

CLOSE-UP:
APPLES & PEARS

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Banana in Europe:
2009 price review

Blueberries from Chile:
Small but on the up and up...



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Longitudinal 4, Edificios
Bancos despacho 23
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Tel : +34 935 561 157
Fax : +34 935 561 159
contact@simonatur.com

Publisher
Cirad
TA B-26/PS4
34398 Montpellier cedex 5
France
Tel: 33 (0) 4 67 61 71 41
Fax: 33 (0) 4 67 61 59 28
Email: odm@cirad.fr
http://passionfruit.cirad.fr

Publishing director
Hubert de Bon

Chief Editors
Denis Loeillet and Eric Imbert

Editor
Catherine Sanchez

Computer graphics
Martine Duportal

Iconography
Régis Domergue

Website
Unité multimédia (Cirad)

Advertising Manager
Eric Imbert

Subscriptions
Christian Clouet

Translator
Simon Barnard

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South Korean won	1 609.87

Source: Central European Bank

If a famous Parisian chef announces that *pineapples grow on trees we can take it. His job is not necessarily to preach the truth (although perhaps...?) or to educate urban consumers for whom fish are rectangular and sardines live in oil. And the professional media do not always provide accurate information either.*



More seriously, we have often grumbled about the lack of special training of heads of fruit and vegetable departments. The fault lies with managements who concentrate more on profitability per square metre than on proper advice for customers. The merry-go-round of non-specialised staff who move from department to department also makes a contribution to poor knowledge of the produce sold. It is a period when 'the customer is always right' and when he or she is paying more attention to purchases and not the moment to pull wool over people's eyes. So trained staff should be sent (back?) to the fruit and vegetable department... possibly precisely the opposite of the 9000-square-metre discount hypermarket called Priba that Auchan is opening in Mulhouse. We don't know yet whether the fruit and vegetables department is to be twinned with ironmongery or household cleaning products...

Denis Loeillet

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Cécilia Céleyrette

Close-up by Cécilia Céleyrette

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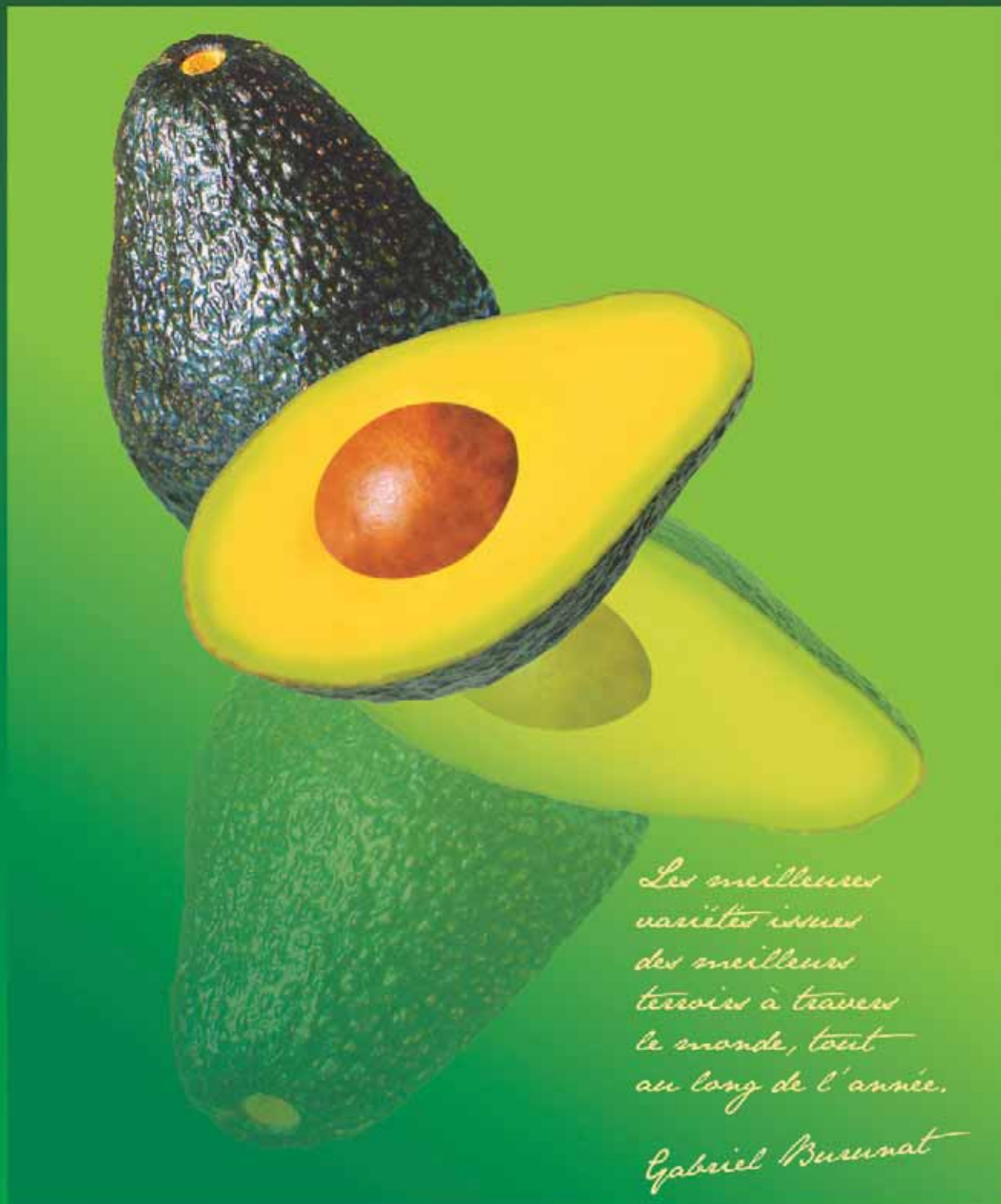
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Cover photo: Régis Domergue

LE MEILLEUR DE L'AVOCAT



*Les meilleures
variétés issues
des meilleurs
terroirs à travers
le monde, tout
au long de l'année.*

Gabriel Burunat



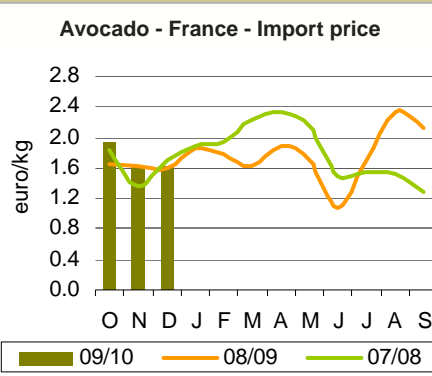
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3, rue de la corderie - Centra 330
94586 Rungis cedex France
Tél : 33 (0)1 46 87 30 00 Fax : 33 (0)1 45 12 96 74
E-mail : g.burunat@commercial.fruits.com

Avocado

December 2009

'Hass' was still supplied in large quantities. Massive shipments continued from Chile and deliveries from Mexico returned to an average level (the US market was difficult at the beginning of the month). Spanish and Israel exporters limited their shipments in this context. Prices remained lower than average but the downward movement that started in November halted as arriving produce was fairly well distributed among the various EU markets and demand was brisker thanks to special Christmas offers. The supply of green varieties was also substantial once again. Arrivals of 'Fuerte' from Spain were still moderate but large volumes were shipped from Israel as the 'Pinkerton' and 'Fuerte' seasons got under way. However, distribution of the volumes among the various EU markets made it possible to limit the downward price movement.



■ Access to the US market for 'Hass' from Peru: green light...but conditions. The end of a story eagerly awaited by a fair proportion of avocado market professionals: the ruling opening the frontier of the United States to 'Hass' avocados from Peru was published in the Federal Register on 4 January 2010. The sanitary protocol is very strict because of the pests present in Peru, and especially several types of fruit fly (**FruiTrop 171**). However, the possible use of treatments combining cold and fumigation at scales compatible with the physiology of avocados leads to considering that this opening will not be just a formal measure. According to the press agency Andina, exporters plan to ship about 10 000 t to the United States in 2010, that is to say nearly 20% of the exportable potential. According to an official at the association ProHass, it should be possible to attain the 20 000 t set as the limit in the US-Peru agreement in 2011. Given the rapid expansion of the area under avocado, the development of this new market should not be at the expense of shipments of 'Hass' to the European Union, that have been some 40 000 t in the last two years.

Sources: APHIS, Federal Register, Andina

Colts, the Minnesota Vikings...? It's not finished yet. But what is certain is that avocado will be one of the big winners. The guacamole parties held in US households during the event make consumption figures rocket. In 2009, purchases approached 12 000 t per week during the fortnight before the Super Bowl, whereas the figure is hardly more than 9000 t during the rest of the year. Some 15 000 t of crisps and 4 000 t of popcorn are also ingurgitated during the event. Statistics for beer are not available but there is a 20 percent increase in sales of aspirin and stomach pills...

Source: Associated Content

■ Florida avocado sector: laughter and tears. A tiny beetle called *Xyleborus glabratus* is threatening Florida's 'small' avocado production as it can be the vector of a fungus that has a devastating effect on all species belonging to the Lauraceae family. A 1.2 million dollar budget has been allocated for the control of laurel wilt disease. However, the 2009-10 season ended on an optimistic note as average prices reached USD16 per 24-kg box, a 50% increase on the preceding season. Avocado orchards are concentrated in Dade County in the south of the state and the varieties grown are mainly West Indian ('Pollock', 'Simmonds') and hybrids ('Lula', 'Choquette', 'Booth', etc.). The harvest has totalled some 25 000 to 30 000 t in recent years.

Sources: North County Times, USDA

■ US market: avocado sales boom forecast in Weeks 4 and 5! So which teams are going to be in the Super Bowl, the American National Football League final, in Miami on 7 February? The New England Patriots, the Indianapolis

PRICE	Varieties	Average monthly price euro/box	Comparison with the last 2 years
	Green	5.50-5.75	- 7%
Hass	6.00-6.25	- 17%	

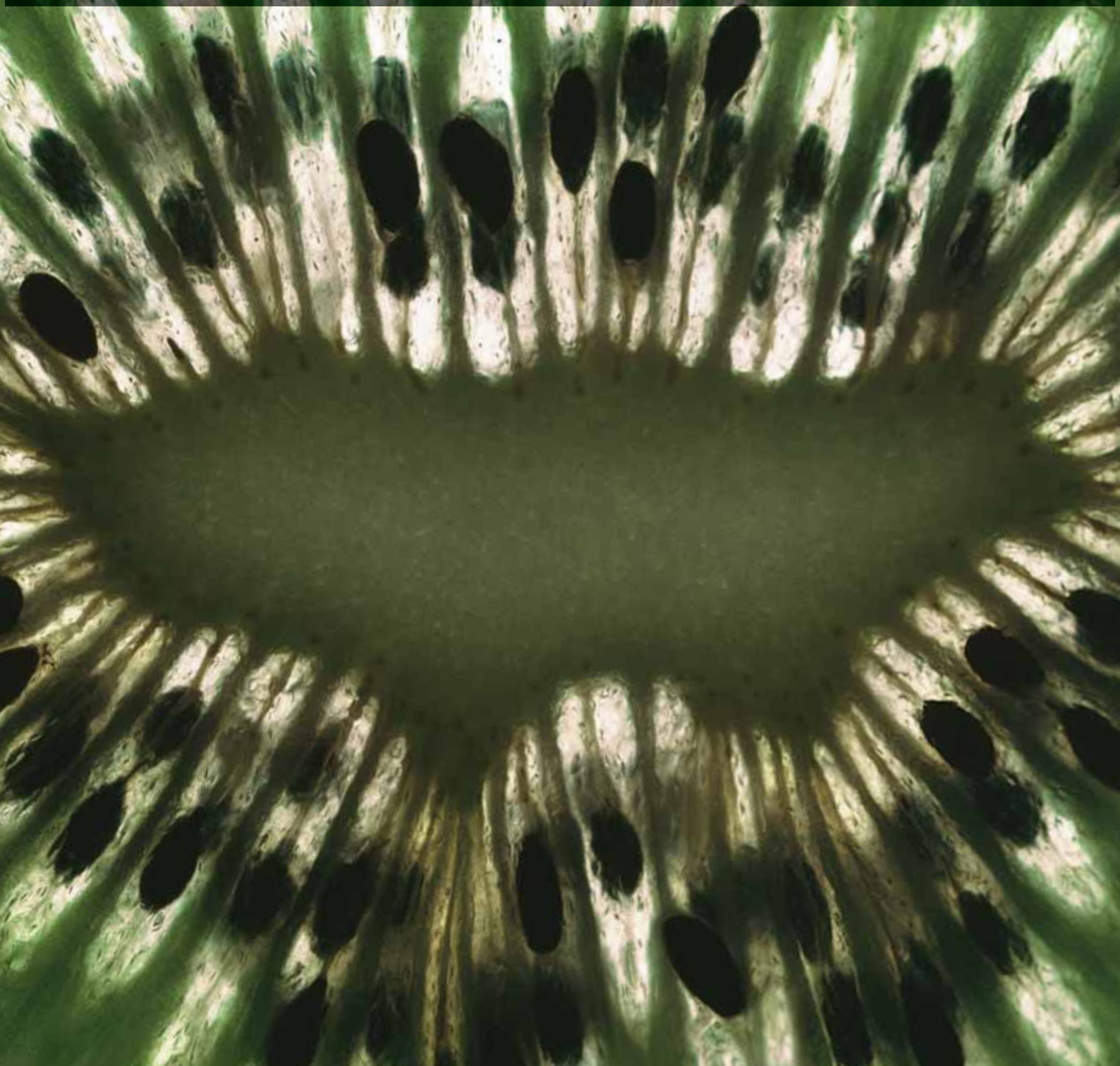
VOLUMES	Varieties	Comparison	
		previous month	last 2 years average
Green		↗	+ 36%
Hass		↗↗	+ 68%

VOLUMES	Source	Comparison		Observations	Cumulated total / cumulated average for last 2 years
		previous month	average for last 2 years		
	Chile	=↘	+ 150%	The volumes of 'Hass' exported to the EU were smaller than in November but still well above average, especially at the beginning of the month.	+ 105%
	Mexico	↗	- 1%	Arrivals of 'Hass' were still smaller than in 2008 but returned to an average level.	- 26%
	Spain	↗	- 20%	The 'Hass' and 'Fuerte' season got under way but volumes were distinctly smaller than average.	- 22%
	Israel	↗	+ 22%	Very large exports of green varieties but these were distributed among the major EU markets. The 'Hass' season started very gradually.	+ 10%

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Banana

December 2009

Supply was fairly plentiful. Deliveries of West Indian and African fruits were normal, with the deficit in produce from Cameroon and Ghana compensated by substantial volumes from Côte d'Ivoire. Supplies of dollar bananas were fairly large. However, arrivals from Ecuador were somewhat moderate as operators favoured the United States and the Mediterranean. The end of the Costa Rican deficit was confirmed and shipments from Colombia held at a level distinctly higher than average.

The Northern European markets remained balanced during the first half of the month. Demand slowed distinctly with the change in range to the benefit of exotics but was satisfactory for the season, especially in Germany and France, where retail prices were still attractive. In addition, a good level of re-exports was observed from the northern ports to the Eastern European markets where demand was fairly brisk. Prices were firm and at an average level at the beginning of the month and then became much more flexible during the second fortnight as a result of a distinct decrease in demand in both Northern and Eastern Europe.

December turned out to be a difficult month on the Southern European markets. Large supplies of Canary Island bananas caused a fall in prices in Spain. Likewise, prices in Italy fell throughout the month as a result of poor demand and disorganisation of the market. Outside the EU, the Russian market collapsed. Supplies were only average but the appearance of a very large number of small operators has made the market extremely competitive.

■ European banana consumption still going slow. As Belgium has finally updated its import statistics, provisional for the 27 EU members are now available for October 2009, confirming the 10% decrease in import business in the first 10 months of 2009. It was the seventh consecutive month of the fall in European supply. The shortfall totals more than 400 000 tonnes of fruits. Few sources have been unscathed. The Dominican Republic is the only supplier to have made substantial progress. These poor European figures clearly confirm the downward trend observed in France in September and October (**Fruitrop 173**, December 2009, page 3).

Source: CIRAD

■ Ecuador: trouble in banana land. Peace and quiet have deserted the world's leading exporter. While the international market is becoming blocked and the Ecuadorian government has to buy in bananas for use as cattle feed to clear the market a little, local exporters are complaining vociferously about the absurd level of the

minimum guaranteed price. Indeed, it is still USD 5.40 per box while the price really paid is about USD 2.00. The government is also accused of not ensuring that prices are respected. At the beginning of January, it announced the creation of a body that will monitor respect of the payment of the minimum price in transactions between exporters and producers and also help to develop new markets such as Libya. The project has been allocated funding of USD 30 millions.

Source: Reefer Trends

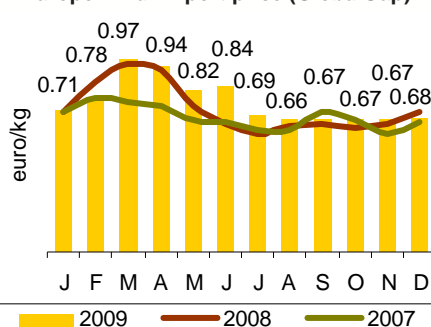


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EUROPE — ALDI IMPORT PRICE

December 2009 euro/box	Comparison	
	previous month	average for last 2 years
13.03	+ 1%	0%

Europe - Aldi import price (GlobalGap)



Banana - January to October

Tonnes	2006	2007	2008	2009	Variation 2009/2008
EU-27 imports	3 646 283	3 906 940	4 118 462	3 754 450	- 9%
MFN	2 919 228	3 201 859	3 362 197	2 965 611	- 12%
ACP Caribbean & others	327 348	344 716	307 460	363 525	+ 18%
ACP Africa	399 706	360 365	448 805	425 313	- 5%
Net supply in France	399 782	423 779	450 088	463 658	+ 3%
United States imports	3 204 623	3 386 744	3 358 188	2 926 602	- 13%

Sources: USDA, EUROSTAT

EUROPE — RETAIL PRICE

Country	type	December 2009			Comparison	
		euro/kg	December 2008	average for last 2 years		
France	normal	1.28	- 5%	- 7%		
	special offer	1.23	- 3%	- 2%		
Germany	normal	1.09	- 6%	- 2%		
	discount	0.91	- 5%	- 4%		
UK (£/kg)	packed	1.17	+ 3%	+ 6%		
	loose	0.94	+ 2%	+ 13%		
Spain	plátano	1.94	- 5%	- 1%		
	banano	1.38	- 2%	- 4%		



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A CROWN

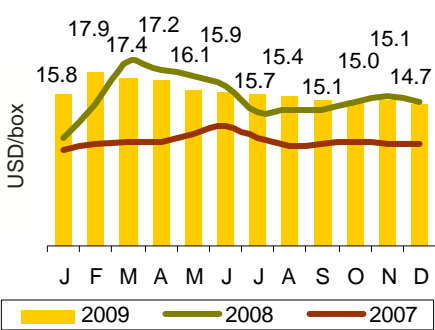
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Banana

UNITED STATES

USA - Green price (spot)

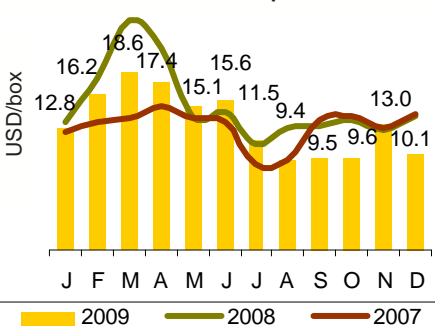


USA — IMPORT PRICE

December 2009 USD/box	Comparison	
	previous month	average for last 2 years
14.69	- 3 %	+ 15%

RUSSIA

Russia - Green price

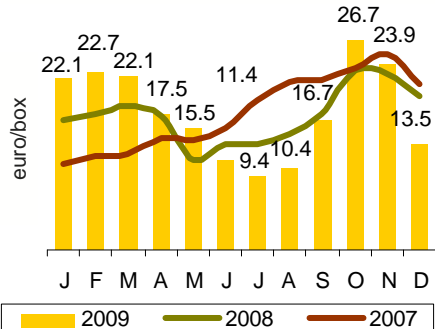


RUSSIA — IMPORT PRICE

December 2009 USD/box	Comparison	
	previous month	average for last 2 years
10.09	- 23 %	- 28%

CANARIES

Spain - Green price - Platanos*



CANARIES — IMPORT PRICE*

December 2009 euro/box	Comparison	
	previous month	average for last 2 years
13.45	- 44 %	- 34%

* 18.5 kg box equivalent

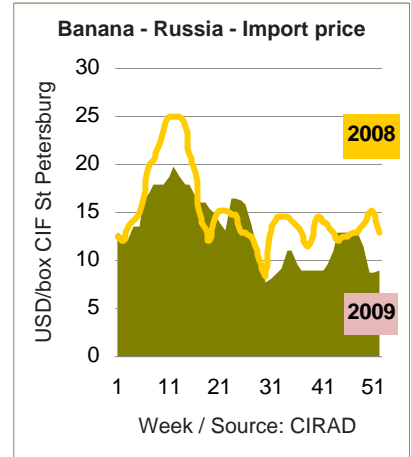
■ Banana: pulp prices in Europe in December 2009.

Type of juice	Price (USD/t)	Origin	Observations
Aseptic pulp, 22°Brix	620-640 FCA EU dp	Ecuador	Market calm and stable. Substantial supply and normal demand.

Source: MNS-IT Geneva

■ Russia: atomisation on the menu. Nothing has gone right since the Russian operator Sunway withdrew from Ecuador in Week 19 of 2009. On a slowing Russian market (- 4 to - 5% in 2009), the failure of the second largest banana operator resulted in the multiplication of the number of operators and this has disorganised the market. We now talk in terms of several tens of importers in Russia. Containerisation enhances this atomisation as anybody and everybody can become a banana importer.

Source: CIRAD



■ Record Ecuadorian banana exports in 2009. Ecuador increased shipments to the international market by 15.5 million boxes in 2009, a 6% increase. According to AEBE, the world's leading banana exporting country sold 271 million 43-lb boxes, that is to say 5.3 million tonnes. A record! In 2006, the total was 235 million boxes.

Source: AEBE



EUROPE — IMPORTED VOLUMES — DECEMBER 2009

Source	Comparison		
	November 2009	December 2008	cumulated total December 2008
French West Indies	=↗	+ 4%	+ 27%
Cameroon/Ghana	↗	- 17%	- 7%
Surinam	↗	- 1%	- 11%
Canaries	↗	+ 9%	- 8%
Dollar:	↗	na	na
Ecuador	↗	- 8%	+ 1%
Colombia	=↘	+ 9%	- 3%
Costa Rica	↗	na	na



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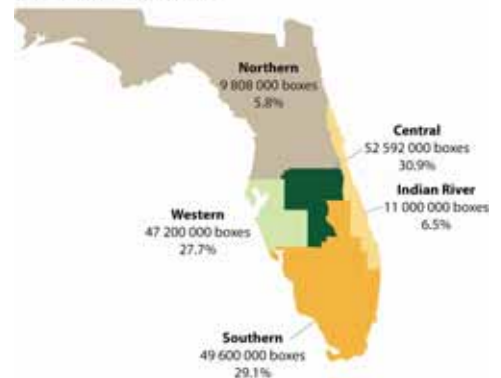
Orange

December 2009

The market remained very satisfactory. Supplies still consisted of practically only 'Naveline' from Spain. Even though the fruits were at a fairly advanced stage of ripeness, the volumes supplied remained moderate because of a continued production deficit, with shipments 20 to 30% smaller than average. Prices remained very firm at both production and import stages. Supplies were completed by a few batches of 'Salustiana' from Spain.

■ Frost in Florida causes rising temperatures on the concentrated juice market. The cold spell that hit Florida does not seem to have spared the orange groves. Temperatures in the north and west of the citrus belt dipped to -2/-2.5°C for four hours, and this is when fruit quality is affected. It is still impossible to evaluate the damage. However, the Florida Citrus Mutual, the main producers' association, admits that there have probably been losses. Private analysts talk in terms of 7 to 10% of the harvest. The very speculative concentrated juice market had a strong upward reaction, especially as the harvest was already likely to be particularly small. The latest forecast was 135 million field boxes, 12% less than average. Prices on the New York futures market had been around 135 cents per lb at the end of December and now rose to 150 cents. A decrease seems to be occurring as we go to press. This sharp price rise follows a much less speculative upward movement related to the limited production prospects in Florida in the long term because of sanitary problems and the recovery of US demand (**FruiTrop 172**). The US fresh orange market should not be touched markedly as it is supplied mainly by California, Florida being very little involved.

Orange - Florida
2007-2008 production
170 200 000 boxes 90 lb



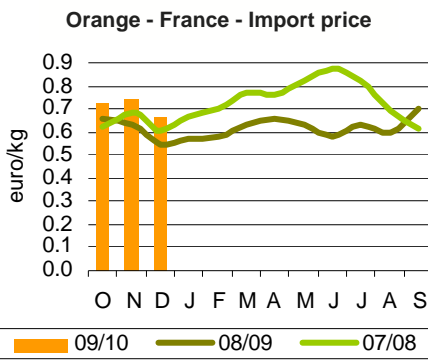
■ The prepared citrus market: a fresh attempt... Del Monte launched a new range of prepared fruit on the British market with the name Naked Fruit. Orange is one of the pilot products and presented peeled (rind and albedo) in individual transparent plastic packaging. The retail price is £0.69. The range also includes pineapple, with 550 g sections selling at £2.40. Apple, pear and melon should follow soon. The managing director of Del Monte UK targets sales worth £40 in a few years time. The UK prepared fruit segment market is currently worth £130 million. Small market penetration (purchases by only 37% of households in comparison with nearly 75% for lettuces) is a good indicator of the development potential. The launching of the range is supported by a marketing campaign.

Sources: Fresh Produce Journal, The Grocer

Sources: USDA, Reuters



© Régis Domergue



PRICE	Type	Average monthly price euro/box 15 kg	Comparison with average for last 2 years
	Dessert oranges	10.05	+ 17%
Juice oranges	12.75	na	

VOLUMES	Type	Comparison	
		previous month	average for last 2 years
Dessert oranges	=↗	- 17%	
Juice oranges	↗	na	

VOLUMES	Varieties by source	Comparison	
		previous month	average for last 2 years
Navelina from Spain	=↗	- 17%	

Observations	Cumulated total / cumulated average for last 2 years
Peak season, but volumes distinctly below average because of a production deficit. Fruits very ripe.	- 9%

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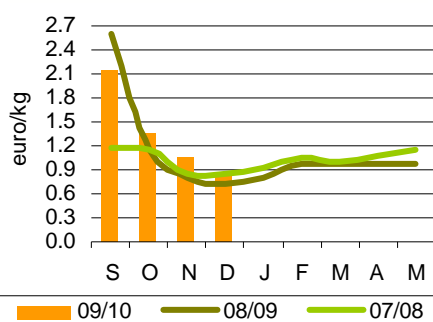


Easy peelers

December 2009

2009 was confirmed as one of the best vintages in recent years for Mediterranean growers. Demand was fairly slow at the beginning of the month because of the high prices at the retail stage but perked up with the start of special offers for Christmas and the arrival of cold weather. The Spanish supply deficit was even more marked than in November because only small volumes of 'Nules' remained to be sold at production and because some 'Clemenvilla' producers speculated by holding back fruits for January. Prices remained distinctly higher than average for both these varieties. The very open market continued to benefit other sources. The volumes sold and the prices fetched were significantly better than in previous years for both 'Fine' from Corsica and Morocco.

Easy peelers - France - Import price



■ Towards an early end to the easy peeler season. The volumes of easy peelers available during the last part of the 2009-10 season will probably be smaller than usual. The season for the main Spanish varieties available during the heart of the season ('Clemenvilla', 'Nules' clementine) started to come to an early end in January as a result of shortage of production and a large proportion of rejects resulting from extreme ripeness and rain at the end of December. In addition, 'Nour' from Morocco, with moderate potential this season, was also affected by floods that reduced export potential to some 50 000 t in comparison with the 65 000 to 70 000 t forecast initially and the 90 000 t shipped during the preceding season. The season may well finish early. Supply will probably be moderate in February. The Spanish 'Fortuna', 'Ortanique' and 'Hernandina' seasons will therefore start early and cover the mid-range (medium potential). In this context of limited supply, the top-quality varieties

such as 'Or' from Israel and 'Nadorcott' from Morocco and Spain should profit from a very open market. Their potential is greater than last year's, with some 30 000 t against 18 000 t of 'Or' from Israel and nearly 22 000 t against 14 000 t of 'Nadorcott' from Morocco.

Source: CIRAD

■ 'Minneola'. A variety bred in Florida in 1931 by USDA, 'Minneola' is a cross between 'Duncan' grapefruit and 'Dancy' mandarin. It is sensitive to cold, like all the other tangelos. The fruits are large and round and often have a small collar. The rind is orangey red, fine and smooth and difficult to remove. The aromatic pulp has a melting texture and an acid taste. This tangelo ripens late and is available from mid-December to mid-March mainly in Israel, Turkey and Cyprus.



Source: CIRAD

© Régis Domergue

■ Citrus: juice prices in Europe in December 2009.

Type juice	Price (USD/t)	Origin	Observations
Grapefruit	Frozen concentrate, 58°Brix, white	1 850-1 950 cfr EU dup	Cuba
	Frozen concentrate, 58°Brix, white	1 700-1 900 fca EU transit	Florida
	Frozen concentrate, 58°Brix, pink	1 550-1 600 fca EU dp	
Lemon	Frozen concentrate, cloudy, 500 gpl	3 250-3 600 fca EU	Argentina
	Frozen concentrate, clear, 500 gpl	3 850-4 300 fca EU	
	Frozen concentrate, cloudy, 400 gpl	2 000-2 400 fob Santos	Brazil
Lime	Frozen concentrate, 400 gpl	1 700 cfr EU	Mexico

Note: fca: free carrier / cfr: cost and freight / dp: duty paid / dup: duty unpaid / fob: free on board
Source: MNS-ITC Geneva

PRICE	Variety	Average monthly price euro/kg	Comparison with average for last 2 years
	Clementine	0.94	+ 19%
Other easy peelers	0.89	+ 12%	

VOLUMES	Variety	Comparison	
		previous month	average for last 2 years
Clementine	⇒↘	- 5%	
Other easy peelers	↗↗	- 27%	

VOLUMES	Varieties by source	Comparison		Observations	Cumulated total / cumulated average for last 2 years
		previous month	average for last 2 years		
Clementine from Spain	⇒↘	- 12%	Worsening supply deficit resulting from the early ending of the 'Nules' season.	- 10%	
Clemenvilla from Spain	↗↗	- 27%	Full season but exports smaller than average in spite of normal production to make up for the early end of supplies of 'Nules' clementine.	- 31%	
Clementine from Morocco	↗	+ 12%	Shipments more broadly directed to the EU.	+ 2%	
Clementine from Corsica	↗	+ 11%	Very substantial shipments because of the open market.	+ 15%	



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Tomate tomato

Maroc / Italie / Israel
Morocco / Italy / Israel



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Chili / Kenya / AFS
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Chile / Kenya / South Africa

Pomme/Poire

afrique du Sud / Chili / Argentine
South Africa / Chile / Argentina

Mangue mango

Afrique du sud / Brésil / Pérou /
Côte d'Ivoire / Israel
South Africa / Brazil / Peru /
Ivory Coast / Israel

Légumes vegetables

Israël / Maroc / Italie
Israel / Morocco / Italy



Grapefruit

December 2009

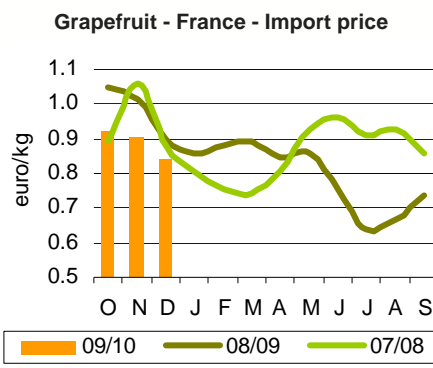
As every December, there was no rejoicing on the grapefruit market. Demand remained particularly sluggish as retailers switched to exotics. Prices of Florida grapefruit hardly changed and remained close to average, especially as arrivals were markedly smaller than in other years (market conditions, high cost of the goods). Likewise, prices remained practically stable but lower than average for Israeli and Turkish produce that arrived in fairly large quantities.

■ Florida grapefruit: harvest forecast very slightly down. FDOC reduced the harvest forecast slightly in January. Some 19.5 million 85-lb (38.6 kg) field boxes are expected—300 000 boxes less than the initial estimate. The decrease mainly concerns 'White Marsh' and is caused by smaller sized fruits than usual and an increase in losses caused by wind. If it is accurate, the crop will be 10% smaller than last season's when 21.6 million boxes were 'used'. Frost does not seem to have greatly affected Indian River, the main production zone in south-east Florida.

was a major shock for the Cuban economy. Citrus production was halved until 1994. Measures set up to try to save the sector resulted in 2001 production close to that of the record 1990 season. However, a series of hurricanes (Michelle in 2001, Gustav and Ike in 2002 and Dennis in 2005), shortage of inputs resulting from the economic embargo and the spread of diseases resulted in Cuba all but disappearing from the international fresh citrus scene. However, the country continues to play a role on the world orange and grapefruit juice market.

Sources: FAO, Reuters

Source: USDA



■ Good news at last for the Cuban citrus sector. Cuban citrus production is reported to have stopped decreasing in 2009 for the first time in a decade. The harvest, 95% of which consists of orange and grapefruit, was 9% larger than in 2008 at 427 500 tonnes, according to the National Statistics Office in Cuba. Production exceeded a million tonnes towards the end of the 1980s. Cuba was one of the world's leading exporters, with 500 000 t exported mainly to the Soviet bloc within the framework of compensation markets. The sudden collapse of the USSR



PRICE	Type	Average monthly price euro/box 17 kg box eq.	Comparison with average for last 2 years
	Tropical type	15.25-15.75	- 1%
Mediterranean type	10.50-11.00	- 11%	

VOLUMES	Type	Comparison	
		previous month	average for last 2 years
Tropical type	↘↘	- 31%	
Mediterranean type	↘	+ 30%	

Tonnes	2003	2004	2005	2006	2007	2008	2009
Total, of which	792 700	801 700	554 600	373 000	469 000	391 800	427 500
Orange	492 200	495 000	389 469	178 357	302 800	200 400	na
Grapefruit	227 800	225 000	134 090	169 556	140 000	166 100	na
Lemon	26 700	22 000	8 028	6 134	6 000	5 400	na

Source: Oficina Nacional de Estadísticas de Cuba

VOLUMES	Source	Comparison		Observations	Cumulated total / cumulated average for last 2 years
		previous month	average for last 2 years		
Florida	↘↘	- 31%	Seasonal decrease in arrivals more marked than in other years.	- 20%	
Israeël	↘	+ 31%	More moderate shipments but still distinctly larger than average.	+ 16%	
Turkey	=↘	+ 6%	Exporters still shipping more than 75% of their fruits to Eastern Europe, but the volumes supplied to the EU increased as the harvest was large.	- 17%	

Pineapple

December 2009

Operators conducted several clearance sales during the first two weeks of December and this brought order to the market. The late arrival of several ships from Costa Rica affected the supply of 'Sweet', which was thus smaller than forecast. In the second half of the month, strong demand from the southern markets—especially Italy and Spain—resulted in the continued increase in prices. However, trade was slower during this period as supplies of 'Sweet' were smaller and some problems of fruit keeping quality were reported here and there.

Supply of 'Smooth Cayenne' increased from Week 49 and peaked in Week 51. Sales were comparatively small in Weeks 49 and 50 as demand was still moderate. However, this increased from Week 51 and prices rose, resulting in a degree of business for two weeks. As was the case for 'Sweet', sales and prices of 'Smooth Cayenne' slumped during the last week of the year.

The air pineapple market was brisk, with fairly busy sales from the second week of the month onwards. Supply was smaller than expected from all sources. Even so, prices did not rocket and sales were fluid at firmer prices. Batches of 'Sugarloaf' pineapple from Benin and Togo sold at between EUR1.90 and 2.00 per kg.

Sales were very difficult on the 'Victoria' market at the beginning of the month. Supply from Réunion was substantial but there was no real demand. In contrast, the last three weeks were very busy. Supply was smaller and demand increased for this festive fruit and so sales were brisker at better prices.

■ Panama counts on pineapple. Panama aims at overtaking Costa Rica as the world's leading pineapple producer and exporter. For this, it must increase the planted area tenfold, as it is currently reported to have a planted area of 3 741 hectares in comparison with more than 40 000 ha in Costa Rica.



Good relations between Fyffes and local growers and optimum climatic conditions in the centre of the country are encouraging the government to step up aid for the sector. Panama is the fourth-largest supplier of pineapple to EU-27 (39 000 tonnes in 2008) and the sixth-largest

to the United States (26 000 tonnes). With a total of 55 000 tonnes, it is the sixth world exporter after Côte d'Ivoire and ahead of Ghana.

Sources: Reefer Trends, CIRAD

■ Mango in Japan: Peru in the starting-blocks! The sanitary authorities in Lima hope that Japan's phytosanitary barriers to Peruvian mangoes will be lifted in the first quarter of the year. In January 2009, the Japanese authorities validated the installations for the hot water treatment of fruits aimed at managing fruitfly. The 2010-11 harvest would therefore be the first to benefit from the opening of this new market, possibly opening the way for table grapes. Japan imports an annual 12 000 to 13 000 tonnes of fresh mangoes, mainly from Mexico, the Philippines and Thailand.

Sources: Andina, CIRAD

■ Mango: juice and purée prices in Europe in December 2009.

Type of juice	Price (USD/t)	Origin	Observations
Aseptic pulp, 16-17° Brix, 'Alfonso' variety	1 350-1 550 cfr EU	India	Market stable and normal. Prices firm as demand is still strong. The Brazilian harvest ('Tommy Atkins' and 'Palmer') should be smaller than forecast. Stronger import demand could reduce world market supply.
Aseptic concentrate, 28°Brix, 'Totapuri' variety	1 200-1 500 cfr EU	India	
Aseptic pulp, 14-16° Brix, 'Magdalena' variety	920-950 cfr EU	Colombia	
Aseptic concentrate, 28-30° Brix, 'Magdalena' variety	1 300-1 325 cfr EU	Colombia	
Aseptic concentrate, 28-30° Brix, 'Tommy Atkins' variety	1 250-1 400 fca EUdp	Mexico	
Aseptic concentrate, 28-30° Brix, 'Tommy Atkins' variety	1 225-1 400 fob Santos	Brazil	

Note: fca: free carrier / cfr: cost and freight / dp: duty paid / fob: free on board

Source: MNS-ITC Geneva

PINEAPPLE — IMPORT PRICE

Weeks 49 to 53	Min	Max
By air (euro/kg)		
Smooth Cayenne	1.65	1.90
Victoria	3.00	3.80
By sea (euro/box)		
Smooth Cayenne	5.00	8.50
Sweet	5.00	9.50

PINEAPPLE — IMPORT PRICE IN FRANCE — MAIN ORIGINS

Weeks 2009		49	50	51	52	53
By air (euro/kg)						
Smooth Cayenne	Benin	1.70-1.85	1.75-1.90	1.85-1.90	1.75-1.90	1.75-1.90
	Cameroon	1.70-1.85	1.75-1.85	1.80-1.90	1.75-1.90	1.75-1.90
	Ghana	1.65-1.80	1.75	1.75-1.80	1.75-1.85	1.75-1.85
	Côte d'Ivoire	-	1.80-1.85	1.80-1.90	-	-
	Togo	-	1.90	1.85-1.90	1.85-1.90	1.85-1.90
Victoria	Réunion	3.00-3.50	3.00-3.50	3.30-3.80	3.50-3.60	3.50-4.00
	Mauritius	3.10-3.20	3.10-3.20	3.00-3.30	3.20-3.40	3.20-3.30
By sea (euro/box)						
Smooth Cayenne	Côte d'Ivoire	5.00-7.00	5.00-7.00	6.00-8.50	6.00-8.00	5.00-7.50
Sweet	Côte d'Ivoire	5.00-7.00	6.00-9.00	8.00-9.50	7.00-9.50	7.00-9.50
	Cameroon	5.00-7.00	6.00-9.00	8.00-9.50	7.00-9.50	7.00-9.50
	Ghana	5.00-7.00	6.00-9.00	8.00-9.50	7.00-9.50	7.00-9.50
	Costa Rica	6.00-7.00	6.00-8.00	8.50-9.00	8.00-9.00	6.50-8.50
Victoria (euro/kg)	Côte d'Ivoire	2.00-2.25	2.00-2.25	2.00-2.40	2.50	2.50

Mango

December 2009

Shipments from Brazil were dominant during the first three weeks of December. The change in European supply pattern in the third week resulted in accumulated arrivals because of a slow decrease in deliveries from Brazil and a rapid increase in those from Peru while demand increased less than in preceding seasons. The switch from Brazil to Peru was complex because of the rapid loss of interest by buyers in Brazilian fruits, whose quality was uneven overall and not very reliable. The volumes from Brazil were still substantial and hindered the release of the first large shipments from Peru, causing a downward market trend, given the matching of prices of fruits from both sources. This trend was confirmed at the end of the month, after Christmas. Only 'Tommy Atkins' arriving in decreasing quantities from Brazil sold better than in the preceding period. Their price firmed, especially on the markets in northern Europe. Ecuador also shipped 'Tommy Atkins' and 'Kent', but in limited quantities as export priority went to the North American market. Prices were lower than those recorded for the two dominant sources on the European market.

As for the sea mango market, supply of fruits by air switched gradually from Brazil to Peru. Buyers gradually abandoned 'Kent' from Brazil, with its frequently inadequate colour, and purchased fruits from Peru whose colour and taste qualities were better; these generally sold at EUR0.50 per kg more than those from Brazil.

Litchi

December 2009

The season continued in December with shipments by air from all the Indian Ocean sources until Week 49. The arrival of the first fruits shipped by sea in Week 51 resulted in the halting of shipments by air from most sources in order to avoid the sale of the last batches of air fruit at the price fetched by those shipped by sea. Only Mauritius and Réunion continued to ship fresh litchis on the branch, aimed at a specific clientele. However, the quantities shipped from these sources decreased rapidly, allowing a price recovery as Christmas approached. The decrease in supply even caused a significant increase in the price of Réunion litchis at the end of the year. While the price of litchis shipped by air had fallen at the end of November, the situation displayed better dynamics in the first half of December, with a general increase in the price of sulphur-treated fruits as a result of increased demand.

The sale of litchis arriving by sea started in Week 51. Sale of the cargo of the first ship that docked in Marseilles on 14 December was handled rapidly, given the late date in the season for the sales schedules of retail chains and the limited quantities received at the Euro-

pean scale. As a result, selling prices held well overall and in any case at a higher level than in 2008. Still firm in Week 52, the price of litchis from Madagascar weakened more markedly at the end of the month, slipping beneath the EUR2.00 per kg mark. The fall in price is accounted for in particular by the sharp decrease in demand after Christmas. South African litchis shipped by sea tended to transit via wholesale markets where they fetched higher prices as the fruit size was better.

LITCHI — ARRIVAL ESTIMATES
Tonnes

Weeks 2009	49	50	51	52	53
By air					
Mauritius	20	20	15	10	-
South Africa	100	120	5	-	-
Madagascar	60	100	5	5	-
Réunion	40	50	70	50	20
By sea					
South Africa	-	-	-	160	360
Madagascar	-	-	4 440	7 700	1 000

LITCHI — IMPORT PRICE ON THE FRENCH MARKET — Euro/kg

Weeks 2009		49	50	51	52	53	December 2009 average	December 2008 average
By air								
Mauritius	br	5.00-7.00	5.00-6.50	5.50-6.50	7.00-8.00	-	5.60-7.00	5.35-6.25
Mauritius	s	4.30-4.50	4.30-5.00	-	-	-	4.30-4.75	4.00-4.50
Madagascar	br	6.00	5.00-6.00	5.50	-	-	5.80	6.00
Madagascar	s	4.00-4.50	4.30-5.00	4.80-5.00	-	-	4.35-4.80	-
Réunion	br	7.00-8.00	7.00-7.50	7.00-7.50	7.00-8.00	10-12	7.60-8.60	5.35-6.10
South Africa	s	4.00-4.50	4.20-5.00	-	-	-	4.10-4.75	3.00-5.00
By sea								
South Africa		-	-	-	2.50-3.50	2.20-2.60	2.35-3.05	1.35-1.70
Madagascar		-	-	2.20-2.40	2.00-2.30	1.70-1.90	1.95-2.20	1.75-2.50

br: fresh on the vine / s: sulphur treated

MANGO — ARRIVAL ESTIMATES
Tonnes

Weeks 2009	49	50	51	52	53
By air					
Brazil	120	120	90	80	40
Peru	20	50	120	100	60
By sea					
Brazil	3 250	3 120	2 570	1 930	1 340
Ecuador	330	220	300	1 600	na
Peru	500	90	2 370	2 600	3 850

MANGO — IMPORT PRICE ON THE FRENCH MARKET — Euro

Weeks 2009		49	50	51	52	53	Dec. 09 average	Dec. 08 average
By air (kg)								
Brazil	Haden	3.00-3.50	-	-	-	-	3.00-3.50	-
Brazil	Kent	3.00-3.80	3.00-3.80	3.00-3.70	3.00-3.50	2.50-3.80	2.90-3.70	2.90-3.50
Peru	Kent	4.50	4.00-4.50	4.00-4.50	4.00-4.30	3.50-4.30	4.00-4.40	4.00-4.35
By sea (box)								
Brazil	T. Atkins	3.00-3.50	3.00-3.50	3.00-3.50	3.00-3.80	-	3.00-3.55	2.25-3.35
Brazil	Kent	4.50-5.00	4.00-4.80	3.00-4.50	3.00-3.50	2.50-3.50	3.40-4.25	3.10-4.25
Peru	Kent	4.50-5.00	4.00-5.00	4.00-4.50	3.50-4.50	3.00-4.00	3.80-4.60	4.00-4.45

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Sea freight

December 2009

The year ended in disappointment for reefer owners and operators: although rates had started rising for spot cargoes towards the end of November by the middle of December it was clear that capacity supply was greater than demand and fixture values corrected downwards accordingly.

Despite the demolition of a further 40 reefer vessels and with a similar number laid up throughout the off-season, the Spot market returned 43% less than it had for the previous 12 months! The knock-on impact for Period business was equally dramatic – an estimated 50-60% of the value of the incremental rate rises since 2003 was wiped out on most renewals as owners and operators were forced to readjust to a capacity surplus.

As a result the Med banana charterers in particular have taken the decision to gamble on a continuing supply imbalance – this strategy has an interesting spin-off benefit for the charterers: the absence of an advance loading schedule will make it more difficult for the independent Ecuadorian banana producers to gauge the strength of potential Spot demand. They will therefore find it more difficult to set or maintain a uniform price.

This may be one of many motivating factors behind the Ecuadorian Government's desire to establish a banana parastatal – it is reportedly planning to invest US\$30m this year in the creation of a trading entity that will theoretically act as a moderating influence in the interface between producer and exporter on the one hand and will, it hopes, help develop new markets on the other.

Although banana supply is currently abundant and Chile also active, the row between the US and Russia over veterinary protocols for poultry imports threatens the stability of the market. Russia imports an annual 780K MT of poultry from the US - the majority is shipped in specialised reefers. If an agreement cannot be reached the reefer business will not remain unaffected!

■ Jacques Azoulay, chairman and managing director of Katopé International, retired in January 2010. In a career in the sector spanning 40 years, he contributed to making Katopé one of the leading European import companies and has played a major role in the *Chambre syndicale des importateurs français de fruits et légumes frais* and FRESHFEL. He is to be succeeded by Nicolas Morinière. The **FruiTrop** team wishes all the best to both of them.



■ Fruits: juice and pulp prices in December 2009 in Europe.

Type of juice	Price (USD/t)	Origin	Observations	
Pomegranate	Aseptic concentrate, 66° Brix	3 700-3 900 fca EU	Turkey	Market normal. The Turkish harvest seems to be down on forecasts. Demand increasing steadily. Prices moving upwards.
	Frozen concentrate, 50° Brix	7 500-8 000 fca EU	Ecuador	
Passion fruit	Not from concentrate (NFC), 14° Brix	2 700-3 000 delivered to factory EU	Ecuador	Very limited market supply but world supplies should gradually return to normal.
	Frozen concentrate, 50° Brix	7 200 fob Callao	Peru	
Papaya	Aseptic concentrate, 25° Brix, red	1 050-1 065 fca EU	India	Market normal.
	Aseptic single pulp, 9° Brix, red	675 fca EU		
	Aseptic concentrate, 25° Brix, yellow	1 040 fca EU		
	Aseptic single pulp, 8-10° Brix, yellow	695-725 fca EU		
Guava	Aseptic single pulp, 8-10° Brix, pink	650-700 cfr EU	Brazil	Brazilian supplies should be affected by the bad spring weather. Demand is stable and prices firm.
	Aseptic concentrate, 14-16° Brix, pink	1 040-1 050 cfr		
Acerola	Frozen concentrate, 18° Brix	4 100 fob Santos	Brazil	Prices falling distinctly. Demand reported to be weakening.
	Frozen single juice, 18° Brix	800-1 150 fob Santos		

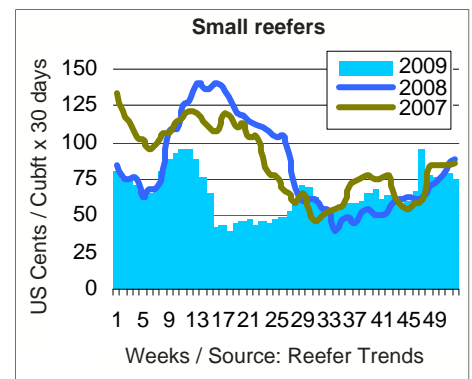
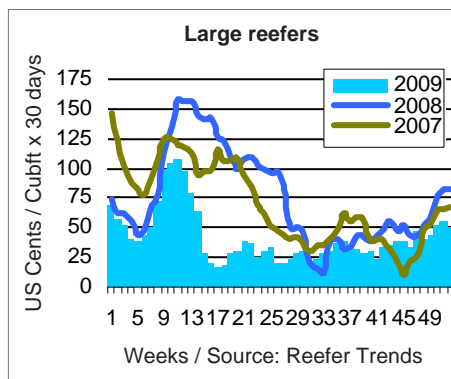
Note: fca: free carrier / cfr: cost and freight / fob: free on board / Source: MNS-ITC Genève

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MONTHLY SPOT AVERAGE			
US\$/cubic foot x 30 days	Large reefers	Small reefers	
December 2009	50	73	
December 2008	72	85	
December 2007	57	77	





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Banana in Europe: 2009 price review

What a pity!

The traditional review of the 2009 banana year is in two parts once again. This issue of Fruitrop contains a price review and then a full review of the volumes sold and bought will be published in April 2010, to provide the time required to gather and analyse all the information.

A traditional greeting at the Chinese New Year is 'Congratulations and best wishes for a prosperous New Year!'. It is a pity that this only came true in the first half of 2009 and not for the entire year. Import prices had nevertheless moved very well everywhere in the world while retail prices remained very sensible, making banana the anti-slump fruit par excellence. The recovery of world export potential throughout the second half of the year and stronger competition from competing fruits spoiled the part. Finally, the average annual price was identical to those of the two previous years.

This article could be entitled 'When the weather replaces political and trade regulation' as the variation in the volumes available world-wide from the end of 2008 marked the general evolution of markets in 2009. The import price in France reached EUR 0.67 per kg (EUR 12.2 per box); this was similar to prices in 2007 and 2008 and 6% higher than in 2006. However, as with all annual averages, the result hides extremely contrasted situations. A quick look at the past is needed to understand the optimism that dominated the whole of the first half of 2009 before suddenly changing to disappointment and then concern throughout the second half of the year.

A magnificent first half of the year

Import prices in the EU increased a little in the last weeks of 2008 after very serious flooding in Central America. Costa Rica, Panama and Honduras suffered very heavy human and

material losses, with the banana sector particularly hard-hit. Reports at the time mentioned some 10 000 hectares affected to varying degrees in Costa Rica alone. This followed other weather damage in 2007 that had reduced the 2008 export potential in many areas.

As some people's misfortunes spell good fortune for others in the banana trade, the resulting decrease in the quantities of bananas available world-wide strongly affected the international situation in the first half of the year. In Germany (Aldi reference figures), import prices reached new heights in February, with transaction at about one Euro per kg, that is to say EUR 18 per box. Prices approaching this had not been seen since February 2005. The situation was the same in France, with good performance in the first half of the year with prices at about EUR 0.74 per kg (EUR 13.40 per box).

The second quarter (EUR 0.75 per kg or EUR 13.60 per box) was excellent even

though this spring period is particularly difficult to handle because of strongly increasing supplies of local fruits. The performance was all the more remarkable since certain red and stone fruits were strongly present. The apple market—difficult throughout the year—should be seen in conjunction with this. The banana market was thus clearly satisfactory during this period. Volumes from the dollar zone were measured, as were those from the French West Indies and Africa and this strengthened import prices.

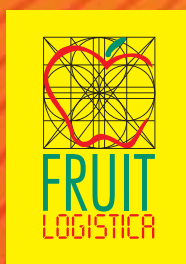
A tasteless half of the year

The second half of 2009 proceeded much more in ups and downs. Unfortunately, the summer months—July and August—held no surprises. The import price decreased by a quarter from June to July, falling to EUR 0.55 per kg (EUR 10.00 per box). And, in contrast with 2007 and 2008, it did not recover in August. Subse-



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Tombez sous le charme



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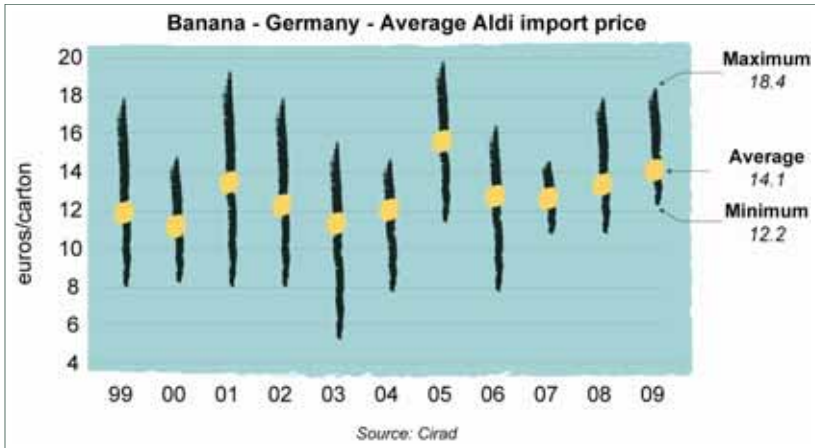


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Banane
DE GUADELOUPE
& MARTINIQUE

C'est pour ça qu'on l'aime.



quently, nothing happened as regards the hypothetical positive effects of the start of the school term on sales, a phenomenon less and less expected by operators. Worse still, the level set in July remained the norm or reference threshold not to be exceeded until the end of the year. From July to December, the average monthly price in France varied from EUR 0.53 to 0.57 per kg, that is to say a variation of two centimes per kg around a central EUR 0.55! The standard deviation for the second half of the year is the smallest ever recorded at around EUR 0.013 per kg in comparison with eight or ten times this figure in preceding years. This smoothing phenomenon is thus a recent one and particularly disturbing. Examination of the statistical series drawn up by the CIRAD Market News Service dates the phenomenon—which started in 2007 and has become stronger ever since.



Green prices rising and retail prices falling

2009 will go down in history as the year in which import prices remained firm for six months while retail prices fell! The latter continued to lose ground in line with the downward trend in import prices described above. In France, both standard and special offer prices fell to 4% lower than those of 2008. This was a return to traditional levels: EUR 1.41 per kg standard and EUR 1.26 per kg for special offers. As always, these average prices conceal a very broad range, especially as regards special offers. Prices that hardly cleared EUR

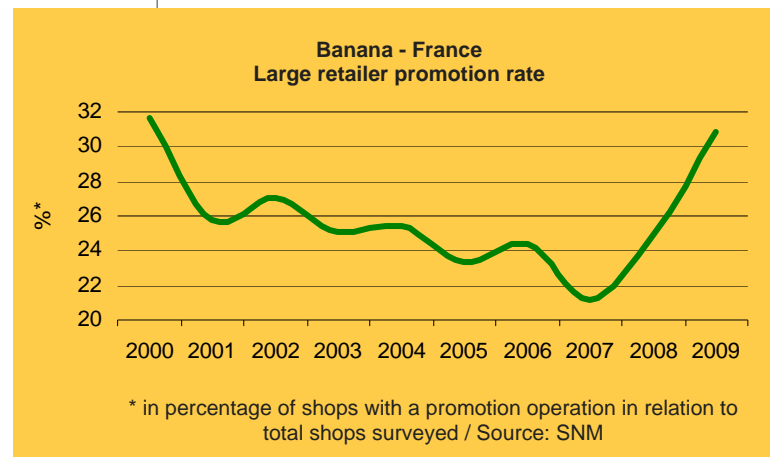
0.60 per kg were seen throughout the year in local, one-off promotion operations.

The strong competition in supply with import prices holding steady should be compared to the still partial figures for French consumption in 2009. The sector has every reason to rejoice. The review to be published by Fruitrop in April may confirm that banana consumption has increased again in France, especially during the first part of the year when import prices were at their highest. This kind of squaring of the circle merits further explanation in order to be repeated. An example is that in March 2009 the import price reached EUR 0.97 per kg (5% higher than in March 2008), retail prices were down by 14% and consumption up by 22%.

Banana, the slump-beater

It is difficult to pinpoint just one cause for this phenomenon. A few explanations were put forward in the September 2009 issue of **Fruitrop (No. 170)**. For example, France is less sensitive than the other EU member-countries to a decrease in world supply because it has a substantial production base in the West Indies and West Africa is also an important, historical stakeholder in this market. It can also be considered that the marketing efforts made by Martinique and Guadeloupe stimulate demand. Finally, the 'slump-beating' value of the fruit can also be considered. As we announced here precisely a year ago and as was subsequently confirmed in practice, the excellent price:energy value of banana played its role fully in 2009.

Retail chains clearly participated in this fine dynamics, profiting from a very widely consumed item at a very competitive price, not only in fruit and vegetable departments but also in



* in percentage of shops with a promotion operation in relation to total shops surveyed / Source: SNM



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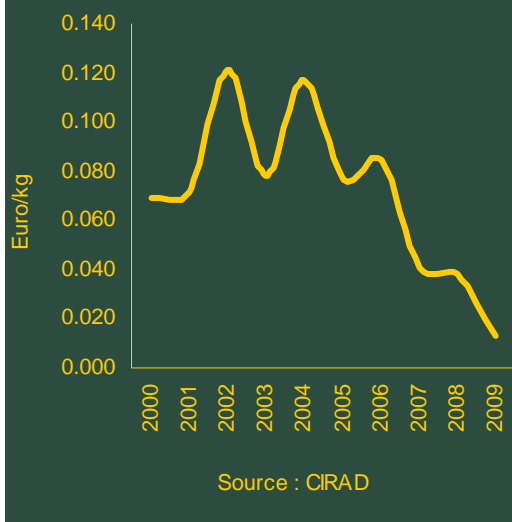
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FRUIT LOGISTICA : HALL 22 STAND A 13

Banana - France - Standard deviation of import prices in the second half of the year



relation to other departments. Bananas were promoted as never before. During the six of the twelve months of 2009, promotion intensities (PI measured by SNM) reached levels that had not been attained in the preceding decade. In terms of annual average, 2000 was the last year in which the PI was slightly higher than in 2009: 32% in 2000 against 31% in 2009.

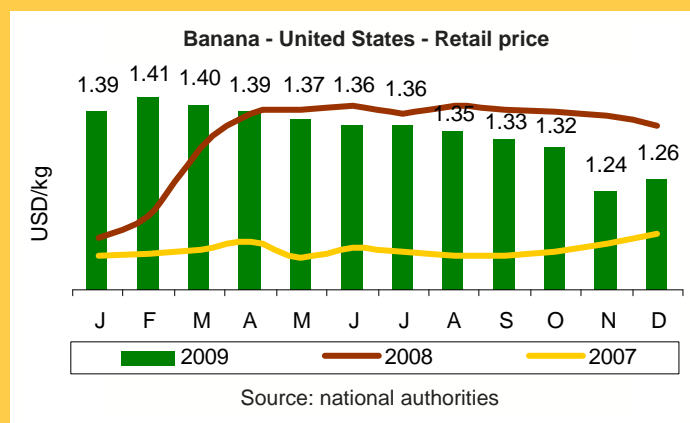
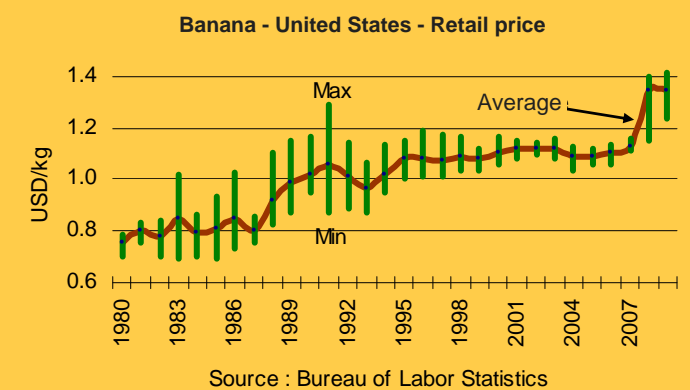
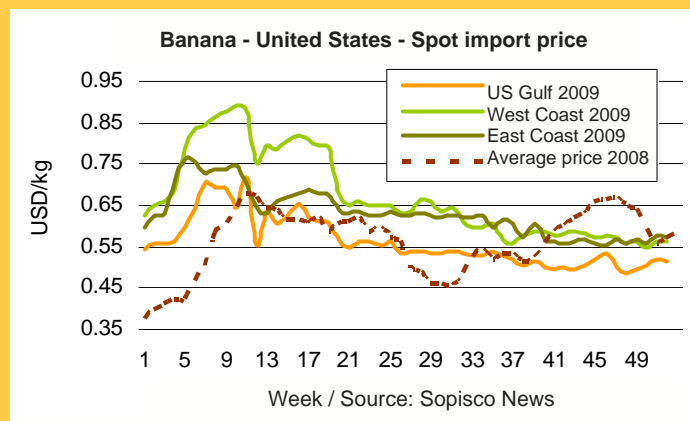
The French market stood out from the other European markets in 2009 in this strong retail business in bananas. In Germany, the activity index that measures sales dynamics in supermarkets fell in 2009 by a whopping 7%. This feature can be seen in EU supply statistics. Even though Eurostat and certain member-countries such as Belgium are slow to publish import data, it is estimated that supply from third countries decreased by more than 10% in 2009. Full report in April.

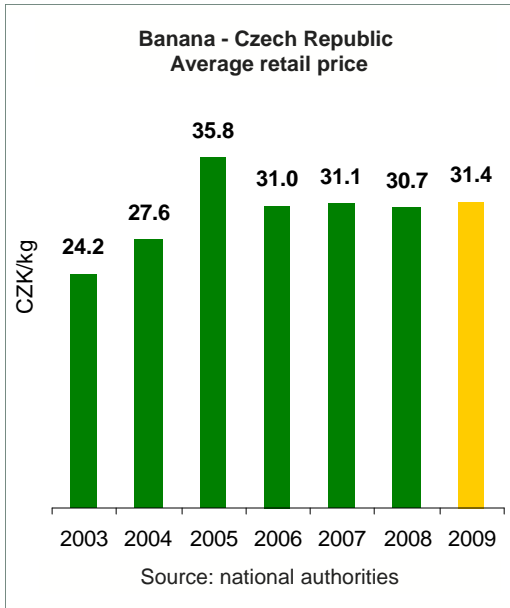
In contrast, a feature common to many European countries was sensitive retail prices. In Germany, the leading consumer country, prices stabilised in both traditional retail outlets (EUR 1.21 per kg) and discount stores (EUR 1.03 per kg). In Italy, retail prices gained a tiny 2% but displayed a downward trend at the end of the year (12% lower in December 2009 than in 2008). The same trend was observed in the Czech Republic, where the average annual price was CZK 31.4 per kg, well below the CZK 36 per kg of 2005. In Spain, the price of Canary Island bananas was stable at EUR 1.89 per kg whereas bananas from all other sources fell by 5% to EUR 1.44 per kg. The situation was more complex in the United Kingdom. The price of loose bananas remained stable at £ 0.83 per kg thanks to the price war re-



United States

Exceptional ! The spot price on the US market set a new euro and dollar record in 2009, reaching nearly USD 16.00 per box (EUR 11.5). This is 4% better than in 2008. The increase is even greater when calculated in euros: +10%. The US customs confirm the trend, with a unit value declared up by USD 100 per tonne, a 30% increase. The pattern of spot price movement was the same as that on the European markets, except that the price fall was not as sharp in the second half of the year. Prices were rarely lower than those of 2008 in the second half of the year. The fragility of the spot price in the southern USA (Gulf of Mexico) should be noted. Retail prices remained very high and close to the all-time record set in 2008, but with clear weakening from November onwards.





launched by ASDA in October. In contrast, the price of pre-packed fruits increased strongly by 13% from £ 1.07 to 1.21 per kg.



**Returns to producers:
prospect of a hard fall**

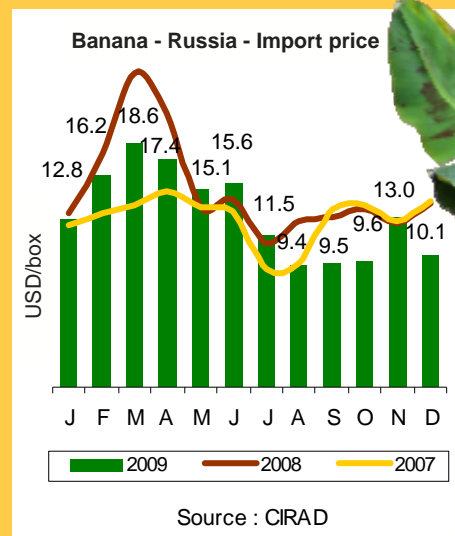
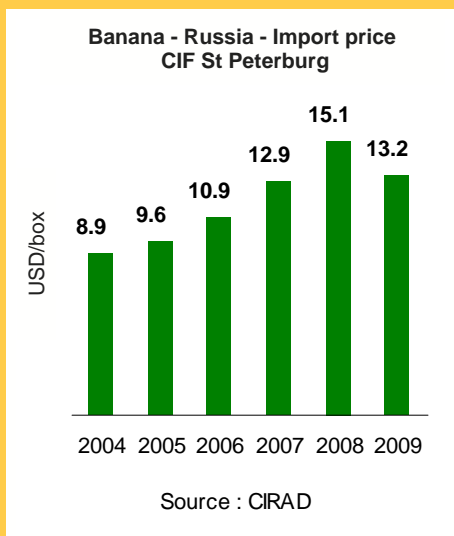
Did the production sector weather 2009 successfully? It is difficult to give a general reply. The increase in the guaranteed minimum price in Ecuador (USD 5.40 per kg from July 2009, after USD 5.05 in March 2009 and USD 3.75 in July 2007) and in Costa Rica (USD 8.66 per kg in comparison with USD 7.17 in 2008 and USD 5.85 in 2007) is a clear sign of a substantial improvement in producers'

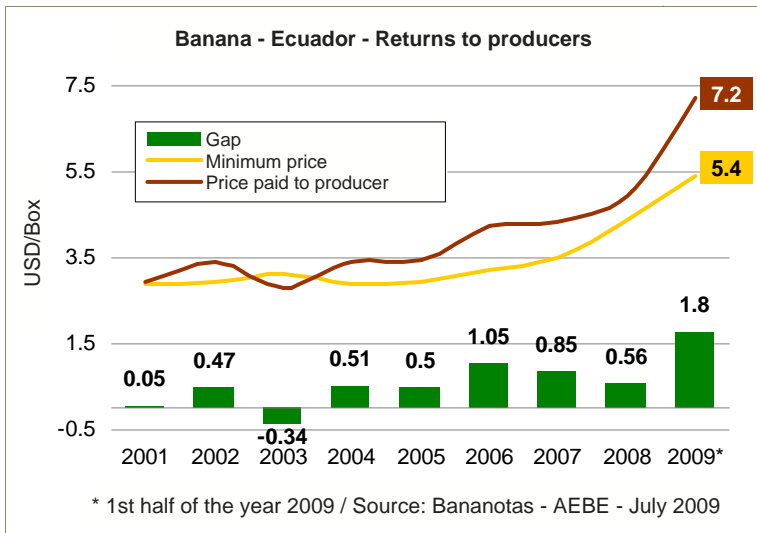
incomes. The journal *Bananotas*, published by AEBE (Association of Ecuadorian Banana Exporters), confirms the trend and stresses the fact that actual returns were higher than the minimum guaranteed prices because world supply was considerably reduced at the end of 2008. It reports a return to prices of USD 7.20 per kg in the first half of 2009, that is to say 42% more than the minimum price. The full 2009 performance will doubtless be less glorious as the second half of the year was more patchy, especially towards the end when world banana supplies increased.

This rise in prices for Latin American producers might seem surprising as the situation was not as good for producers in the West Indies (EU and ACP) and Africa. This is explained to a

Russia

The 2009 Russian market was not one developing strongly, centred on solid commercial structures. Phenomenal variations in the St Petersburg import price reveal the difficulties experienced. The withdrawal of a major market operator seems to have opened the door to a host of small operators who try their luck each week. All this is in a context of a consumer slump and a reduction of at least 4%.





considerable extent by the euro:dollar exchange rate. High prices in the euro zone and a very low US dollar (USD 1.3 to 1.5 to the euro throughout 2009) automatically increase returns in the zones operating in dollars, especially as intermediate costs—a subject for considerable concern in 2007-08 in particular—were in the background in 2009. Oil prices fell considerably and both reefer charter and container shipping transport costs decreased strongly. World economic recovery and the increase in banana shipments from Latin America could change the situation in 2010.

A banana horoscope for 2010

Forecasting is always delicate and dialectic caution often wins against clear conclusions. But there is no need to beat about the bush for 2010. The banana year is going to be difficult. Practically all the warning lights are flashing. The dollar production zones will be back to full production. Ecuador and to a lesser degree, Colombia, may well turn in record

performances. African potential is intact or perhaps better and EU production should reach traditional levels, especially in Martinique. Intermediate costs could increase again (oil, freight, inputs, etc.). There is a little bit of hope with regard to competing fruits—not on the apple market where competition will be intense but in citrus, where supplies of both oranges and easy peelers will be short. The Spanish strawberry season should be moderate, at least at the beginning, as a result of unfavourable weather conditions. Finally, 2010 is a

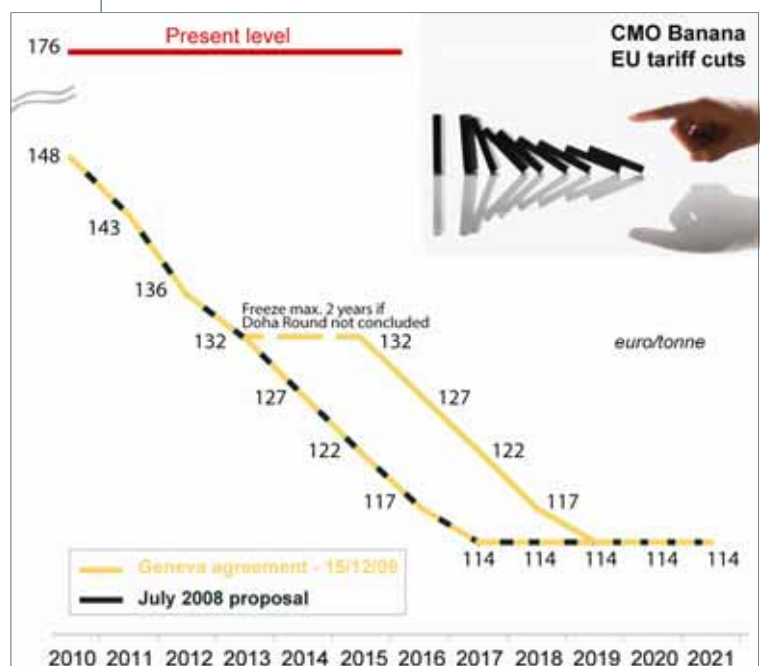
negative alternate bearing year for stone fruits (cherries, peach, nectarines and apricots).

The disorganised Russian market that upsets Eastern European markets is also a reason for concern. This is a pity as market growth in 2007 and 2008 and a degree of grouping of market releases had a stabilising effect on Russian demand for the EU market.

European deregulation makes things worse. Indeed, the customs tariff decreased on 15 December 2009 (from EUR 170 to EUR 148 per tonne). This results in a price decrease of EUR 0.50 per box—demanded by European retailers—and a strong psychological effect leading all suppliers to

considering that the European banana market is a machine to make them happy. They should all remember the irrational behaviour of certain importers and exporters in spring 2006 when the European market switched from a quota to a single-tariff system. The opening of the market attracted operators who thought that they had won the jackpot but finally flattened the European market for months. Econometrists will never be able to measure the true effect of the customs tariff at EUR 176 per tonne as world banana supplies have been reduced by meteorological disasters since 2006. But they will be able to do it with the new rate of EUR 148 per tonne. These statistical magicians will be able to cancel all their forecasts and grovel. But this means leaving astrology for the fourth dimension! ■

Denis Loeillet, CIRAD
denis.loeillet@cirad.fr

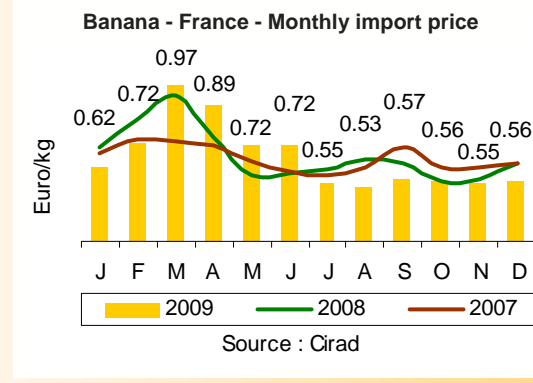
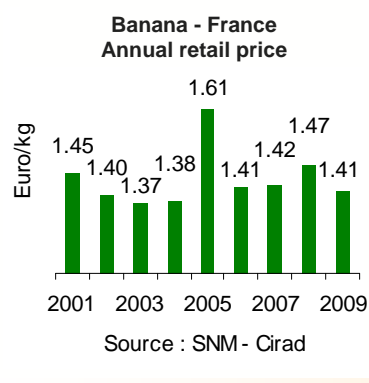
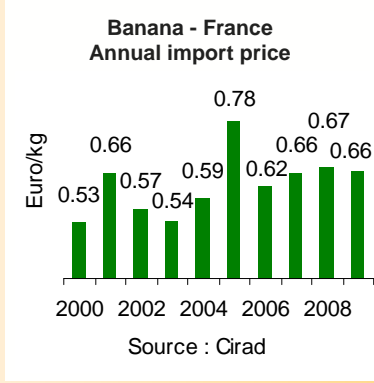
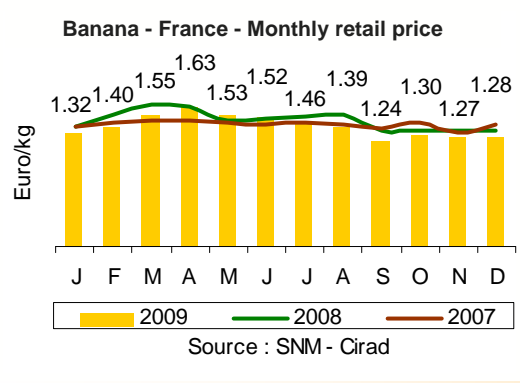
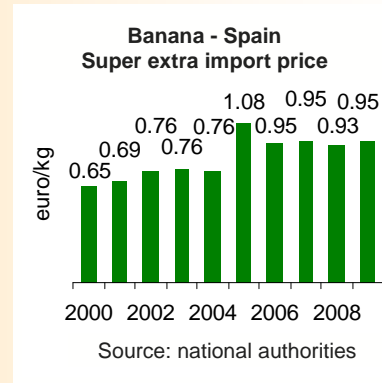
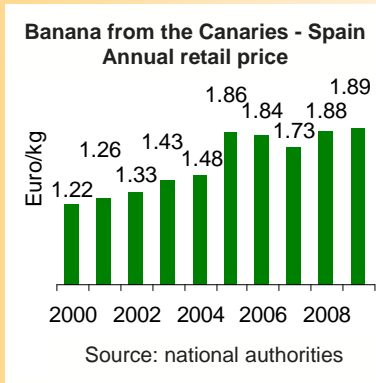
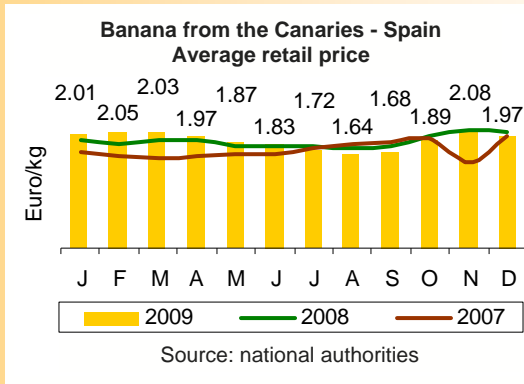


photos © Régis Domergue

The movement of banana prices in Europe in 2009

Spain

The major feature of the Spanish market is the increasingly strong competition between Canary Island bananas and those from elsewhere in the world. In 2009, the difference between the retail prices of the two types of banana broadened considerably. In the shops, Canary bananas were a third more expensive than the others (often from the dollar zones), whereas the difference had still been 15 to 20% in the last four years. However, a feature that is more worrying in the long term is the increase in the price of Canary Island fruits, which for months exceeded the psychological threshold of EUR 2.00 per kg, while other bananas cost less than EUR 1.50 per kg. It is clear that this movement in the retail prices of Canary Island bananas can be seen in both wholesale and import prices. In the autumn, you could even purchase two kilos of dollar bananas for the price of a kilo of Canary Island fruits!



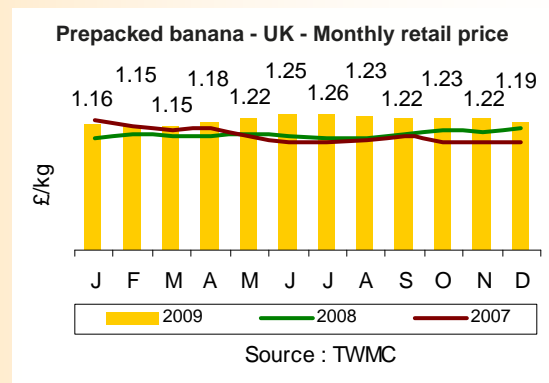
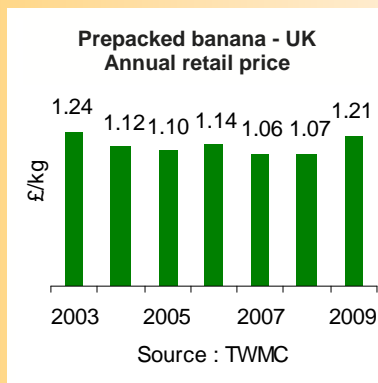
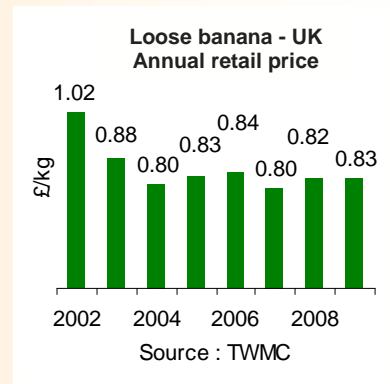
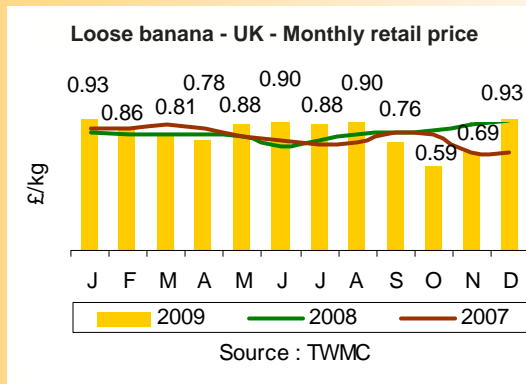
France

'Reasonable' would be a good description of the movement of retail prices in France. Although there were a few geographically isolated killer promotion operations, retail prices neither soared nor weakened. Special offer and standard retail prices were both at 2006 and 2007 levels. Retail prices behaved as elsewhere in Europe, at least during the first half of the year, with a difficult start at the beginning of the year and then an increase. However, the fall was sometimes heavier in France in the second half of the year with a worsening in the summer and a poor end of the year.

United Kingdom

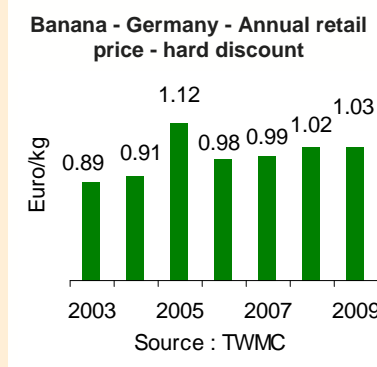
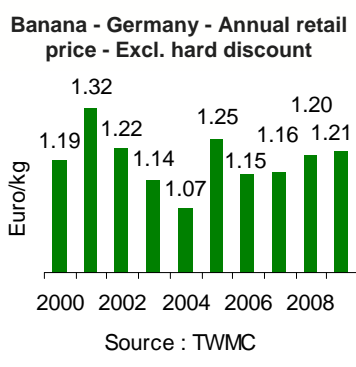
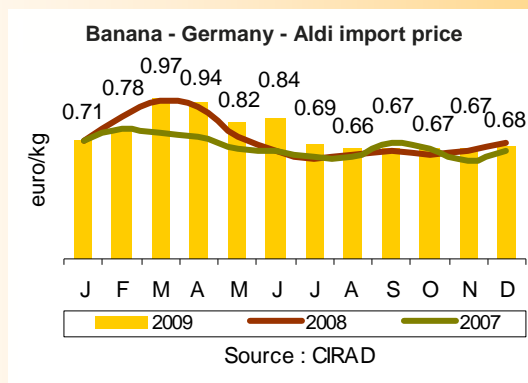
The British market obeys the rules. The retail price is fixed according to the annual contracts between banana operators and major retailers. Unless a retailer upsets this beautiful mechanism. And that is what ASDA (a subsidiary of the US chain Wal-Mart) did by deciding to start the umpteenth price war. This hit the loose banana segment with extreme violence! In the autumn, prices practically halved from £ 0.90 to £ 0.46 per kg. The trend did not change until December.

Wholesale prices in Britain rose in February, peaked in March and June and then fell rapidly, finishing the year with a downward trend at the same level as in preceding years.



Germany

The trends in Germany were fairly similar to those elsewhere in Europe. Retail prices were stable. Wholesale prices were slightly higher than in previous years, even when they fell all over Europe in the second half of the year. The movement of the Aldi price—the reference price for imports—was stranger. It remained at a comparatively high EUR 12.20 to 12.60 per box for almost the whole of the year, without any apparent change in the weekly situation. It is known that offers were made to certain retail chain purchasing centres at much lower prices, so one can wonder whether the Aldi price is truly representative. To be continued...!



Blueberries from Chile

Small but on the up and up...

Chile is the leading blueberry producer in the southern hemisphere, with potential production of 50 000 tonnes in comparison with 10 000 tonnes in Argentina and 2 000 tonnes in Uruguay. The crop has developed rapidly in recent years. Exports increased from 15 000 t in 2005-06 to 44 000 t in 2008-09, putting blueberries among the Top 10 fruits exported from Chile, with performance similar to that of peaches and cherries.

Rapid but anarchic increase in production

However, the increase in production has also caused prices to fall. Although prices were satisfactory at the beginning and end of the year, they were too low during the last season when production peaked in January-February, dipping to 20% below the profitability threshold according to professionals. This is because the development of production

potential and demand at this time of year are out of phase, and pressure is applied by supermarket chains.

A specific committee, the CBC (Chilean Blueberry Committee), was set up in April 2009 by the 19 leading blueberry exporters (90% of the volumes exported) and Chilean operators belonging to the CFFA (Chilean Fresh

Fruit Association), which groups ASOEX (the Chilean Exporters Association to which 92% of exporters belong) and Fedefruta (more than 1 000 producers). This consolidates the sector after the possibly somewhat over-anarchic development of production in recent years, with reconversions and newcomers, and aims at unification by better integration of producers and exporters via partnerships. The issue is indeed important as today nearly 1 300 producers grow blueberries and only half of the potential is currently in production; the crop should increase by 30% per year for the next four years. However, although most growers have now acquired a degree of mastery of the sector, the main challenge is now the development of consumption.

Creating demand for blueberries in South America

So far, most of production is exported to the US market, which takes 85% of the crop. The batches exported to Europe are mainly for the British market. One of the committee's objectives is therefore the development of counter-season blueberry exports to other markets, and this year especially to Germany and Italy where consumption is substantial during the summer. However, 2009-10 production potential initially estimated at 54 000 t will be smaller in fact for reasons of poor weather conditions—cold and frosts in recent weeks—and a two-week

displacement of the production calendar.

Nevertheless, the committee also wishes to increase consumption in the countries in which the fruit has already been sold in recent years and 'create demand'. To this end, the CFFA is repeating last year's promotion campaign in partnership with operators in Uruguay and southern Argentina. This unique association is aimed at promoting and developing sales of South American blueberries during the winter. The partnership between the three sources stems from the fact that before being competitors they have joint interests and complementary cropping calendars. The season starts in Tucuman and Concordia regions in southern Argentina

in September, followed in October by the Salto region in Uruguay, then Buenos Aires in Argentina and Montevideo in Uruguay in November-December,

while Chile supplies the market from October to January because of the climatic range there.

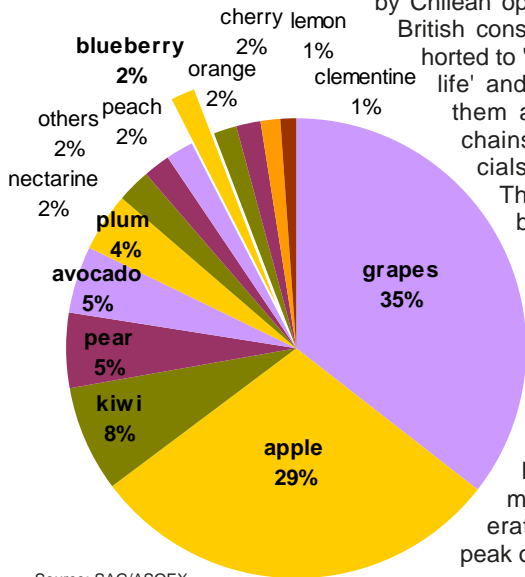
... 'Get some blueberries in your life'

This year, the three partners have thus continued the major TV advertising campaign run in the United Kingdom only for the moment. The aim is to remind consumers that blueberries are now also



Blueberry production has developed rapidly in recent years in South America and especially in Chile, further diversifying its already broad range of counter-season export fruits. However, sector operators now have to manage this strongly increasing potential and create demand, currently very timid in the counter-season. But Chilean operators fully intend to take up the challenge!

Chile - Market shares in volume of the main fruits exported in 2008-09



Source: SAG/ASOEX

available during the winter. The campaign is also innovative as it combines major supermarket chains with the TV commercial, a technique already used in the USA by Chilean operators for nearly ten years.

British consumers can therefore be exhorted to 'Get some blueberries in your life' and also be told where to find them as the various participating chains are listed in the commercials during promotion periods.

This season, the campaign is being run on ITV, ITV2 and ITV3 from October 2009 to January 2010 and it should even be extended into February as the crop is late. Other promotion methods are also used. The efforts made by the three production zones in South America have focused on the German market with point-of-sale operations in January during the peak of the season.

Blueberries — Chile — Exports in tonnes			
2005-2006	2006-2007	2007-2008	2008-2009
15 066	21 162	30 315	41 534

Source: SAG/ASOEX

Supplying high-quality produce

In addition, faithful to their reputation, Chilean operators also wish to supply high-quality fruits that match demand. One of the committee's missions therefore concerns the improvement of the taste quality and shelf life of blueberries. Controls have been established upstream to validate the quality of the produce exported. Studies have been conducted on the best techniques and the optimum cropping period, together with respect of the cold chain and quality control during all harvesting and storage operations. However, as fruit quality also depends on the characteristics of each variety and good matching to soil and climate conditions, the CBC has entrusted research & development projects to the FDC (Fruit Development Foundation) as most of the varieties grown today come from other countries ■

Cécilia Céleyrette, Consultant
c.celeyrette@infofruit.fr

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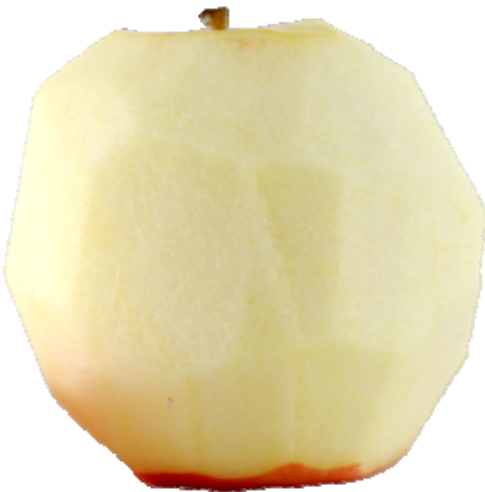


Afrique du Sud • Argentine • Chili • Nouvelle-Zélande



A report
by
Cécilia Céleyrette

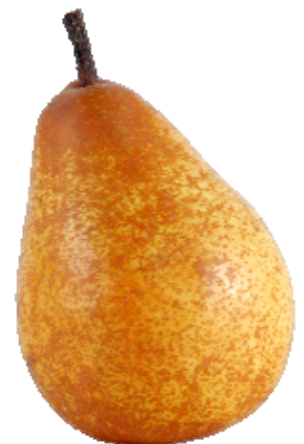
The year 2009 was a particularly difficult year, especially for apples, as the economic downturn affected a great number of outlets, including the traditional markets formed by Europe and the United States. Against a background of continued economic difficulties, 2010 promises to be just as uncertain, for pears too as a result of a peak in local production, and more generally as a result of late withdrawal from storage of both apples and pears in most countries.



Apple

&

Pear



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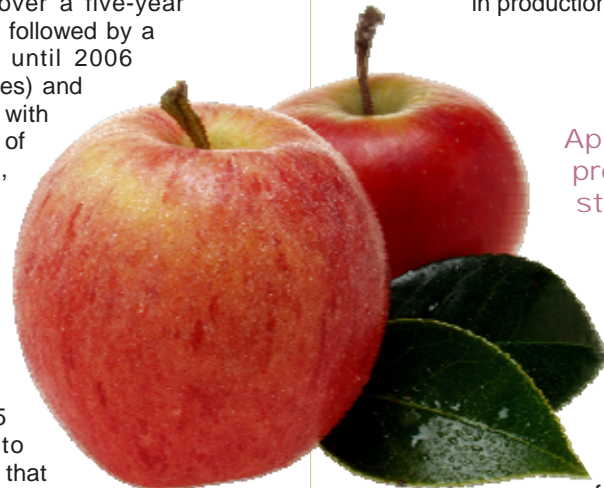


Apples & pears World counter-season market

2009 review: frozen situation?

While the market had recovered to a certain extent after the difficulties of 2005 and 2006, it was hit in 2009 by the economic downturn that affected practically all supply sources of apples and, to a less degree, of pears. Indeed, total apple exports from the main southern hemisphere countries grew continuously from 2000 to 2004, with USDA figure indicating an increase from 1.2 million tonnes to 1.77 million tonnes (+ 47% over a five-year period). This was followed by a slight decrease until 2006 (1.55 million tonnes) and then a recovery with the development of new markets, especially in Eastern Europe, Asia and the Middle East. Similarly, pear exports increased continuously from 2000 to 2005 (from 523 000 to 690 000 tonnes, that is to say + 32%) before dipping slightly in 2006 (658 000 tonnes) and then recovering to a peak of 768 000 tonnes in 2008, with an increase in shipments, especially to Russia. However, economic difficulties resulting

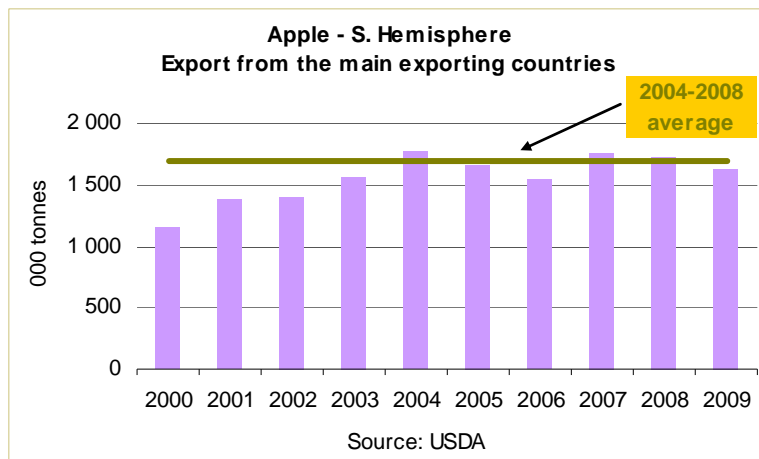
from falling consumption and prices, loss of competitiveness for southern hemisphere sources as a result of changing exchange rates and increased production costs and the establishment of obstacles at the import stage currently limit prospects for development. Apple exports in 2009 were 6% down on those of 2008. Pear exports were also down by 6% even though the fall was softened in 2009 by strong decrease in production.



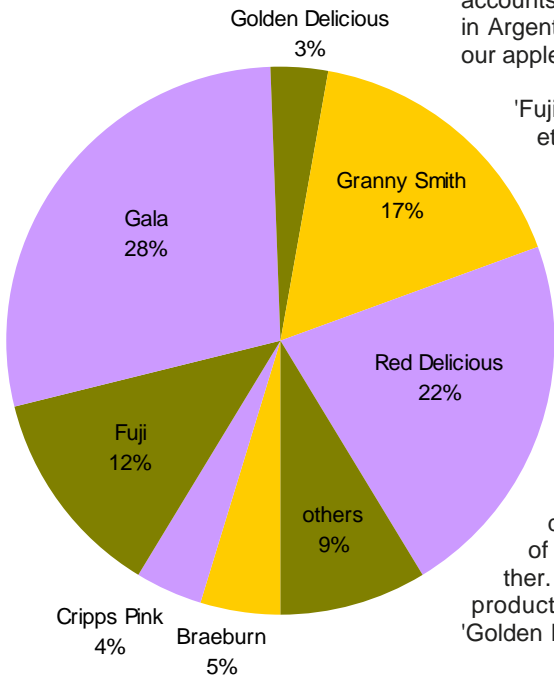
Apple production stabilising

After increasing steadily in southern hemisphere countries, cultivated areas—especially of apple—have been unchanged for two years as growers are faced with falling prices and rising production costs and can no longer invest. Apple production in the main southern hemisphere countries has thus remained at around 5 million tonnes in recent years, according to WAPA (World Apple and Pear Association). However, varieties are still being replaced to a certain extent but distribution now seems to be fairly stable, with most of the orchards replaced in recent years now in full production.

'Gala' is now the main variety grown in the southern hemisphere, with a crop totalling 1.45 million tonnes in 2009. This is 28% of the potential, with 37% grown in Chile and 34% in Brazil. However, after increasing strongly at the beginning of the decade (492 000 t in 2003 and 1.2 million tonnes in 2006), production seems to have stabilised at over 1.4 million tonnes since 2007.



Apple - S. Hemisphere
Varietal distribution
in 2009



Source: WAPA

Red varieties still form 22% of production in the southern hemisphere (1.14 million tonnes, with 47% grown in Chile and 44% in Argentina) and 'Granny Smith' accounts for 17% (869 000 t, with 30% in Chile, 14% in Argentina and 12% in South Africa). Crops of bicolour apples other than 'Gala' are smaller.

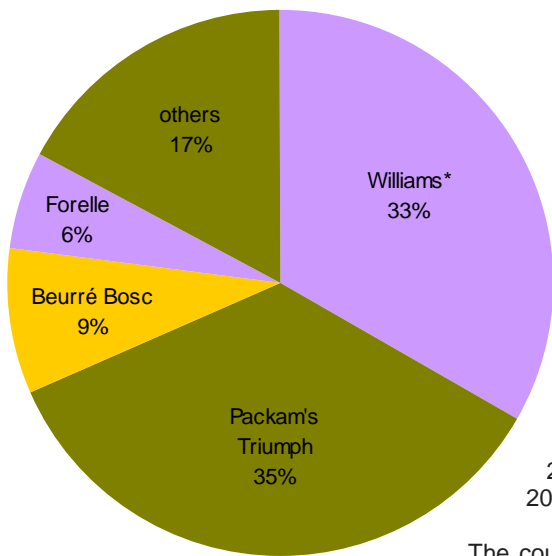
'Fuji' is still the second most planted bicolour variety and the fourth most planted of all varieties (640 000 t, that is to say 12% of total apple production). Like 'Gala', it was planted fairly intensively in all the southern hemisphere producer countries even though it is found above all in Brazil (48% of total production) and Chile (37%). Its production potential has been comparatively stable since 2007 (327 000 t in 2003).

Production of 'Braeburn' is stable at around 238 000 t (5% of production, with 70% grown in New Zealand, 17% in Chile and 11% in South Africa). 'Cripps Pink' production is 214 000 t for the moment; this is 4% of the total but the figure should increase further. Most of the orchards are in Australia (40% of production), Chile (31%) and South Africa (29%). 'Golden Delicious' has difficulty in maintaining its posi-

Cultivated areas have been unchanged for two years in the southern hemisphere but varieties are still being replaced



Pear - S. Hemisphere
Varietal distribution
in 2009



* Williams, Bartlett, Bon Chrétien and Early Bon Chrétien / Source: WAPA

tion, with 171 000 t in 2009, that is to say 3% of the crop, with 92% from South Africa.

Slow increase
in pear production

In contrast, the pear harvest is continuing to increase with the development of major producers like Argentina (with a switch from apples to pears) and South Africa (diversification of the range of varieties). It increased from 919 000 t in 2003 to 1.55 million tonnes in 2009.

The counter-season pear market is dominated by two varieties. 'Packham's Triumph' accounts for 35% of total production (542 000 t in 2009), with most being grown in Argentina (57%) and South Africa (22%). In fact, production doubled after 2005 (212 000 t in 2003) and is still increasing. Likewise, production of 'Williams Bon Chrétien' (33% of the total) has increased considerably, from 298 000 t in 2003 to 518 000 in 2009. The variety is grown mainly in Argentina (58%) and South Africa (23%).

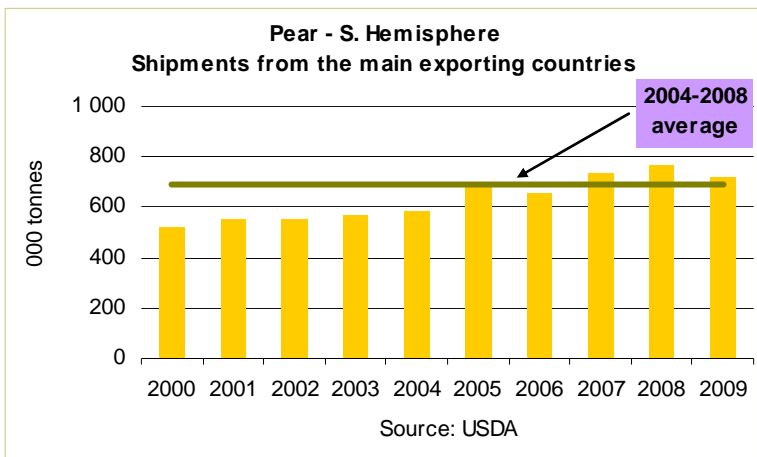
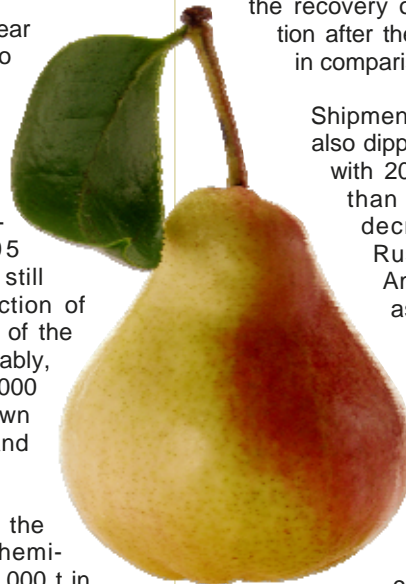
Production of 'Beurré Bosc', the third pear in the southern hemisphere, is also increasing (65 000 t in 2003 and 133 000 t in 2009); it is grown mainly in Argentina (69%) and on a lesser scale in Chile (14%) and South Africa (9%).

New varieties, such as 'Forelle' (54 000 t in 2003 and 90 000 t in 2009, of which 87% is grown in South Africa), 'Rosemarie' and 'Abate Fetel' have also appeared recently.

And a future increase
in tension on the
world market?

Consumption has slowed markedly in most destination countries and above all on traditional markets such as Europe and North America. According to the latest figures provided by SHAFTE (Southern Hemisphere Association of Fresh Fruit Exporters), apple shipments to Europe were 8% down on 2008 (i.e. 17% less than in 2007) but were 6% up to the North American markets. However, the trend is related mainly to the recovery of New Zealand production after the 23% decrease in 2008 in comparison with 2007.

Shipments to other destinations also dipped (- 10% in comparison with 2008) but were still larger than those of 2007, with a decrease in shipments to Russia and certain South American countries such as Brazil, which have set up stricter measures for imports. However, these measures, and especially phytosanitary barriers, resulted in the transfer of certain volumes to the traditional markets (+ 5% in comparison with 2008 in Europe and + 9% in North America), where demand was fairly strong as a result of local production deficits. However, as demand should not really evolve in 2010 with the continued economic slump, the increase in unemployment and what should be a fairly good harvest in the countries forming the traditional markets, the different southern hemisphere sources should continue to diversify their customer portfolios by negotiating new bilateral free trade agreements. Once the economic crisis has lessened and confidence returns, this could result in new market tension in the coming years, like that of 2007, because of the increase in world demand and the stagnation of southern hemisphere production ■



Cécilia Céleyrette, Consultant
c.celeyrette@infofruit.fr



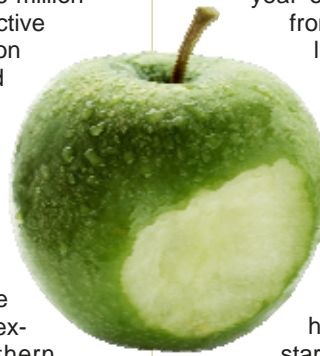
Apples & pears European counter-season market

2009 review: a year of crisis!

After 2008 driven by the development of emerging markets that caused strong world demand, this dynamics was suddenly torpedoed in 2009 by the economic downturn and the shock wave is still perceptible. Shipments of apples from the main southern hemisphere producer countries fell to between 1.60 and 1.63 million tonnes according to the source, that is to say 7% less than in 2008 (5% less than the average for the last five years). Pear shipments totalled between 689 000 and 722 000 t according to the source, that is to say 4 to 6% less than in 2008, but 5% up on the average for the five-year period. Nevertheless, the harvest was substantial with 5.01 million tonnes of apples and 1.56 million tonnes of pears, that is to say respective increases of 4 and 11% in comparison with 2008, according to WAPA (World Apple and Pear Association).

Apples sold cheap

The slump was particularly marked for apple because of the very low price levels, aggravated by unfavourable exchange rates for most of the southern hemisphere producer countries. The prices paid to growers for some varieties, such as 'Braeburn' from New Zealand, were nearly 40% lower than in 2008. Without forgetting the fact that production costs had increased. Labour costs were up in particular (+ 26% in comparison with 2008 in Chile), but fertiliser, pesticides and energy costs were also up. The European market was particularly seriously affected in 2009 as

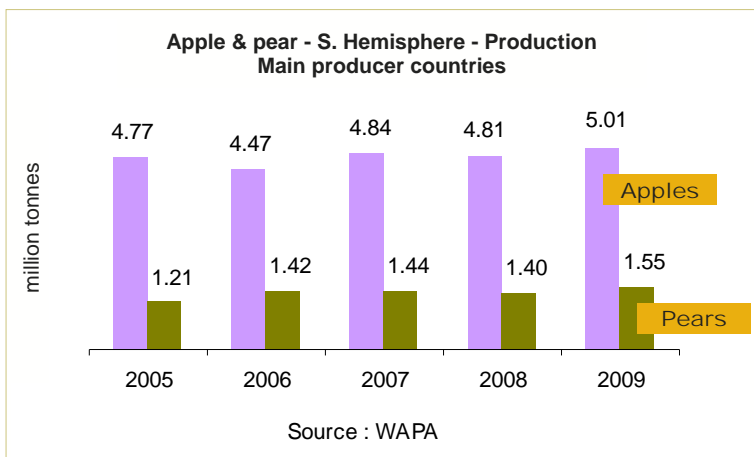


demand was slowed considerably by the economic downturn. In addition, increased production in Eastern Europe (4.6 million tonnes in 2008-09, that is to say 145% more than in 2008 and 30% more than the five-year average), the devaluation of certain currencies (the rouble, the zloty and sterling) and a record citrus harvest caused the saturation of the local market and the later start of sales of southern hemisphere fruits, further aggravated by the slump in summer fruits. As a result, EU imports from all the southern hemisphere sources dipped very markedly to 698 000 t according to applications for European certificates, that is to say 5% less than in 2008 (a year of European supply deficit resulting from strong world demand) and 27% less than in 2007 (the year serving as reference). Exports to the North American markets (USA and Canada) were also hit (150 000 t according to SHAFFE (Southern Hemisphere Association of Fresh Fruit Exporters), that is to say 6% more than in 2008 but 28% less than in 2007) by the economic downturn and a large American harvest, resulting in an even later start to the season (June).

A balanced pear market

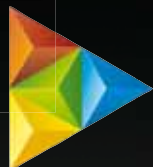
In contrast, the pear market was much more buoyant because of the deficit in Europe (2 178 million tonnes in 2008-09, that is to say 14% less than 2007-08) and America (818 500 t, 2% less than in 2008). Nevertheless, the southern hemisphere season was fairly competitive as production potential was good and outlets were scarce, especially in Russia (under-consumption, devaluation of the rouble, phytosanitary protectionism, no guarantee of payment) and also other countries such as Brazil. Total southern hemisphere pear exports are thus reported to have fallen by 6% in comparison with 2008 (688 700 t) mainly because of a decrease in shipments from Argentina (12% less than in 2008) resulting from strikes. In contrast, SHAFFE's cumulated figures to Week 41 show a 5% increase (329 875 t) with the transfer of supply to the European market, which displayed a deficit ■

Cécilia Céleyrette, Consultant
c.celeyrette@infofruit.fr



GROUPE AZ FRANCE

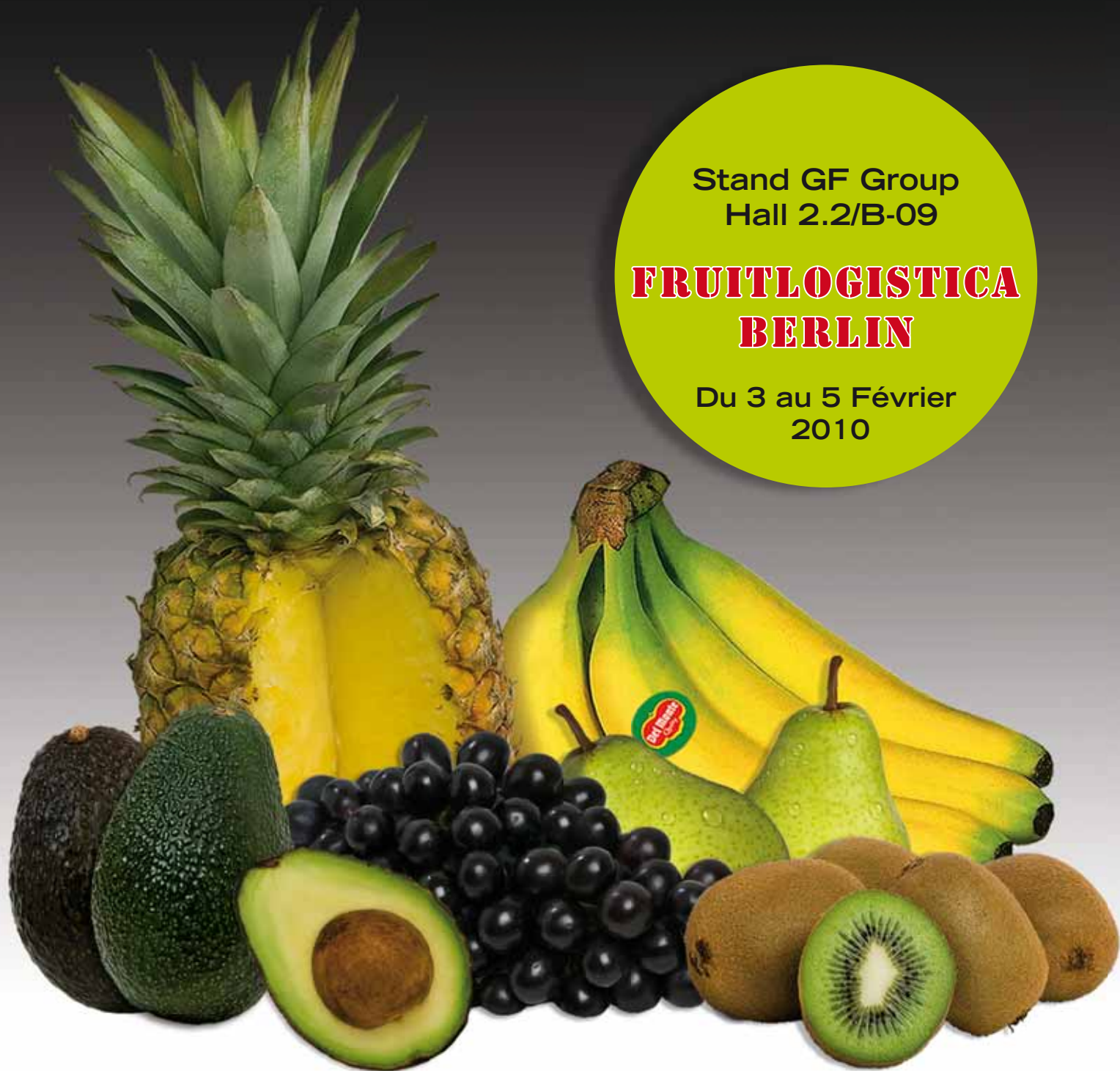
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Tel : 04 90 06 66 00

Tel : 01 41 80 33 33

Tel : 02 47 49 30 30

Tel : 02 32 10 52 52

Tel : 0387575650

Fax : 04 90 96 66 16

Fax : 01 46 86 23 16

Fax : 02 47 29 01 84

Fax : 02 35 70 96 03

Fax : 0387575651

E-mail : azmed@azmed.fr

E-mail : commercial@azfrance.fr

E-mail : p.raguin@aztouraine.fr

E-mail : commercial@mia-rouen.fr

E-mail : azgrandest@azgroupe.com



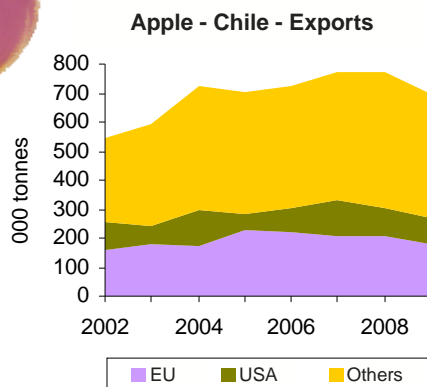
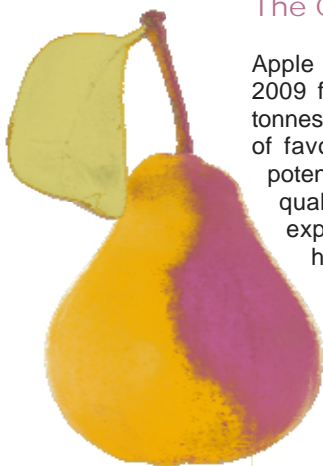
Southern hemisphere apples & pears Prospects for 2010

Concern

After 2009 when the slump hit the apple trade, 2010 promises to be very uncertain as a result of the serious lateness in the release of stored apples and pears, especially in Europe, in a very depressed market context with consumption still slow by the economic downturn. The euro exchange rate is still very favourable for imports and the markets of continental Europe should remain much sought after in spite of pressure exerted by supermarket chains on prices. The weak pound, serious economic difficulties and the increase in domestic production (especially of 'Braeburn') should lead to a transfer to continental Europe of volumes intended for the United Kingdom. In contrast, the behaviour of the dollar should result in better returns than last year, although this advantage might not be enough in the light of the steady increase in production costs—especially labour—in South America. Phytosanitary barriers and the lack of guarantees for payment, especially in Russia, not to speak of the weakness of certain currencies such as the rouble, should also slow diversification to emerging countries.

The Chilean sector mobilised again

Apple production sold for export from Chile in 2009 finally decreased a little (at 1.27 million tonnes, the total was 5% down in 2008) in spite of favourable weather conditions. The export potential was reduced because of problems of quality, amplified by difficulties in selling on export markets. Shipments are reported to have been at least 9% smaller than in 2008 (698 000 t), to judge by the last estimates at the end of September. The



decrease was particularly marked on the European market (EU-27) with only 182 800 t, down by 13% in comparison with 2008, and more moderate on the North American market with 88 000 t (- 6%).

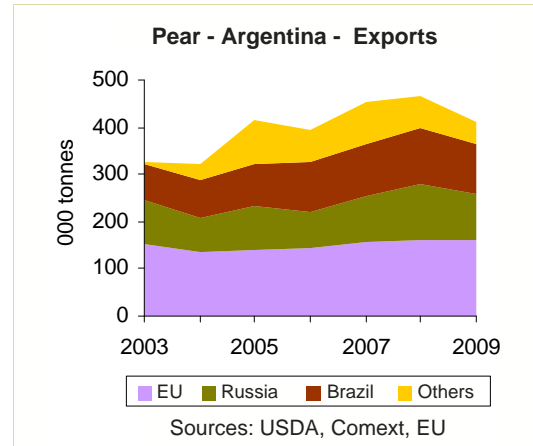
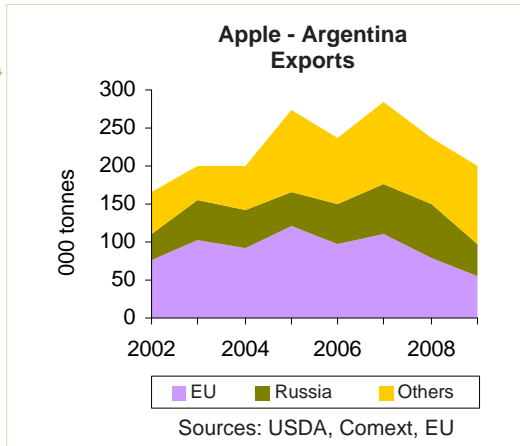


Pear exports were stable at 127 000 to 135 000 t according to the source, in spite of a buoyant market (strong European harvest shortfall) and strong competition between supplier countries. For the moment, the 2010 harvest is estimated to be good, with 1.3 million tonnes of apples (2% more than in 2008) and 280 000 t of pears. Indeed, the very good winter weather conditions with sufficient hours of cold enhanced flowering. But the El Niño phenomenon strongly affected the climate, generating a cold, rainy spring that could affect fruit colour and possibly export potential a little. In contrast, this is good for fruit size.

Exporters count on normal export potential, that is to say 800 000 t of apples and 135 000 t of pears, although this would seem difficult to attain in the light of the economic difficulties persisting on many markets. The coming Chilean season promises to be very difficult, with the main export outlets experiencing poor economic conditions—the case especially in the USA and the EU—and decreased competitiveness as the exchange rate is still very unfavourable and production costs—especially labour and energy—are rising. Exporters have therefore decided to strengthen their partnership with the leading European supermarket chains, and especially Auchan and Carrefour, and to diversify their outlets by targeting the Eastern European countries in particular.

Weak Argentinian potential

The 2009 season was particularly complicated for Argentinian growers as economic factors were added to domestic events and import obstacles for certain destinations. Pear exports thus decreased by 6% in comparison with 2008 (410 000 t) and shipments of apples by 15% (200 000 t) in spite of good harvests: 760 000 t of pears (+ 6% on 2008) and 940 000 t of apples (+ 11%). Losses were substantial. A pickers' strike meant that some of the fruits were not harvested and this decreased their exportable



potential and caused logistic problems, without forgetting prices that were too low coinciding with a strong increase in production costs (labour). Shipments were also reduced as a result of the phytosanitary barriers set up by certain countries, in particular Russia which drastically lowered maximum residue limits (MRLs) at the end of 2008. Likewise, Argentina was seriously affected when the Brazilian government set up an import certificate system—with a two-month waiting period—for food products and especially for fruit and vegetables transported by road. Production in 2010 may be hit by the bad weather (late frosts and gales) that affected flowering. Today, forecasts set the apple harvest at 800 000 t, 15% down on that of 2008 and the smallest of the decade. The decrease of the pear harvest should only be 2%, putting it at 750 000 t. Export potential should not increase, given the economic difficulties and the continued presence of the main obstacles.

decreased by 15% (93 300 t) because of the economic downturn and the small diversification of shipping destinations, with 85% of the total exported to the European market. The areas under apple are stable overall in Brazil as the increase in production costs limits orchard extension. The weather conditions have been poor this season, with long rainy periods, violent thunderstorms and hail that particularly affected the main production region, Rio Do Sul, causing losses of at least 10%. Under these conditions, export volumes could be similar to last year's at best.

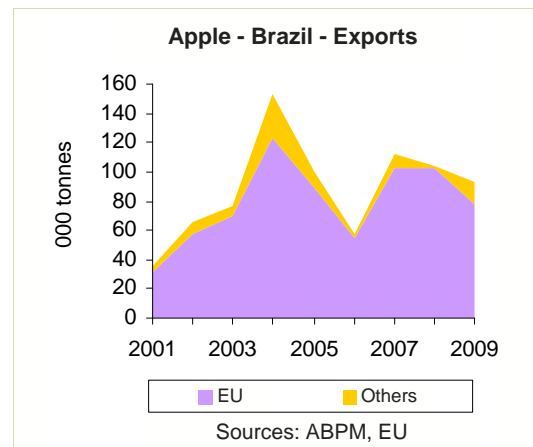
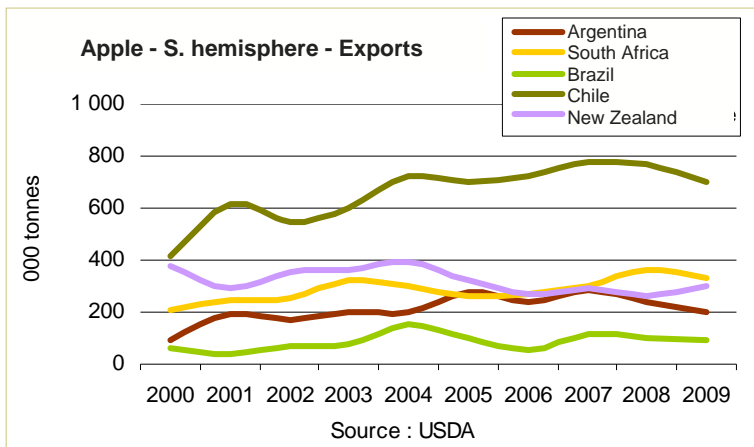


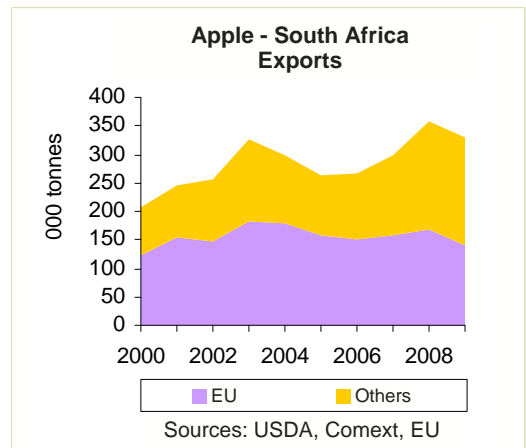
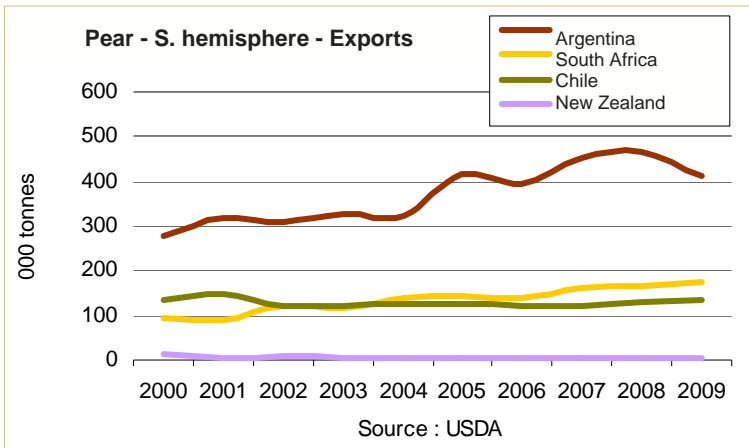
Good South African potential

The various sources report that South African production in 2009 was similar or slightly greater than that of the preceding year at 748 000 t of apples and 352 000 t of pears. However, apple exports fell far short of forecasts and were 8% down in comparison with 2008 (331 000 t). Shipments to the European market decreased by 16% to only 140 000 t, the lowest figure since 2000. However, exports of pears were fairly brisk, in particular thanks to the deficit in Europe, and totalled 175 000 t (2% more than in 2008), of which 125 000 t was shipped to the EU.

Small Brazilian deficit

Brazilian production reached a very good level in 2009, with the total estimated at between 935 000 and 1 million tonnes, an increase of at least 5% in comparison with 2008. Exports have





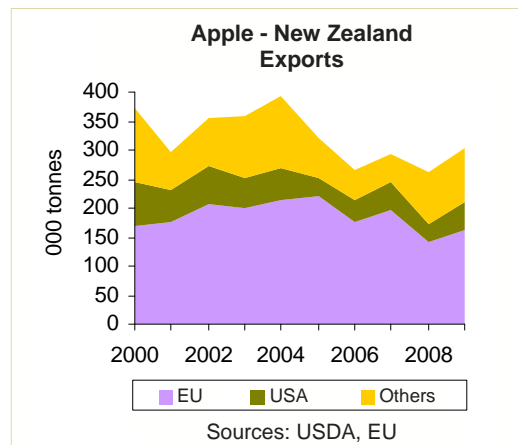
Weather conditions have been fairly favourable this year and 2010 harvest forecasts are similar to last year's at 750 000 t of apples and 360 000 t of pears. Exporters therefore hope to regain market shares. Efforts have been made, in particular to tighten phytosanitary guarantees and to improve logistics by increasing container shipment and by adapting railway infrastructure. However, at best, export potential should be between 330 000 and 350 000 t for apples and 175 000 t for pears as market conditions are most unfavourable in Europe and especially in the UK because of the economic downturn and the exchange rate. However, operators are counting on the World Football Cup for the promotion of apples and pears, together with the other produce in the South African range (grapes and stone fruits) and should also continue to develop on new markets such as Malaysia, the Middle East and China, although the dollar exchange rate is not favourable for these destinations.

according to the source, that is to say 3% to 13% more than in 2008) as was quality, except for the variety 'Jazz'. The marked presence of domestic production on the EU and US markets, the two main destinations for New Zealand apples, made sales very late (end of June on the US market). This weighed on price levels and especially those of the latest varieties such as 'Braeburn', with a decrease of as much as 40% in comparison with 2008, with sales at less than cost. However, exports remained strong to these destinations for lack of other outlets, with 164 000 t shipped to EU-27 (16% more than in 2008) and 45 700 t to the USA (+ 39%). Indeed, exports to the other markets increased by only 2%, with a 2% decrease on practically all the Asian markets, with the exception of China and Hong Kong where demand grew strongly (14 119 t, a 37% increase).

Small crop in New Zealand

2009 was a particularly bad year for apple growers in New Zealand even though production volume was satisfactory (439 000 to 473 000 t

However, production might fall to around 405 000 t this (8% less than in 2008), the smallest harvest of the last ten years and following the bumper harvest in 2009. The decrease is explained by alternate bearing and poor weather (a cold spring and hail on several occasions, especially in the Hawkes Bay region) that limited flowering. Exports would therefore decrease by nearly 14% this season in comparison with 2009. But the smaller crop should result in better size and thus enhance exports to the US market. However, the world market may well continue to be very competitive and exchange rates are not favourable for New Zealand: the NZ dollar has gained 17% against the euro and 28% against the US dollar in recent months. Operators therefore count on the reputation and quality of production. In particular, they are to strengthen their partnerships with large British supermarket chains. They will also continue to diversify, especially in the Middle East and Asia after the signing of free trade agreements with the Gulf states (in October 2009) and Malaysia ■



Cécilia Céleyrette, Consultant
c.celeyrette@infofruit.fr



Northern hemisphere apples & pears Prospects for 2009-2010

Medium-sized apple harvest, strong potential for pears



The 2009 European apple harvest returned to close to the average for the last five years, after the very large 2008 crop. It was estimated at 10.9 million tonnes in October, a 5% decrease in comparison with 2008 but 3% greater than the five-year average.

However, this decrease in the quantities available is mainly the result of a fall in supply in Eastern European countries (3.9 million tonnes expected in 2009 in the new member countries (NMCs), that is to say 16% less than in 2008 but 7% greater than the five-year average) and the alternate bearing phenomenon that somewhat reduced potential in Poland. Indeed, the harvest was estimated at 2.6 million tonnes in Poland, 19% down on the 2008 figure but distinctly larger than the five-year average (+ 15%) and the second largest harvest of the decade.

The Western European harvest is similar to that of 2008 (7 million tonnes, 2% more than in 2008 and the same as the five-year average, even if the overall figure hides contrasting trends in the southern and northern countries. Indeed, the development of bicolour production should be noted in some Northern European countries, especially in the United Kingdom and Germany where young 'Gala', 'Braeburn' and club variety orchards are coming into production and grubbing up is steadily reducing the potential in 'Golden Delicious' and red varieties in France and Spain.

The American harvest was initially estimated to be 3.94 million tonnes. This is 5% less than in 2008 and 8% less than the average for the last three years.

In contrast, the pear harvest was large after the 2008 deficit and with the increase in the areas under pear in certain countries. Thus, European production of 2.53 million tonnes in 2009 is back in line with the average for the last five years and 16% greater than in 2008. However, this figure masks substantial disparities between European production zones and especially the decrease in production in Southern Europe, mainly in summer pears, and an increase in supplies of autumn-winter pears in Northern Europe.

Spanish production is reported to display a marked deficit this year at 427 000 t. This is 10% less than in 2008 and 19% less than the

five-year average. Likewise, although at 202 000 t the French harvest is 29% larger than the small one in 2008, the potential is still decreasing as a result of grubbing up and is 8% down on the average for the last five years. Orchard areas are also decreasing in Italy, mainly affecting summer varieties. However, at 817 000 t, 2009 production in Italy is 8% greater than that of 2008 but 6% down on the five-year average.

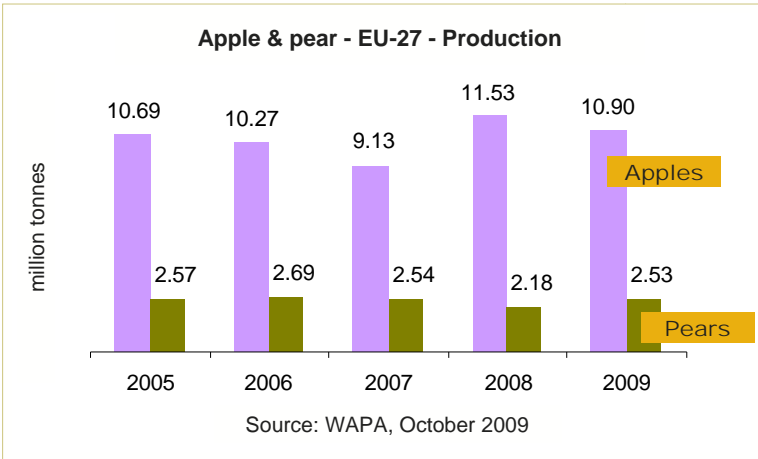
In contrast, Portugal had a record harvest of 199 000 t, 6% up on that of 2008 and 21% larger than the five-year average. Production was plentiful above all in Northern Europe where 'Conference' is still being planted. The Netherlands also had a record-breaking harvest of more than 300 000 t; this was 75% more than in 2008 and 39% greater than the five-year average. Belgian production was more modest in 2009 at 281 000 t (65% more than in 2008 and 43% greater than the five-year average), but this was still the second largest harvest of the decade.

A laborious start for apples and a late one for pears

The 2009-10 apple season started under very poor conditions as a result of the lateness of the previous seasons in both the southern hemisphere and Europe. It is pointed out that European stocks on 1er June 2009 were 48% larger than in 2008 and that requests for EU import certificates for southern hemisphere apples totalled 482 300 t on 1 June 2009; this was 5% less than in 2008, a year of strong world demand, and 27% less than in 2007. The European season started with very low prices running at some 30% less than in September 2008 in France, where prices were nevertheless fairly high, and 10% ('Gala') to 20% ('Golden Delicious' and 'Granny Smith') less than in 2007.

The European pear season started in July in a clear context as there had been a serious deficit in the preceding season (2.178 million tonnes: 14% less than in 2007-08). Prices in early September were 25% or even 30% higher than in 2008 (a year of deficit) depending on the variety, but from similar to 10% higher than 2007 prices. However, they subsequently lost ground to varying degrees depending on the source because of the early start of the Benelux pear





harvest at the beginning of August and a degree of confusion with regard to the harvest period. But the market became distinctly less encumbered in November and the prices of pears from these sources increased markedly once everything was in storage, allowing for a certain holding back of supply by producers. Prices were also firm for this reason in both Italy and Portugal. This limiting of supply nevertheless enabled small European producer countries such as the United Kingdom and Germany—and even France—to progress in their releases.



Serious concern for the second part of the season

The market may well be strongly loaded with apples and pears in the second part of the season, given the late release from stocks in all the major European producer countries and record stock volumes. Apple stocks in the main Western European countries totalled 3.2 million tonnes (according to WAPA) on 1 December 2009; this was 3% more than in 2008 and 7% more than in 2007. Stocks are particularly large in Northern Europe. In Germany, they were 9% larger than in 2008 on 1 November 2009 and 12% larger on 1 December. Likewise, the Netherlands reported 9% more on 1 November and 13% more on 1 December. Stocks were also up by 13% in Austria and by 16% in the United Kingdom. In contrast, Italian stocks on 1 November 2009 were similar to those of 2008, although certain production zones seen mainly in the second part of the season, such as Trentino-Alto Adige, reported that stocks were 6% up. However, it was already 4% up on national stocks on 1 December 2009. French stocks were reported to total nearly 509 000 t, (+ 7%) on 1 December. But a deficit was recorded in other countries such as Spain (- 22% on 1 December).

Similarly, it should be pointed out that releases of apples from stocks in Eastern Europe were very slow, especially in Poland with 700 000 t on 1 December 2009, an increase of 8% in comparison with 2008 but with a harvest down by

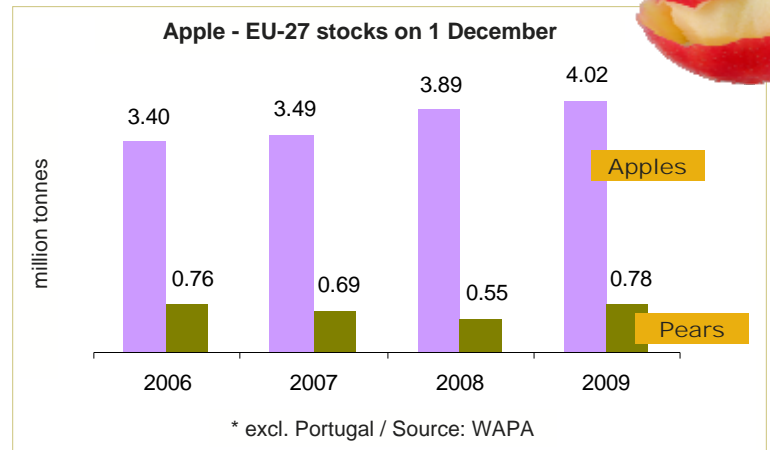
19%. This was the result of the excellent harvests in the Ukraine and Russia totalling 760 000 t (+ 6%) and 2 million tonnes (+ 7%) respectively, that weighed very heavily on the prices of Polish fruit, dragging them down to very low levels from September onwards: EUR0.25-0.30 per kg for 70 mm+ bicolour fruits packed in boxes at release from storage in comparison with EUR0.43-0.50 per kg in 2008 and EUR0.63 per kg in 2007. However, sales seemed to become brisker at the beginning of December but with no increase in prices.



The situation could become particularly complicated this year as summer (drought) and autumn (rain) weather conditions also had unfavourable effects on apples in numerous countries, resulting in a majority of large fruits, colour defects and internal problems (including internal breakdown or bitter pit). The market for industry—especially juice—is also dull, with very slow sales and so stocks are still very large.

The late release of pears from storage may lead to difficulties. Indeed, stocks are still very large in most of the major European producer countries. European stocks totalled 779 700 t on 1 December 2009 (according to WAPA), that is to say 41% more than in 2008 (a year of deficit) and 14% more than in 2007 (the reference year). Dutch stocks, that stood at 210 000 t on 1 November, were 88% larger than in 2008 and then, at 71 000 t on 1 December, 99% greater than in 2008 and 33% greater than in 2007 (record year). Belgium still held stocks totalling 125 000 t of pears on 1 December (86% more than in 2008 but 1% less than in 2007). Italian stocks still totalled about 297 250 t on 1 December 2009 (25% more than in 2008 and 7% more than in 2007) and those of Portugal were 138 400 t on 1 November 2009 (26% more than in 2008, a year with a large crop) ■

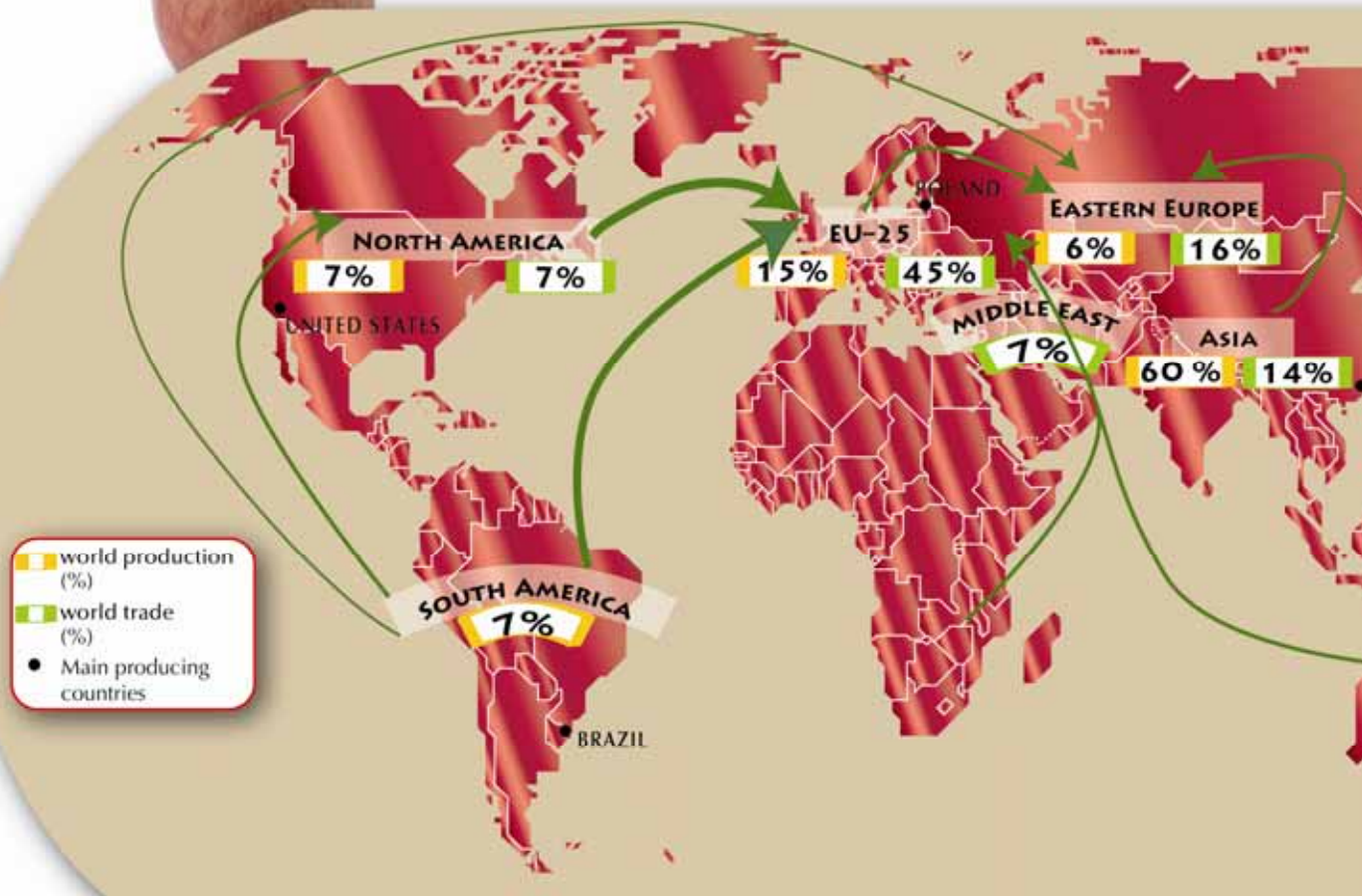
Cécilia Céleyrette, Consultant
c.celeyrette@infofruit.fr





APPLES

production 70 million tonnes
international trade 7.4 million tonnes



Apple — United States imports

tonnes	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Total	141 971	164 167	163 894	157 120	170 354	186 622	207 378	122 773	156 689	206 562	165 282
Chile	37 285	42 971	43 706	57 685	62 540	90 288	113 259	54 415	82 619	123 521	93 667
New Zealand	41 649	61 285	71 474	48 442	60 367	51 166	57 708	32 353	37 417	47 210	32 801
Canada	41 166	42 668	38 358	38 740	43 366	37 268	30 336	33 789	34 893	31 062	36 035
Argentina	1 105	2 660	2 071	3 262	1 659	4 713	2 295	1 510	1 512	4 424	2 243
China	0	0	0	0	78	0	20	117	172	0	0
Japan	42	35	43	46	46	58	61	407	61	61	144
Thailand	0	5	0	0	0	0	0	6	14	27	4
India	0	0	0	0	0	0	0	0	3	2	0
Brazil	0	345	473	0	0	239	2 248	0	0	226	359
South Africa	18 206	13 972	6 772	8 771	2 226	2 851	1 434	157	0	11	22
Others	2 519	226	998	174	72	38	19	19	0	18	7

Source : US customs (code 080810)

Apple — Japanese imports

tonnes	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Total	150	221	308	594	2 339	120	108	18	124	0	0	37
Korea	22	108	39	251	1 411	1	0	2	0	-	-	1
Australia	-	-	110	247	650	120	108	16	124	-	-	16
United States	105	0	159	96	278	-	-	-	-	-	-	-
New Zealand	9	112	0	0	0	-	-	-	-	-	-	20
France	12	-	-	-	-	-	-	-	-	-	-	-
Nepal	1	-	-	-	-	-	-	-	-	-	-	-

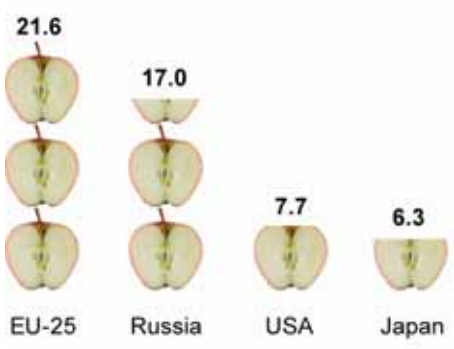
Source: Japanese customs (code 080810000)

Apple EU imports by entry point



Source: Eurostat

Apple
Per capita consumption (kg/year)



Sources: FAO, customs & Cirad

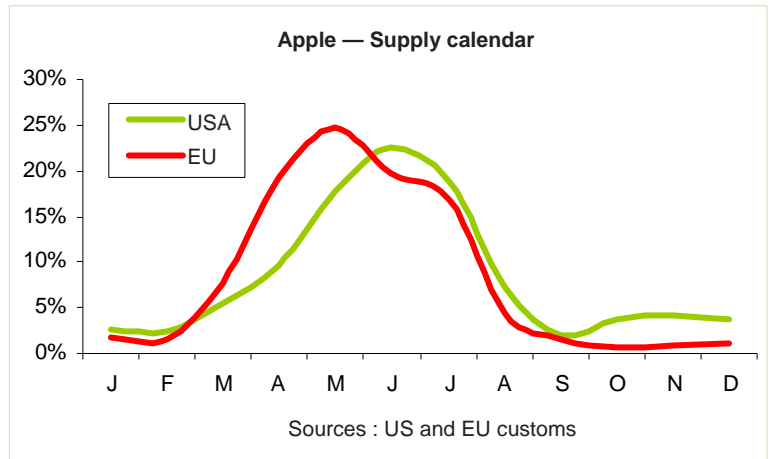


Apple World production	
2008	tonnes
World	69 600 000
China	29 851 163
United States	4 431 280
Poland	2 830 870
Iran	2 660 000
Turkey	2 504 490
Russia	1 467 000
Italy	2 208 227
India	2 001 400
France	1 940 200
Chile	1 370 000
Argentina	1 300 000
Brazil	1 121 468
Germany	1 046 995
Japan	840 100
Spain	721 200

Apple World exports	
2007	tonnes
World	7 400 000
China	1 549 269
Chile	1 020 315
Italy	784 886
France	685 339
United States	663 465
Poland	434 506
Netherlands	395 218
Belgium	344 289
South Africa	334 336
New Zealand	292 413
Argentina	283 211
Lithuania	221 110
Germany	146 560
Syria	125 282
Brazil	112 076

Apple World imports	
2007	tonnes
World	7 400 000
Russia	931 232
Germany	668 837
United Kingdom	522 841
Netherlands	399 669
Germany	237 736
Belgium	224 676
Mexico	219 814
United States	206 600
Canada	180 477
France	178 140
Lithuania	172 321
Ukraine	167 603
China	164 718
Saudi Arabia	147 423
Indonesia	145 302

Sources: FAO



Apple — EU-27 imports — Main extra EU suppliers excluding Eastern Europe

tonnes	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Total extra EU, of which	678 650	783 249	671 425	729 943	801 780	872 671	902 685	926 815	784 860	969 827	813 695
Total S. hemisphere	539 550	655 926	484 326	598 099	648 530	734 675	795 054	820 344	711 735	761 014	705 649
Chile	144 788	179 905	91 159	143 362	158 094	177 697	179 157	225 158	224 289	204 405	211 199
New Zealand	130 623	183 851	167 070	175 819	206 039	198 628	213 746	219 958	178 238	177 243	140 862
South Africa	179 818	158 341	121 631	152 725	148 085	181 893	180 147	156 821	151 852	158 598	171 154
Argentina	68 461	77 051	41 329	87 427	73 372	97 682	91 722	121 292	97 378	107 918	79 726
Brazil	10 308	49 679	57 052	31 662	57 487	69 010	122 947	88 320	53 442	104 767	97 453
Uruguay	3 008	4 406	2 595	3 534	3 142	5 219	5 326	6 661	3 596	6 789	4 653
Australia	2 543	2 693	3 489	3 571	2 312	4 546	2 010	2 136	2 940	1 294	603
Total S. hemisphere	55 845	64 895	43 870	48 412	49 901	60 102	105 122	95 703	68 573	76 884	68 017
China	1 219	1 900	4 010	7 949	14 922	28 409	62 658	50 289	33 513	43 535	38 172
United States	46 188	55 454	32 384	33 957	28 769	28 258	37 242	39 857	30 600	30 996	27 313
Canada	8 439	7 540	7 477	6 506	6 209	3 436	5 222	5 558	4 460	2 352	2 532
Others*	83 255	62 428	143 229	83 432	103 350	77 894	2 509	10 768	4 552	131 930	40 030
Intra-EU	1 753 508	1 900 193	1 876 630	1 779 872	1 887 024	2 050 049	2 192 439	2 271 427	2 459 219	2 567 254	2 348 400

* mainly Eastern Europe until 2004 / Source: Eurostat (code 080810)



The main varieties of apples

After *Le pommier*, CTIFL, 2002

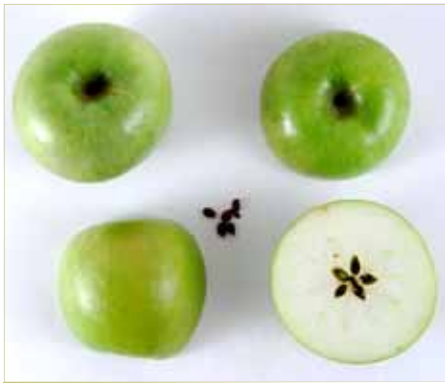
Apple — Classification of the main varieties grown by type	
Green	Granny Smith and mutants
Yellow	Golden Delicious and mutants — Golden Extrême® Gradigold — Primgold® Deljéni — Tentation® Delblush — Earlygold® Snygold, Ozark Gold — Newgold® Newaphough
Bicolour	Akane — Belle de Boskoop and mutants — Braeburn and mutants — Cameo® Caudle — Corail® Pinova — Cox's Orange Pippin and mutants — Delbard Jubilé® Delgollune — Delbarestivale® Delcorf — Elstar and mutants — Fuji and mutants — Gala and mutants — Honey Crunch® Honeycrisp — Idared — Jonagold and mutants — Melrose and mutants — Pink Lady® Cripps Pink
Red	Delicious Rouges and mutants — Redwinter® Redaphough
Russet	INRA® Belchard® Chantecler — Reinette du Canada and mutants — Reine des Reinettes and mutants — Reinette Clochard — Reinette de Brive

Source : CTIFL

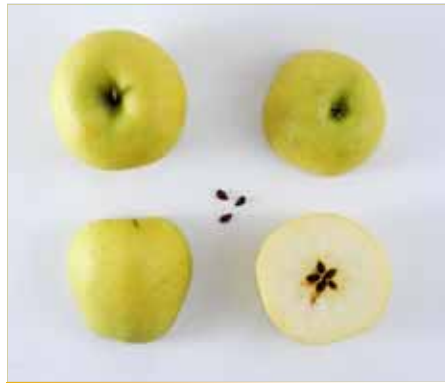
Varieties

Numerous breeding programmes are running and new varieties or mutants of existing varieties are released commercially each year. A number of criteria are sought during the varietal creation and breeding: suitability to the cultivation environment, to harvesting and packing, taste and technical characteristics (productivity, flowering period, susceptibility to diseases, keeping potential, etc.), appropriateness for market demand (colour, shape, size, firmness, sugar content, acidity, texture, flavour, etc.). The main varieties grown are in five groups according to their appearance: yellow, red, green, bicolour and russet.

Apple —					
Variety	Type	Sucre ° Brix	Acidity g/l malic acid	Texture and flavour	Firmness kg/cm ²
Granny Smith and mutants	Green	10-12.5	6.5-8	Firm texture, very crisp and very juicy, acidulous flavour.	6-8
Golden Delicious and mutants	Yellow	12-15	4-6	Crisp and juicy texture, acidulous, sweet flavour.	5-7
Braeburn and mutants	Bicolour	11.5-14	5-7	Crisp and very juicy texture, aromatic flavour, good sugar:acid balance.	6.5-8
Pink Lady® Cripps Pink	Bicolour	13-15	6-7	Crisp texture, firm and juicy, sweet, acidulous and aromatic flavour.	5-6.5
Gala and mutants	Bicolour	12-14	3-5	Crisp, very juicy, sweet flavour.	5-7
Red Delicious and mutants	Red	10-13	2-4	Crisp and juicy texture but neutral flavour.	5-6.5



Granny Smith



Golden



Braeburn



Pink Lady®



Gala



Red Chief®

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The characteristics of some varieties

Some mutants	Normal cold		Controlled atmosphere			Ultra Low Oxygen (ULO)		
	Duration (months)	T (°C)	Duration (months)	% O2	% CO2	Duration (months)	% O2	% CO2
Challenger® Dalivair, Early Smith® Jim Brian	5	0-1	6-7	2-3	1.5-2	7-8	1.5-1.8	1-1.5
Golden X 972, Smoothee® CG10 Yellow Delicious, Golden Reinders®, Lysgolden® Goldenir, Belgolden® Goldensheen, Calgolden® Elbee, Pink Gold® Leratess, Rosagold® Quemoni, Bertanne	6	0-1	8	2-3	3-5	9-10	1.5-1.8	2-3
Hillwell® Hidala, Braesun® Braecest, Jobrun® Aurora, Mariri® Eve, Mahanared® Redfield	5	0-1	7	2-3	1-1.5	8-9	1.5-1.8	0.8-1
	4-5	1-2	6	2-3	2-2.5	6-7	1.5-1.8	1
Royal Gala® Obrogala, Gala Must® Régal Prince, Buckeye Gala	4	0-1	5-6	2-3	2-3	6-7	1.5-1.8	1.5
Standard types: Topred Delicious, Early Red One® Erovan Types spur: Starkrimson, Redchief® Campsur, Stark Spur Ultra Red®, Flatar, Scarlet Spr® Evasni, Super Chief® Sandige	4-5	0-1	6	2-3	3-4	7	1.5-1.8	1.8-2.2

Source: CTIFL



Growing apples

After *Le pommier*, CTIFL, 2002

Agronomy

Apple (*Malus domestica*) is a member of the Rosaceae family. It grows in temperate zones and it is cultivated in a very extended area. It is one of the fruit species that best withstands cold and adapts to a broad range of soils, preferring well-drained, slightly acid, clayey-silty, deep soil with a high organic matter content. Annual water requirements vary between 700 and 900 mm. Apple requires a long resting period and much cold weather. Spring frost and hail are the greatest weather risks.

Pests and diseases

The main diseases of apple are scab, powdery mildew, cankers, brown rot, Botrytis and other aerial fungal diseases, fire blight, *Phytophthora*, soil diseases, viral diseases and phytoplasmas.

Pests of apple are numerous and include red and yellow mites. Insects are the most numerous: beetles, dipterans, dermapterans, aphids, lepidopterans (codling moth, leaf miner, etc.) and Thysanoptera (thrips).

The main storage diseases of apple are *Penicillium* mould, Alternaria rots, spots and scald (pre-ripening and senescence).

Harvesting

Apple is a climacteric fruit and its suitability for keeping and its quality are directly affected by the stage of maturity at picking:

- early picking: inadequate size and colour, poor taste quality, susceptibility to post-harvest diseases;
- late picking: better taste quality (sweetness and aroma) but decreased suitability for keeping (loss of crispness and acidity), occurrence of water core and increase in fungal and senescence diseases.

The optimum picking date is when the fruit has formed its reserve potential and started to produce ethylene. The basic epidermis colour, decreased starch, firmness, sugar content and acidity and pip colour are the main indicators for starting picking.

Post-harvest

The stage of ripeness, the weather conditions of the year, the sanitary condition of the orchard, cultural practices, etc. affect the keeping potential of apples. Post-harvest antifungal and antioxidant treatments are sometimes applied to prevent physiological problems or fungal diseases. Speed of chilling is particularly important. The fruits must reach a temperature lower than 5°C between 24 and a maximum of 48 hours after picking. The cold susceptibility threshold varies according to the variety, with many keeping at between 0°C and 1°C. A minimum threshold of 92% relative humidity must be maintained throughout cold storage. Some varieties susceptible to dehydration even require 95%. The effect of cold is enhanced by reducing the oxygen level and increasing that of carbon dioxide.



Wholesale market prices in Europe

December 2009

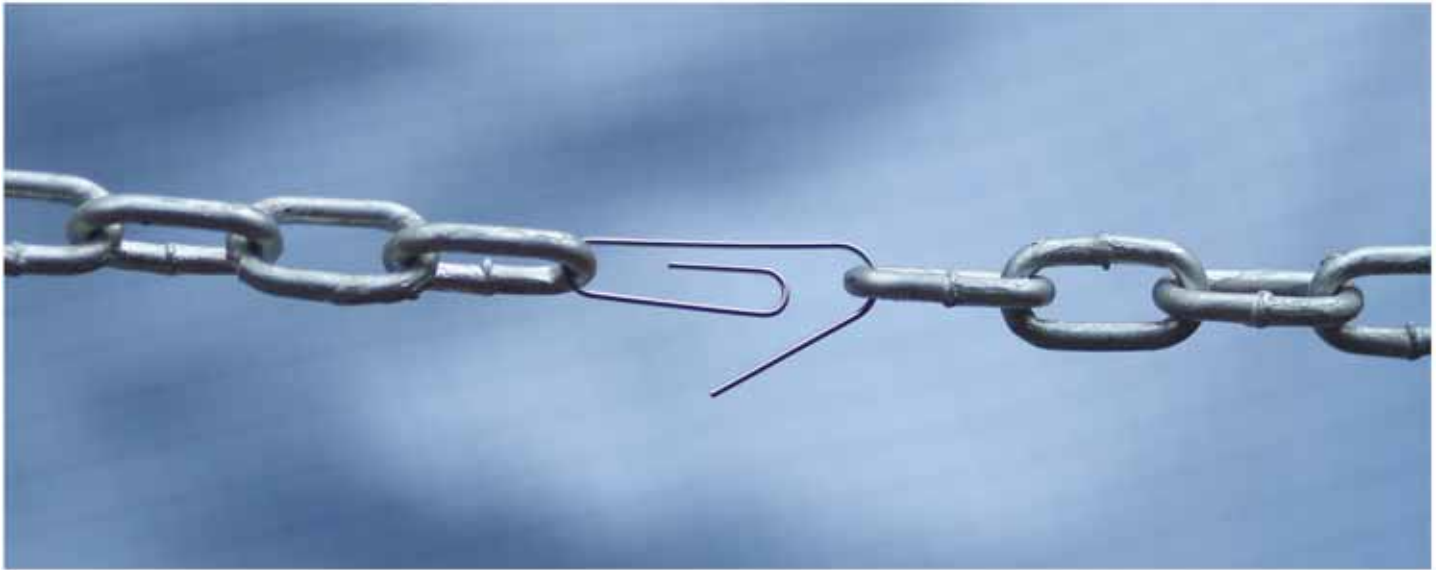
					EUROPEAN UNION — IN EUROS			
					Germany	Belgium	France	Holland
AVOCADO	Air	TROPICAL	DOMINICAN REPUBLIC	Box			11.20	
	Sea	ETTINGER FUERTE HASS	ISRAEL	Box		8.00		
			ISRAEL	Box				5.75
			ISRAEL	Box				8.50
			CHILE	Box		7.60	6.50	6.25
			ISRAEL	Box	7.25			8.00
	Truck	PINKERTON HASS	SPAIN	Box			8.50	
BANANA	Air	RED SMALL	ECUADOR	kg				4.88
			COLOMBIA	kg		5.96	6.00	
			ECUADOR	kg				4.17
	Sea	SMALL	ECUADOR	kg			1.80	
CARAMBOLA	Air		MALAYSIA	kg			5.00	4.07
	Sea		MALAYSIA	kg	3.14			3.14
COCONUT	Sea		COSTA RICA	Bag				15.50
			COTE D'IVOIRE	Bag		13.10	7.50	5.75
			SRI LANKA	Bag				14.00
			NETHERLAND	Bag				9.13
DATE	Sea	NOT DETERMINED MEDJOOOL	TUNISIA	kg				1.72
			ISRAEL	kg	6.28	7.56		7.30
			SOUTH AFRICA	kg		5.26		
GINGER	Sea		BRAZIL	kg	2.31			2.12
			THAILAND	kg				1.68
			CHINA	kg	2.46		2.00	1.96
GUAVA	Air		BRAZIL	kg			4.60	5.83
			THAILAND	kg		6.55		
KUMQUAT	Air		ISRAEL	kg	4.50	4.31	4.50	3.13
LIME	Air		MEXICO	kg			3.70	
	Sea		BRAZIL	kg	1.28	1.22	1.60	1.16
			MEXICO	kg	1.50	1.61	1.60	1.38
LITCHI	Sea		MADAGASCAR	kg	2.60	2.85	2.30	
LONGAN	Air		THAILAND	kg		8.20		7.25
MANGO	Air	HADEN KENT	BRAZIL	kg				2.88
			BRAZIL	kg		2.99		
			ECUADOR	kg		2.99		
			PERU	kg		4.08	4.80	3.83
	Sea	PALMER NAM DOK MAI ATKINS KENT	BRAZIL	kg	2.75			2.88
			THAILAND	kg				6.50
			BRAZIL	kg	0.94			1.07
			BRAZIL	kg			1.30	1.03
			ECUADOR	kg		1.09		
			PERU	kg		1.09	1.50	

					EUROPEAN UNION — IN EUROS			
					Germany	Belgium	France	Holland
MANGOSTEEN	Air		INDONESIA	kg		7.45		6.63
			THAILAND	kg				7.00
MANIOC	Sea		COSTA RICA	kg		1.38	1.05	1.08
PAPAYA	Air	NOT DETERMINED FORMOSA	BRAZIL	kg			3.00	2.88
			BRAZIL	kg				3.05
	Sea	NOT DETERMINED	BRAZIL	kg	1.71	1.94		1.78
			ECUADOR	kg				1.63
PASSION FRUIT	Air	PURPLE	KENYA	kg		4.38		4.50
			REUNION	kg			11.50	
			SOUTH AFRICA	kg	6.00			5.00
			ZIMBABWE	kg		4.88		4.88
		YELLOW	COLOMBIA	kg		7.60	6.20	6.94
PERSIMMON	Sea		ISRAEL	kg	1.63	1.88	2.20	1.40
PHYSALIS	Air	PREPACKED	COLOMBIA	kg			8.00	7.08
	Sea		COLOMBIA	kg	4.17	5.25		5.93
PINEAPPLE	Air	SMOOTH CAYENNE	CAMEROON	kg			2.00	
			COLOMBIA	kg		5.96		
			VICTORIA	Box		11.60		11.75
		VICTORIA	MAURITIUS	kg			3.50	
			REUNION	kg			4.00	
			SOUTH AFRICA	Box	9.50	11.60		9.88
	Sea	MD-2	COSTA RICA	Box	9.25	8.80		11.00
			COSTA RICA	kg			0.95	
PITAHAYA	Air	RED	THAILAND	kg	5.67			
			VIET NAM	kg		5.27	7.20	6.25
		YELLOW	COLOMBIA	kg				8.80
			ECUADOR	kg				8.30
PLANTAIN	Sea		COLOMBIA	kg				0.80
			ECUADOR	kg			0.90	
RAMBUTAN	Air		MALAYSIA	kg				6.75
			THAILAND	kg	7.50	7.25		6.75
			VIET NAM	kg				6.25
SWEET POTATO	Sea		BRAZIL	kg			1.60	
			EGYPT	kg			0.75	
			ISRAEL	kg	1.25		1.55	1.08
			SOUTH AFRICA	kg				1.25
TAMARILLO	Air		COLOMBIA	kg		5.72		5.40
YAM	Air		BRAZIL	kg			1.75	
	Sea		GHANA	kg			1.00	0.98

Note: according to grade

These prices are based on monthly information from the Market News Service, International Trade Centre UNCTAD/WTO (ITC), Geneva.
MNS - International Trade Centre, UNCTAD/WTO (ITC), Palais des Nations, 1211 Geneva 10, Switzerland
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