710	652	926	2 214	500	220	463	1 903	665

Source: Eurostat

European market for the Southern Hemisphere orange

Diversification markets and an open commercial context in the EU-28

The weakness of the euro and rouble weighing down on volumes equating to 45 % of total exports from South Africa and South America is the stuff of nightmares. Nonetheless, the commercial context appears less difficult than last season in the EU-28, due to the head start by Spanish sales, while the diversification markets are able to absorb significant additional volumes. There are substantial challenges for the upstream segment, since the orange is still by far the number one product by value in the summer citrus family.

Export potential slightly down, but above average

The overall supply is set to be a bit more modest than last season, though still above average. This trend is due to the evolution of the production of the undisputed leader of this product family, namely South Africa, which on its own represents more than 90 % of total exports from supplier countries to the European market. Its harvest should ebb very slightly, both for the Navel group and Valencia group, because of the unfavourable weather in certain zones (Western Cape and Senwes). The downturn in the Valencia sizing, due to the drought in the north of the country, should pose fewer problems than with the grapefruit, with most of the international markets being fairly flexible in terms of juice orange size. The additional volumes from South American sources should be more moderate. While the Uruguayan export potential should be close to that of 2014, Argentina's competitiveness problems should lead to a fall in exports despite a steeply increasing production, returning to an average level after two years of intense shortfall.

A more open commercial context in the EU-28, able to at least partially counterbalance the exchange rate loss

The EU-28, which absorbs approximately 45 % of volumes exported by South Africa and South America, is a key outlet. The commercial context, radically different to last season, is likely to at least partially reassure exporters discouraged by the fall in the euro. Spanish Navelate sales got off to distinct head start, which should enable the season to end in late May. This situation is helping the source maintain a good sales tempo for Valencia Late. Furthermore, just like last season, Maroc Late exports should be low, in order to supply the high-demand local market in the Ramadan period. Hence price prospects appear better than in 2014. This is unfortunately not the case with Russia, though the volumes in play are less substantial.

Diversification markets in a position to play a stabilising role

Furthermore, exporters should be able to ease the supply to markets weakened by the exchange rate, in order to guarantee decent returns on production. Asia, whose imports practically doubled since 2010, to approach 400 000 t in 2014, should be able to absorb significant additional volumes from South Africa, especially since production from its Australian competitor is relatively stable. The dynamic of the Middle Eastern markets is also a positive point. The natural growth trend should continue to be boosted by the presence of Ramadan, a strong consumption period for this product, during the summer. Which leaves the unknown of the Egyptian presence, stronger every year, a major trend given the very heavy expansion of surface areas in recent years. The harvest, estimated at approximately 3.5 million tonnes at present, could reach 5.5 million tonnes by the end of the decade.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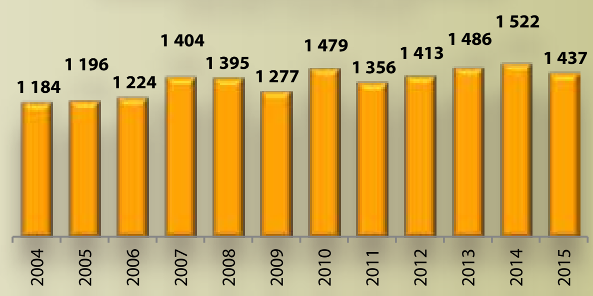
ORANGE

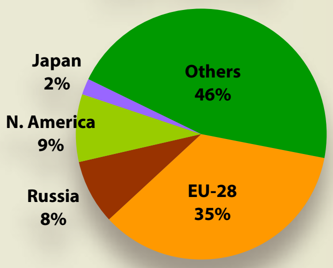
Orange - Southern Hemisphere - 2015 forecasts			
tonnes	2015 forecasts	Comparison 2015 with	
		2014	Average 2011-2014
South Africa	1 113 000	- 3 %	+ 5 %
Argentina	40 000	- 47 %	- 56 %
Uruguay	62 000	- 17 %	- 1 %
Peru	9 300	- 7 %	- 9 %
Total	**1 224 300**	**- 7 %**	**+ 8 %**

Professional sources, Freshfel, Customs

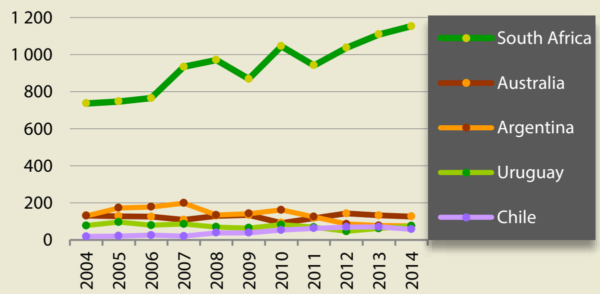
Southern Hemisphere orange - World trade
(000 tonnes - source: Customs)



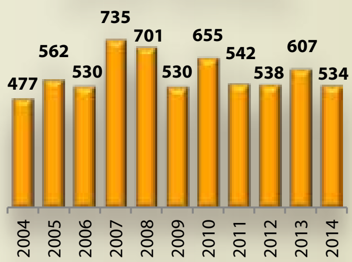
Southern Hemisphere orange
Imports by market
(source: Customs 2014)



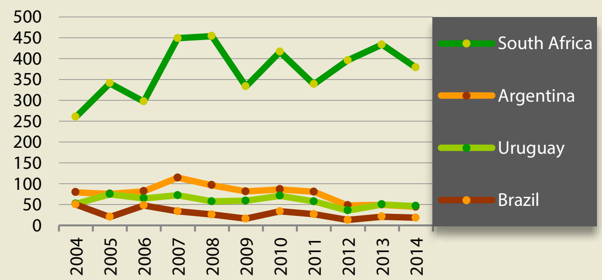
Orange - Southern Hemisphere - Exports from main suppliers
(000 tonnes - source: Customs)



Orange - EU-28 - Imports from Southern Hemisphere
(000 tonnes - source: Eurostat)



Southern Hemisphere orange - EU-28
Main suppliers (000 tonnes - source: Eurostat)

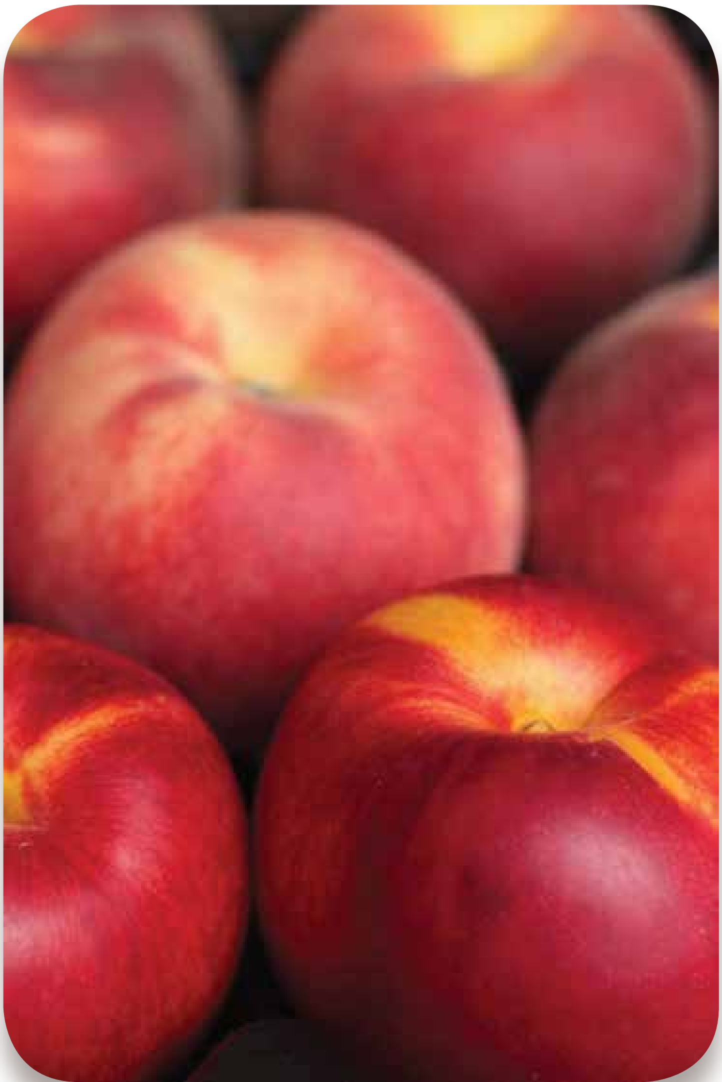


Orange — European Union — Imports											
tonnes	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Total S. Hemis.	**476 929**	**561 676**	**530 340**	**734 565**	**701 032**	**529 560**	**655 309**	**542 240**	**538 071**	**606 770**	**533 673**
South Africa	260 034	341 031	296 973	448 674	453 956	333 211	416 018	338 664	396 015	433 369	378 708
Argentina	79 584	75 607	81 906	114 628	96 350	81 413	86 702	80 720	47 971	49 621	44 472
Uruguay	51 825	75 145	64 930	72 261	57 700	59 293	71 279	57 610	36 012	50 243	46 768
Brazil	50 414	20 459	47 937	34 066	26 091	16 217	33 903	26 872	13 276	21 248	18 690
Zimbabwe	16 215	30 153	13 342	25 488	16 582	13 517	23 705	11 645	19 257	28 471	31 868
Swaziland	13 645	10 375	13 654	19 274	14 878	12 983	9 566	11 879	12 005	9 801	2 674
Chile	4 019	4 426	10 105	9 006	21 385	8 609	6 899	4 716	5 730	2 208	1 557
Australia	1 113	4 315	1 041	5 250	1 730	1 640	1 045	243	553	487	318
Peru	81	166	454	5 921	12 361	2 678	6 192	9 892	7 254	10 565	8 619

Source: Eurostat

European stone fruits campaign

First 2015 harvest information



The European harvest forecasts were unveiled at the recent EuroMéditerranée trade fair (Medfel), held in Perpignan from 21 to 23 April. They indicated that the campaign does not really have a head start, although the Seville zone started early. The calendar actually seems to be slightly behind last year, which was an early one, by a week or even ten days. Peach and nectarine production (including flat varieties) seems to be stabilising overall, and should reach nearly 3 million tonnes (+ 1 % on 2014 and + 5 % on the 2009-2013 average). Apricot production is set to be slightly in shortfall (- 4 % on 2014 and - 4 % on the 2009-2013 average), and could reach 510 000 t at most due to poor climate conditions which have affected several production centres.

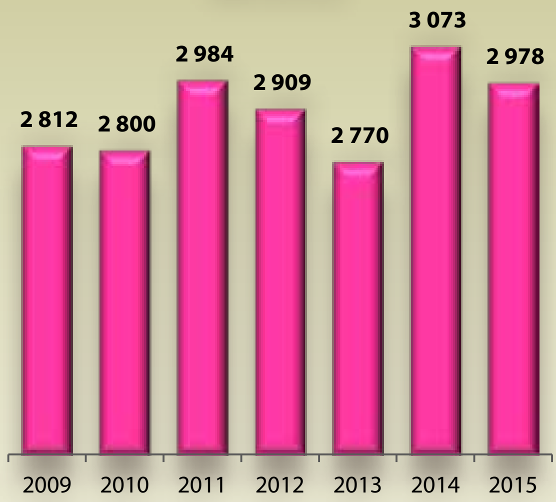
Fewer peaches, but more nectarines

The major structural trends from recent years are not flagging, though the changes are now less marked, particularly for the peach. True, surface areas are continuing to rise in Spain, while other European production centres are still registering a slight drop. However, the situation is tending to stabilise, with in addition a small advantage for nectarines to the detriment of peaches. Indeed, we are still seeing conversion of pip fruit orchards to stone fruits, which primarily involves the nectarine and apricot, plus the cherry, while the peach and plum are on the wane. And this trend can be found even on modern cultivars, since while flat peach production is still expanding (+ 12 % for Spain this year) due to the entry into production of young orchards, certain producers are already opting to graft their trees with flat nectarines. Modern varieties are also being planted in Greece and southern Italy. Surface areas in France are stable. Climate conditions have been unfavourable in Spain, and should enable a normal production potential to be expressed, though slightly behind the early 2014 season. Conversely, the climate conditions were less favourable in other countries. The rain that fell during flowering should cause a fall in potential, including in production zones where surface areas are on the rise (Southern Italy, Greece). In addition, the potential was reduced in Greece by the frosts. Most countries are approximately ten days behind 2014, an early year, i.e. on a near-normal calendar. Hence the overall potential should at the very most be similar to last year, and could even be revised downward slightly, especially in France.

Apricot potential reduced to too simple an expression

Similarly, there is no sign of the frenzy fading for the new apricot varieties, especially the decent-sized orange and above all red types. So the potential appears to have expanded significantly with the increase in surface areas in most of the production zones, and the entry into production of young orchards. Yet the climate vagaries and pendulum phenomenon, after a strong 2014, limited the progress of a potential just waiting to be expressed. The harvest is actually set to be particularly lean in Greece, where in addition to very wet climate conditions during flowering, volumes were reduced by a heavy frost period which was particularly damaging to the production potential in the north of the country. Excessive production is not expected either in France, with a slight shortfall in Italy. Only Spain, which en-

Peach and nectarine - EU-28 - Production
(000 tonnes)



Source: Medfel

Peach and nectarine — EU-28
Evolution of production
in main producer countries

tonnes	2015 forecasts	Comparison 2015 with	
		2014	Average last 3 years
Italy	1 314 587	0 %	- 11 %
Spain	1 131 168	+ 3 %	+ 40 %
France	214 791	- 4 %	- 25 %
Greece	317 000	+ 1 %	+ 15 %
Total	**2 977 546**	**+ 1 %**	**+ 5 %**

Source: Medfel / Processed by Infofruit

joyed more favourable climate conditions, should harness its full production capacity. However, as with the peach, the production calendar shoud be slightly out of step with 2014.

A campaign under embargo

The primary concern of the upstream structures is the consequences of the Russian embargo. European exports to Russia amount to around 165 000 t. The bulk is exported by Spain (110 000 t) and Greece (26 000 t). But the re-routing of these quantities will have effects on the whole European market; and the measures taken in light of the embargo by the European Community might not be sufficient, and in principle are set to end in June. So producers are asking for this aid to be extended, and for the compensation to correspond to the severity of the crisis. Since while operators are turning to other destinations to relieve the market, this destination will not be easy to replace, since exports to third countries are unsuitable for these highly perishable products, and will take a long time to set up. So they want to see the implementation of a vast Europe-wide promotion programme, and more generally are requesting the inclusion in the CAP of proportionate intervention measures in case of serious crises. The introduction into R-1308 of horizontal provisions on "exceptional measures against market disruptions", "crises due to lack of consumer confidence" or "specific problems", and the creation of the "Crises Reserve" is a first step, though producers appear to want them to be triggered automatically, and to be well funded, in order to be able to stabilise the markets by activating the "Crises Reserve" without delay ■

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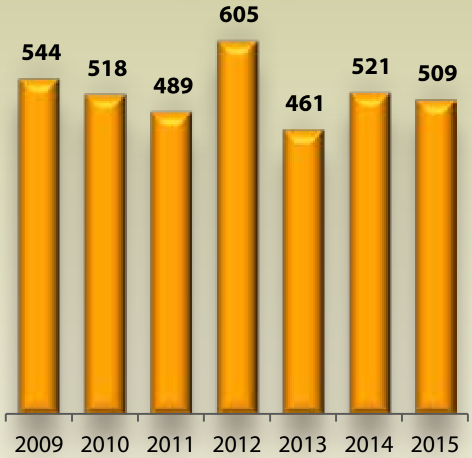
Apricot - EU-28 - Production
(000 tonnes)



Source: Medfel

Apricot — EU-28
Evolution of production
in main producer countries

tonnes	2015 forecasts	Comparison 2015 with 2014	Comparison 2015 with Average last 3 years
Italy	197 451	- 7 %	- 12 %
France	166 169	- 4 %	+ 2 %
Spain	99 950	+ 12 %	+ 21 %
Greece	46 000	- 13 %	- 20 %
Total	**509 570**	**- 4 %**	**- 4 %**

Source: Medfel / Processed by Infofruit

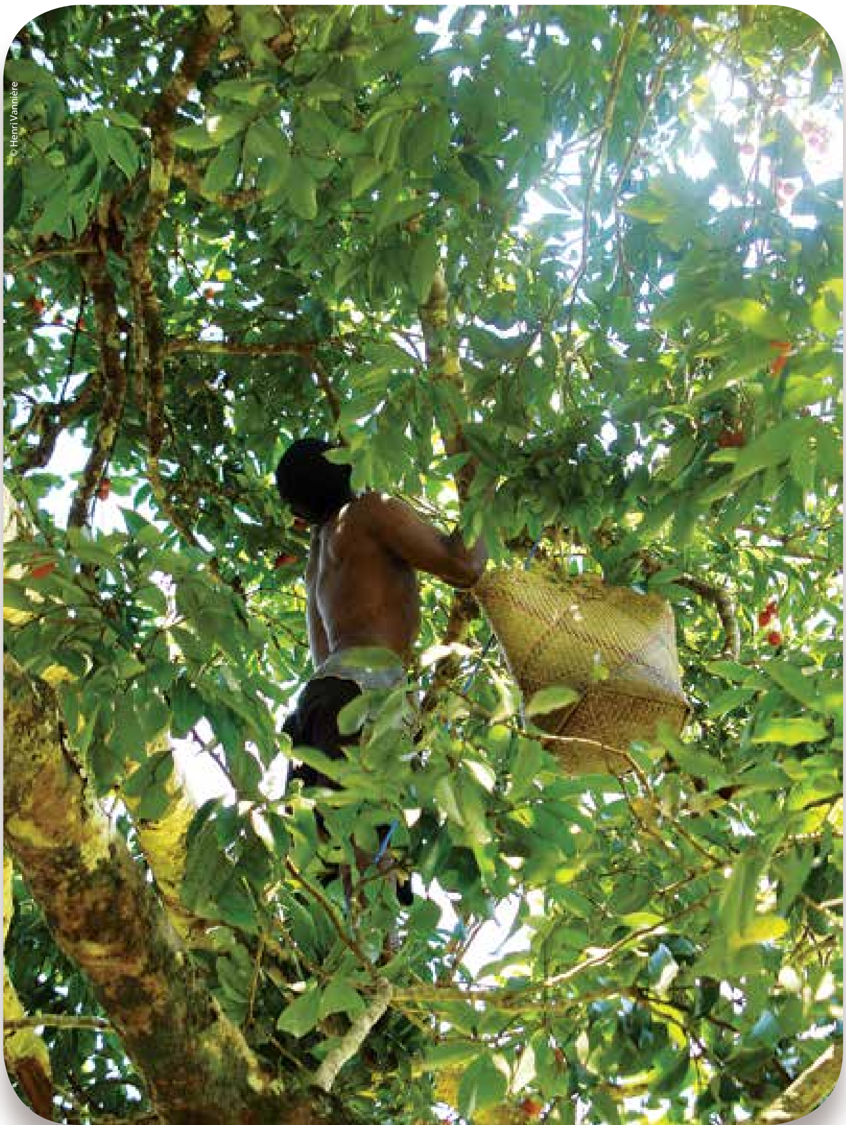
Peach and nectarine
Russian imports in 2013

tonnes	2013
World, of which	**214 510**
EU-28, of which	166 360
Spain	111 433
Greece	42 780
Italy	11 823
Others	324

Source: Customs / Processed by Infofruit

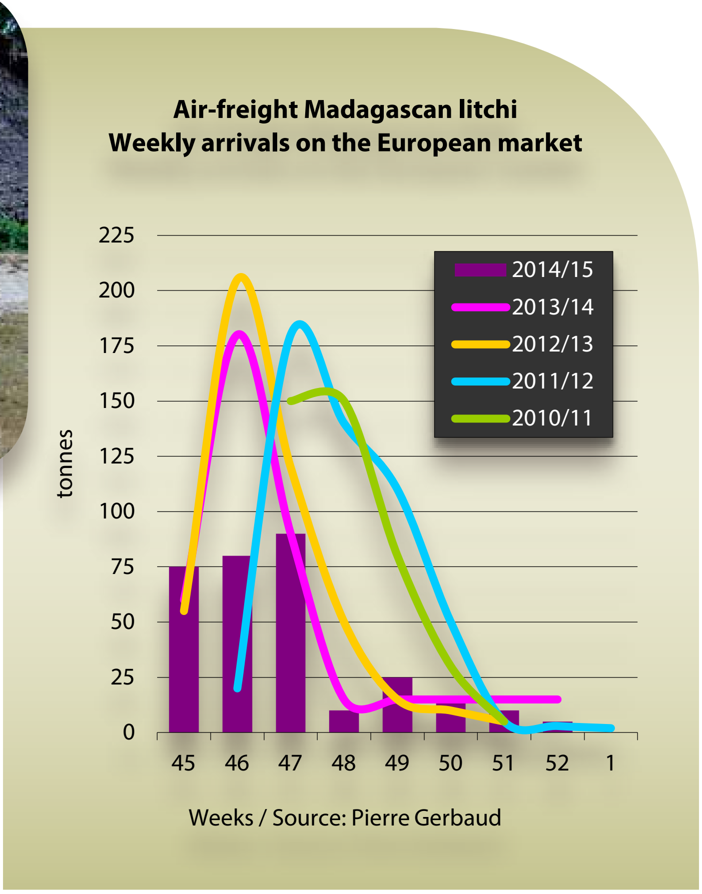
Madagascan litchi in 2014-15

Sun shining on the Madagascan industry



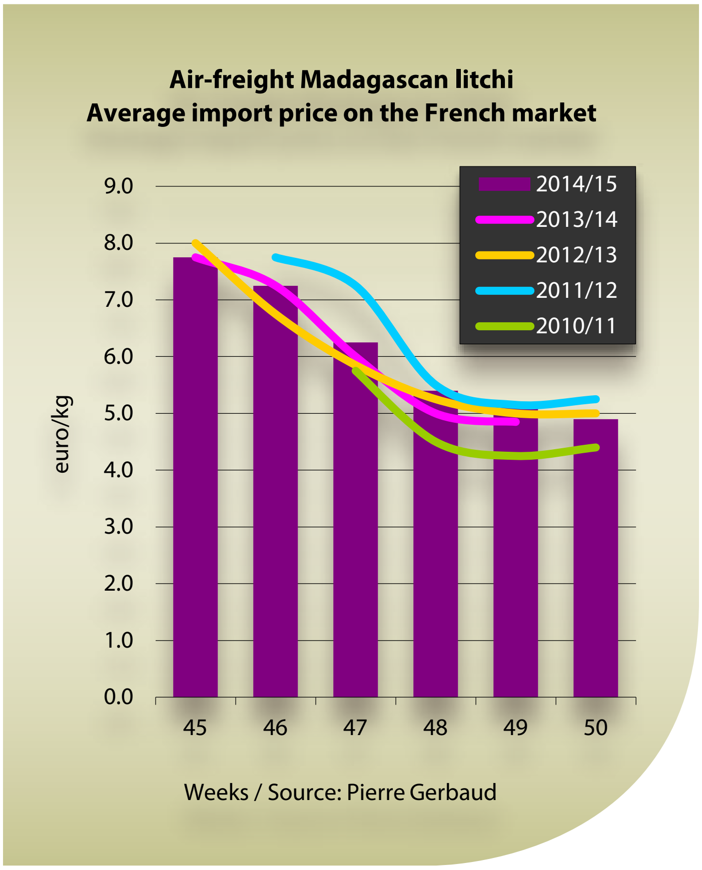
An old saying has it that the truly happy are those unburdened with history. Might this apply to the Madagascan litchi industry? After the restructuring of 2010-11 and the consolidation of 2011-12, the 2013-14 campaign confirmed the industry's new organisation set up two years previously. Reproducing the same organisational components for the 2014-15 campaign put the industry on the tried and tested path to success. What can we say about the satisfactory results, without repeating the observations already made in this review? However, we still need to reckon with the vagaries inherent in a large-volume export campaign over a concentrated time-scale.

On the strength of the positive results of the 2013-14 campaign, the players in the Madagascan litchi industry unanimously decided to reproduce the same campaign model for the 2014-15 season. The forecasts announced on the dawn of the campaign looked like they had been mistaken for those from last year. The scheduled volumes were similar with the same logistics, down to the conventional ships selected and their order of arrival in Europe. Similarly, production was equivalent and the harvest calendar once again early, for the third consecutive year. Hence the sea-freight litchi campaign amounted to 17 470 tonnes, divided between 14 950 tonnes by conventional ships and 2 520 tonnes by container, to which we should add the 320 tonnes of air-freight litchis. This quantitative result is practically the same as the previous year: 14 880 tonnes by conventional ships, 2 550 tonnes by container and 405 tonnes by air freight. The previously observed trends were partly confirmed, with a slight rise in conventional ship volumes, a similar container tonnage and a dip in air-freight quantities.



Air-freight shipments down

Confirming the trend highlighted above, Madagascan litchi exports decreased once again last campaign, down from 400 to 320 tonnes. The higher competitiveness of fruits from the other Indian Ocean sources actually seems to have limited Madagascan shipments on a highly competitive market in the first period of the campaign. The relative earliness of the harvest was an advantage, but also a drawback. The advantage lay in the fairly substantial market time before the arrival of the sea-freight litchis. The drawback lay in the lack of consumption vigour in a period still a long way off the end-of-year holidays, the purchasing peak for this product.



As during the previous campaign, trading began in week 45. The source kicked off the season with substantial shipments, thus dominating the supply. Yet the other Indian Ocean sources started their shipments the following week, leading to sudden litchi availability on an unresponsive market. Furthermore, the high prices offered, above 7.00 euros/kg, did not help invigorate consumption. Rates ebbed from the second week on the market, approaching 6.00 euros/kg in the third week, while the supply intensified further with an average of 200 tonnes per week across all sources.

Faced with the increase in incoming shipments from South Africa and Reunion, the Madagascan industry operators decided to suspend supplies in week 48, in an attempt to check the fall in rates, now down to around 5.00 euros/kg and close to their profitability threshold. Shipments resumed on a very moderate scale to bridge the gap to the arrival of the sea-freight litchis scheduled for the middle of week 50. A few batches were received until the end of the year. These were marginal quantities comprising untreated fruits aimed at traditional stores.

While the cost price of Madagascan litchis is still impeding their profitability, they are not being helped much by their quality either. Every year there is a similar observation: despite a higher cost price, they are no more attractive in terms of quality than fruit from competing sources. The mostly small fruit size, and the proportionally inverse size of the stones leaves consumers with little flesh to enjoy. Their appearance, generally drab and not always coloured, is a frequent disappointment for purchasers, especially at the prices charged. Hence, an objective comparison between air-freight and sea-freight fruits is indistinct at best. The fall in volumes exported for the past few years is a true reflection of the economic and qualitative aspects facing Madagascan exporters. Might better selection of air-freight fruits not be a realistic way of at least partly eliminating the competitiveness deficit of Madagascan litchis?

A stable sea-freight campaign

The organisation of the sea-freight campaign seems to be practically a rerun of last year's. The early litchi production made it possible to schedule the same conventional ships, with more or less the same volumes and the same ship arrival dates in Europe to supply the markets for the end-of-year holidays. The only apparent modifications were logistical, with more rapid departures from the port of Tamatave, with one or two additional days' sailing demonstrating the efficiency of the ship loading process at the source. Setting off on 21 and 24 November, the two conventional ships arrived in Europe on 9 and 15 December respectively. The late-evening arrival of the first ship from Madagascar, half a day behind the initial forecasts, put back the fruit unloading until Wednesday 10 December. In the morning, the first pallets were loaded onto the lorries making the final delivery to the main European consumption centres. Unloading was finished on Thursday 11 December. The speed of the unloading operations complied with the orders of the big distribution stores, which were able to offer their customers Madagascan litchis from the weekend of 13 and 14 December. These standard quality fruits were well received by the distribution circuits, with a number of promotions adorning shop shelves. The price was set at around 2.50-2.80 euros/kg, i.e. at the same level as the previous year. Some batches sold at slightly lower prices to meet the promotion demands of the distributors.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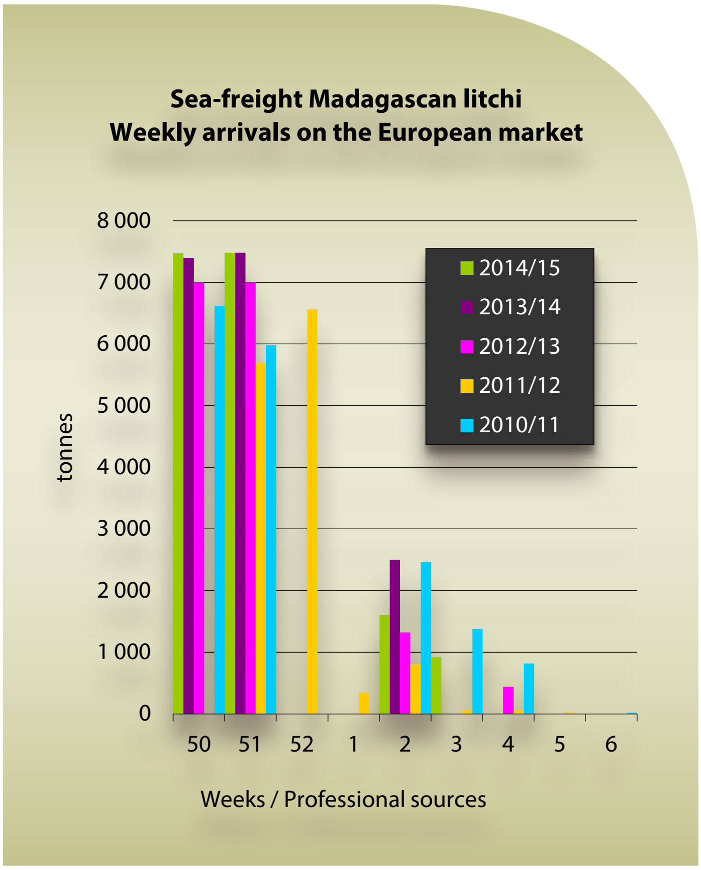
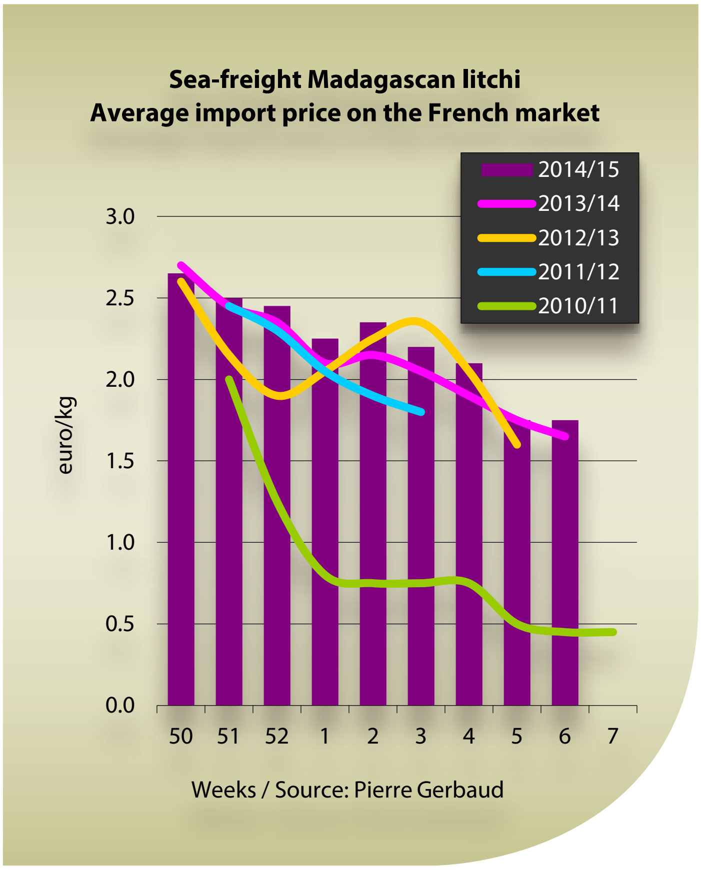
Demand remained high in week 51, when the second conventional ship docked in the port of Zeebrugge. The unloading of this ship was also delayed, not starting until Tuesday 16 December, because of the general strike declared in Belgium on 15 December; this ended on the afternoon of Wednesday 17 December. This cargo supplemented the shipments to the various European markets for the sales of the weekend of 20 and 21 December. The quality of fruit from the second ship proved similar to the first, though with a slightly bigger average size.

On the eve of the end-of-year holidays, the cargo from the first ship had practically sold off, enjoying good general demand in various European countries. Germany and France remained the main markets for the Madagascan litchi. Italy, the Netherlands, the United Kingdom and Belgium absorbed smaller quantities. Markets more affected by the European economic stagnation, such as Spain, made a more modest contribution. Prices of Madagascan litchis ebbed gradually as the campaign went on, though they remained slightly above those of the previous year. This slight increase was due not to livelier demand but rather to this year's higher costs being passed on. After the holiday period demand dipped, though it did remain relatively high. This trend intensified at the beginning of the year, when price concessions were granted to certain distributors, in order to maintain consumer interest in the product and sell off the rest of the cargo from the second ship before the arrival of the first container litchis scheduled around 10 January.

The previously fluid sales of Madagascan litchis proved distinctly more difficult in the final phase of the campaign. A combination of adverse factors at this time produced a more complex profile. The traditional fall in demand after the end-of-year holidays was hugely intensified this year in France by the attacks of 7 and 9 January, stronger competition from better sized and better tasting South African produce, the late celebration of Chinese New Year (19 February) and the more fragile quality of Madagascan container litchis. This all weighed down heavily on the sales of the last quantities available. The attempted price re-evaluation for marketing container litchis lasted only a few days. Prices then took a downturn, dropping more slowly than the previous year, though accompanied by greater market difficulties. The slow sales told on the fragile quality of the fruit, which put off purchasers as it aged. The last batches often sold at open prices in the first half of February.





Good results, but still room for improvement in quality

While the Madagascan litchi industry can once again take pride in the good results achieved during this campaign, certain aspects remain pending, or deserve more attention from the players in this industry. True, the loss of competitiveness of the air-freight litchis is dependent on the higher freight rates for Madagascar than for other sources in the region. Yet fruit quality also remains a handicap for the source, while more rigorous selection would help if not eliminate the cost differential at least significantly reduce it. With the reduction in air-freight volumes, Madagascar is losing market share, which may be damaging to the whole campaign. The air-freight campaign is complex and short, but to some extent paves the way for the sea-freight litchi campaign by advertising the presence of the source.

For the end-of-year sea-freight campaign, Madagascar progressively made its presence felt through its volumes and competitive prices, more particularly in the European supermarket circuits. Here, a standard quality based mainly on fruit safety in terms of sulphur residues is acceptable. In this field, the systems in place at all stages of the industry seem to have been operating satisfactorily for the past three campaigns. However, an improvement in quality would probably boost Madagascan export value.

Ultimately, these qualitative aspects are more damaging to Madagascan merchandise during the latter phase of the campaign. The standard quality, acceptable with the conventional ships, is considerably less so for the containerised merchandise which in January and early February comes up against competition from South Africa at the height of its campaign. At the end of the season the containers can be loaded under calmer conditions than for the conventional ships: so stricter fruit selection does not seem beyond the realms of possibility. It may appear difficult to toughen up the qualitative requirements on sizing among producers, hitherto used to supplying fruits as they come, and working methods evolving slowly. Were the modifications vital for the industry in terms of sulphur treatment and certification not made in their time? The Madagascan litchi industry is achieving good results, but it could be tending to rest on its laurels, while the development of an industry is often based on its ability to adapt and innovate ■

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Fear for the Madagascan industry

Every year, the litchi trade is subjected to internal or external vagaries which more or less heavily disrupt the preparations or the campaign itself. It may be bad weather in Europe, cyclones in the Indian Ocean, or port or transport strikes. This campaign was once more interrupted by serious events, though without profound effects. True, the Paris attacks did influence store footfall in January 2015. Yet during the preparations for the campaign, the resurgence of the plague in the suburbs of Antananarivo for a time called Madagascan litchi exports into question. This disease endemic to Madagascar reappeared during August, causing tens of deaths. Could this dramatic event have compromised the litchi export campaign? AFP wrongly reported that the fly was the disease vector. That was all it took to put the profession into a panic over the possibilities of transmission via the fruits. Press releases by the WHO and the Pasteur Institute in Madagascar quickly specified that the plague transmission vector was a variety of flea hosted by rats, and the spread of the disease by fruit exports was ruled out. This tragicomedy reiterates, if proof were needed, that age-old fears persist.


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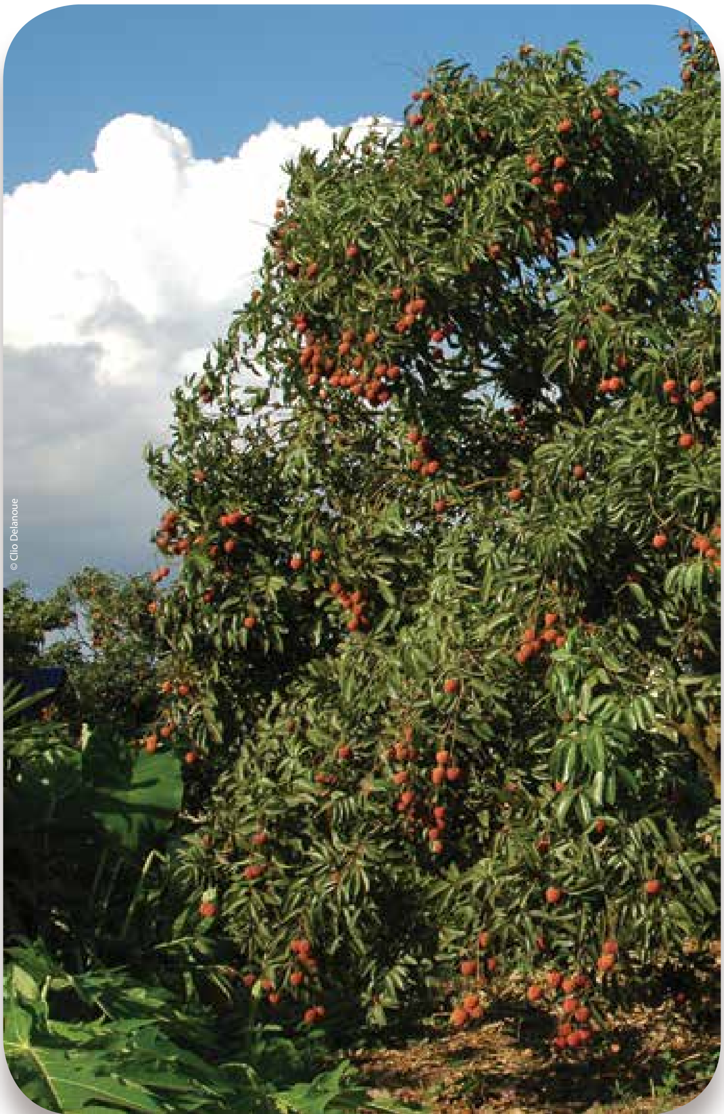
2014-15 litchi campaign

The other Indian Ocean sources



Apart from the appearance of Mozambique as an emerging source in the litchi trade, the 2014-15 campaign very much resembled the previous one. The end of the year remained the highlight for this product, with fruits supplied from Madagascar, South Africa, Reunion and Mauritius. The trading periods, the volumes received and fruit quality were more or less similar to the previous year. Besides the Indian Ocean season, there was also little perceptible change for Israel, with stable exports over the summer period. Thailand seems to have confirmed its winding-down period in May-June. The other sources active during the year maintained the same limited volumes, such as Mexico (June-July) or Vietnam. China also shipped some volumes, though its fruits are not generally sold via traditional distribution circuits, making it difficult to evaluate the flows.

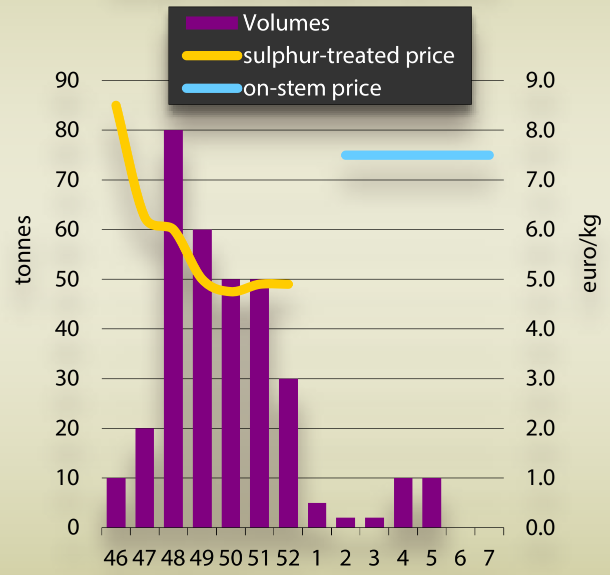
South Africa

Smaller tonnages, with adaptation

The 2014-15 South African campaign proved distinctly less abundant than the previous one, when the quantities shipped were estimated at 2 450 tonnes. It marked a considerable downturn, with volumes estimated at between 1 700 and 1 800 tonnes. The campaign profile was also different this year. The first air-freight shipments started in week 46, at the same time as the neighbouring sources, whereas the first batches, though modest, were received in week 44 in the previous campaign. Faced with competition from other suppliers to the European market, South African litchis saw their rates drop rapidly in parallel with the overall growth in supply, from 8.00 euros/kg for the first shipments to 5.00 euros/kg the following weeks.

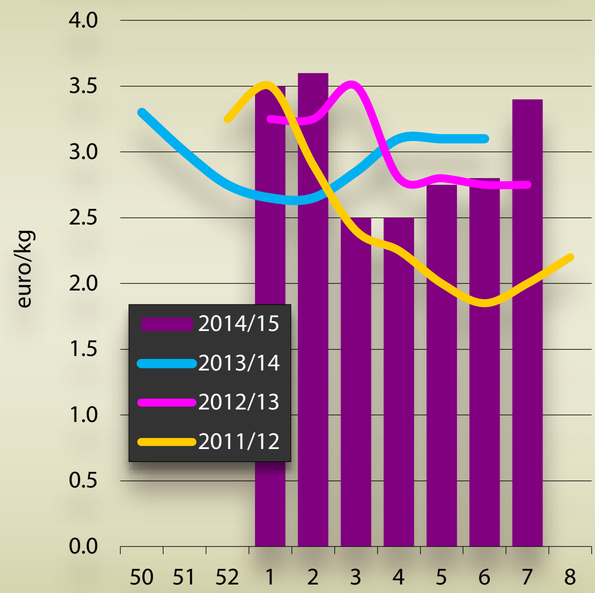
What was definitely original about the South African air-freight campaign was its shipments continuing beyond the arrival of the first sea-freight litchis from Madagascar. These shipments were earmarked mainly for North European countries initially, with sulphur-treated fruits, and subsequently with untreated on-stem Mauritius and then Red McLean fruits. This period, already perceptible in 2013-14, intensified this year, considerably extending the export period from January to mid-February. On-stem South African fruits were valued on a steady footing of around 7.50 euros/kg. The bulk of the South African air-freight litchis were sold via traditional circuits where the sizing is preferred to Madagascan fruits.

**Air-freight South African litchi
Volumes and average import prices
on the French market in 2014-15**



Weeks / Source: Pierre Gerbaud

**Sea-freight South African litchi
Average import price on the French market**



Weeks / Source: Pierre Gerbaud

Much less early this year, the shipping container campaign started only at the beginning of the year, thereby avoiding direct confrontation with the massive supply from Madagascar. The shipments were also smaller than the previous year. The good prices of the first shipments, at around 3.50 euros/kg, fell rapidly (2.50 euros/kg) in the second half of January. Weakened by precipitations during the harvest, the litchis exhibited occasional yeast growth, which called for rapid sale, entailing price concessions. The strong presence of Madagascan fruits also contributed to sale prices subsiding. Conversely, in February, the lull in competition with the progressive withdrawal of Madagascan fruits, but also the wane in South African exports, enabled rates to recover considerably. The Chinese New Year celebrations in several European Union countries, too far removed in time for the Madagascan fruits, was a further plus for South African produce.

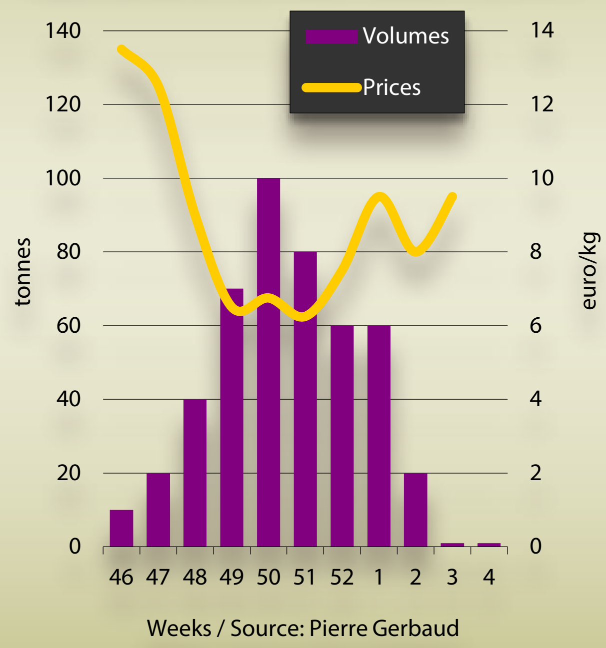
With smaller quantities this year, South Africa enjoyed a fairly satisfactory campaign, given the difficult market conditions which accompanied the 2014-15 season. The delay in production doubtless prevented South Africa from delivering its largest quantities of litchi at the same time as Madagascar, and from being submerged by the conventional ship volumes from this source. The extension of the campaign into February was also a major factor in keeping prices fairly strong. Diversification with air-freight produce also represented a new strategy favouring increased exports, with an estimated volume of 350 tonnes as opposed to 250 tonnes in 2013-14. By adapting its exports to the market conditions, the diversification available and the unwavering quality of its litchis, especially in terms of sizing and in spite of variable coloration, South Africa consolidated its place as the number two supplier to the European Union.

Reunion

The fresh specialist

Year on year, Reunion is asserting itself as a fresh litchi supplier. After the boom in export volumes over recent years, the source has stabilised its shipments, with 460 tonnes during the 2014-15 campaign as opposed to 540 tonnes the previous season, which represented a record, and 420 tonnes in 2012-13. The 2013-14 campaign, as you may remember, was cut short by Cyclone Bejisa at the very beginning of 2014. The cyclone does not appear to have hit production zones hard, though it may have limited the production of the last

Reunion litchi - Volumes and average import prices on the French market in 2014-15



campaign. The 2014-15 campaign began slightly less early than the previous one in week 46, with tonnages progressing more slowly. The shipments peak extended from week 49 to week 52. The beginning of year exports remained bigger, but subsequently weakened rapidly before practically drying up in late January, with quantities that had become marginal. Hence Reunion's campaign gained nearly three trading weeks, thus partly making up for the volumes not shipped due to its later start.

Like the previous year, Reunion's shipments comprised de-stalked, on-stem or trussed fruits. Each of these specialities had distinct sale prices, lowest for de-stalked fruits and highest for trussed fruits. The very high prices registered at the beginning of the campaign were applied while the volumes available were still moderate. They fell as shipments were intensifying, particularly during weeks 49 to 51. The average price amounted to around 6.00 euro/kg, with some sales made at lower levels for fruits with deteriorating quality. In the week before the end-of-year holidays, the livelier demand and waning supply favoured an increase in rates, which continued until the end of the campaign to reach prices above 8.00 euros/kg.

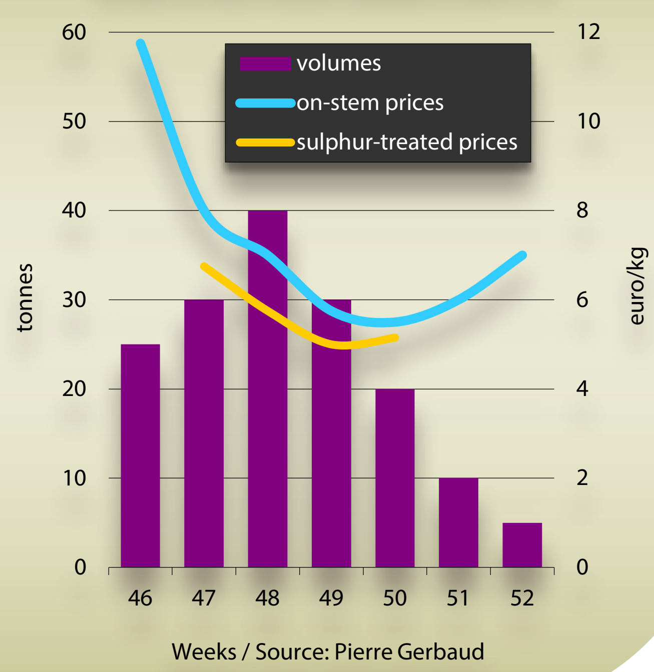
Fruit quality is doubtless one of the assets of Reunion, especially the large sizing and attractive coloration. These features make it a festive fruit par excellence, prized for its organoleptic qualities. The product is distributed primarily via a traditional circuit able to maximise value from this litchi, particularly in trussed form on the shelves of fruit retailers. The freshness and absence of treatment make the Reunion litchi a standout product during the Indian Ocean sources campaign. While the naturalness of the product is a sales vector, it also represents its weakness. Poor sales at certain periods inexorably lead to rapid fruit deterioration, and consequently a potentially considerable depreciation. It is doubtless for this reason that the Reunion litchi sales remain focused on the French market, and can barely withstand further forwarding. Another limiting factor for distribution of the product is local demand, especially at the beginning of the campaign, when the Reunion litchi maintains high prices.

Mauritius

A concentrated campaign

Mauritius remained the smallest Indian Ocean source supplying litchis to the European market. A long way from the 2012-13 record campaign when exports amounted to 270 tonnes, last campaign weighed in at only around 160 tonnes, although this was up on 2013-14. For quality reasons, Mauritius has stopped being an early producer for the past few campaigns. Its later exports quickly come up against competing sources, although they do enjoy competitiveness factors in terms of cost. Air-freight capacities remained limited for this source, which also exports Victoria pineapples and floriculture products at the same time of year. Furthermore, the weather conditions seem to have been mediocre for litchis this year, both during fruit-bearing and the harvest, when heavy rainfall impeded the collection but also undermined the fruit quality.

Mauritian litchi - Volumes and average import prices on the French market in 2014-15



Weeks / Source: Pierre Gerbaud

© Guy Bréhinier

The first shipments from Mauritius coincided with the arrival of fruits from all Indian Ocean sources in week 46. The tonnages then available proved greater than demand, rapidly sending rates downward. The first batches, comprising on-stem fruits, obtained high prices, though with limited quantities. Competition on this market slot with fruit from Reunion rapidly drove prices down to around 8.00 euros/kg, and then below 6.00 euros/kg. Simultaneously, Mauritian operators shipped de-stalked and sulphur-treated fruits, but once more they had to face Madagascan and South African competition. The competitiveness of Mauritian fruits came up against a general influx of products onto the European markets, but also the qualitative fragility of certain incoming batches, which made sales still more difficult. From week 50, the volumes shipped eased off and the campaign finished rapidly in week 51, with only on-stem fruits, the only type of product shipped by air-freight since the arrival of Madagascan sea-freight litchis in week 50.

Mauritius has maintained its trade window on the European market, but is finding ever increasing competition. Exporting fresh and treated fruits means that it has more commercial flexibility, by favouring a particular product type in line with market developments. Nonetheless, Mauritian operators are still faced with the larger supply from their neighbour, which drives the sales conditions. The competitiveness of Mauritian fruits remains the key to keeping the source as an exporter, in a period when we can see other emerging supply opportunities such as Mozambique ■

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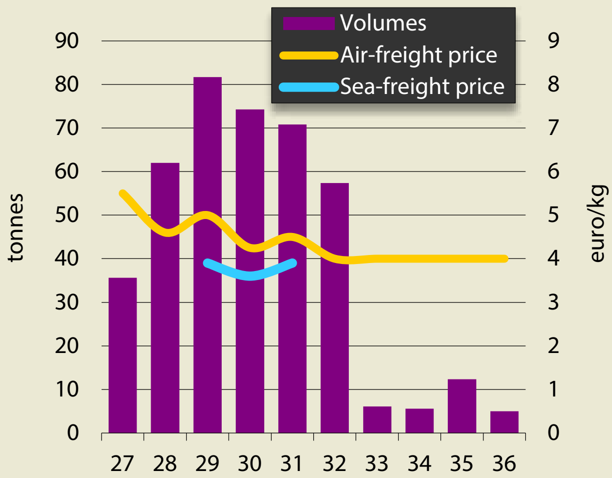
Israel: increase in exports

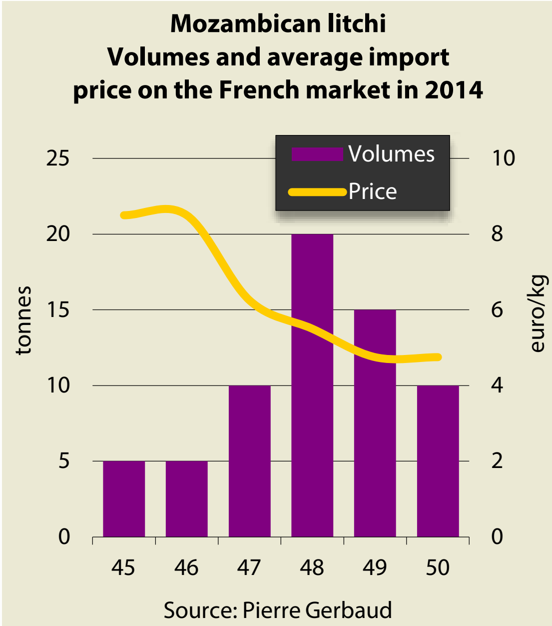
Israel remains one of the main sources supplying the European market during the summer period. The 2014 export campaign saw an increase from the previous one. Totalling 410 tonnes in comparison to the 300 tonnes exported 2013, Israeli litchi volumes to Europe remain fairly constant from year to year, and the variations observed, although considerable in terms of percentage, are still modest in terms of absolute value. These fluctuations are more a reflection of good or bad annual production than a desire to conquer the market. The 2014 campaign began like the previous one in week 27, and finished in late August-early September. The biggest shipments were concentrated from mid-July to the first half of August, when air-freight exports were magnified considerably by incoming sea-freight volumes. The geographic proximity of Israel to the consumption markets means that sea shipment does not alter the produce quality. From 5.00 euros/kg at the beginning of the campaign, air-freight litchi prices then dropped to stabilise at 4.00 euros/kg on average in August. Sea-freight litchis sold at a slightly lower price (between 3.50 and 4.00 euros/kg), when volumes were larger. Prices registered during the Israeli campaign were similar overall on the Dutch, Belgian and French markets. At the end of the period, some Yellow/Red variety batches traded on a higher price footing, at around 6.00 euros/kg for marginal quantities, while the fruit quality of other varieties deteriorated, making sales more difficult.

Israeli litchi - Volumes and average import prices on the French market in 2014



Source: Pierre Gerbaud

Mozambique: a new emerging source?



True, Mozambican litchis did not come out of the blue during the 2014-15 trading season. Some batches had already been exported in previous years, though most often by way of South African operators, without the source being clearly identified. These most often involved marginal quantities enabling an earlier start to exports, or small supplementary batches. Yet this year the source emerged on its own, thereby validating its entry to the sources supplying the European end-of-year market. The tonnages shipped this campaign were estimated at 60 to 80 tonnes, which puts Mozambique at the rear of the peloton of traditional suppliers to the European market, but which is far from negligible for its debut, and gives some clues as to the potential of the country. The Mozambican litchis started the trading campaign slightly early in week 45, to some extent taking the place traditionally set aside for Mauritius. The fruits were sulphur-treated, and packed in 2-kg boxes identical to those used by South African operators. Furthermore, the packaging was not the only similarity with South African litchis. The sizing and taste quality also proved similar. Well received by purchasers, these products sold at high prices for the first shipments. Thereafter, they dropped to 6.00 and then 5.00 euros/kg due to the increase in volumes and the rapid deterioration of market conditions with the other Indian Ocean sources opening their campaigns. For a first campaign, Mozambique left its mark on the international litchi trade, and if it developed its shipments, it could intensify the already tough competition in this trading period. This will depend mainly on the competitiveness of Mozambican fruits against the neighbouring sources.

Thailand: shrinking fast

The evolution of Thai litchi exports seems set on a decline. While it is difficult to estimate the volumes exported by this source, we cannot help but observe a reduction in the duration of the campaign. Still present on the European market between May and July in previous years, Thai litchis were apparently only sold in 2014 from mid-May to late June, when Israeli exports were starting. Thai air-freight litchis were sold mainly from the Dutch market, at average prices of 7.00 euros/kg. There were some containers supplementing this supply, with fruits selling at between 5.50 and 6.00 euros/kg. The lack of interest in these litchis available at the height of the European produced fruits season is doubtless one of the reasons for Thailand's progressive shrinkage in this period, besides the bad weather in the production zones, plus sanitary and phytosanitary problems.

Date market

A market finally developing!

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Also known as "desert brown gold", the date is a very popular staple for many populations worldwide. Depending on the country, it has its consumption peak during Ramadan or the end-of-year holidays. Its long-stable and seasonal market is showing very positive signs of growth, both in Europe where consumption is continuing to develop, and on new booming markets.

World production on a continuous rise

Originating from the Middle East and the Mediterranean zone, the date palm has spread across the globe as a fruit tree, but also an ornamental species. Although present in China, the United States, sub-Saharan Africa and South America (Peru, Colombia), 96 % of date cultivation is still packed into the Middle and Near East, and North Africa.

After a period of growth interrupted in the early 2000s due to numerous regional conflicts in the main production zones, the world date supply started to climb once more in 2005. The more than 7.5 million tonnes produced worldwide (FAO, 2012) originate mainly from the Middle East. Leading the peloton is Egypt, which with nearly 1.5 million tonnes represents 19 % of world volumes, followed by Iran (14 %), Saudi Arabia (14 %), Algeria (10 %) and Iraq (9 %).

World production has been seeing steady annual growth of 15 % since 2005, which can be explained mainly by a very positive dynamic from Egypt, which has been growing exponentially (volumes doubling since the 2000s). Iraq, which was for a long time the main date producer until the late 90s, saw its production collapse during the second Gulf War (2003). However since 2006, Iraqi production has taken an upturn, doubling its volumes to regain 5th position among world producers in 2012.

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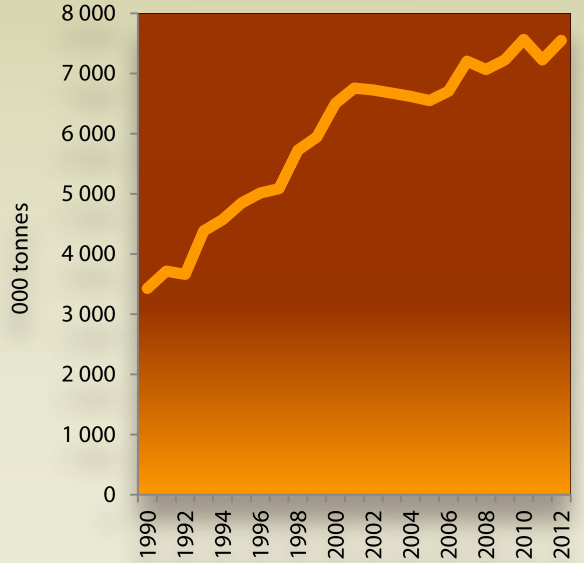
Date - Evolution of world production



Source: FAO

Date — World production

tonnes	2012
Egypt	1 470 000
Iran	1 066 000
Saudi Arabia	1 050 000
Algeria	789 357
Iraq	650 000
Pakistan	600 000
Sudan	433 500
Oman	270 000
United Arab Emirates	250 000
Tunisia	190 000
Libya	170 000
China	150 000
Morocco	113 397
Others	346 664

Source: FAO

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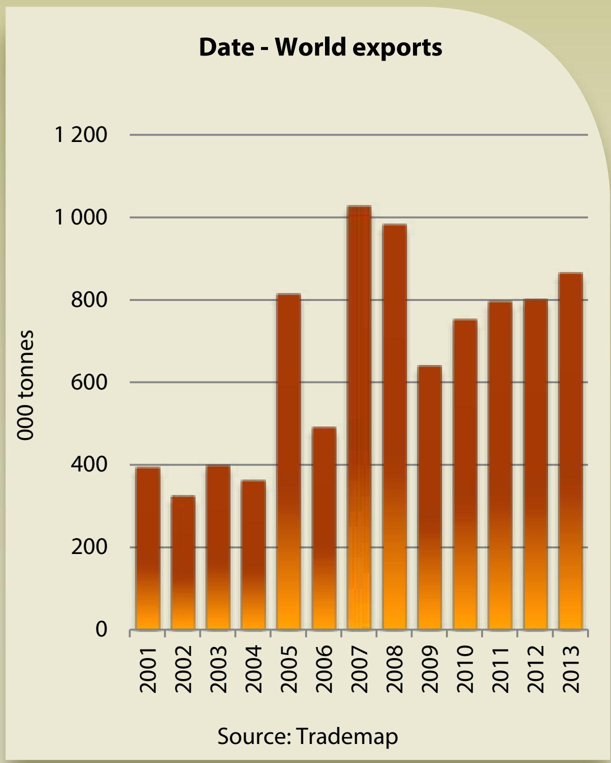
A product dedicated to self-consumption, but increasingly exported

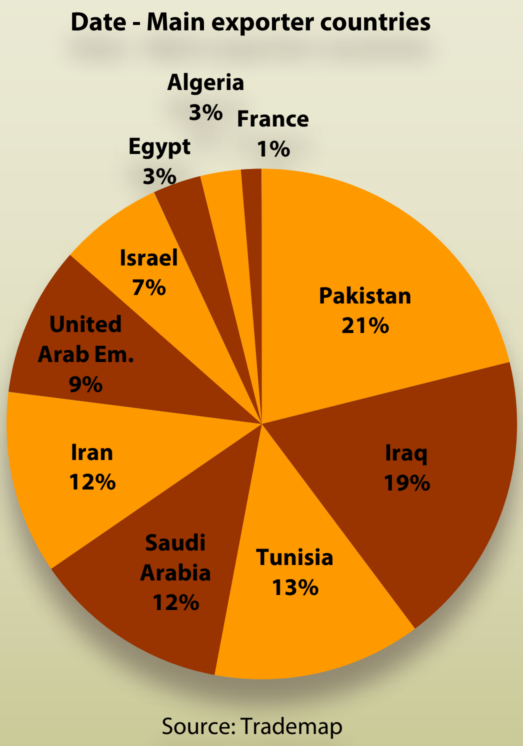
Particularly prized during the Ramadan period, the date is consumed most of all in the various producer countries. Hence Egypt, the main world producer, consumes the bulk of its harvest itself.

The share of exports is still modest in relation to world production, though it has doubled since the early 2000s, going from 6 % of production to 11 % in 2013, i.e. 865 124 tonnes.

While the main traditional exporters, such as Iraq and Iran, maintain a strong presence on the international stage, they are all too familiar with the irregular export dynamics, due to the various geopolitical conflicts of recent years. Conversely, more continuous growth has been provided by Saudi Arabia, Tunisia and above all by Pakistan, which became the number one world exporter in 2013, in spite of its very high self-consumption. Other countries are expanding their exports steadily though less explosively, such as Algeria and Israel.

Countries such as the United States and China can also be found on the international stage, though the quantities they export remain anecdotal.





New dynamic consumption centres

The world's biggest date importer, India, absorbs nearly 40 % of world export volumes, quantities which have more than doubled over the past ten years!

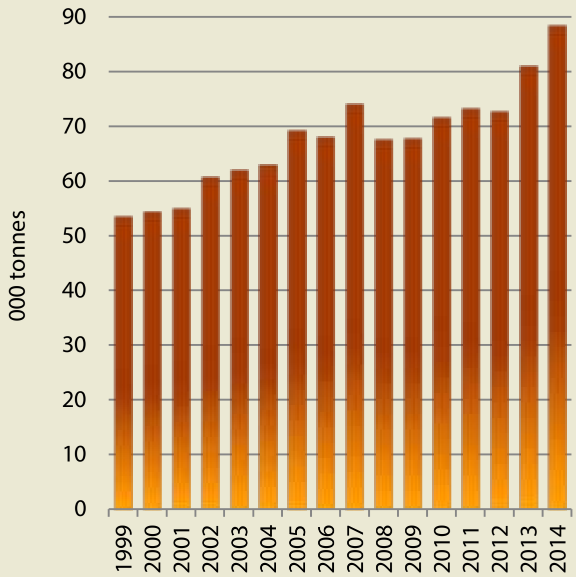
In second position, the European Union is seeing its imports grow, followed by Morocco whose import volumes have risen very significantly over the past ten years.

Conversely, the United Arab Emirates have slumped both in terms of production and exports, contrary to the situation we reported in **FruiTrop** no.211 (May 2013). Is this a statistical error or dramatic fall? We might question the reliability of the data from the various Middle East Customs authorities in view of the various conflicts seen by the region in recent years.

European Union: imports again on the rise

Long stable, or even in decline in the early 2000s, European date consumption has been growing since 2012. This is particularly the case in the United Kingdom, where it is seeing very marked growth, thanks in particular to the boom in the supply from Pakistan, with its varieties aimed primarily at the industrial sector, but also the Israeli supply, which targets a higher-end market segment with the Medjoul variety. Hence in 2014, the United Kingdom became for the first time the main European date consumer behind France, whose consumption was down from 2013. The performance of markets such as Germany seems positive, although volumes are still moderate. Consumption on traditional markets such as France is stagnating, with few apparent prospects of rising. So European growth is now being driven by countries such as the United Kingdom, as well as smaller consumers such as Germany, markets which prioritise the industrial sector, but also the top-end fresh segment.

Date - EU-28
Evolution of imports



Source: EUROSTAT

Date — The 10 leading world importer countries

tonnes	2013
World	**819 483**
India	311 575
EU-28	**81 099**
Morocco	47 374
France	32 089
Indonesia	29 111
Yemen	28 711
USA	23 875
Malaysia	22 661
United Arab Emirates	22 548
Niger	21 687

Sources: Trademap, Eurostat

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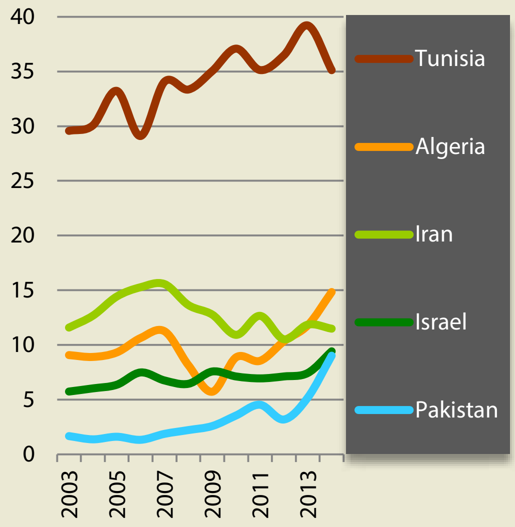
Hence European imports are exhibiting a positive dynamic, which has picked up in particular since 2012. With 90 000 tonnes in 2014, they have risen by 40 % since 2004.

Tunisia is the number one supplier to the European market, mainly with the Deglet Nour variety. Exporting approximately 50 % of its production, it primarily supplies Europe, but also Morocco, whose consumption has boomed in recent years. Its shipments to diversification markets such as Russia and the United States are also rising, though with still limited volumes.

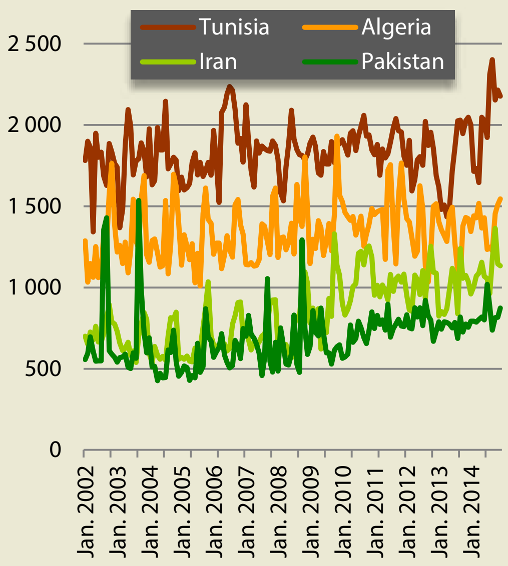
Despite Tunisia's downturn in 2014 (35 000 tonnes) due to quality problems caused by rains, the supply to Europe continued to rise. Indeed we saw alongside the increase in supply other suppliers, such as Algeria (which became the number 2 supplier) and Pakistan, which have competitive advantages in terms of price. The Israeli supply, comprising primarily the Medjoul variety sold on the top-end fresh segment, has practically doubled in recent years. Hence there has been an upward trend across practically all sources and market segments.

Date - EU-28
Main supplier countries
(000 tonnes)



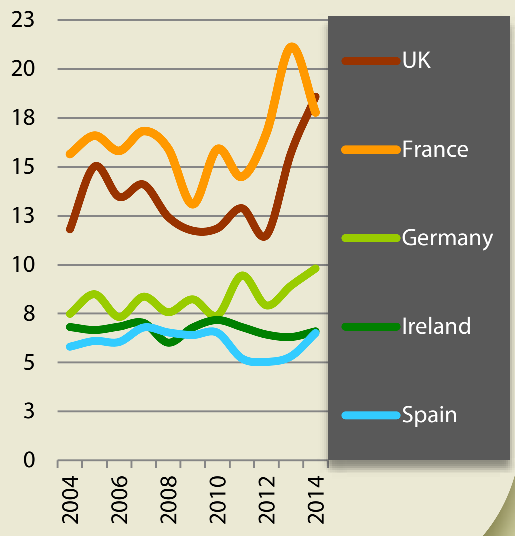
Source: Eurostat

Date - EU-28 - Customs value for several sources
(euro/tonne)



Source: Eurostat

Date - EU-28
Main consumer countries
(000 tonnes)



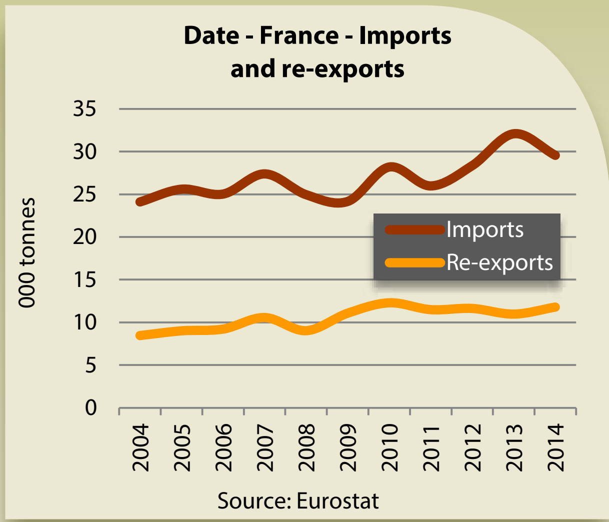
Source: Eurostat

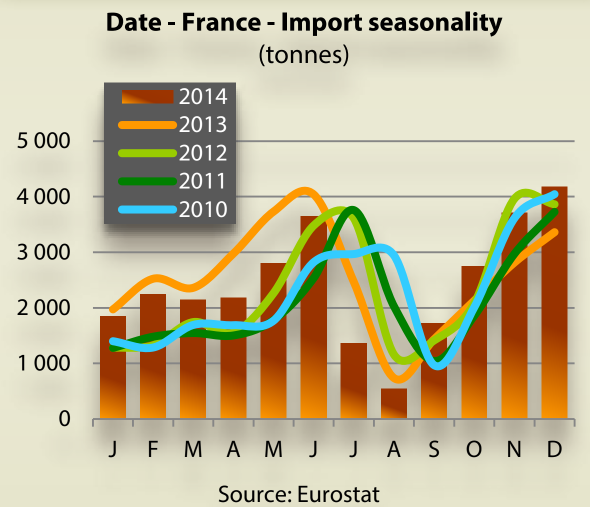
France, Europe's date hub

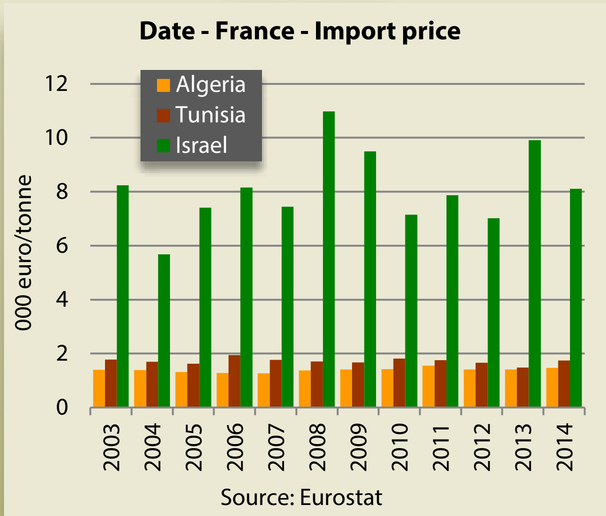
With nearly 30 000 tonnes imported in 2013 and 2014, France remains Europe's number one date importer, though also the number one re-exporter. Indeed, 40 % of import volumes in 2014 were re-exported to other European markets. The dynamic of these flows observed up to 2010 saw a stagnation phase from 2010 to 2013. However a slight recovery was observed in 2014.

French annual consumption seems to be somewhat stagnating at around 270 grams per capita, and no major changes have been observed in recent years. In addition, approximately two thirds of sales took place during Ramadan (35 %) and the end-of-year holidays (30 %), and the market trend does not seem to be changing significantly.

In terms of suppliers, Tunisia remains the dominant source on the dried dates segment, with the Deglet Nour variety, though Algeria has registered a very big rise (+ 50 % since 2010). Indeed Algerian Deglet Nours seem to be gaining ground rapidly, especially in 2014 when they made up for the Tunisian shortfall. The import price analysis shows a comparative advantage for Algeria, which could further boost this trend. On the fresh date segment, Israel is still dominant, registering slight growth with the Medjoul variety.







Morocco, the new giant?

With a production in 2012 of 113 000 tonnes, Morocco is ranked the number 13 date producer country, and the number 3 importer. Over the past ten years, import volumes have expanded significantly, with today nearly 40 % of volumes consumed in the country coming mainly from Tunisia and Egypt. Quantities produced locally are still insufficient in view of the apparent consumption practically doubling in the space of ten years, going from 270 g per capita in 2003 to nearly 500 g in 2013, which is double French consumption!

In spite of the presence of Bayoud disease, which led to the destruction of hundreds of thousands of date palms and the disappearance of certain varieties for a century, date production is on the rise, with heavy development in Morocco since 2009 under the "Maroc Vert" Plan, which aims to upgrade the entire industry.

The national date palm development plan aims to expand the cultivation area from 48 000 ha in 2010 to 65 000 ha by 2020, by planting 3 million plants, rebuilding the existing palm cultivation area at a higher density, and creating 17 000 ha of new modern plantations. The upgrade of the whole industry is also to be accompanied by the creation of date processing and storage units, and by the promotion of Geographic Indications (labelling of Mejhoul dates from Tafilalet). The ultimate objective is to achieve 160 000 tonnes of production by 2020. As regards Bayoud, for which there is no means of eradication, integrated pest management systems are being set up in zones already infested, and resistant varieties such as Nedja are being planted. Elsewhere, use of vitroplants for new plantations is preventing the extension of the disease to uninfected zones.

While demand continues to grow faster than local production, the market will remain tight. Will the 160 000 tonnes of production reckoned on by the "Maroc Vert" plan be sufficient to cope with this highly dynamic internal demand? ■

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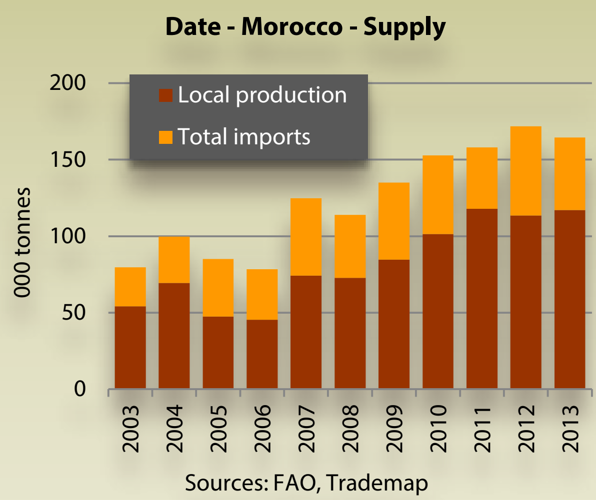
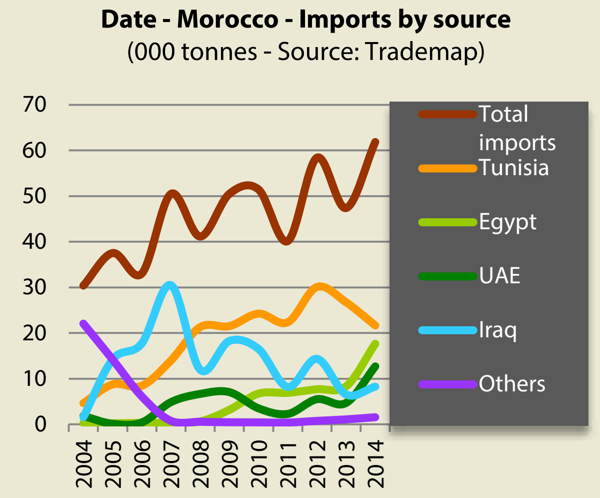




Date varieties

Fresh dates

So-called fresh dates are picked mature, and keep for only a few days. So they are refrigerated for up to six months, or can also be frozen, to increase their conservability. The main varieties found are Hayani, Sphynx, Barhi and Medjoul, Medjool or Madjool from Israel, the United States and Morocco. On-stem is the most common presentation format. Medjoul is a large date weighing 20 to 30 grams.

Dried glucose-treated dates

The Deglet Nour variety from Algeria and Tunisia is the best known of this category, though other varieties, such as Halawi, Dayri and Zahidi, can also be involved. Dates are dried on the tree in the sun, and then in hot air ovens in order to reduce their water content from 70 % to 20 %. They are sometimes covered with glucose syrup to increase their conservability. They vary in weight from 6 to 11 grams.

So-called common dates

The Allig, Khouet Allig and Kenta varieties are often used for industrial preparations.

Date cultivation

The date palm belongs to the family of the species *Phoenix dactylifera*, which is a monocotyledon of the palm family.

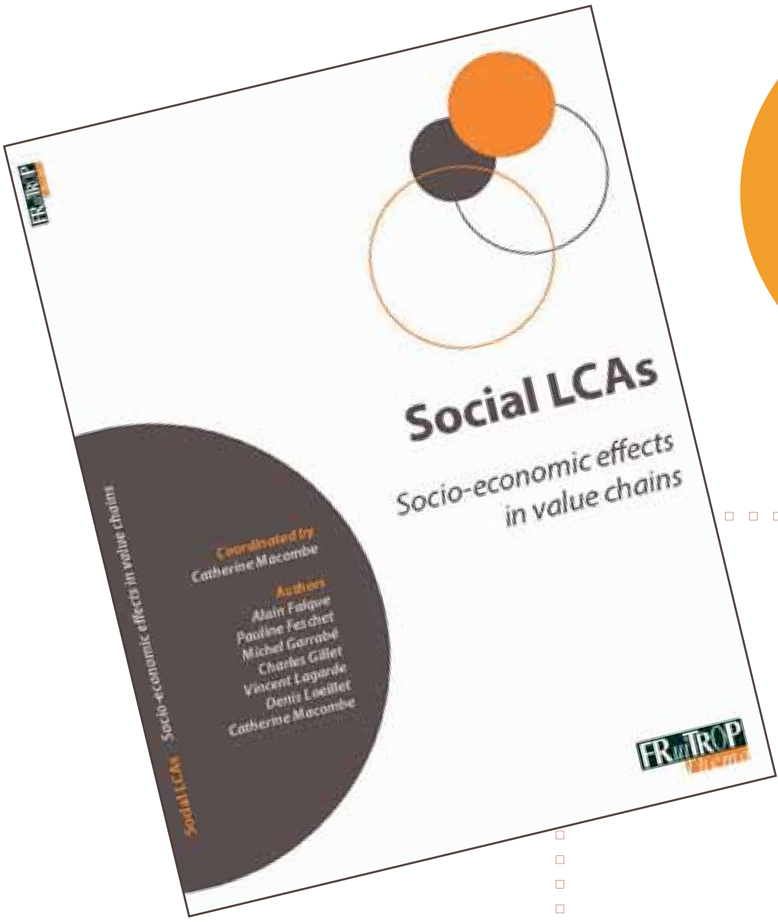
The date palm is a dioecious species (separate male and female plants), and for pollination to take place, the presence of a male plant is required in the vicinity of the female plants. Only pollinated female plants will be able to bear bunches of dates. Since wind pollination is unreliable, the usual practice is artificial pollination (traditionally by hand, or mechanically).

The date palm employs a seed or vegetative reproduction strategy. However, seed reproduction is a long process, providing productive plants only after around ten years. In addition, the seedlings yield 50 % male plants and 50 % female plants; so seed reproduction cannot reproduce the characteristics of the mother plants. Vegetative reproduction is therefore the common propagation method used for setting up new plantations. The sprout which develops on the basal part of the trunk or on the bulb has the capacity to reproduce the characteristics of the mother plant in full (sex, aptitudes, fruit quality).

"The date palm lives with its feet in the water and its head in the fiery skies" (Arabic proverb). Established in both arid and semi-arid regions, the date palm is adapted to poor desert and sub-desert soils. However, the proximity of water reserves is required so that it can satisfy its water requirements for the roots. Hence oasis zones or zones above water tables are preferable.

The flowering of the date palm is triggered after a cold or cool period, when the average daily temperature rises to reach a threshold, i.e. in spring (April in Spain, from mid-March to mid-April in Algeria, March in Egypt, and February in Mauritania). The conditions for good fruit bearing are heat, no rain and low relative humidity in the air. The fruit bearing period begins on fruit-setting, and finishes when the dates have matured. Its duration varies depending on the cultivars and local climate conditions, ranging from 120 to 200 days. The harvest takes place from July to October.

A date palm can produce more than twenty bunches. However, there is a pendulum phenomenon: after abundant production, the following harvest is generally lean, below the average production and of lower quality. Hence to maintain steady production, the number of bunches is often reduced after fruit-setting.



- You are making decisions about the future of industrial sectors.
- You would like to understand the social consequences of these decisions.
- You belong to one of the following groups: entrepreneurs, public decision-makers, public authorities, consultants, researchers or students.

Social LCAs

Socio-economic effects in value chains

What are the social consequences of changes enacted in the value chains, especially when they involve large international agricultural product industries? How can we anticipate the results of changes in technical procedures, supplier, work organisation, distribution of revenue generated, etc.?

Researchers from French research centres (Cirad, Inra, Irstea, SupAgro, and University of Montpellier I) and consultants (Epsil'Hôm, CEP) set out over 100 pages their methodology and practices for assessing socio-economic effects.

Publication available in French **and** English

Release: October 2013

Price: EUR 40

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Wholesale market prices in Europe

April 2015

					EUROPEAN UNION - EURO				
					Germany	Belgium	France	Holland	UK
AVOCADO	Air	TROPICAL	BRAZIL	Box			16.80	17.75	
			DOMINICAN REP.	Box			15.20		
	Sea	FUERTE	ISRAEL	Box			7.50		
			KENYA	Box			7.50		
			PERU	Box			8.00		
			SOUTH AFRICA	Box	8.50		7.75	8.75	11.54
		HASS	BRAZIL	Box	14.00				
			KENYA	Box			10.67		
			MEXICO	Box			11.17		
			MOROCCO	Box			12.00		
			PERU	Box	13.00		11.50	14.00	
			SOUTH AFRICA	Box	14.00		9.50		
		NOT DETERMINED	PERU	Box					10.49
		PINKERTON	SOUTH AFRICA	Box			7.70	9.25	
	Truck	FUERTE	SPAIN	Box			7.50		
		HASS	SPAIN	Box			16.00		
		REED	SPAIN	Box					7.69
		REED	SPAIN	Box					6.82
BANANA	Air	SMALL	COLOMBIA	kg			6.90		
			ECUADOR	kg				5.67	
	Sea	RED	COLOMBIA	kg				2.94	
			ECUADOR	kg				2.33	
		SMALL	ECUADOR	kg			1.70	2.65	
CARAMBOLA	Air		COLOMBIA	kg					4.00
			ISRAEL	kg					6.99
			MALAYSIA	kg			4.86	5.20	4.39
COCONUT	Sea		COTE D'IVOIRE	Bag			10.00	11.61	13.29
			DOMINICAN REP.	Bag				23.30	16.78
			SRI LANKA	Bag					11.19
		YOUNG	COSTA RICA	Bag				15.50	
			THAILAND	Bag				12.70	
DATE	Sea	BAHRI	PERU	kg				6.60	
		DEGLET	ALGERIA	kg			5.50		
		KENTA	TUNISIA	kg				1.75	
		MEDJOOL	ISRAEL	kg				7.90	
			PERU	kg				6.00	
		MOZAFATI	IRAN	kg				3.30	
		NOT DETERMINED	ALGERIA	kg					1.54
			ISRAEL	kg					7.97
			TUNISIA	kg					2.18
		STONELESS	TUNISIA	kg				2.75	
GINGER	Sea		CHINA	kg			2.30	1.48	2.47
			THAILAND	kg				2.07	1.51
GUAVA	Air		BRAZIL	kg				6.22	3.96
KUMQUAT	Air		ISRAEL	kg					6.99
			SOUTH AFRICA	kg					6.99
LIME	Air		BRAZIL	kg			5.50		
	Sea		BRAZIL	kg	2.00	1.89	2.00	2.38	1.94
			MEXICO	kg					2.01
LITCHI	Air		THAILAND	kg				12.20	
	Sea		SOUTH AFRICA	kg					1.40
MANGO	Air	AMELIE	BURKINA FASO	kg			2.80		
			MALI	kg			2.85		
		KEITT	BRAZIL	kg			5.40		
			PERU	kg			5.75		
		KENT	BURKINA FASO	kg			4.53		
			COTE D'IVOIRE	kg			5.40		
			PERU	kg			5.75		
		NAM DOK MAI	THAILAND	kg				8.40	
		PALMER	BRAZIL	kg			5.40		
		VALENCIA	MALI	kg			3.25		

					EUROPEAN UNION - EUROS				
					Germany	Belgium	France	Holland	UK
MANGO	Sea	ATKINS	BRAZIL	kg	1.38			2.00	2.11
			COSTA RICA	kg				1.75	
		KEITT	BRAZIL	kg				1.63	
			NICARAGUA	kg				2.13	2.15
			PERU	kg	1.82				
		KENT	PERU	kg	1.82		1.90		
		PALMER	BRAZIL	kg				2.10	
MANGOSTEEN	Air		INDONESIA	kg				8.45	
MANIOC	Sea		COSTA RICA	kg			1.35	1.11	
MELON	Air	CHARENTAIS YELLOW	DOMINICAN REP.	kg			5.00		
	Sea	CANTALOUP	COSTA RICA	kg			1.40	1.50	1.54
			HONDURAS	kg				1.50	1.75
		CHARENTAIS	HONDURAS	kg				1.75	
		CHARENTAIS GREEN	MOROCCO	kg			2.55		
		GALIA	BRAZIL	kg				1.70	1.12
			COSTA RICA	kg				1.10	1.54
			HONDURAS	kg				1.50	1.82
			MOROCCO	kg			1.00		1.96
			PANAMA	kg			1.20		
		HONEY DEW	BRAZIL	kg			0.75	1.05	0.98
			COSTA RICA	kg			0.80	1.05	1.22
			PANAMA	kg				0.98	0.97
		PIEL DE SAPO	COSTA RICA	kg			0.85	1.40	1.47
			PANAMA	kg				1.40	1.40
		SEEDLESS WATER	COSTA RICA	kg			0.95	1.11	
		WATERMELON	BRAZIL	kg					1.23
			COSTA RICA	kg				1.11	1.13
			PANAMA	kg			0.85	1.06	0.97
PAPAYA	Air	FORMOSA	BRAZIL					3.31	
		NOT DETERMINED	BRAZIL	kg		3.57	3.50	3.57	4.28
			THAILAND	kg				5.25	
	Sea		ECUADOR	kg				2.64	
		SUNRISE	BRAZIL	kg				2.40	
PASSION FRUIT	Air	NOT DETERMINED	COLOMBIA	kg	4.75	5.25	5.50	6.32	
		PURPLE	BRAZIL	kg					5.59
			ISRAEL	kg			7.00	5.88	
			KENYA	kg		5.25			5.25
			SOUTH AFRICA	kg			6.80		
			VIETNAM	kg			8.50		
			ZIMBABWE	kg		5.25		6.00	
		YELLOW	COLOMBIA	kg				8.39	
			ECUADOR	kg				7.88	
PHYSALIS	Air		COLOMBIA	kg			9.00	9.22	9.33
	Sea		COLOMBIA	kg	5.21			6.36	
PINEAPPLE	Air	VICTORIA	MAURITIUS	Box				14.43	
			MAURITIUS	kg			3.80		
			SOUTH AFRICA	Box				12.70	
	Sea	MD-2	COSTA RICA	Box	8.38	8.75		10.15	9.58
			COSTA RICA	kg			0.95		
			COTE D'IVOIRE	kg			1.00		
			GHANA	Box				8.75	
			PANAMA	Box				10.47	
			PANAMA	kg			0.90		
PITAHAYA	Air	RED	VIETNAM	kg				7.75	
		YELLOW	COLOMBIA	kg				10.52	
			ECUADOR	kg				8.80	
PLANTAIN	Sea		COLOMBIA	kg			1.00		
			ECUADOR	kg			0.90	0.94	
			WINDWARD ISL.	kg					1.54
RAMBUTAN	Air		VIETNAM	kg				9.15	
SWEET POTATO	Sea		EGYPT	kg			1.00		
			HONDURAS	kg					1.75
			ISRAEL	kg					1.86
			SOUTH AFRICA	kg			1.70		0.98
TAMARILLO	Air		COLOMBIA	kg				7.53	
YAM	Sea		GHANA	kg			1.30	1.26	1.00

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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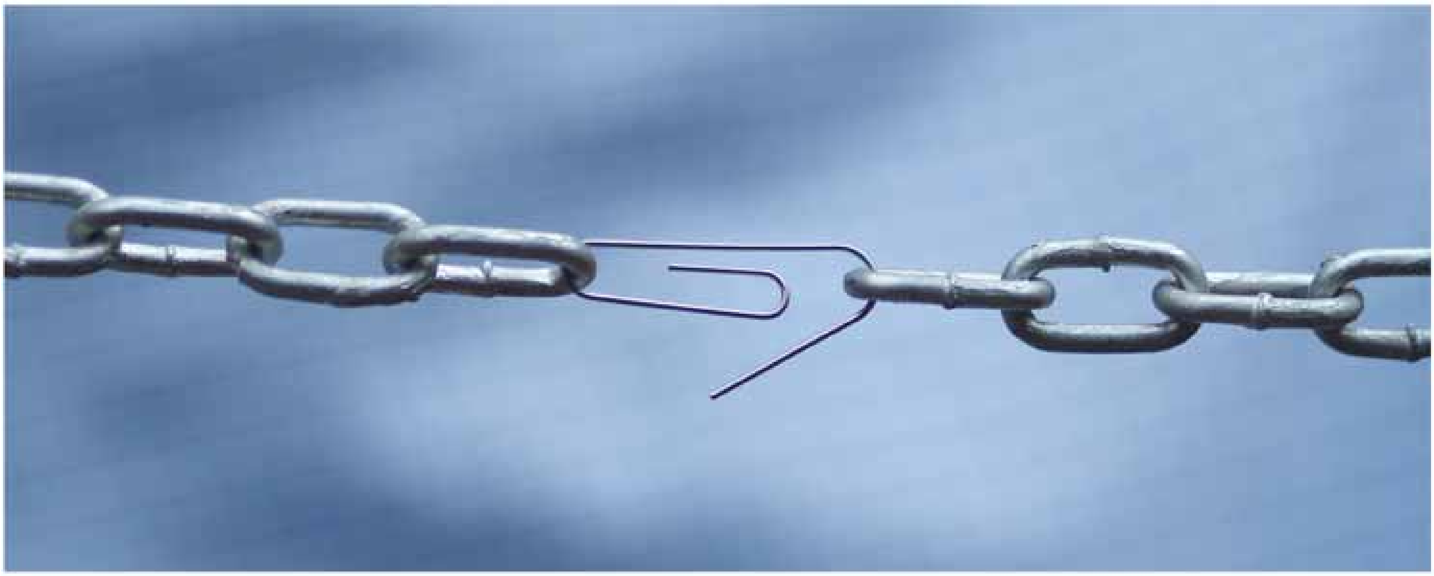

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