

CLOSE-UP

Grapefruit



Cherry imports: European market
still restrained

Citrus and exotics:
monthly review

<http://passionfruit.cirad.fr>

À CHAQUE SAISON DES FRUITS DE QUALITÉ



COMPAGNIE
FRUITIERE

Gorgés de soleil, ils arrivent avec l'été

LES POMELOS DU MEXIQUE !



C'EST LE
MOMENT
DE LES
COMMANDER !

- Une marque gage de qualité pour les consommateurs
- Une variété savoureuse : Tropical Red
- Une large gamme de vrac et de préemballés : vrac, girsac, filet, D-pack...
- Un producteur partenaire exclusif reconnu





photos © Eric Imbert

Strange times! It seems that 'communication' generally prevails over reliable, confirmed information, with the risk of worsening public perception of the food crises that dot the recent past. The problem of the bacterium *E. coli* is a fine illustration of this. It would be a joke if it had not caused several dozen deaths. We could have done without the rumours concerning Spanish cucumbers and the naming of the companies that were supposedly responsible. What about the lettuces, tomatoes and other fresh produce whose sales suffered chronically and lastingly from the general hysteria? The collateral damage caused by this unbridled communication based on rumour was enormous. How can we correct the damage suffered by the fruit and vegetable sector, whose produce is generally vaunted for its virtues as regards health? Miserable communication amplified by the multiplicity of media conceals the growing incoherence of certification and traceability for everything and that finishes by making them remote from their initial purpose. And the story does not stop there. What can one say about the suspension of sales of litchis from Madagascar by German retail distributors last December because of the exceeding of the maximum residue limit for sulphur? The levels authorised for litchi are extremely low while they are much higher for dried fruits like raisins and apricots. Here again, the sector and its thousands of producers in Madagascar footed the bill to the last centime.

The explosive cocktail consisting of a mixture of communication and certification that are not mastered in case of crisis clearly reveals the perversity of a system that is quicker to throw stones at the persons supposedly responsible than to seek the real reasons for the problem. The likely effect of this crisis will doubtless be a strengthening of the criteria for certification references that are already difficult to respect for professionals in countries supplying the European Union...

Pierre Gerbaud



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

Editors-in-chief

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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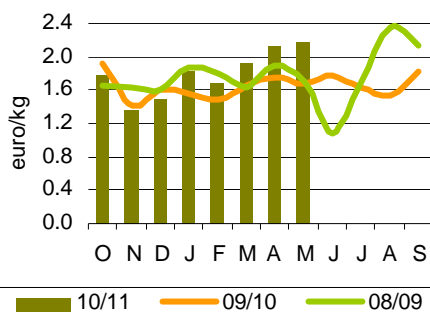
Cover photograph: Régis Domergue

Avocado

May 2011

The 'Hass' market was still exceptional at the beginning of May and then worsened. Prices remained very high during the first half of the month as supply remained limited with the decrease in shipments from winter sources and still very moderate volumes from South Africa and Peru. The market began to change direction in mid-month. First, demand slowed because of high retail prices and the early increase in the supply of seasonal fruits. Second, supply broadened with volumes from Peru returning to an average level and less of a deficit in fruits from South Africa. Prices decreased, especially for large fruits. The market for green varieties was difficult. Supply was at a good level, especially in France with the arrival of Kenyan shipments, and demand was somewhat sluggish.

Avocado - France - Import price



Avocado GEM

■ **First licence to grow 'GEM'** avocado outside California. The South African company Westfalia has obtained the first international licence to plant and propagate the variety developed by Grey E. Martin at University of California Riverside. 'GEM' differs from its parent 'Hass' in that it has a slightly later production calendar, pulp that oxidises more slowly and is less subject to alternate bearing. Westfalia will target quality retailers for sales of fruit in the 'ready to eat' segment. The South African company also plans to distribute germplasm in the Mediterranean, South America, Oceania and sub-Saharan Africa in order to lengthen the sales calendar.

Source: University of California Riverside

lion Kenyan shillings (about 70 million dollars).

Source: Reefer Trends

■ **Israel: Granot changes hands.** The change in the alliance of 'Avocado Granot' shuffles the cards in the downstream part of the avocado sector in Israel. The cooperative, which handles about 30% of avocado production in Israel, has put an end to a 50-year partnership with the state company Agrexco and will now work with Mehadrin. This private group that is already the leader in citrus has now become the leading exporter of avocado in Israel with a market share estimated at 50%.

Source: Freshplaza



© Eric Imbert

■ **South Africa lifts ban on imports of Kenyan avocado.** A sanitary protocol has been designed and aimed in particular at preventing the introduction of fruit flies. It should allow the resumption of Kenyan exports to South Africa by the end of the year. According to the Kenyan authorities, the South African embargo has resulted in lost sales worth 6 bil-

PRICE	Varieties	Average monthly price euro/box	Comparison with the last 2 years
	Green	4.00-4.50	- 10%
	Hass	9.00-10.00	+ 33%

VOLUMES	Varieties	Comparison	
		previous month	last 2 years average
	Green	↘	+ 6%
	Hass	↗	+ 3%

VOLUMES	Source	Comparison		Observations	Cumulated total / cumulated average for last 2 years
		previous month	average for last 2 years		
	Israel	↘↘	- 15%	Very last limited volumes at the beginning of the month	+ 18%
	Peru	↗	- 13%	Very gradual start of the 'Hass' season with short volumes except at the end of the month (awaiting the opening of the US market). Large volumes of green varieties.	- 13%
	Spain	↘↘	+ 240%	Last volumes of 'Hass', distinctly larger than average, at the beginning of the month.	+ 15%
	South Africa	↗	- 52%	Very marked shortage of supply of 'Hass' and green varieties, improving at the end of the month.	- 36%
	Kenya	↗	+ 17%	Peak season, with distinctly larger than normal supply of green varieties and above all of 'Hass'.	+ 7%

Pineapple

May 2011

The situation worsened steadily in May. The first fortnight was marked by a pronounced weakness in the supply of 'Sweet' when everybody thought that it would increase. Demand was sluggish and hardly sufficed to take the few fruits sold, allowing a slight increase in prices at the end of the fortnight.

In the second fortnight, the fruits awaited so eagerly finally arrived. Initially, supply did not seem to be as large as announced. Operators managed to shift their stocks thanks to numerous promotion operations. Unfortunately, this was at the expense of prices, which fell steadily. Demand remained very small whereas supply continued to increase. As the weeks went by operators had increasing difficulty in finishing their stocks and this exerted increasing pressure on sales of all sizes of fruits. The prices of fruits of established brands seemed to have decreased less.

'Smooth Cayenne' was available on the market again at the end of the first fortnight. Unfortunately, the fruits received were very fragile and difficult to sell. Quality was uneven even though supply was very small.

The situation on the air pineapple market was fairly difficult. Demand for pineapple decreased gradually as interest switched to seasonal fruits. Operators tried to reduce imports in the hope of re-launching demand. But this was not enough and prices soon fell. Only specialised retailers seemed interested but they sought practically perfect fruits that were difficult to find. Sales of 'Sugarloaf' pineapples were also slower although prices remained fairly stable at EUR 1.90-2.00 per kg.

Operators gradually lost interest in 'Victoria' pineapple when seasonal fruits appeared and although supply was limited overall sales became increasingly difficult as the month went by.

■ Pineapple: juice prices in Europe in March 2011.

Type of juice	Price (USD/t)	Origin	Observations
Frozen concentrate, 60° Brix, 'Smooth Cayenne'	2 250-2 300 fca Holland df	Thailand	Supply from Thailand should be limited until the autumn. Traces of nitrates in Thai juice slowed sales to Europe. However, prices continued to climb thanks to demand outside the EU, especially in Eastern Europe.
Aseptic concentrate, 60° Brix, 'Smooth Cayenne'	2 200-2 250 fca Holland df		
Single juice, 12° Brix, in bulk, 'MD-2'	800-815 fca Holland	Costa Rica	
Aseptic concentrate, 60° Brix, in bulk, 'MD-2'	2 100-2 150 fca Holland		
Frozen concentrate, 60° Brix, 'Perola'	2 100 fob Santos	Brazil	

Note: fca: free carrier / df: duty free / fob: free on board / Source: MNS-ITC Geneva

■ Fruits: juice and pulp prices in Europe in March 2011.

Type of juice	Price (USD/t)	Origin	Observations
Acerola	Frozen single juice, 6-8° Brix 1 450-1 500 fob Santos	Brazil	Demand strong, peak season. Prices higher than in preceding seasons.
	Frozen concen- trate, 65° Brix, clear 14 300 fob Santos		
Passion fruit	Frozen concen- trate, 50° Brix 4 200-4 250 cfr Rotterdam	Ecuador	Demand remained sluggish even though prices were low. This could discourage some growers who may switch to other crops. In Brazil, where most of production is sold on the domestic market, demand was fairly strong but prices were too high, especially in comparison with competing products from Peru and Ecuador.
	Clarified juice, 50° Brix 6 000 cfr Rotterdam		
	NFC, 11° Brix 1 700 cfr Rotterdam		
	Frozen concen- trate, 50° Brix 4 500-5 000 fob Santos	Brazil	
	NFC, 12-14° Brix 1 500-2 100 fob Santos		
Guava	Aseptic single pulp, 9° Brix, pink 675-775 fca Holland in transit	South Africa	Supply and demand at normal levels. Brazilian production was too expensive to be competitive on the export market.
	Aseptic single pulp, 9-12° Brix, pink 650-700 fob Brazil	Brazil	
	Aseptic concen- trated pulp, 14-16° Brix, pink 950 fob Brazil		
	Aseptic concen- trated pulp, 18-20° Brix, pink 1 000-1 140 fob Brazil		
Pome- granate	Aseptic concen- trated clarified juice, 66° Brix 4 350-4 650 euro/t fca Rotterdam	Turkey	The harvests in Iran and Turkey were smaller than expected. Demand growing.
Papaya	Aseptic concen- trate, 25° Brix, red 1 100-1 150 fob Brazil	Brazil	Market normal but demand fairly small .

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

PINEAPPLE — IMPORT PRICE

Weeks 18 to 21	Min	Max
By air (euro/kg)		
Smooth Cayenne	1.70	1.90
Victoria	3.00	4.00
By sea (euro/box)		
Smooth Cayenne	6.00	7.00
Sweet	5.00	9.00

PINEAPPLE — IMPORT PRICE IN FRANCE — MAIN ORIGINS

Weeks 2011	18	19	20	21
By air (euro/kg)				
Smooth Cayenne	Benin	1.80-1.90	1.70-1.90	1.80-1.90
	Cameroon	1.80-1.90	1.70-1.90	1.80-1.90
	Ghana	1.75-1.80	1.75-1.80	1.80-1.85
Victoria	Côte d'Ivoire	-	-	-
	Réunion	3.50-4.00	3.50-4.00	3.80-4.00
	Mauritius	3.00-3.50	3.00-3.50	3.50
	South Africa	3.00-3.50	3.00-3.50	3.00
By sea (euro/box)				
Smooth Cayenne	Côte d'Ivoire	-	-	6.00-7.00
Sweet	Côte d'Ivoire	6.50-9.00	6.50-9.00	6.00-8.00
	Cameroon	6.50-9.00	6.50-9.00	6.00-8.00
	Ghana	6.50-9.00	6.50-9.00	6.00-8.00
	Costa Rica	5.50-7.00	6.50-8.00	6.00-7.00
				5.50-6.50

Banana

May 2011

The market was still very satisfactory at the beginning of the month and then worsened during the second half. First, supply from most sources increased distinctly. Volumes of dollar bananas returned to higher than average from mid-May with the return to normal of shipments from Colombia and the still very strong presence of Ecuador making up for the Costa Rican deficit. The situation was similar for imports from the French West Indies where production displayed a seasonal peak. Finally, shipments from Africa increased to a higher level than average, with average volumes from Ghana but large quantities from Cameroon and the end of the April dip in Côte d'Ivoire following the political problems in the country. Second, demand slowed distinctly under the combined influence of unusually hot weather and an early increase in supplies of summer fruits. The market held up fairly well during the first fortnight, especially thanks to re-exports to the very open southern European markets (marked shortage of arrivals of Canary Island bananas in Spain and a historically high price for these fruits). The situation worsened more noticeably at the beginning of the second half of the month with prices falling to below average at the end of the month. Outside the European Union, the Russian market was very satisfactory even though arriving volumes were large.

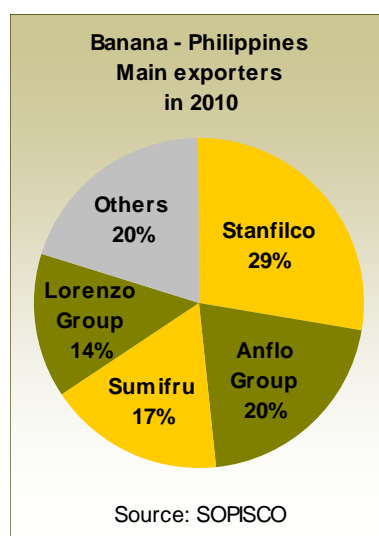
■ All going bananas! Three large international groups have recently announced their intention to increase their banana production capacity in the south island of Mindanao. Stanfilco will probably invest in Surigao del Sur. This subsidiary of Dole already has some 11 400 ha of plantations in the country and confirmed its leading position in 2010 by exporting about 43 million 13-kg boxes (28% of the national total). Sumitomo Fruit Corporation has also expressed its intention to invest in Surigao. Sumitomo is a Japanese importer specialising in the fruit and vegetables

sector and exported nearly 27 million boxes in 2010. Finally, Unifrutti, which already has about 1 000 ha, has said that it wishes to invest 20 million dollars to double its production capacity. This means that the Asian and Middle Eastern markets that took the 2 million tonnes bananas exported from the Philippines in 2010 are becoming a popular target!

Source: Reefer Trends

■ Minimum price for Panamanian banana growers soon? According to whispers in ministry corridors, a decree is being drafted under pressure from growers who are feeling the pinch. A study of production costs is reported to have been commissioned from the Technology University in Panama. It is reminded that the minimum price is USD 5.50 per box in Ecuador and an average of USD 7.70 in Costa Rica.

Source: Reefer Trends



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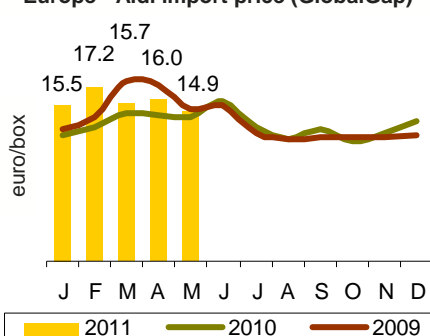
EUROPE — ALDI IMPORT PRICE

May 2011 euro/box	Comparison	
	previous month	average for last 2 years
14.90	- 7%	+ 2%

Banana — Philippines — Exports			
	2008	2009	2010
Japan	812 309	909 011	828 480
Middle East	588 495	549 058	514 500
South Korea	199 173	205 241	271 487
China	209 535	226 389	242 199
Others	117 918	134 840	146 182
Total	1 927 430	2 024 539	2 002 848

Source: Sopisco

Europe - Aldi import price (GlobalGap)



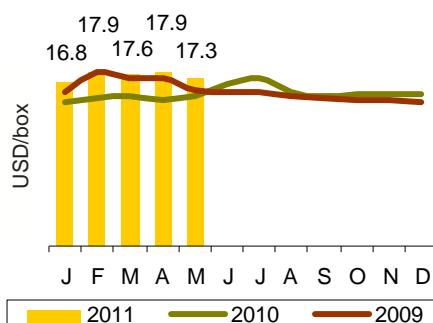
EUROPE — RETAIL PRICE

Country	May 2011		Comparison	
	type	euro/kg	April 2011	average for last 2 years
France	normal	1.55	- 3%	+ 5%
	special offer	1.31	- 1%	+ 1%
Germany	normal	1.29	- 1%	+ 2%
	discount	1.13	0%	+ 3%
UK (£/kg)	packed	1.19	0%	0%
	loose	0.73	+ 1%	- 18%
Spain	plátano	2.13	+ 7%	+ 20%
	banano	1.40	- 2%	- 5%

Banana

UNITED STATES

USA - Green price (spot)

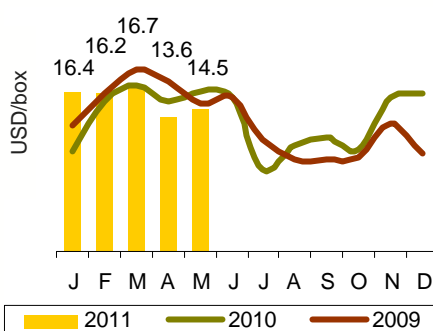


USA — IMPORT PRICE

May 2011 USD/box	Comparison	
	previous month	average for last 2 years
17.30	- 3%	+ 10%

RUSSIA

Russia - Green price

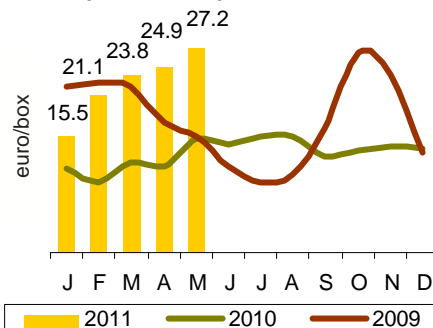


RUSSIA — IMPORT PRICE

May 2011 USD/box	Comparison	
	previous month	average for last 2 years
14.50	+ 2%	- 8%

CANARIES

Spain - Green price - Platano*



CANARIES — IMPORT PRICE*

May 2011 euro/box	Comparison	
	previous month	average for last 2 years
27.20	+ 9%	+ 78%

* 18.5 kg box equivalent

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■ Banana: purée prices in Europe in March 2011.

Type of juice	Price (USD/t)	Origin	Observations
Aseptic purée, 22° Brix	650-720 fca Holland duty zero-rated	Ecuador	Prices increased slightly. Demand was still strong for both fresh fruits and purée.
Organic ss aseptic, 22° Brix	1 280 fca Holland df		

Note: fca: free carrier / df: duty free / Source: MNS-ITC Geneva

■ 87.5% of Spaniards prefer 'Platano de Canarias'! This was shown by an opinion poll conducted by GFK at the request of the Canary banana promotion collective. Slightly more than 10% of the persons questioned had no opinion and less than 3% said that they preferred the other types of banana. The president of ASPROCAN justified the preference by mentioning the unique taste of 'platano' that results from a longer production cycle and a later cutting time allowed by the very short duration of transport from the Canaries to Spain. And you don't count the cost when you like something, as is shown by retail prices at the record level of over EUR 2.20 per kg in early June in comparison with less than EUR 1.40 per kg for other bananas.

Sources: ASPROCAN, CIRAD



© Charles de Wulf

that is to say nearly EUR 15! And the situation is unlikely to change before August when the first fruits from replantings should arrive on the market. Payment by cheque or bank card is accepted for two fingers or more...

Source: Sopisco



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EUROPE — IMPORTED VOLUMES — MAY 2011

Origin	Comparison		
	April 2011	May 2010	cumulated total 2011 compared to 2010
French West Indies	↗	+ 15%	- 12%
Cameroon/Ghana	↗	- 4%	- 19%
Surinam	↗	+ 37%	- 2%
Canaries	⇒↘	- 17%	- 11%
Dollar:			
Ecuador	⇒↘	+ 27%	+ 22%
Colombia*	↗	- 2%	- 6%
Costa Rica	↘	- 10%	- 4%

* total all destinations

Mango

May 2011

Benefiting from the late, complex start of shipments from West African sources (as a result of the political events in Côte d'Ivoire), Peruvian shipments of small quantities continued until mid-May. Sales were increasingly difficult as retail distributors dereferenced this source, favouring countries that were starting their shipments. In addition, the uneven quality of the last batches caused a gradual worsening of prices.

In parallel, Brazil returned to the leading position of supplier of the European market with moderate quantities that dipped during the month. Brazilian supply was dominated by 'Tommy Atkins', completed by smaller batches of 'Keitt' and 'Palmer'. These fruits were sold mainly on the northern European markets at falling prices (EUR 6.00 to 4.50 per box) because of problems of quality and fading demand.

It is difficult to estimate the volumes shipped from West Africa but they increased throughout the month in spite of the logistic problems experienced by exporters in Côte d'Ivoire, Mali and Burkina Faso. 'Kent' from these sources sold well, especially during the first half of the month when volumes were small. Prices then weakened because of fierce competition from seasonal fruits (strawberries, cherries, melons, stone fruits, etc.) that were available in large quantities at very attractive prices.

Complementary batches of 'Keitt' from Puerto Rico counter-balanced the dip resulting from uncertainties in West African shipments. The Dominican Republic started its season in the second half of the month with 'Keitt', with prices more or less matching competing fruits.

On the air shipment market, arrivals from Côte d'Ivoire were particularly large, making up from time to time for

shortages of goods shipped from the same source by sea. These arrivals caused the gradual saturation of the market, with prices falling at the end of the month. The multiplication of deliveries from Côte d'Ivoire also affected demand for fruits from Mali and Burkina Faso whose quality was more uneven and demand for these fruits collapsed. The sale of varieties other than 'Kent' became particularly difficult and even impossible, causing the halt of shipments in mid-month.



© Denis Loelliet

■ Mango: juice and purée prices in Europe in March 2011.

Type of juice	Price (USD/t)	Origin	Observations
Aseptic concentrate, 28° Brix, 'Totapuri'	1 600-1 700 fca Rotterdam	India	The high prices of the last harvest affected sales to the point at which Indian producers had to sell off their stocks at low prices to make room for the new harvest. Economic problems in the Middle East, where the countries are generally good customers, put sales of purée and concentrate of Indian varieties under pressure. According to preliminary information, the 'Alphonso' and 'Totapuri' harvest should be good but late. Demand is still excellent in Europe and North America.
Aseptic purée, 14-16° Brix, 'Totapuri '	1 075-1 100 cfr Rotterdam		
Aseptic purée, 17° Brix, 'Alphonso'	1 600-1 700 fca Rotterdam		
Aseptic concentrate, 28-30° Brix, 'Palmer'	1 380-1 400 fob Santos	Brazil	
Aseptic concentrate, organic, 28-30° Brix, 'Palmer'	2 100 fob Santos		
Aseptic concentrate, 28-30° Brix, 'Tommy Atkins'	1 350-1 400 fob Santos		
ss aseptic, 14-16° Brix, 'Tommy Atkins'	925-950 fob Santos		
Aseptic concentrate, 28° Brix, in bulk, 'Tommy Atkins'	1 500-1 550 fca Holland	Mexico	
ss frozen, 14-16° Brix, 'Chato d'Ica'	1 100 cfr Rotterdam	Peru	
Aseptic concentrate, 28° Brix, 'Maaddalena'	1 475 cfr Europe	Colombia	

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

MANGO — ARRIVALS (ESTIMATES) Tonnes

Weeks 2011	18	19	20	21
By air				
Mali	80	80	60	30
Burkina Faso	15	20	20	30
Côte d'Ivoire	100	150	110	100
By sea				
Brazil	1 540	1 100	950	770
Peru	840	-	22	-
Côte d'Ivoire	220	440	660	880

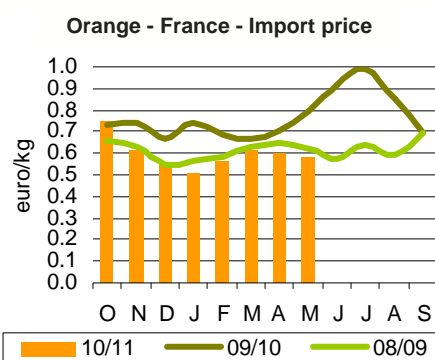
MANGO — IMPORT PRICE ON THE FRENCH MARKET — Euro

Weeks 2011		18	19	20	21	May 2011 average	May 2010 average
By air (kg)							
Mali	Amélie	2.50	2.50	-	-	2.50	2.40-2.50
Mali	Valencia	2.50-2.80	2.50-2.80	-	-	2.50-2.80	2.60-3.25
Mali	Kent	2.50-3.50	2.00-3.50	2.00-3.00	1.80-2.50	2.10-3.10	3.00-3.70
Burkina Faso	Kent	2.50-3.00	2.00-2.50	2.00-2.80	1.80-2.20	2.10-2.60	2.85-3.35
Côte d'Ivoire	Kent	3.50-4.00	3.50	3.50-4.00	2.00-3.50	3.10-3.75	3.80-4.25
By sea (box)							
Peru	Kent	5.00-6.00	5.00-5.50	5.00	-	5.00-5.50	-
Côte d'Ivoire	Kent	7.00	5.50-6.50	5.00-6.00	4.00-5.00	5.35-6.10	4.55-5.50
Puerto Rico	Keitt	5.00-5.50	5.00-5.50	5.00-5.50	4.00	4.75-5.10	nd
Dominican Rep.		-	-	5.00-5.50	5.00	5.00-5.25	nd

Orange

May 2011

The market remained difficult and prices low. Demand did not recover and the early production of seasonal fruits accentuated the sluggishness seen since the beginning of the year. In this context, the Spanish 'Navelate' season continued, especially as the uneven quality of a proportion of the supply slowed sales even more. Releases of 'Valencia Late' were also slow, with prices nearing rock bottom at the import and production stages. Given these conditions, Moroccan exporters concentrated on the busy domestic market at the approach to Ramadan. Several batches of 'Maltese' from Tunisia completed supply at the beginning of the month.



■ **Orange juice: the Garcia Carrion group has big ambitions.** The Spanish group that specialises in beverages is to invest massively to develop its own orange juice production. The sum of EUR 120 million is to be used to double the processing capacity of the Villanueva de los Castillejos plant near Huelva and a further 70 to 80 million to develop 3 000 ha of orange plantations. The group says that it wishes to be able to process nearly 1 million tonnes of oranges per year in ten years time, that is to say about 300 000 t more than the average volumes processed in Spain in recent years.

Source: diariodesevilla.es

■ **Argentina: the vector of greening, but not the disease, detected in Tucuman.** An Asian psyllid that is potentially vector of the most severe form of greening was identified at the end of May in the Tucuman region, the site of more than 80% of Argentina's enormous area under lemon. The insect was identified in an urban zone and did not carry the disease, that is nevertheless present in neighbouring Brazil.



Source: ATC

■ **Fresh lemon market: belief in the sector in Argentina.** After stagnating at about 43 000 ha since the mid-2000s, Argentinian lemon plantations should display a noticeable increase if the investments planned by two large agroindustrial groups are made. La Morajela, with a cultivated area of 30 000 ha, should double the 2000 ha currently under lemon with an investment of 50 million dollars. The Avellanada and Pablo Padilla group have decided to plant a further 3 000 ha. These investments will be made in the leading Tucuman region. The aim is the fresh fruit market as the prospect of the opening of the United States market seems to be increasingly credible.

Source: Reefer Trends



photos © Régis Darnegue

■ **Oranges from Morocco: first exports to China in 2010-11.** Three containers of oranges were exported to the Chinese market that was opened officially last season on condition that a sanitary protocol is respected. The chairman of the Delassus group that made these first shipments invited the other Moroccan exporters 'to board the train before the departure'.

Source: Reefer Trends

PRICE	Type	Average monthly price euro/box 15 kg	Comparison with average for last 2 years
	Dessert oranges	9.00-9.50	- 20%
	Juice oranges	8.50-9.00	- 14%

VOLUMES	Type	Comparison	
		previous month	average for last 2 years
	Dessert oranges	↘	- 16%
	Juice oranges	↗	- 30%

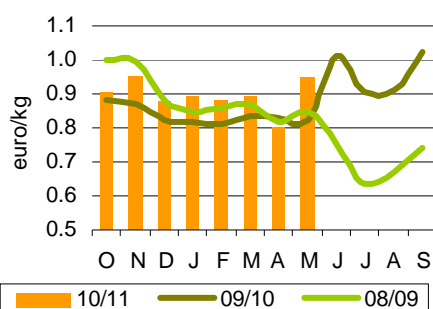
VOLUMES	Varieties by source	Comparison		Observations	Cumulated total / cumulated average for last 2 years
		previous month	average for last 2 years		
	Valencia Late from Morocco	↘↘	- 28%	Concentration on the domestic market. Very limited volumes for the EU because of prices.	- 36%
	Navelate from Spain	↘↘	- 16%	Limited supply maintained throughout the month and often consisting of large fruits of sometimes uneven quality.	- 24%
	Valencia from Spain	↗	- 28%	Peak season. Slow sales.	- 36%
	Maltese from Tunisia	↘↘	na	Last volumes at the beginning of the month.	+ 3%

Grapefruit

May 2011

Under-supply kept prices high even though demand was very slow. Supply from the southern hemisphere was moderate. Arrivals from South Africa were larger than during the poor 2010 season but remained small, while the decline of plantations in Argentina is increasingly obvious from one year to the next. In addition, the northern hemisphere sources shipped only limited volumes (last significant shipments from Florida and Israel in April). Supply was completed by a few shipments from Spain and Corsica. This resulted in prices holding at a level significantly higher than average for fruits from all sources, but with the difference remaining considerable between Mediterranean fruits and those from Florida or South Africa.

Grapefruit - France - Import price



PRICE	Type	Average monthly price euro/box 17 kg box eq.	Comparison with average for last 2 years
	Tropical	17.00	+ 11%
	Mediterranean	11.50-12.00	+ 13%

VOLUMES	Type	Comparison	
		previous month	average for last 2 years
	Tropical	↗	- 10%
	Mediterranean	↘	+ 51%

VOLUMES	Source	Comparison	
		previous month	average for last 2 years
	Florida	↘↘	na
	Israel	↘↘	+ 36%
	Argentina	↗↗	- 80%
	South Africa	↗↗	+ 24%

■ Citrus: juice prices in Europe in March 2011.

Type of juice		Price (USD/t)	Origin	Observations
Orange	FCOJ, 66° Brix,	2 600-2 700 fca Holland dup	Brazil	The NFC market seems to have recovered, with larger exports from Brazil and the USA. The European market in particular displayed good growth. Retail prices increased in Europe and the USA for all forms of orange juice. The coming Brazilian harvest should be better than the last one. The Mexican and Cuban harvests seem to have low ratios.
	FCOJ, organic, 66° Brix,	4 500 fob Santos		
	NFC	600-750 fob Santos		
	NFC	400 euro/t ex-works	Spain	
	NFC	480-500 euro/t cfr Northern Europe	Greece	
	FCOJ, 66° Brix, blood orange	2 850-3 050 euro/t ddp Holland df	Italy	
Grapefruit	Frozen concentrate, 58° Brix, red	2 450-2 550 fca Holland	Florida	Sales of concentrate and NFC seemed to show signs of recovery in the United States. Indeed, prices firmed and increased, even though they remained well below the levels observed five years ago. Cuban production was recovering strongly after hurricane damage sustained three years ago. Its outlets benefit from duty-free access to the EU but it has no access to the US market.
	Frozen concentrate, 58° Brix, pink	2 300-2 450 fca Rotterdam		
	Frozen concentrate, 58° Brix, white	2 350-2 500 fca Rotterdam		
	Frozen concentrate, 58° Brix, red	1 950-2 050 fob Cuba	Cuba	
	Frozen concentrate, 58° Brix, white	2 000-2 100 fob Cuba		
	Frozen concentrate, 58° Brix, coloured	2 150-2 200 fca Holland	Mexico	
Lemon	Frozen concentrate, cloudy, 500 gpl	4 250-4 400 fca Rotterdam	Argentina	March stock levels were practically nil. However, distinctly better supply from Argentina was hoped for and a large harvest in Spain. This should meet demand on the fresh fruit and juice markets.
	Frozen concentrate, clear, 500 gpl	5 200-5 400 cfr Rotterdam		
	Frozen concentrate, cloudy, 400 gpl	3 500 euros/t cip Europe	Greece	
Lime	Frozen concentrate, cloudy, 400 gpl, 8% pulp	2 500 fob Santos	Brazil	Demand for fresh fruits and juice was strong while supply of fresh lemon was short. Prices seemed to dip in the expectation of a good lemon harvest in Argentina.
	Frozen concentrate, clear, 400 gpl, 8% pulp	4 100 fob Santos		

Note: fca : free carrier / dup: duty unpaid / fob: free on board / cfr: cost and freight / ddp: delivered duty paid / df: duty free / cip: carriage and insurance paid to / Source: MNS-ITC Geneva

Source	Observations	Cumulated total / cumulated average for last 2 years
Florida	Only a few batches received in April were still available.	- 16%
Israel	Last shipments limited in the first half of the month.	+ 12%
Argentina	Very limited arrivals (production decreasing strongly because of much grubbing up).	- 80%
South Africa	Return to a normal arrivals calendar after a late 2010 season. Volumes distinctly larger than last season's but smaller than those of 2007, 2008 and 2009.	+ 24%

Sea freight

May 2011

After a reasonably encouraging start to the year for operators May's charter market performance delivered below-breakeven returns to those owners who had gambled on one final voyage prior to lay-up: or to those who made one-way fixtures to the breakers. Given the pessimistic forecast for the mode and the endemically high cost of fuel it is perhaps surprising that fewer than 20 vessels have been fixed for recycling so far this year. While it is true that some of the smaller units have been sold into China, never therefore to return to haunt the transatlantic Spot trade, there are many more fuel-inefficient larger units that would do the market a big favour by disappearing for good. The May monthly TCE average of around 30c/cbft compares to last year's 51c/cbft corresponding average. The 40% reduction is recorded despite only a USD 0.15c year-on-year per-box fall in the average monthly box rate fixture – from approx USD 5.90 per box to USD 5.75. The difference in yield is, of course, explained by the almost 50% rise in bunker prices over the period. It appears that despite the ongoing cull in specialised reefer units there is sufficient capacity, both specialised and reefer box, to keep a lid on the charter market. With the oil price forecast to remain high on the one hand and ever more reefer equipment being manufactured on the other it is difficult to see how this post-peak scenario will improve for reefer operators. It is without doubt that it is the massive incursion into Ecuadorian banana exports by the container lines that has put the charter market under so much pressure. After a steady rise in market share since 2005 this year more bananas will be shipped in reefer boxes than on specialised reefer vessels for the first time. In 2005 a total of 49 000 reefer boxes were shipped out of Ecuador – by 2010 this figure had more than doubled to 110 000: in weekly terms, from just under 1 000 boxes per week to just over 2 000 boxes per week. If the first three months of 2011 are a reliable guide, this figure will show a further upwards leap.

And while Maersk can lay claim to pioneering the conversion of the Ecuadorian banana trade, it is arguably MSC that has done the most damage over the past 24 months: in 2008 the line didn't load a single box – the next year it shipped 2 500 FFE and in 2010 11 800. In Q1 this year it had a 35% share of box shipments, only 2 percentage points behind Maersk, which has seen its share dip below 40% of reefer box shipments for the first time. While MSC's achievement in grabbing market share is certainly impressive, it has not been without its problems. Whether the line manages to retain what it has built remains to be seen. The increase in box traffic from Ecuador has led to increases in shipments to the US, EU and most importantly Russian market, which has seen a 30% rise in imported bananas year to date, according to CIRAD data. Russia has also absorbed more Argentinean, Chilean and South African fruit than ever before at this stage of the year. The general oversupply of tonnage made life even more difficult for the smaller segment, which is already struggling because of the high fuel cost. The segment was hit by the seasonal fall in demand (end of potatoes, citrus) and reduction in the fish catch off Mauretania and poultry cargoes. On a more positive note for operators the reefer mode held its own in the seasonal trades out of Argentina and Chile: although market share of loadings may have dipped, this was due to an increase in total volumes. In absolute terms the reefers lifted a similar quantity in 2011 as they had in 2010, proving the point that there are certain trades where demand for reefers is more inelastic than in others.

■ The European litchi market in May. Supply of litchis to the European market from Thailand was steady but small in May. The fruits from this source were shipped mainly by air whereas batches were already arriving by sea at the same time in previous years. The development of sales of seasonal produce, accelerated by particularly warm weather in April, seems to have left no room for this exotic fruit. Thai litchis were sold on the Dutch and Belgian markets at EUR 8.00-8.50 per kg, weakening to EUR 7.00-7.50 per kg at the end of the month. The French market was supplied only occasionally from the Netherlands. Demand remained marginal as fruits from Thailand were sold only on a specific order basis. Supply was completed by a few batches from Mexico but the fruits were small and not very attractive and this did not encourage traders to continue to sell them. It seems that litchi sales during the European spring are responding to ever smaller demand in the face of European fruits that are more firmly fixed in consumption habits.



© Christian Lavigne

Source: Pierre Gerbaud

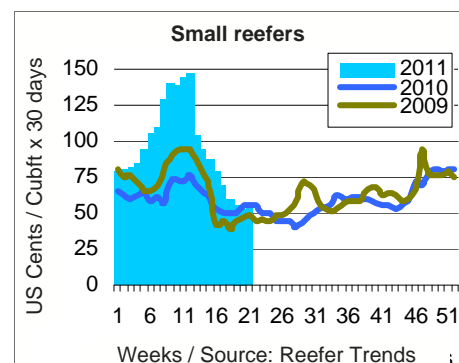
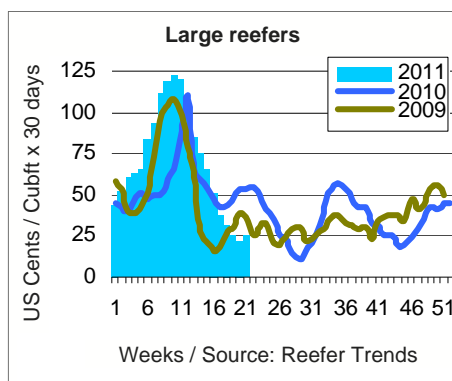
MONTHLY SPOT AVERAGE

US\$/cents/cubic foot x 30 days	Large reefers	Small reefers
May 2011	30	48
May 2010	51	55
May 2009	29	49

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Cherry imports

European market still restrained



Although the world cherry market is still dynamic as a result of increasing demand from emerging countries, European imports have marked time noticeably in the last three years. This is the result of the economic downturn that made the European market unattractive and encouraged Turkish and American exporters to enlarge their client portfolios.

Although cherry exports are increasing steadily at the global level, European imports from third countries have tended to stagnate in the last three years. However, although this is partly the result of conjunctural parameters such as the economic downswing of 2008-09, the situation should have recovered in 2010. But EU imports were only just 38 200 t once again, similar to those of the preceding year, after the boom of the 2000s when they peaked at 51 200 t in 2006.

Even if last year's decrease can still be partly explained by late European domestic crops, it must now be admitted that the decrease may well be structural and the result of strong world demand that affects available supply. Thus even if the European Union is still an important outlet for Turkish operators (28 100 t in 2010 against 34 000 t in 2006 and 2007) because of demand in Eastern

European countries (Bulgaria), priority has tended to be awarded to Russia in recent years. Similarly,

although imports from Chile are holding at around 5 200 to 5 400 t, Chilean exporters tend to target emerging countries. However, the downward trend is continuous for North American cherries, with shipments from the USA (2400 t) down by 35% in comparison with 2009 and Canadian shipments down by 21% (1 000 t).

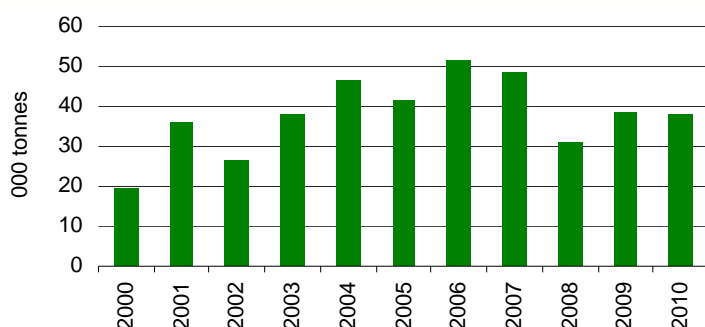
Turkish cherries taking over the Eastern European markets

The ever very dynamic world cherry market is a major challenge for the Turkish fruit industry which, after two difficult years (2008 and 2009), still aims at achieving an export potential of 100 000 t to respond to increasing demand from emerging countries. Turkish exporters set a new record last year with a total of 53 358 t (+ 24% in comparison with 2009) as a result of excellent exports to Russia (14 657 t, that is to say + 18%) and also to Bulgaria with practically doubled tonnage according to the Turkish customs (15 200 t against 8 900 t in 2009 and 2 000 t in 2008). In contrast, shipments are stable at best to the other EU countries such as Germany (17 000 to 19 000 t according to source), and even down for the UK (2 200 to 2 300 t, that is to say - 21 to -25% in comparison with 2009, against 5 000 to 6 000 t until 2006) and to France (300 t against 500 t in 2009).



Cultivated areas are continuing to increase steadily at about 3% per year with plantations of 'Ziraat 0900' for export and also early and late varieties ('Bing', 'Lapin' and 'Sweetheart') to lengthen the production calendar that now runs from the end of May to August. Production of fresh fruits reached nearly 420 000 t last year according to provisional USDA figures. In contrast, the first 2011 fruits were picked nearly a week late towards 15 May in the early zones after a long winter and a cold spring and this may well result in medium production potential. However, an increase in supply and shipments was forecast for mid-June.

Cherry - EU-27 - Extra-Community imports

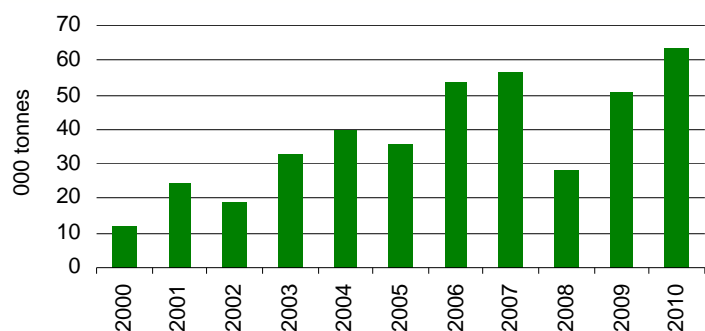


Source : Eurostat

Chile out to conquer China

Cherries are also one of the challenges for Chilean orchard farming and operators hope to double export volumes to 75 000 t (15 million 5-kg boxes) in five years, which would make Chile one of the 10 leading cherry producing countries in the world. The current area totals 16 000 to 17 000 ha, of which 40% consists of young orchards. Planting is continuing in the north and also in the south of the country with new varieties such as very recent plantings of the French varieties 'Earlise' and 'Bigalise' with the aim of lengthening the production calendar. However 'Bing' is by far the most commonly grown variety, accounting for 84% of exports in 2010-11.

Cherry - Turkey - Evolution of exports



Sources : MEU, USDA

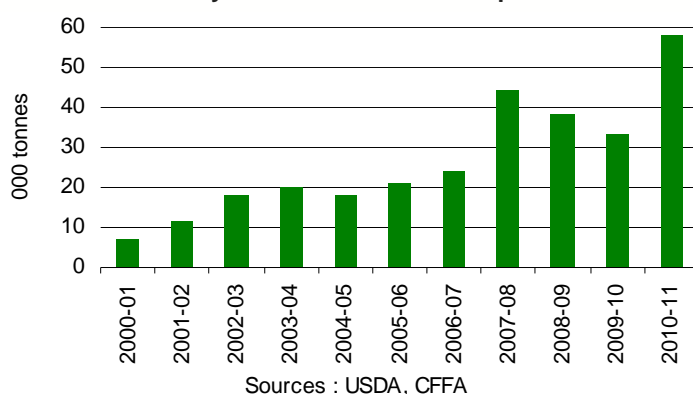
However, demand was slowed by the economic downturn in 2008 and 2009, which affected the European market in particular. Operators then favoured other outlets such as Turkey or the Middle Eastern countries, where substantial quantities of cherries are purchased, and above all China and Hong Kong where demand is stimulated by the Chinese New Year and a free trade agreement. The Asian markets now take nearly half of the volumes exported but operators hope to penetrate new markets such as



India once customs dues have been negotiated. However, cherries must remain profitable for growers if this target is to be attained, especially as the fruit is particularly fragile. The sector is therefore counting on the planting of new high-yield varieties

and is investing in protection against rain. But returns for producers seem to have been fairly disappointing this year. The organisation Fedefruta reports a 20 % decrease against 2009-10 in the average price paid to producers (USD3.32 per kg) because of the very large export potential (11.5 million boxes or 57 700 t, a 72% increase on 2009-10).

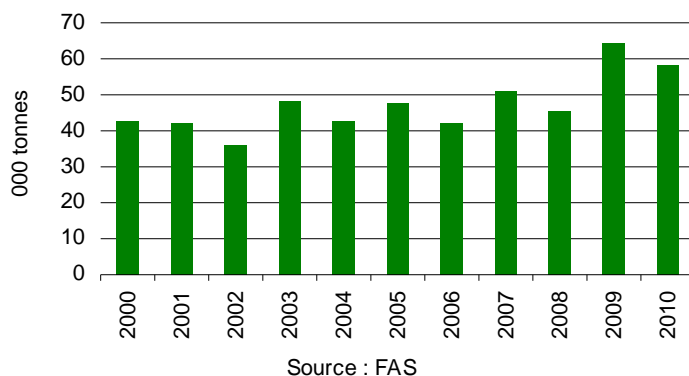
Cherry - Chile - Evolution of exports



The United States aims at a later production calendar

American production is continuing to increase in spite of the sales difficulties experienced in recent years and especially in 2009 for reasons of over-production. However, the 2010 season was a little more balanced as production was smaller after the bumper crop in 2009. The sweet cherry harvest for fresh sales nonetheless totalled 248 000 t (- 16% in comparison with 2009), the second largest harvest of the decade (+ 42% in comparison with 2008), as a result of the steady increase in orchard area (88 000 acres including 60 000 acres in the North-West).

Cherry - USA - Evolution of exports



But exports are reported to have decreased by only 9% in comparison with 2009 (58 500 tonnes) but with a few differences nonetheless. Growth was smaller on the Canadian market, the main outlet for US cherries (24 200 t, that is to say 16% less than in 2009 and 1% less than the average for the last three years) after the strong growth of the early 2000s (7 500 t in 2000 and 12 700 t in 2005), and also a further decrease in shipments to Europe (2 300 t, - 37% in comparison with 2009). The decrease would seem to be the result of the summer fruit crisis in Europe last year and also an unfavourable

exchange rate and strong world demand in August that weakened availability for the European market.

Indeed, demand is growing on the Asian markets. In comparison with 2009, exports increased by 17% to Japan (11 000 t), 15% to Hong Kong (5 400 t) and 5% to South Korea (4 100 t). Shipments to Taiwan decreased by 3 900 t (-43%) following the exceeding of the maximum residues limit (MRL) for malathion in batches from California and Oregon.

The season also started late this year because of very cold spring weather, especially in April, that delayed flowering. However, the harvest might be substantial and even larger than in 2010 but without attaining the record level of 2009. The first fruits were picked in May in California with full potential due in June. The season should not start before mid-June in the North-West states, with full potential at the beginning of July, with a fairly long production peak in that month and above all an increase in supply in August as a result of recent plantings. Operators in the region count on the late segment when there is limited competing supply and increasing demand. The export potential of the North-West states might therefore be considerable in August and certain professional sources forecast 3 or even 4 million boxes in comparison with 2.3 million boxes in 2010 ■

Cécilia Céleyrette, Consultant
c.celeyrette@infofruit.fr



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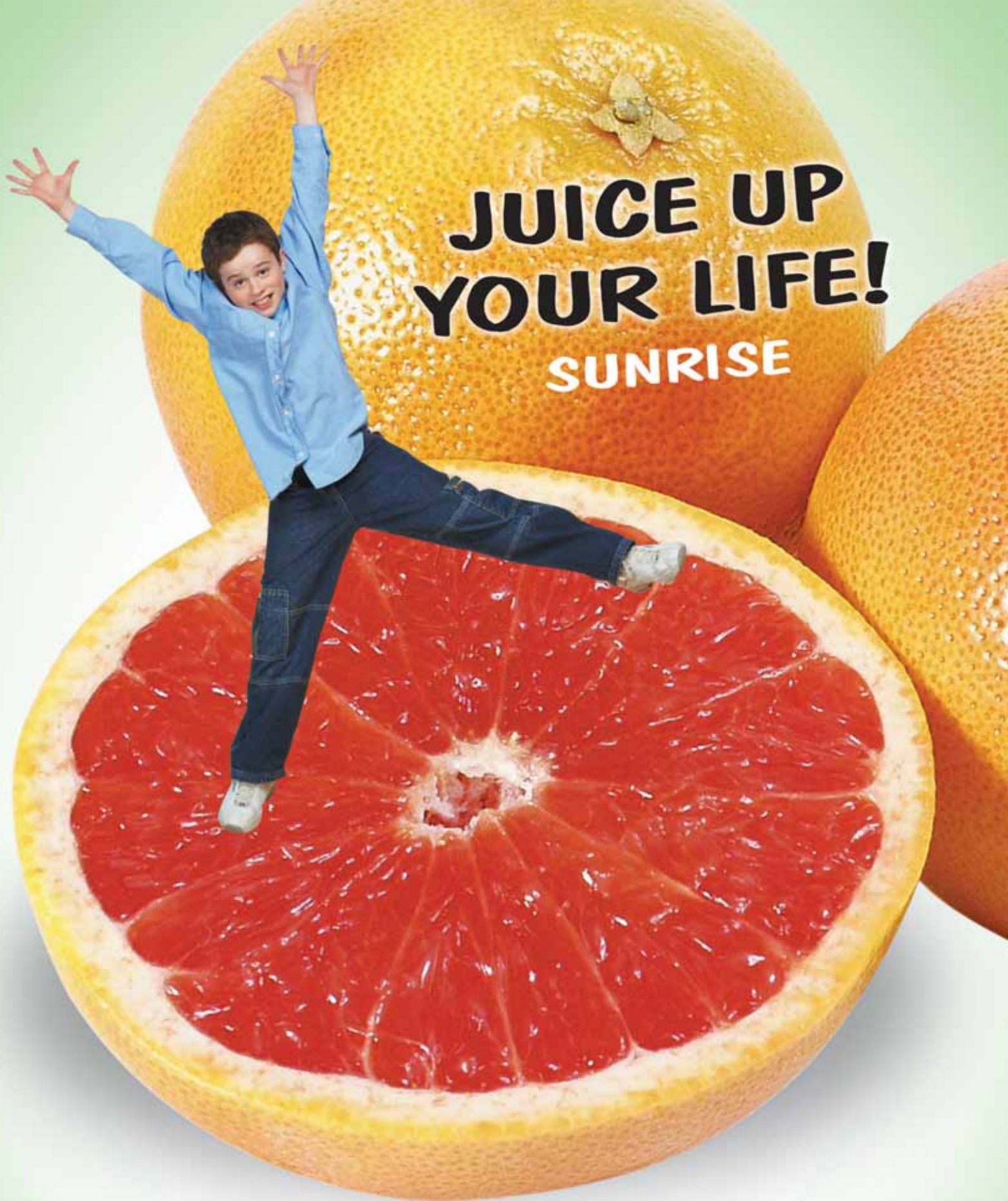
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A report prepared by
Eric Imbert

Grapefruit

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The slope down which the grapefruit market has been sliding since the mid-2000s seems to be just as slippery as ever. Analysis of world demand shows that loss of interest by consumers in the major developed countries has remained very marked in recent seasons. The Eastern European markets are currently the only ones to display growth, but with what profitability for production? Thus in spite of the continuing weakening of the giant producer, Florida, enthusiasm seems to have been replaced by questioning and even resignation among competing sources and the wave of planting in the second half of the 2000s was just a flash in the pan. However, weakening demand is not inevitable. Returning to grapefruit with guaranteed taste qualities would spruce up the tarnished image of the fruit and gain a part of the immense public that ignores it at the moment. FruiTrop reviews the question in detail.



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World grapefruit market

An increasingly dangerous slope

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Stable – but
only just!

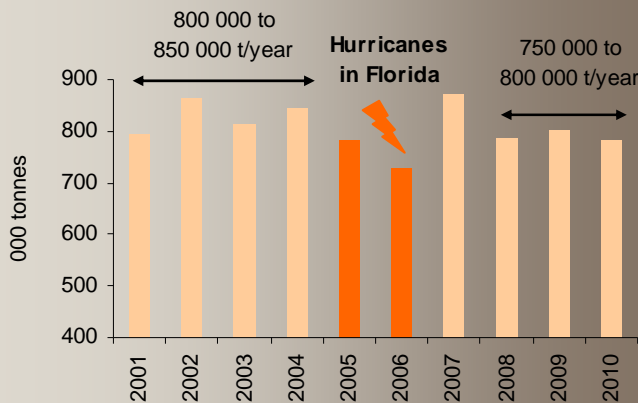
Has the world grapefruit market achieved a new balance? This is at least what the figures gathered by our market news service seem to show. After the depression in the mid-2000s linked with the collapse of production in Florida, international trade seems to have been stable at between 750 000 and 800 000 t since 2008. However, closer analysis shows that this good performance regained is only apparent and the conclusions reached are alarming. Although consumption is increasing in a small number of countries in Eastern Europe—that can be counted on the fingers of one hand—all the other markets in the world display a downward movement. In short, a small measure of joy in a sea of tears.

Distinct slide in consumption
on the major markets

The heart of the market, that is to say the rich countries that account for about 70% of world trade, beats a little more slowly each year. In Western Europe, the leading importing region in the world, volumes from overseas or from producer countries in the region have lost about 30 000 t since 2006-07, slipping below 300 000 t, less than the volumes handled in the mid-2000s when the Florida crisis was at its worst. The same feature can be observed in Japan, the second largest import market in the world, where consumption is now less than 180 000 t after falling by about 40 000 t during the same period. Canada is no different: at about 45 000 t in 2010, imports have decreased by 10 000 t since 2007.

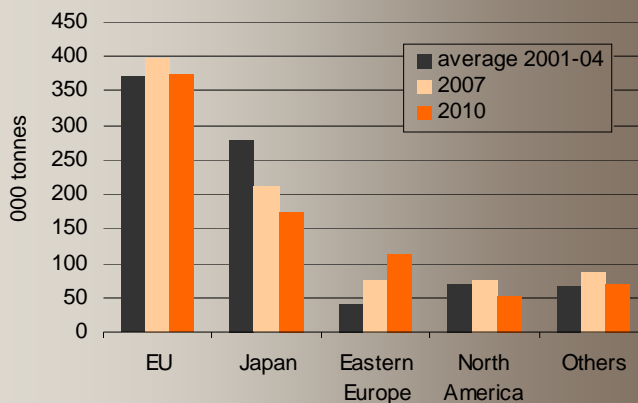


Grapefruit - World trade



Sources: national customs, COMTRADE

Grapefruit - Main world market imports



Sources: national customs, COMTRADE

No new opportunity
for growth on
the horizon...

Another subject for major concern is that there is no upcoming market on the (very short) list of other countries that import significant quantities of grapefruit. Consumption in the Persian Gulf countries has stagnated at between 20 000 and 30 000 t per year for a decade. Nothing is moving at all in South America, the latest part of the world to display interest in the fruit and where imports are stable at 10 000 to 15 000 t per year.

Eden in the East...

The dynamism of the markets of Eastern Europe is the only good news in this very gloomy overview. Imports by countries outside the EU have nearly doubled in the last five years, exceeding 110 000 t in 2010. Russia, which imported about 80 000 t in the latter year, accounts for the greater part of the development of the zone since 2007. Volumes are tending to stabilise at about 30 000 t in the other countries of the region, among which Ukraine is by far the main market. The same smiling faces can be found among importers in the new EU member countries where volumes have gained about 30 000 t thanks in particular to the dynamic Polish and Romanian markets.

Dwindling supply
from Florida

Is shortage of supply responsible for their practically universal moroseness? It can be considered that it plays a role, as in the crisis of the mid-2000s. Production is still dwindling in Florida, losing nearly 300 000 t since 2006-07, the last season with no serious meteorological event with direct consequences for the harvest. In addition, the spread of citrus canker to practically all the counties in the state means that the volumes available for sale fresh have de-

Grapefruit — Main world market imports

tonnes	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Japan	268 650	284 687	274 328	288 510	205 961	170 881	212 837	184 037	178 911	174 770
N. America	78 410	80 668	56 246	64 978	53 982	66 657	74 471	65 515	58 272	53 494
EU	370 074	391 150	366 803	364 098	378 521	357 941	398 540	377 102	386 530	373 288
Eastern Europe	26 848	40 600	41 821	57 346	58 411	72 317	99 772	100 593	104 174	114 320
Others	49 938	68 782	76 387	71 362	85 932	62 231	86 332	60 803	76 398	*70 000

* Estimate / Sources: national customs, COMTRADE



creased strongly. At certain times of the year, this problem has become a limiting feature for importers in Europe where the measures to protect against the diseases are stricter than in Japan, a country reputed for its strictness with regard to the sanitary conditions of produce. Furthermore, the effects of increased production costs on FOB prices make importers very cautious with regard to this produce that changes hands on a firm purchase basis. A 2009 study estimate that greening alone had caused an increase in costs of some 50%, without considering other items. Thus imports decreased from 12.6 million export boxes in 2006-07 to about 9 million during the last season, representing a fall of about 70 000 t.

Unused possibilities for compensation in spite of the increase in Mediterranean production!

However, the upstream part of the chain does not alone account for the fall in consumption. In the Mediterranean region, the second largest grapefruit production area after Florida, growers got ready to be able to take over from Florida as one man's misfortune is another man's opportunity. Planted areas have thus increased distinctly in Turkey and to a lesser degree in Spain and a fair number of Israeli growers have enhanced their export potential by replacing their not very profitable 'Marsh' by 'Star Ruby'. But the results are very mixed. Both Israel and Turkey gained practically no ground in Japan, even though this market is open to the two

sources on condition that a sanitary procedure to eliminate fruit flies is respected. The same has been observed in the United States and Canada. The volumes exported by the Mediterranean supplier countries have only increased in their natural market, that is to say the European Union. But a reserve should be made here too as the increase has resulted more from consumption in the markets in the eastern part of the EU than the replacement of volumes from Florida on Western European markets. The figures speak for themselves: in spite of a 50 000-t decrease in arrivals from Florida, the volumes of Mediterranean grapefruit have not increased on the Western European market, with the increasing Israeli and Spanish shipments just making up for the dips in Cyprus and Turkey, which has redeployed to cover the new member countries.

Rigid market segmentation in Europe

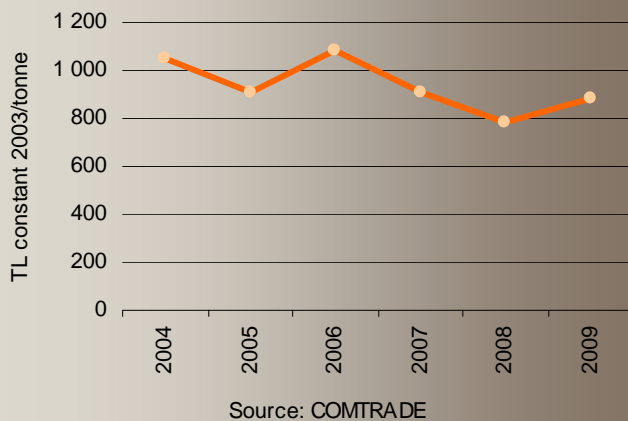
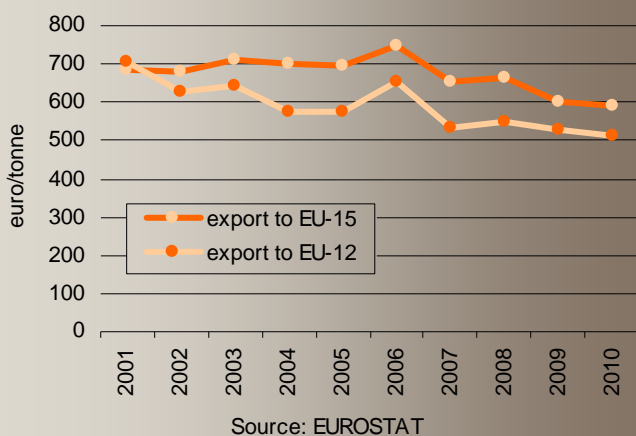
Segmentation of the grapefruit market is clearly very rigid and fruits from the Mediterranean cannot substitute those from a more tropical climate. The particular physiology of this citrus fruit whose taste characteristics are strongly marked by soil and climate conditions is a major reason. High, stable temperatures make grapefruit sweeter than those grown in colder climates, giving the fruit a more characteristic flavour and making it less ordinary.

Southern hemisphere sources not spared

But it is not only Mediterranean grapefruit that is striving to find a new public. The performance of southern hemisphere sources is not much to write home about either, even though the taste of the fruits is 'tropical'. Here again, there seemed to be a fine opportunity for development, at least on paper. The early end of the northern hemisphere season should have given the southern hemisphere a broader sales window. But performance clearly did not match the theory. The summer grapefruit season in Japan shrank: after 70 000 to 75 000 t in a normal year, the total fell to 45 000 to 60 000 t in 2009 and 2010. The same trend was seen in the EU, where average imports of 120 000 to 130 000 t lost 20 000 t in spite of the entry of 100 million more consumers following the enlargement of the community. Canada did not save the situation as its imports were marginal and stable at about 5 000 t. The only positive feature to report is the breach opened by South Africa in



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Grapefruit - Turkey - Evolution of customs value**Grapefruit - Spain - Evolution of customs value**

2010 in the US market, now accessible for certain zones certified as free of black spot. But the Springboks' try remains to be converted as shipments totalled no more than 200 tonnes in this first season.

A simultaneous decrease in value-added

But the less than sweet icing on the cake was that it was not only the volumes traded that decreased. The decrease in consumption also caused a decrease in value-added for fruits from certain sources. The increase in the volumes sold on certain Eastern European markets sometimes looked like dumping. Thus, analysis of customs values of the Turkish grapefruit that dominates these markets shows a decrease of slightly more than 15% in local currency from 2005-06 to 2008-09. It is even more concerning to note that some sources are confronted with a similar phenomenon of decrease in returns on the Western European markets in spite of the decrease in overall sales. The customs values of shipments of Spanish grapefruit to EU-15 display a fall of a little more than 15% between 2005-06 and 2009-10. Given the increase in the cost of all factors of production, it is reasonable to assume that returns for producers have decreased, even if the increase in productivity has probably softened the blow. Israeli exports have just managed to maintain stable customs values by increasing the volumes sold at the end and above all the beginning of the season when prices peak. In the last two seasons, Israeli exports sold 20 to 30% of their produce from mid-September to mid-November, in contrast with 10 to 15% in the mid-2000s.

Shaddock attacks

The simultaneous rise of Chinese shaddock is probably another factor. Even if shaddock and grapefruit are not interchangeable, if only for reasons of size, they compete on retail shelves. It can also be supposed that grapefruit is much appreciated by retail distributors as the returns are closer to those of exotics than to run-of-the-mill citrus fruits. Individual fruits are purchased for less than one euro (the average season price is some EUR 9.00 to 10.00 for a box of 10-11 fruits) resold at EUR 2.00 to 3.00! Great business, especially as the fruits are neither particularly perishable nor difficult to handle. It quickly went further than the French market and the ethnic/festive segment (Chinese New Year) to become an exemplary success of the 2000s. European imports were less than 10 000 t in the mid 2000s and reached some 80 000 t in 2009 and 2010. Sales of this fruit have also increased in Eastern Europe (more than

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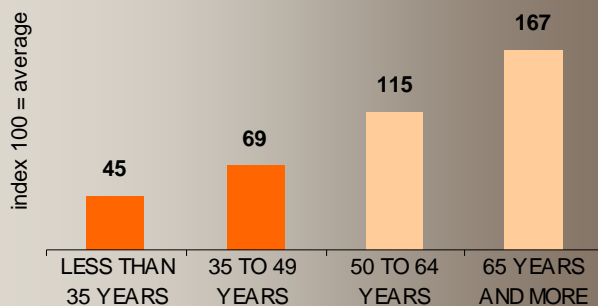


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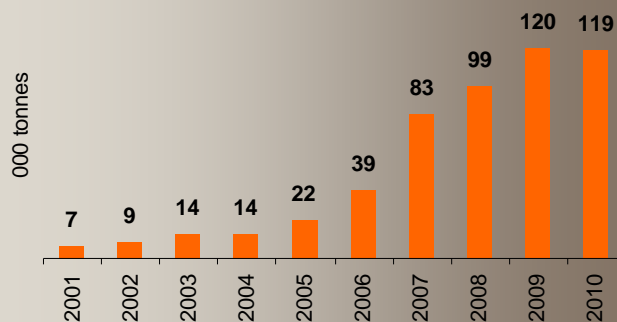


Grapefruit - France - Consumption by age bracket



Source: Kantar Worldpanel

Shaddock - China - Evolution of exports



Source: COMTRADE

30 000 t imported to Russia in 2009) and it is also sold in Canada.

A glaring lack of image

It is pitifully banal to say that the image of grapefruit is in need of rejuvenation. But it should be repeated as this is a serious, universal situation that is tending to worsen. An illustration using an emblematic market makes it possible to understand the seriousness of the situation: in France, consumption by persons younger than 35 is less than half of the average and has decreased by nearly 10% in the last five years. There are many factors in this loss of interest. A well-known component that also hits the consumption of fresh oranges is the tendency for consumers to favour more convenient items such as juice or easy peelers, or dairy products if we go beyond the universe of fruit and vegetables. The components related to the produce itself are also concerned, and these differ from one market to another. The polemic about the interactions between certain substances in grapefruit (bergamottin) and statin group drugs seems to have continued to slow consumption in the United States. In Europe, the acidity of the white grapefruit served in school canteens in the 1970s and 1980s seems to have put a whole generation off the fruit. Grapefruit is clearly in need of a new image.

Rejuvenation

What is the recipe for putting the freshness back into grapefruit? It is difficult to be very impressive on the 'ready-to-eat' front, which nonetheless attracts the young public. A grapefruit will never be a clementine and 'fresh-cut' and simply peeled 'natural' production techniques that reconcile the quality of the finished product and a reasonable price have not yet been perfected. Peeling is still a problem. Solely mechanical techniques are not sufficient as they wound the fruits as the latter are unevenly

Shaddock — China — Exports

tonnes	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total, incl.	6 595	8 774	14 201	14 073	21 716	38 868	82 814	98 879	120 160	119 204
EU	14	50	396	1 431	5 485	16 890	47 148	66 712	82 917	78 000
Russia	-	-	79	787	5 040	9 191	22 014	19 171	22 818	31 789
China HK	3 521	5 272	9 702	8 666	5 166	5 705	5 321	1 870	3 134	3 134
Philippines	678	742	1 404	124	417	1 068	641	1 812	2 404	2 404
Canada	1 019	1 430	1 184	1 961	3 418	2 699	2 563	2 669	2 390	1 815
Ukraine	-	-	-	-	37	360	1 056	2 162	1 055	1 055

Note: estimates in italics / Source: COMTRADE

shaped. They have to be combined with a complementary enzyme treatment to digest the remains of the albedo, and this considerably shortens the lifetime of the finished product. In this context it is difficult to consider the powerful snack segment. In contrast, the diversification of forms of consumption is certainly a pathway, especially as the use of this fruit either as a starter or a dessert gives a broad spectrum. Promoting grapefruit as an ingredient for salads and other dishes would probably attract young consumers.

Check the sugar content to avoid surprises at tasting!

Another image to be eliminated is that the fruit is too acid—a major brake on purchases, especially in Europe. For although some consumers seek a more characteristic taste, too much acidity seriously affects the reputation of the fruit. It would seem important to take several complementary steps. Export stakeholders must take care to keep to a minimum sugar:acid ratio. This approach is a key ingredient in the success and fame of grapefruit grown in Florida. It has to be admitted that this is not the case today, especially for certain Mediterranean producers at the beginning of the winter season when prices encourage concentrating on sales rather than using a refractometer. This mission is all the more possible in the Mediterranean as the sectors are concentrated in certain major supplier countries. Fewer than 10 structures are active in Spain. In Israel, Mehadrin and Agrexco account for more than 80% of citrus exports. These two countries also have joint trade organisations (AILIMPO in Spain and the Citrus Marketing Board in Israel) that are capable of setting up a joint quality certification policy and profit from this through promotion downstream. AILIMPO has already done this for the lemon sector. In Turkey, the problem of acidity is acute in certain zones that are marginal for grapefruit in terms of climate but is more difficult to handle because of the dispersal of the sector. However, for a short time now there has been a citrus board that is capable of handling the problem.



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Publication of a study showing the absence of serious interactions between Lipitor and grapefruit juice

The interaction should between the taking of certain drugs and grapefruit juice are a serious hindrance to consumption, especially in the United States. In particular, this point weighs heavily on the large numbers of people treated with statins for cholesterol. A recent study published in the British Journal of Clinical Pharmacology shows that Lipitor, the main anti-cholesterol drug sold in the world, does not interact sufficiently with grapefruit juice to cause clinical symptoms. This is perhaps another good sign for re-launching advertising focused on the advantages of grapefruit for health, an area hitherto affected by the polemic. In addition to its nutritional qualities (especially vitamin C and fibres), grapefruit plays a positive role in the fight against obesity and cardiovascular diseases, in particular by boosting HDL cholesterol levels.

Where are the varietal innovations?

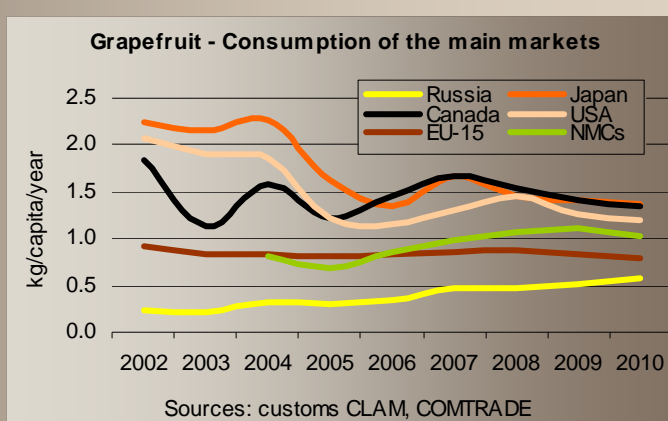
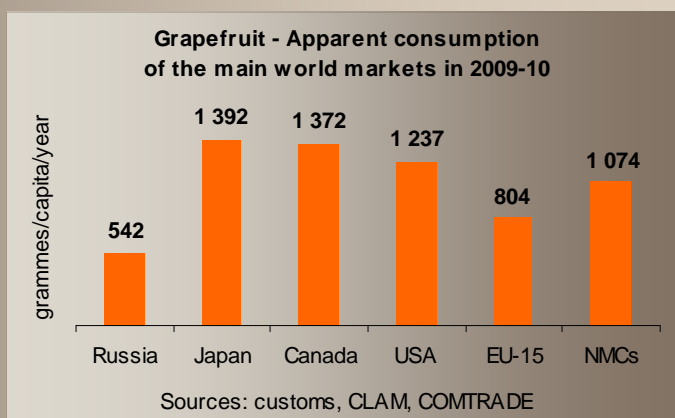
Market dynamics and innovation are linked in agriculture just as they are elsewhere. The success of 'Extra Sweet' pineapple and Chinese shaddock prove this point. Varietal research can also be an effective line of attack for the development of grapefruit cultivars with a sweeter flavour. However, although varietal research is very active in citrus, grapefruit is the poor relation in current breeding programmes that are focused on easy peelers that generate more value-added. Although new shaddock varieties have been bred recently ('Valentine', etc.), this is not the case for grapefruit. The last new cultivars that made a mark as regards dissemination were 'Flame' and 'Rio Red' in 1987 and 1988 respectively. Is anything new expected in the short or medium term? Some research centres are working on the subject but it seems that nothing is due for completion at last in the medium term.

Deliver the message of 'the pleasure of grapefruit' to consumers

Advertising centred on the image of a fruit for pleasure remains. Is this optional? No! The extent of the decrease in consumption (see box), that can only get worse, given the disaffection of the younger age groups, should needle the trade into action. There is first the question of budgets—a complex problem in a context of stagnating sales and increased costs. The producers' associations found in all exporting countries must play a leading role in making their public aware of the need to fund this type of programme. The FDOC and, more recently, the CGA in South Africa imposed by decree a parafiscal tax for funding the promotion of grapefruit. There is also the question of means. Although operations to promote awareness are essential

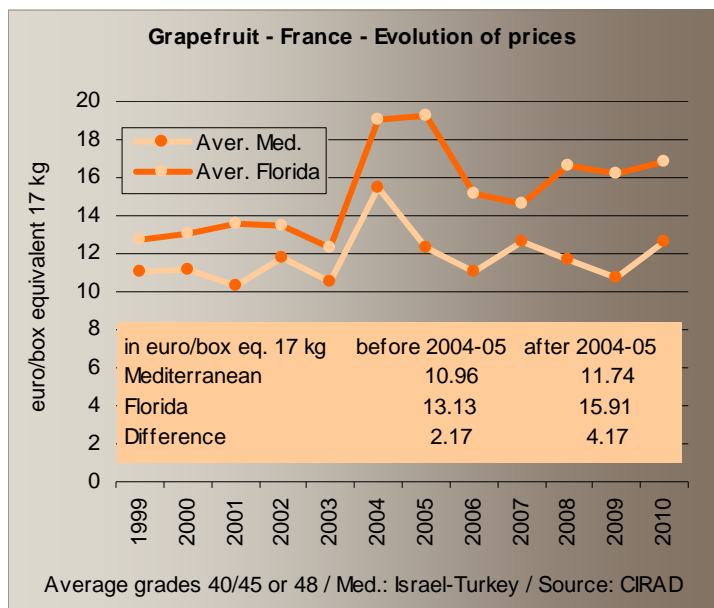
Consumption: a black decade

The series of disasters continues. After the collapse of Florida caused by hurricanes in the mid-2000s, when some markets such as Japan observed a fall of nearly a kilo per person per year, the decrease in consumption continued strongly. In the last three years, annual consumption per person has decreased by between 100 and 300 g per person in the rich countries. The stars of the world market were the hardest hit. The decrease was nearly 20% in Japan and Canada, which nonetheless remain in the lead with more than 1.3 kg per person per year. The United States lost about 7% at about 1.2 kg per person per year—hardly any more than the levels of 2005 and 2006 when direct losses caused by hurricanes sent production in Florida down to a historically low level. Western Europe also lost 100 g per person and 10% of total consumption which slid to 800 g per person per year. The movement varied considerably from one country to another in Western Europe. France, the main EU market for grapefruit, lost about 100 g but per capita consumption remained higher than 1.2 kg and continued to rival that of the world leaders. The fall was tremendous in the United Kingdom with a per capita loss of 250 g and a switch in status from that of over-consumer to one of under-consumer. Grapefruit is still not very attractive in the countries of south-west Europe and especially in Spain even though it is one of the leading European producers, along with Cyprus. The status quo in Italy, another large EU market, is fairly honourable. However, Germany has displayed the best performance with about 850 g, this being above the European average. In Scandinavia, with 170 g and an upward trend, the Swedes and above all the Danes are affirming their positions as large consumers, even if the total volumes imported are still moderate. The last countries in the world to display a certain dynamism are in Eastern Europe. Consumption in Russia has increased by more than 200 g and is now more than 500 g per person per year. The increase in volumes is some 150 g in the new member countries, where consumption is exceeding that of the Western European countries and is more than 1 kg per person per year. This performance is strongly linked to extremely strong dynamics in Bulgaria, the Baltic countries and Poland. Consumption is stable in Romania where annual per capita consumption at 1.4 kg makes it one of the largest consumers in the world.



Grapefruit — EU — Consumption				
	Consumption 2009-10 (kg/cap./year)	Evolution 2009-10/2006-07 (kg/cap./year)	Apparent volumes (tonnes)	Population (millions)
France	1.218	- 0.091	78 787	64.7
Denmark	1.006	+ 0.174	5 533	5.5
Belgium	0.844	- 0.187	9 114	10.8
Germany	0.826	+ 0.149	67 549	81.8
Sweden	0.810	+ 0.032	7 536	9.3
Aver. EU-15	0.804	- 0.040	306 338	381.1
Greece	0.669	- 0.095	7 557	11.3
Ireland	0.650	- 0.175	2 926	4.5
Luxembourg	0.610	- 0.155	305	0.5
Italy	0.572	+ 0.010	34 498	60.3
UK	0.557	- 0.252	34 549	62
Austria	0.425	- 0.001	3 572	8.4
Finland	0.390	+ 0.033	2 109	5.4
Spain	0.380	+ 0.084	17 478	46
Portugal	0.099	+ 0.036	1 051	10.6
Baltic states	1.49	+ 0.416	10 282	6.9
Romania	1.36	- 0.010	29 257	21.5
Bulgaria	1.35	+ 0.571	10 224	7.6
Aver. NMCs	1.07	+ 0.153	107 457	100.1
Czech Rep.	1.05	+ 0.087	11 046	10.5
Poland	1.04	+ 0.221	39 667	38.2
Slovakia	0.92	- 0.014	4 988	5.4
Hungary	0.39	+ 0.003	3 914	10

Sources: EUROSTAT, CLAM



(tastings in shops, press advertising), shoppers should be helped to identify the fruit readily in shops at the moment of purchase. A simple sticker highlighting the taste qualities of the fruit and that respects the regulations on nutritional claims, would probably suffice if the message is repeated in point-of-sale advertising and in the campaigns mentioned above.

Florida obliged to run advertising?

More active advertising is probably more essential for Florida than for any other production source as in addition to fighting falling consumption, this supplier must justify its increasingly elitist position with regard to its competitors in Europe for reasons of the rocketing of cost prices. The difference in quay price between grapefruit from Florida and fruits from the Mediterranean has doubled since the hurricanes of 2004 2005, increasing from a little more than EUR 2.00 per kg to more than EUR 4.00 for a 17 kg equivalent box (see graph). This is hard to handle when promotion budgets are shrinking rapidly as FDOC funds are logically redirected towards the control of greening, a lethal disease. Would it not be wise in this context to concentrate marketing efforts on the most receptive markets and those with the best potential? France is an ideal target as it takes about half of the volumes from Florida that arrive in the EU and the taste merits of fruits from this source have already been strongly highlighted. Flexibility of demand is another strong point of the French market. At a time when the quantities available at production are decreasing steadily, the ability of being able to ship red or pink fruits and several size references makes the work easier and large-scale promotion operations can be set up. The British market does not have this advantage and many operators

are abandoning it because of its rigidity and because of the weak currency.

Tone down diet claims?

Is a return to the idea of a fruit for pleasure incompatible with that of grapefruit being an ally in diets to lose weight that are often at the core of current advertising campaigns? The question is a twin one. The image of diet foodstuffs still has a very negative connotation as regards taste. The budgets used by major brands of the sector to try to demonstrate that their hyperprotein cream or fatless biscuits are merely edible are proof of this. Another problem is that it is difficult to both guarantee a sugar content—the sworn enemy of those who want to become slim—and push the 'diet' aspect of the fruit.

Work on added-value

Although increasing the volumes sold is important, working on added value is also a priority. Marketing studies carried out recently in the UK for CGA in South Africa have shown that size can be a major element in segmentation and justify greater value-added. Should a cheap range of small fruits in nets be developed, as is already done for a fair number of fruits? Another line of approach could be the development of a brand policy centred on a guaranteed sugar content, as some producers have done for melons.

Reasons for optimism

Reasons for concern are numerous: practically generalised decrease in consumption, ageing of the public that is faithful to grapefruit and absence of innovation. Paradoxically, this fruit has enormous development potential just through its poor market penetration. For example, only 20% of the British and less than 50% of the French, who are nonetheless the European leaders in terms of consumption, bought grapefruit in 2010. In addition, the fruit still has considerable seduction potential. Even if it is not as immediately ready to eat as a clementine or a banana, a grapefruit is easy to prepare and has many uses: fresh as a dessert or a starter (whole or as a salad), juice. But it is necessary to go back to basics, that is to say supplying consumers with grapefruit that are certain to give pleasure and making this known ■

Eric Imbert, CIRAD
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World grapefruit production

Fight or cry?



© Eric Imbert



Citrus canker

Although the decrease in grapefruit consumption is very clear, as is shown in the preceding article, what are the trends upstream at production? **Fruitrop** makes a detailed review of the dynamics of exporting countries in both hemispheres.

Trend still downward in Florida

In Florida, adaptation of the production structure to the decrease in demand is not voluntary but something suffered unavoidably. The grapefruit industry there is the world leader by far in all aspects from processing to fresh exports. But the scale is changing. Although there has been better profitability in recent seasons, the sanitary problems suffered still darken the horizon and go a long way towards accounting for the strong decrease in production capacity in the 'Sunshine State'. The change in the total area under grapefruit clearly illustrates the seriousness of the situation. The number of trees has halved in six years from about 10 million before the 2004 hurricanes to hardly more than 5 million in 2010. Greening has had devastating effects and FDOC's most recent forecasts show that it will probably be the sector's biggest enemy in the years to come (see box).

One disease may hide another

Meanwhile citrus canker seems to be causing a very immediate tension in trade in fresh fruits. The hurricanes that swept the area in 2004 and

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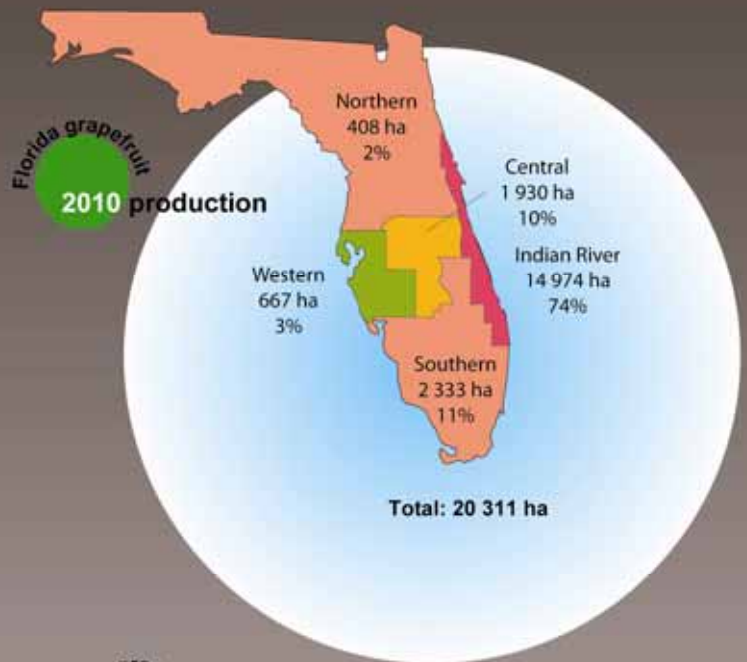
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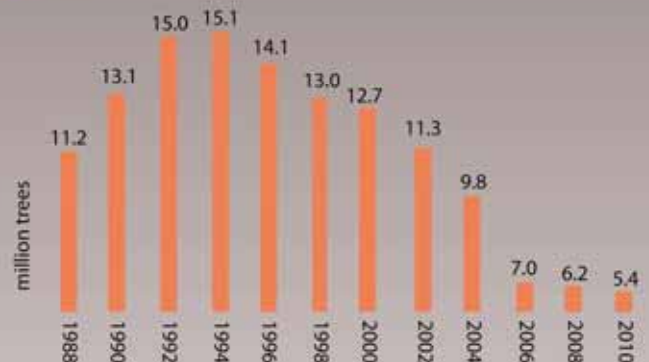
Florida grapefruit



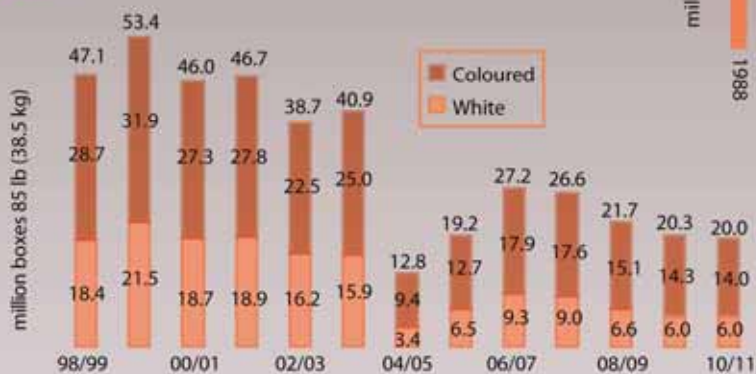
Florida grapefruit Margin at production



Florida grapefruit Planted areas



Florida grapefruit Production



Florida grapefruit Exportations

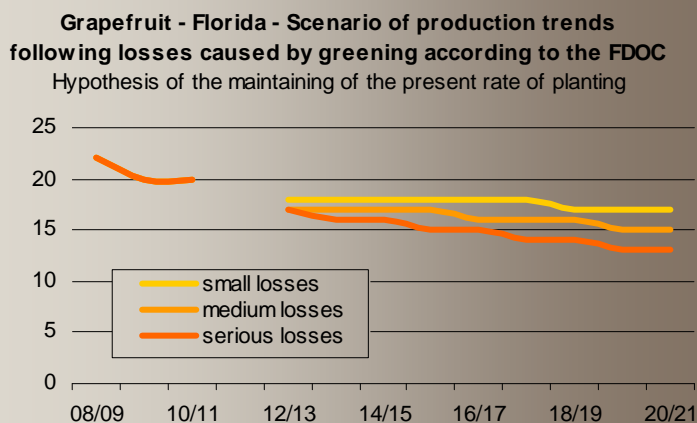
Million boxes 42.5 lb / 19.25 kg											
Season	99/00	00/01	01/02	02/03	03/04	04/05	05/06	06/07	07/08	08/09	09/10
Total, incl.	33.9	31.9	31.8	28.3	30.1	13.4	12.5	20.6	19.8	17.4	17.4
Japan	10.9	10.7	11.2	10.2	12.1	4.8	4.6	7.9	7.0	6.0	6.3
USA	13.2	11.6	11.1	9.9	9.0	4.9	4.8	6.8	6.2	6.0	6.1
EU	6.4	6.6	6.6	6.2	6.9	2.8	2.1	4.4	5.0	3.9	3.5
Canada	2.3	2.2	2.2	1.6	1.8	0.8	0.8	1.3	1.2	1.1	1.2
Others	1.1	0.7	0.7	0.3	0.6	0.1	0.2	0.3	0.5	0.3	0.4

Source: USDA / Processing and presentation: Chez Vincent, Cirad-Fruitrop

Greening in Florida

Although the horizon is not completely black in Florida, the future is not too good according to the long-term production forecasts (horizon 2020-2021) published by the Florida Department of Citrus in February. The scenarios described and which vary mainly according to the degree of incidence of greening and the rate of replanting all indicate a continued decrease in production. The most probable one is not likely to be the worst. It is true that greening has spread strongly, with 8 to 9% of the trees in Florida displaying symptoms—a figure that can probably be doubled given the number of healthy carriers of the disease. However, the comparatively old age of the orchards and the progress made in control of the disease (mainly in management of the psyllid vector by means of

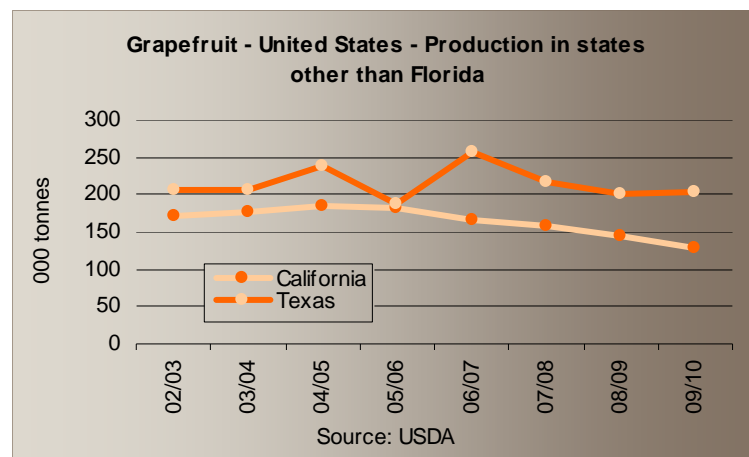
the organisation of joint spraying, including coverage of abandoned groves) lead to considering that the extreme tree loss scenarios can be avoided. However, there remains a recent phenomenon whose importance has yet to be measured. This is the appearance of resistance to certain insecticides. The present replanting rate representing half of the trees lost and nursery production capacity suggest that the most optimistic scenarios should also be discarded. On the basis of this double assumption, the harvest would decrease from about 20 million boxes to 15 million by the end of the decade (- 25%). According to the FDOC, these production levels would enable the sector to maintain its viability while waiting for new management methods and in particular green-ing-resistant plants.



2005 made the policy of eradicating this disease impossible. Citrus canker has since spread to all the counties. Although, unlike greening, the disease does not kill the tree it reduces yields and causes blemishing of the surface of the fruits, making them unsuitable for sale fresh. It is also a quarantine disease on certain export markets and these impose sanitary procedures. The regulation in force to protect EU production is very strict and requires not only the monitoring of fruits at the packing station but also an orchard registration procedure after inspection. The preliminary export statistics for the 2010-11 season seem marked by the worsening of the problems caused by this disease. Small fruits size and probably canker as well have caused a distinct decrease in the proportion of production devoted to the fresh fruit market, which has dropped from about 48% in 2009-10 to 43%. As a result, exports that had stabilised at slightly more than 10 million boxes in 2008-09 and 2009-10 decreased by a million boxes in 2010-11. This is double punishment for growers who, in addition to seeing their crop dwindle also suffer from a decrease in the proportion of production that can be sold fresh, the more profitable segment of the market.

No enthusiasm in the other US producer states

No particular enthusiasm is to be reported in the other grapefruit producing states in the United States. Areas are stable in Texas. Production potential is still 200 000 to 250 000 t, with the harvests of the last two seasons towards the lower end of the range because of





meteorological events. Most of the fresh fruits forming some 55% of production are still sold on the domestic market. In contrast, production is clearly decreasing in California. Producers are hard-hit by the decrease in demand with even the Inland Empire groves (Hemet, Temacula) affected, even those these have a summer production calendar that protects them from competition from the large producer states mentioned above. The Californian harvest dwindled from about 180 000 t in the mid-2000s to hardly 130 000 t in 2010.

End of the planting trend in Israel

Although spared from the scourge of greening, Mediterranean production is also stagnating or even decreasing. Rendered euphoric for a while by the gap left by Florida, producers have become more cautious as demand is slow. Israel is probably where the grapefruit speculative bubble burst most clearly. The second part of the 2000s was marked by the large-scale plant-



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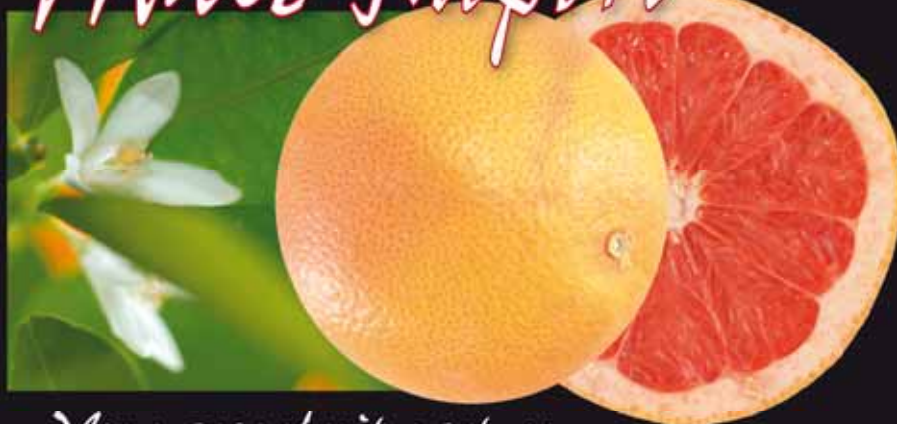
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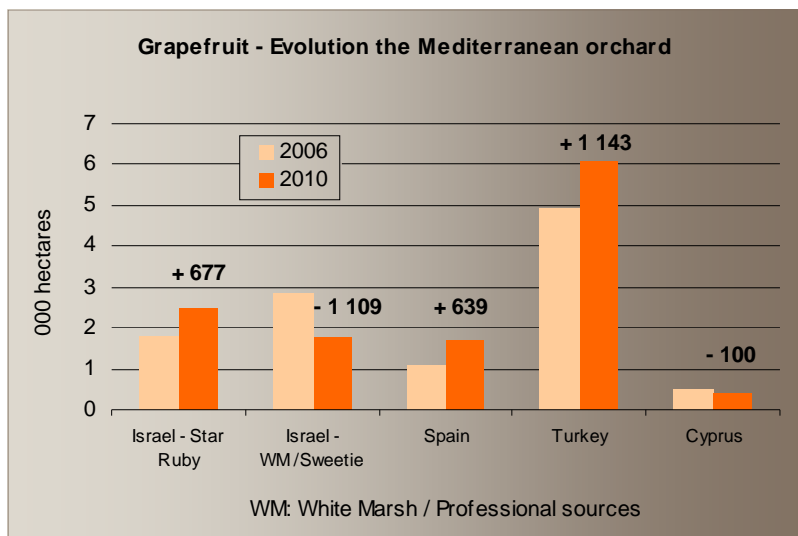
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ing of 'Star Ruby', with a little more than a thousand hectares newly planted or renewed from 2005 to 2007. Given the limited labour and water resources, this dynamics was at the expense of the least profitable varieties. Three varieties were grubbed up in particular: 'Marsh', delivered to a saturated juice market, 'Sweetie', which fell victim of lack of enthusiasm from the Asian clientele and 'Goliath', felled by Chinese shaddock. The enthusiasm for 'Star Ruby' has waned in recent years: the annual planting rate was still slightly over 100 ha in 2009 but no more than about 30 hectares in 2010. Easy peelers, and especially 'Or', formed practically all the 1 200 to 1 300 ha of citrus planted in the last two years. However, production should increase in the coming years. The 4 400 ha of 'Star Ruby' counted in 2010 should finally give production of about 300 000 t.



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Dwindling profitability halts planting in Turkey

Grapefruit no longer seems to be a star crop for Turkish growers. In spite of the 150 000 t exported in 2009-10 and an increase of 50 000 t per year since the mid-2000s, the wave of planting has fizzled out, as in Israel. However, this source still possesses one of its major assets, that is to say its very strong anchorage in the Eastern European markets where the Turkish sector profits from its proximity and the special family organisation that makes it possible to ensure payment in countries where the risk of bad debts is very high. Furthermore, Iraq is now a new market and is playing an important role, especially for small fruits. Volumes of the latter were still insignificant in 2005 but exceeded 4 000 t in 2010. However, profitability has de-

creased considerably and is now disappointing, as is shown by the customs values mentioned in the preceding article. In this context, the total area has stabilised at about 6 000 ha according to official sources, with growers preferring to develop the production of much more lucrative easy peelers. The increase in grapefruit production expected in the years to come should be more moderate than that of the last part of the 2000s and be limited to the increase in production of the last groves planted. The reconversion of a large proportion of the areas under 'Marsh' and 'Ruby Red' into 'Star Ruby' (and also 'Rio Red' which lengthens the season) should probably help to strengthen exportable potential to a volume slightly greater than the growth of production.

Cyprus running dry

Some countries have to face very handicapping weather conditions. This is the case of Cyprus where the grapefruit sector, and the citrus sector in general, is declining in particular as a result of recurrent drought throughout the 2000s. The production recovery observed in recent seasons was very much a one-off affair and not the reflection of dwindling orchards. The total area has decreased by two-thirds in 15 years and was estimated to be about 500 ha in 2009. Exports totalled some 50 000 t per year at the beginning of the second half of the 2000s but were only 15 000 t in 2008-09 before the conjunctural recovery to 25 000 t that has already been mentioned.

A little planting in Spain... for lack of an alternative

Growth of the sector in Spain seems much weaker than it was just after the Florida hurricanes, when the planted area increased by nearly 400 ha from 2006 to 2008, exceeding a total of 1 400 ha. However, it seems to have recovered after a short pause in 2009. Official and professional figures show that the area is still developing in Murcia and more moderately in Andalusia (from Janda to Cadiz, from La Costa to Huelva and above all near Seville where most of production is concentrated in the La Vega/La Campina zone). The context accounts for this remaining measure of dynamism. The economic situation is difficult in Spain and although producers' returns are decreasing, they are still greater than those of other citrus crops like lemon and orange that experience regular crises.

What is happening
around the pyramids?

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Might Egypt be one of the last Mediterranean sources whose production is increasing significantly, to the point of joining the major supplier countries? It is difficult to assess production levels and dynamics (professionals talk in terms of 60 000 t). Grapefruit is still very marginal in comparison with orange which is the leading citrus crop in the country with two million tonnes. However, the development of grapefruit at the international scale shows that the sector is developing. Exports increased from about 1 000 t in the mid-2000s to nearly 20 000 t in 2009-10. Production today is shipped mainly to Saudi Arabia (two-

thirds of the total) and to Eastern Europe (10% of the total, shipped mainly to Russia).

Corsica: an original approach based on quality is paying off and will soon be registered!

Growers in Corsica have concentrated on quality in recent years. The excellent position that this source has gained on the French market is the obvious symbol of a successful approach. The optimisation of fruit sugar content thanks to a harvest that starts only in April, absence of treatment after harvesting and a limited grove to sales time are strong signs of credibility with both retail distributors and consumers. These criteria should shortly be guaranteed by a PGO. But the area under grapefruit is stable and limited to about 150 hectares. The technical difficulties involved in growing fruits that can be sold fresh with a good yield make most producers cautious.

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JANUARY
FEBRUARY
MARCH
APRIL
MAY

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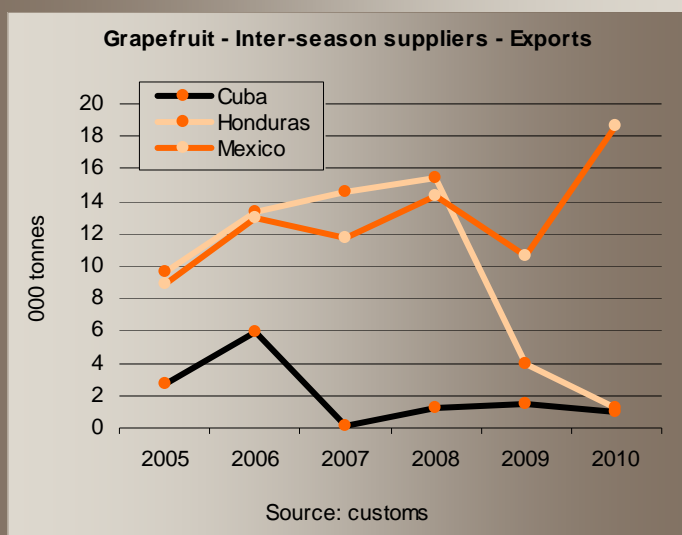
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Grapefruit — Inter-season origins — Exports						
tonnes	2005	2006	2007	2008	2009	2010
Cuba	2 717	5 951	159	1 268	1 500	1 000
Honduras	9 648	13 372	14 537	15 477	3 998	1 269
Mexico	8 870	12 923	11 674	14 338	10 656	18 697
Total	21 235	32 246	26 369	31 083	16 154	20 966

Sources: national customs, COMTRADE

Profound reorganisation of the portfolio of supplier countries during the inter-season

Deep-seated changes have also taken place in recent seasons in Central America, with most of the source countries shipping during the window running from the end of the winter season to the beginning of the summer crop. The historical leaders have lost their positions in a context of dwindling demand. Europe imports most of the fruits for this special segment and its average imports have decreased from about 25 000-30 000 t to 20 000-25 000 t in recent years.

Honduras, which exported 10 000 to 15 000 t per year, mainly to the EU, has practically disappeared from the grapefruit export scene. Shipments totalled only 6 000 t in 2009 and hardly exceeded 1 000 t in 2010. Faced with recurrent problems of fruit keeping quality, the main operator, a sugar group, has ceased diversification into fruit and is refocused on its core activity.

Cuba has declined in a similar way. The sector was already fragile in economic terms and was considerably weakened by several hurricanes and by the arrival of greening in 2008. Exports have been marginal since 2007. Might we see a recovery in the coming seasons, as it has been promised in numerous press releases in recent months? The 2007 plan for the re-launching of citrus growing could have made it possible to replant large areas at Jagüey Grande, the main production zone on the island, and to re-launch operations at Ceiba, where 6 000 ha had had to be grubbed up. However, the effects of the plan have yet to be seen. According to the national statistics office, both the orchard area and production are still decreasing. The 2010 citrus harvest was estimated to have been 320 000 t. This is 40% of that of 2004!

Mexican toronja is taking over during the inter-season

It is clear that Mexico has gained the inter-season shares lost by the other sources. The planted area is fairly stable at an estimated 450 ha in Yucatán, a historical supplier of the European market. Although a psyllid vector of greening was detected in 2009, the disease seems to have spared the commercial groves. The export potential is therefore unchanged at some 5 000 to 8 000 t per year, shipped mainly to the EU and Canada. The figure should return towards the bottom of the range this season after a strong decrease in production in 2010 for meteorological reasons. The improvement is to be sought on the Pacific coast in Michoacán, hith-

erto known more for its avocados. Production potential has existed for a long time. The citrus area is protected from the hurricanes that sometimes hit the Gulf of Mexico and is the second largest in Mexico after the state of Vera Cruz. However, most of the crop was sold on the domestic market until the end of the 2000s when a producer launched sales on the international market and made the state the country's leading export area. Volumes have continued to increase in recent years as the planted area has increased. The total exceeded 10 000 t last year. Supply is now divided equally between pink ('Ruby Red') and red fruits ('Star Ruby' and 'Rio Red'), whose share has increased in recent years.

The South African grapefruit sector at a crossroads

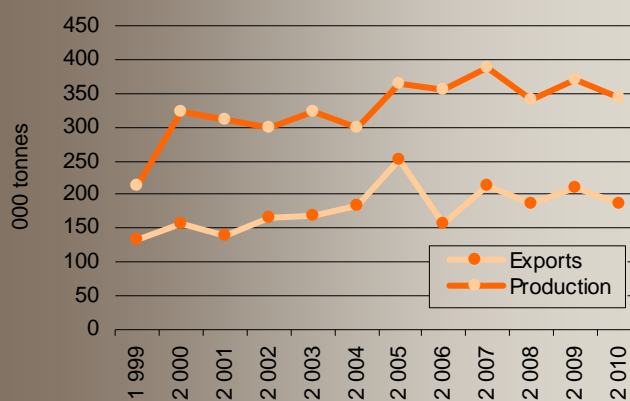
It tends to be a time for asking questions in South Africa, the world leader during the summer season. It is true that exports have been practically stable in recent years at about 200 000 t. However, the downward trend of the Western European and Japanese markets that take some 80% of volumes is a worrying feature. Shipments to Russia are tending to increase but are still moderate, with slightly over a million boxes in 2010, that is to say about 10% of the total volume. In addition, the alternative markets are still limited in scale and are not wildly dynamic. Will the new stimulus for exports come from the United States, open since 2010 to certain grapefruit production regions that are free of black spot? It is still too soon to be sure. Given these features, it can be understood that producers display great caution in their investments. However, the sector is at a crossroads: about 40% of the 9 000 ha of grapefruit groves is more than 15 years old and should be replaced within five years to maintain productivity and hence satisfactory profitability. The current planting of 300 to 400 ha per year is clearly not enough to attain this objective. Will South African production decrease in the medium term? Nothing is final yet as producers have been investing in the downstream part of the chain since 2010, using advertising campaigns to re-launch demand in Japan and the United Kingdom.

Dancing over in Argentina?

It is the moment for radical decisions in Argentina, the second largest exporter in the southern hemisphere. Faced with a decrease in profitability and the poorer image of certain brands than those of their South African competitors, a large number of growers have decided to throw in the sponge. Thus 30% of the planted area of

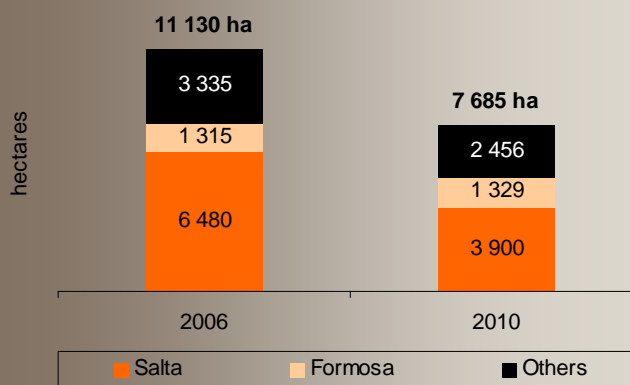


Grapefruit - South Africa - Production and exports



Source: CGA

Grapefruit - Argentina - Evolution of planted areas



Source: FEDERCITRUS

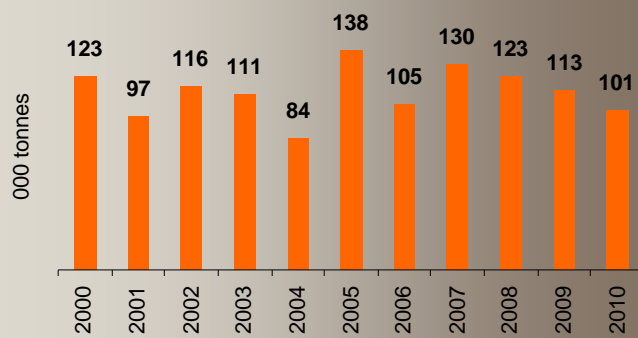
A larger summer grapefruit season than in 2010 in the EU but a more open market

After a light 2010 season, supply of the community market should return to a stronger level in summer 2011. The potential of South Africa, the leading exporter during the summer season, should be some 13 million 17-kg boxes (that is to say about 220 000 t). Although this is a strong 16% up on the last season, it should be seen in relative terms as this is only 8% more than the average for the last 8 years. The question of allocation by destination becomes a more thorny one. Will Japan, the main destination for South African grapefruit, be able to take the usual volumes, given the disorganisation of its infrastructure? The reply seems to be fairly positive downstream as the Florida season seems to have stimulated demand. Upstream, fruit size was initially forecast to be small but finally should not be a limiting factor as the proportion of large fruits will be greater than expected during the start of the season. This should also make it possible to maintain substantial shipments to the Russian market where there is demand for large fruits.

These conditions mean that the volumes destined for the EU should be entirely manageable, especially as another advertising campaign in the UK should stimulate demand. In addition, competition from Argentina should be very limited. The withdrawal from the sector of an increasing number of growers is seen increasingly distinctly in exports. Thus even if an increase in export potential is announced for 2011, the volumes should hardly exceed 10 000 t and will remain well short of the 20 000 to 30 000 t seen until



Grapefruit - Southern hemisphere - European imports



Source: EUROSTAT

2009. Cumulated exports at the end of May did not exceed 4 000 t against 5 000 t in 2010 and more than 10 000 t from 2007 to 2009. Finally, the trading window should be larger at the beginning of the season because of the fairly early dwindling of shipments from winter sources. In contrast, volumes from Mexico should return to a stronger level after a light season from fruits from the Yucatán in 2010. Normal volumes are forecast in this province and those from Michoacán should increase slightly. The first fruits should be delivered towards mid-August, with quantities increasing from the beginning of September.

Grapefruit — World exports

tonnes	2003	2004	2005	2006	2007	2008	2009	2010
South Africa	169 035	184 451	251 345	157 792	214 620	186 400	199 504	187 056
Argentina	28 995	31 358	35 813	19 987	29 276	33 306	17 892	10 999
Chile	933	3 255	1 358	3 946	1 540	1 813	1 474	1 554
Peru	1	20	20	23	131	28	206	278
Uruguay	1 557	1 867	1 385	2 335	1 200	265	300	146
Australia	nd	nd	nd	nd	415	248	400	474
Total	200 520	220 952	289 920	184 082	247 181	222 060	219 776	200 507

Professional sources

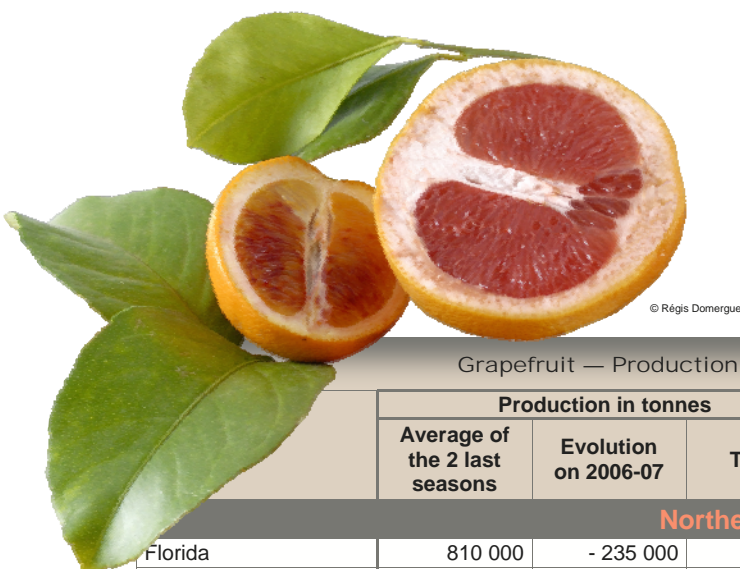
11 000 ha (2006) has been grubbed up. This means 3 500 ha. This massive trend first affected Salta province, the site of more than half of the area and most of the operators growing export grapefruit. Growers have often replaced grapefruit by crops like sugar cane or soya that are more profitable and less exposed to the serious phytosanitary threats that, unfortunately, seem to be approaching (an Asian psyllid that is a vector of the most severe form of greening but which did not carry the disease was identified in May in Tucuman province). This accounts for the drastic fall in production, which fell to less than 200 000 t in 2010 in comparison with 260 000 to 270 000 t in the mid-2000s. The decrease in exports has been just as marked, with hardly 10 000 t in 2010 against 25 000 to 30 000 t until 2008.

Take up the challenge or give up?

It is clear that all the producer countries in the world have taken the measure of the decrease in global demand. With rare exceptions, the hope of gaining market shares that Florida lost because of the hurricanes in the mid-2000s has

been replaced by a feeling of resignation. World cultivated areas are stable or decreasing as in recent years in the Mediterranean, in the southern hemisphere and in Central America, contributing to maintaining a balance between the decrease in world demand in all supply calendar segments. However, there remains the winter market to take the production of the groves planted in the Mediterranean in the mid-2000s that have not yet attained their full crop potential (probably 100 000 to 120 000 t as the areas under coloured grapefruit are estimated to total 2 000 ha). The Eastern European markets are the only ones to display growth dynamics and seem to be able to take these volumes, given the per capita consumption of only 500 g per person per year in Russia and hardly more than 1 kg per person per year in the eastern EU member countries. The price conditions remain to be seen. Even if on paper at least 'it works', it can be regretted that the grapefruit industry, especially in the Mediterranean region, favours this resignation that condemns the planted areas to stability. A good grapefruit can clearly attract more than one consumer in two or perhaps in four, this being the current penetration on many European markets. The attitude of producers in South Africa who wish to give the fruit a fresh chance by investing downstream before taking serious decisions as regards planting should be considered once again. The ball is in the court of the Mediterranean inter-branch associations who can encourage their members to take up the challenge by starting discussions of a parafiscal tax for promotion purposes and a quality charter. Will producers go along with this? It would be reassuring if their response were as rapid as their decision to plant in the mid-2000s after the collapse of production in Florida ■

Eric Imbert, CIRAD
eric.imbert@cirad.fr



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Grapefruit — Production, planted areas and world exports

	Production in tonnes			Orchard in ha		Exports in tonnes	
	Average of the 2 last seasons	Evolution on 2006-07	Trend	2010	Evolution on 2006	Average of the 2 last seasons	Evolution on 2006-07
Northern hemisphere							
Florida	810 000	- 235 000	↘	20 300	- 5 400	218 000	- 46 000
Texas	201 000	- 36 000	=	7 500	=	nd	
California	137 000	- 25 000	↘	3 900	=	nd	
Total USA	1 148 000	- 296 000	↘	31 700	- 5 400	246 000	- 74 000
Israel	208 000	- 25 000	↘	3 630	- 70	71 000	=
Turkey	285 000	+ 81 000	↗	6 060	+ 1 140	150 000	+ 18 000
Spain	54 000	+ 9 000	↗	1 509	+ 448	50 000	+ 12 000
Cyprus	49 000	+ 8 000	↘↘	400	- 100	28 000	+ 9 000
Total Mediterranean	596 000	+ 73 000		11 599	+ 1 418	299 000	+ 39 000
Yucatan	11 700	+ 5 000	=	446	+ 40		
Michoacan	56 000	+ 6 000	↗	4 420	+ 181		
Total Mexico	428 000	+ 41 000		18 466	+ 1 001	14 700	+ 2 400
Cuba	143 800	- 11 000	↘	5 600	- 400	1 250	- 1 800
Honduras	11 500	- 8 500	↘↘	550	- 850	2 600	- 11 300
Total inter-season	223 000	- 8 500		11 016	- 1 029	18 550	- 10 700
Total N. hemisphere	1 744 000	- 223 000		54 315	- 3 982	563 550	- 45 700
Southern hemisphere							
South Africa	356 000	- 15 000	↘	9 140	+ 690	199 000	- 5 000
Argentina	213 000	- 49 000	↘↘	7 685	- 3 500	14 300	- 15 000
Total S. hemisphere	569 000	- 64 000		16 825	- 2 810	213 300	- 20 000

Professional sources, customs



The grapefruit juice market

No bitterness?

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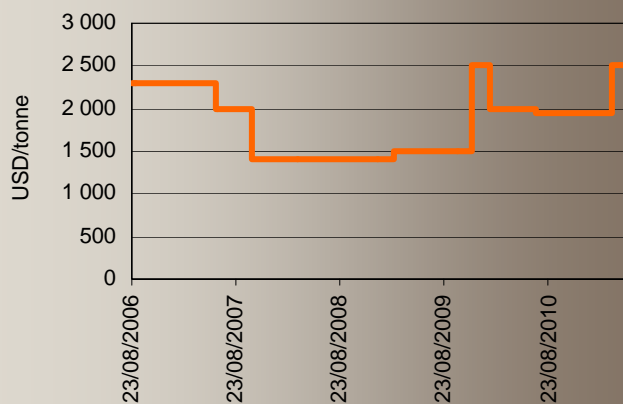


'Sky high' is the first term that comes to mind on examination of the price of concentrated white grapefruit juice that has flirted with the USD 2 500 per tonne mark in Rotterdam since the beginning of April. This is a record level seen only once since 2000 and only for two months from December 2010 to January 2011. Is this a solid increase this time? In any case it results partly from the structural decrease of the volumes sent for processing. The quantities processed world-wide have decreased by nearly 25% since 2006-07, the last season not hit directly by the hurricanes in Florida. A bottom level of 1.3 million tonnes has been reached, that is to say a third of world production.

A structural decrease in Florida beginning to even out?

The prime reason for this overall decrease is obviously the continued fall in production in Florida, the source that controls some 40% of the juice market. The sanitary and economic problems faced by the sector have lowered the quantities processed by this major player by nearly 280 000 t since 2006-07. If the FDOC is to be believed, harvests should continue to decrease, together with the volumes earmarked for juice (see box). However, the downward movement should be less marked than in recent years, especially as citrus canker, which reduces the proportion of fruits that can be sold fresh, could play a levelling role. The season that has just finished confirms this hypothesis: the quantities processed even increased a little while production declined.

Grapefruit juice - Evolution of concentrate prices



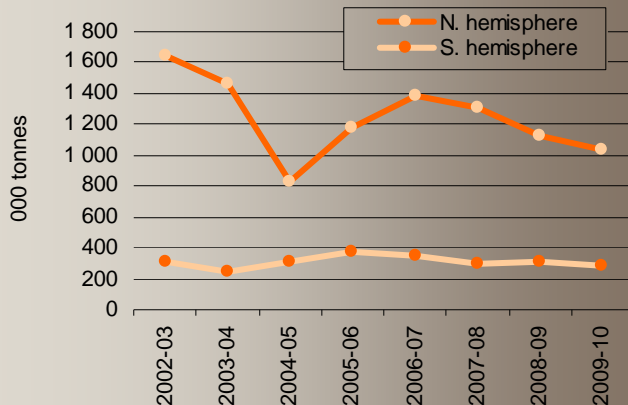
Source: FoodNews

The same trend among the other stakeholders

Production also displays a structural downward trend among the other large grapefruit processors. Israeli producers are refocusing increasingly on the fresh market segment that is more profitable. The same causes have the same effects in Argentina where a fair proportion of Salta producers are replacing grapefruit by sugar cane. Finally, although Cuban production has increased after a period in the mid-2000s strongly marked by serious hurricane losses, the replanting movement announced is not seen in the still sinking production figures. Conjunctural decreases like that of 2010 in South Africa are added to these structural problems.



Grapefruit - Evolution of volumes processed



Professional sources

Brisker demand

The recovery of demand is the other determinant in the rise in prices. The volume sold by the Florida industry was nearly 17% up on the preceding season at the end of April. Export business seems better. Although European demand is still dull, the Japanese market is buying again. In addition, the downward movement of sales in the United States has slowed. This recovery seems to be partially linked with the return of grapefruit in the formulation of certain multi-fruit juices as its price is more attractive than those of certain competing fruits ■

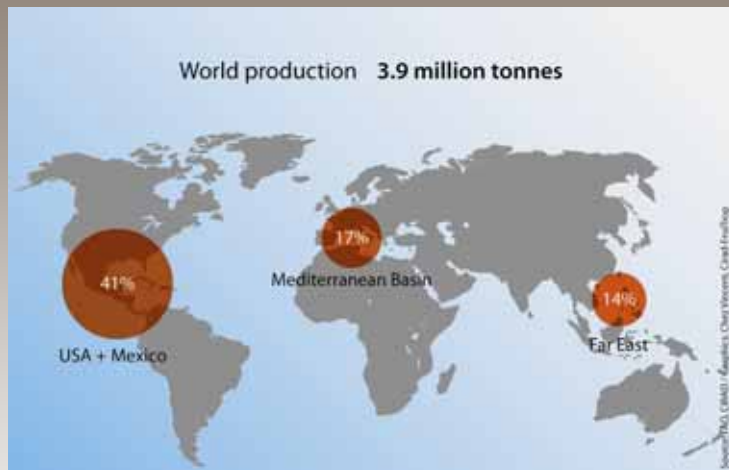
Eric Imbert, CIRAD
eric.imbert@cirad.fr

Grapefruit — World — Estimated quantities processed

000 tonnes	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Total	1 964	1 721	1 149	1 554	1 744	1 597	1 441	1 315
Total N. hemisphere	1 651	1 470	833	1 175	1 392	1 302	1 132	1 035
United States	996	1 038	356	571	779	714	560	504
Mediterranean	207	182	185	195	202	192	173	187
Israel	171	143	157	151	157	144	141	106
Turkey	19	24	10	19	15	18	6	20
Cyprus	9	8	10	16	15	16	18	19
Spain	3	2	2	3	7	6	2	2
Mexico	39	69	112	112	80	100	100	100
Cuba*	207	4	1	107	136	112	133	97
Total S. hemisphere	313	251	316	379	352	295	308	280
Argentina	106	73	127	130	126	91	97	71
Brazil	59	59	59	60	60	60	60	60
South Africa	148	119	130	189	166	144	151	149

* estimate: - 80% of production since 2007 / Sources: FAO, CIRAD, professional, USDA

Grapefruit — Production



Grapefruit — The 10 leading producer countries

tonnes	average 2009-10 or 2008-09
Florida	810 000
Mexico	428 000
South Africa	356 000
Turkey	285 000
Argentina	213 000
Israel	208 000
Texas	201 000
India	190 411
Cuba	143 800
California	137 000

Sources: FAO, CLAM, USDA

Grapefruit — Imports



Grapefruit — The 6 leading importing countries

tonnes	2010
Netherlands	180 436
Japan	174 683
Russia	81 491
Canada	45 428
France	39 426
United Kingdom	35 984

Sources: national customs

Grapefruit — Exports



Grapefruit — The 6 leading exporting countries

tonnes	2009-10
United States	246 865
South Africa	187 056
Turkey	153 000
Israel	84 500
Spain	48 300
Cyprus	25 700

Professional sources and national customs

USA — Imports — Main supplier countries

tonnes	2004	2005	2006	2007	2008	2009	2010
Total	14 316	14 348	18 951	19 797	14 257	11 143	8 066
Bahamas	12 676	13 812	16 216	14 420	10 362	7 538	3 162
Mexico	1 567	506	2 687	5 056	2 741	3 336	4 608
Israel	56	27	43	220	104	119	123
Others	17	3	5	101	1 050	150	173

Source: USDA

Canada — Imports — Main supplier countries

tonnes	2004	2005	2006	2007	2008	2009	2010
Total	50 662	39 634	47 706	54 674	51 258	47 129	45 428
incl. total winter	45 992	33 456	43 482	49 415	45 541	41 465	40 327
United States	41 071	30 299	38 878	44 793	40 977	38 152	37 212
China	598	442	1 522	2 043	2 664	1 913	1 815
Bahamas	712	952	1 335	1 498	1 084	874	396
Mexico	3 510	1 623	1 680	767	512	335	641
Thailand	100	140	67	315	304	192	262
incl. total summer	4 384	6 048	4 005	4 133	4 912	5 220	4 488
South Africa	3 449	5 617	3 828	3 852	3 993	4 589	4 288
Argentina	244	280	85	281	919	626	124
Chile	691	151	92	0	0	5	76

Source: COMTRADE

South America — Main markets

tonnes	2004	2005	2006	2007	2008	2009	2010
Total	10 113	11 674	6 227	12 819	10 804	11 222	11 816
Mexico	7 986	10 267	5 107	11 511	9 081	9 118	9 816
Argentina	2 127	1 407	1 120	1 308	1 723	2 104	2 000

Source: COMTRADE

These statistics are for grapefruit alone
and do not include shaddock

EU-27 — Imports — Main supplier countries						
tonnes	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Total, incl.	378 521	357 941	398 540	377 102	386 530	373 288
Total N. hemis.*	240 230	253 170	268 974	254 310	273 654	271 878
Turkey	42 709	80 893	52 761	42 767	64 634	75 004
Israel	62 612	54 453	60 849	60 898	68 502	58 101
United States	53 077	42 911	66 275	77 089	64 548	55 132
Spain	32 700	34 000	37 700	37 800	36 300	47 900
Cyprus	16 967	14 832	15 133	12 521	11 880	10 617
Honduras	13 169	12 340	12 385	8 820	9 478	6 063
Mexico	7 594	4 527	9 834	9 304	11 600	9 167
Cuba	3 415	700	5 434	0	1 276	754
Others	7 987	8 514	8 603	5 111	5 436	9 140
Total S. hemis.	138 291	104 771	129 566	122 792	112 876	101 410
South Africa	97 170	72 924	90 825	86 852	88 616	78 897
Argentina	26 869	17 627	23 186	24 171	14 828	9 129
Swaziland	7 197	7 210	10 085	9 260	6 707	9 906
Chile	474	2 513	959	719	70	363
Zimbabwe	5 001	2 227	3 556	1 409	1 947	2 053
Uruguay	576	2 063	775	298	213	140
Mozambique	919	120	0	0	240	669
Others	85	87	180	83	255	251

* Extra-Community imports and supply from the main EU producer countries (Spain, Cyprus) / Source: EUROSTAT

Other Western Europe countries — Main markets							
tonnes	2004	2005	2006	2007	2008	2009	2010
Total	10 388	9 281	9 068	9 796	9 506	9 880	1 333
Switzerland	8 970	7 956	7 641	8 366	8 029	8 554	8 500
Norway	1 418	1 325	1 427	1 430	1 477	1 327	1 333

Source: COMTRADE

Russia — Imports — Main supplier countries							
tonnes	2004	2005	2006	2007	2008	2009	2010
Total, incl.	45 164	41 652	49 579	67 373	66 637	71 262	81 491
Total N. hemis.	34 594	30 954	37 965	45 942	44 599	52 705	56 621
Turkey	22 759	18 273	26 499	28 719	32 950	38 211	43 377
Israel	11 087	12 192	10 846	14 172	8 383	11 845	11 978
Spain	713	411	545	2 610	2 129	891	691
Morocco	0	58	47	371	441	544	365
United States	34	19	28	71	696	1 214	209
Total S. hemis.	10 347	10 220	10 766	20 490	21 120	17 963	24 316
South Africa	6 691	6 212	7 537	13 085	15 463	15 402	19 768
Mexico	55	112	176	941	880	1 004	2 704
Argentina	3 386	3 558	2 583	4 484	3 975	691	1 025
Swaziland	58	0	109	345	314	298	631
Zimbabwe	144	241	285	1 025	158	481	188
Honduras	12	97	76	610	330	86	1
Others	223	479	847	940	919	593	554

Source: COMTRADE

Other Eastern Europe countries — Main markets							
tonnes	2004	2005	2006	2007	2008	2009	2010
Total	12 182	16 759	22 738	32 400	33 956	32 912	32 756
Ukraine	5 753	8 063	11 462	16 391	17 684	17 344	17 500
Serbia	0	2 083	3 078	4 151	5 020	4 569	4 255
Belarus	1 636	1 497	2 350	4 675	3 959	4 049	4 000
Croatia	2 097	2 352	2 537	3 087	2 563	2 549	2 446
Bosnia Herz.	1 342	1 502	1 452	1 661	2 093	1 679	1 852
Moldavia	556	591	1 039	1 570	1 613	1 636	1 703
Macedonia	797	671	821	865	1 024	1 086	1 000

Source: COMTRADE

Japan — Imports — Main supplier countries						
tonnes	2005	2006	2007	2008	2009	2010
Total, incl.	205 940	170 825	212 791	183 795	178 908	174 683
Total N. hemis.	103 904	119 347	144 173	129 686	117 850	127 783
United States	93 335	109 341	138 777	126 097	113 949	124 252
Israel	10 418	9 335	5 396	3 589	3 901	3 531
Cuba	151	671	-	-	-	-
Total S. hemis.	102 036	51 478	68 618	54 109	61 058	46 900
South Africa	96 707	48 562	64 335	49 611	57 818	44 602
Swaziland	4 572	2 316	4 283	4 498	3 240	2 237
Chile	757	599	-	-	-	61

Source: national customs

Other Asia countries — Main markets							
tonnes	2004	2005	2006	2007	2008	2009	2010
Total	19 983	18 990	23 386	28 238	24 552	33 483	33 947
China	13 209	12 079	16 179	17 284	14 416	22 606	23 517
South Korea	1 760	1 532	2 251	5 935	4 889	5 724	5 500
Singapore	4 159	4 175	3 998	4 349	4 118	4 022	4 000
Malaysia	854	1 203	958	670	1 129	1 131	930

Source: COMTRADE

Persian Gulf — Main markets							
tonnes	2004	2005	2006	2007	2008	2009	2010
Total	21 960	32 482	17 846	22 204	12 397	15 000	15 000
U. Arab Emirates	0	11 969	0	9 927	8 928	0	0
Koweit	1 775	0	4 575	2 806	2 219	0	0
Qatar	1 483	2 082	2 976	1 246	1 250	0	0
Saudi Arabia	18 702	18 430	10 294	8 226	-	-	0

Source: COMTRADE



photos © Eric Imbert





Cultivation of grapefruit

Climatic requirements and effect of the environment

The climatic requirements of grapefruit are fairly similar to those of other citrus but with a high temperature requirement. Low temperatures limit the cultivation area. Fruits sustain damage when the temperature falls below -1 or -2°C and the aerial parts of the tree are damaged from -3 or -4°C. Among environmental factors, temperature certainly has the greatest influence on fruit characteristics: shape, pulp and peel colour and organoleptic characteristics.

When production zone extremes are considered, it is easy to distinguish between 'tropical' quality and 'Mediterranean' quality. Tropical grapefruit have specific features because temperatures are at a steady high and day/night temperature amplitude is small. These conditions favour more intense internal and external fruit colour. Steadily high tropical temperatures enhance the development of lycopene, the red pigment found in the pulp and peel of coloured varieties. Chromatic potential is fully expressed in tropical grapefruit, with colours ranging from white to red via pink, depending on the case. These conditions also reduce bitterness and acidity and increase juice and sugar contents. The peel is often thinner and the fruit pear-shaped.

In a Mediterranean climate, except during the summer, day/night temperature amplitude is very marked and spring and autumn are cool to very cool. Here, grapefruit requires a warm exposition and plenty of sunshine. However, only the varieties with a very high lycopene content can become coloured. This is the case of comparatively recent cultivars bred in the last 25 years such as 'Star Ruby', 'Rio Red', 'Flame', etc. The production of pigmented fruits has become classic in a Mediterranean climate thanks to these varieties. Other varieties that are potentially coloured in the tropics, such as 'Thomson' (pink), 'Ruby', 'Red Blush' and 'Henderson' (red) acquire little or no colour.

The gentle, sweet taste characteristics of grapefruit were long closely associated with coloured varieties because of their exclusively tropical origin. We still have the habit of associating, a priori, sweetness and absence of bitterness with colour when this is not at all the case.

Cumulated heat in northern zones is not sufficient for the fruits to ripen fully before the winter. The production cycle may then last for 12 months or even more. The fruits must remain on the trees before completing their development in the following spring. They are exposed to rain and low temperatures and this can cause physiological damage to peel or internal damage in case of frost.



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The plant

The grapefruit tree has broad, evergreen leaves and is one of the most vigorous of the genus Citrus. It requires the lowest planting density. When adult and fruiting, the fruit-bearing branches acquire a falling habit enhancing the growth of new shoots on the curves. This means that the species can reach fairly naturally an equilibrium in branch renewal without drastic mechanical intervention.





Grapefruit diseases	Tristeza Virus: <i>Citrus Tristeza Closterovirus</i>	Chancre Bacterium: <i>Xanthomonas axonopodis</i> pv. <i>citri</i>	Huanglongbing (greening) Phloem bacteria: <i>Liberibacter africanum</i> , <i>L. asiaticum</i>
Symptoms	Decline of varieties budded on sour orange, paling of leaf veins, stem-pitting	Corky pustules on leaves, fruits and shoots	Yellowing shoots, leaf marbling, small poorly coloured fruits, decline
Part attacked	Young, growing organs (shoots, flowers)	Aerial parts: young organs, wounded organs	Aerial parts
Cause	Presence of infected plants in the field or nearby	Bacteria released from lesions, infection enhanced by mechanical or weather (hurricanes) wounds or the citrus leaf miner (<i>Phyllocnistis citrella</i>)	Presence of infected plants in the field or nearby
Transmission	Aphids: <i>Aphis gossypii</i> and <i>Toxoptera citricida</i> , budding	Via air and water	Psyllids: <i>Diaphorina citri</i> and <i>Trioza erytreae</i> , budding
Measures to be taken	Control of vectors (chemical, biological control, etc.)	Application of products containing copper or Kasugamycin, removal of infected trees in case of light attack, watering at soil level	Control of vectors using chemical, biological methods, etc.
Prevention	Use of healthy plant material, cross-protection (measure subject to discussion)	Use of healthy plant material, tolerant varieties, protection of young organs	Use of healthy plant material
Economic impact	Loss of trees and decreased production, EU quarantine organism (control of movements)	Harvest loss by fruit fall, EU quarantine organism (control of movements)	Decline of trees, shorter orchard life, EU quarantine organism (control of movements)
Distribution	All regions except for certain countries in the Mediterranean area	Asia (including the Middle East), South America, Florida, small presence in Africa	Asia, tropical and subtropical Africa, the Middle East, Brazil, Florida

* A region harbouring an EU quarantine organism (listed in Council Directive 2000/29EC) may only export fresh produce to the EU under strict conditions.



Grapefruit pests	Fruit flies Diptera Tephritidae, various species of the genera <i>Ceratitis</i> , <i>Anastrepha</i> , <i>Dacus</i> , <i>Bactrocera</i> , etc.	Citrus leafborer Lepidoptera: <i>Gracillariidae</i> , <i>Phyllocnistis citrella</i>	Aphids Hemiptera: <i>Aphididae</i> , <i>Toxoptera</i> spp., <i>Aphis gossypii</i> , etc.
Symptoms	Pricking caused by females laying eggs in the fruits. The larvae develop in the pulp and cause fruit fall	Characteristic meandering larval mines beneath leaf epidermis	Colonies on young shoots. Wilt caused by viruses (tristeza)
Part attacked	Fruit	Leaves, fruits in very rare cases	Young shoots
Measures to be taken	Monitoring of populations. Patch treatments. Male Annihilation Technique (MAT), mass trapping	Monitoring of populations. Biological control by acclimatisation of exotic parasitoids	Monitoring of populations (visual inspection). Conservation of beneficials. Spraying on a threshold basis
Prevention	Destruction of fallen fruits		
Economic impact	Harvest losses	The larval mines limit photosynthesis	Growth flushes limited. Weakening or wilting caused by viruses
Distribution	American continent: <i>Anastrepha</i> . Africa: <i>Ceratitis</i> , <i>Dacus</i> . Asia-Pacific: <i>Bactrocera</i>	Cosmopolitan	Variable according to species. <i>Toxoptera citricida</i> in tropical zones; <i>T. aurantii</i> in the Mediterranean area



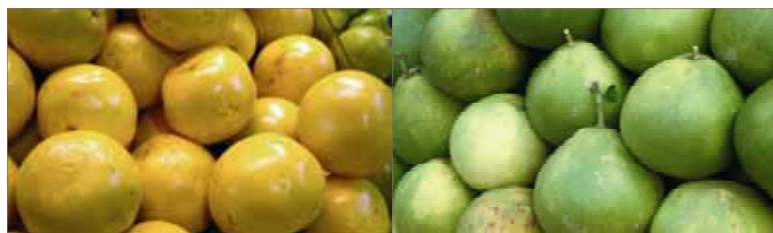
Varieties of grapefruit

Grapefruit and shaddock— frequently confused cousins

Grapefruit and shaddock are frequently confused in common or trade usage. But the two fruits have different characteristics as the grapefruit (*Citrus paradisi* Macfad.), pomelo in French, is not the same botanical species as the shaddock (*Citrus maxima*). Shaddock, called pamplemousse in French and chadèque in the French West Indies, may be called Chinese grapefruit on European market. But it should not be called grapefruit and vice versa.



© Eric Imbert



Fruit characteristics	Grapefruit	Shaddock
Size (diameter)	8 – 15 cm	10 – 30 cm
Weight	250 to 500 g	400 g to 2 kg
Shape	flattened to pear-shaped	flattened to pear-shaped
Peel	fine to medium thickness	thick to very thick
Central axis	open, little or medium-developed	open or closed, well developed
Seeds	few or none	from none to numerous
Pulp colour	pale, yellow, pink or strong red	pale yellow, pink or strong red
Pulp texture	juicy	firm or even crunchy
Bitterness	weak to strong	none to weak

Coloured varieties

A marked switch to coloured varieties has been observed in consumer expectations in the last 20 to 25 years. The change is almost total in Europe. Even Japan, the world's leading market and traditionally a consumer of white grapefruit, has been affected by the change.

Grapefruit — Intensity of the pigmentation of the skin and flesh of various varieties
(after James Saunt in *Citrus Varieties of the World*, Sinclair Publishing)

Varieties	Skin	Flesh
Burgundy	-	★★★★
Thompson (Pink Marsh)	-	★
Ruby (Ruby Red, Redblush)	★★	★★
Henderson	★★★★	★★★
Ray Ruby	★★★★	★★★
Rio Red	★★★★	★★★★
Flame	★★★★	★★★★
Star Ruby	★★★★★	★★★★★

★ = weak ★★★★★ = very strong



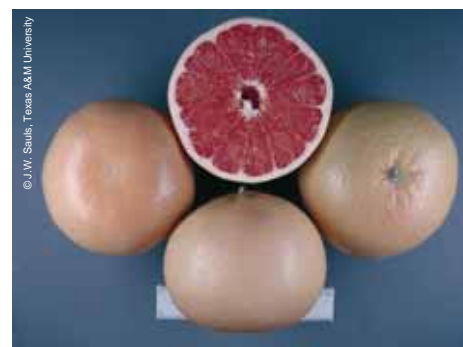
Ruby
(Redblush, Ruby Red, Henninger)

'Ruby', a bud mutation of 'Thompson', was discovered in Texas by A.E. Henninger in 1926. It differs from the parent by the stronger pigmentation of skin and flesh. Its other characteristics are very similar to those of 'Thompson'. However, the sugar and acid contents are sometimes slightly lower. 'Ruby' is still the most widely planted coloured variety in the world and forms a large proportion of new plantings in Florida. In contrast, it is losing momentum in Israel and South Africa.



Flame

A natural mutation of 'Ruby Red', 'Flame' was discovered by H.K. Wutsher in 1973. The fruits are attractive. They are spherical and larger than those of 'Star Ruby' and of a similar size to those of 'Ruby Red'. Suitability for keeping on the tree is good. The skin is particularly fine and smooth. The basic colour is a light bronze similar to that of 'Star Ruby', differing from the pale yellow of 'Ray Ruby' and 'Ruby Red'. Large areas pigmented with as intense a red as that of 'Ray Ruby' can be observed but this colouring is nevertheless not as marked as that of 'Star Ruby'. The flesh is a uniform red similar to that of 'Rio Red'. The fruit is juicy and firm. The variety is planted in significant quantities in Florida and Argentina. It is marginal elsewhere.



Star Ruby

This recently developed variety (released in 1970) was obtained by irradiating 'Hudson' seeds. It has numerous good features. The flesh is the most strongly coloured of all the varieties currently grown. The skin is fine and smooth with strongly red faces. The fruits are practically completely seedless and finally the flesh is firm and juicy with high acid and sugar contents. The juice is intensely coloured. However, irradiation has reduced plant resistance to diseases and to excessive sunshine. Management is more delicate, especially because of its susceptibility to certain herbicides. Yields are generally smaller. The variety is therefore tending to lose ground in some countries to the benefit of hardier cultivars ('Rio Red' and 'Flame').



Guangxi you

This variety originated in Fujian Province ('Guangxi' in Chinese), where it is still widely grown in the Pinghe region. It forms a large proportion of Chinese production. The fruit is medium-sized to large (from 1 to 2.5 kg) with a typical oboval shape. The yellow skin is of medium thickness (about 0.8 cm). The flesh is white and pale with some green lights, soft and medium to fairly juicy. The flavour is sweet and slightly acidulous. The fruits have excellent keeping qualities. The variety is usually sold commercially under the name 'Honey Pomelo'.



Marsh

'Marsh' was bred from a sowing of 'Duncan' seeds in about 1860 near Lakeland, Florida. The variety was the first to be practically seedless (two or three seeds per fruit) and it developed very strongly. 'Marsh' is still the most commonly planted cultivar and the most widespread in the world, even though a general trend towards coloured varieties is observed. Furthermore, it is extremely suitable for canning. Its taste qualities are satisfactory although acid and sugar contents are lower than those of 'Duncan'. However, a few problems are noted at the beginning (high acidity) and the very end of the season (loss of aroma). The fruits are medium-sized to small—not as large as 'Duncan'—and are pale yellow in colour. The skin is medium thick, regular and very smooth. The flesh is soft and very juicy.



Wholesale market prices in Europe

May 2011

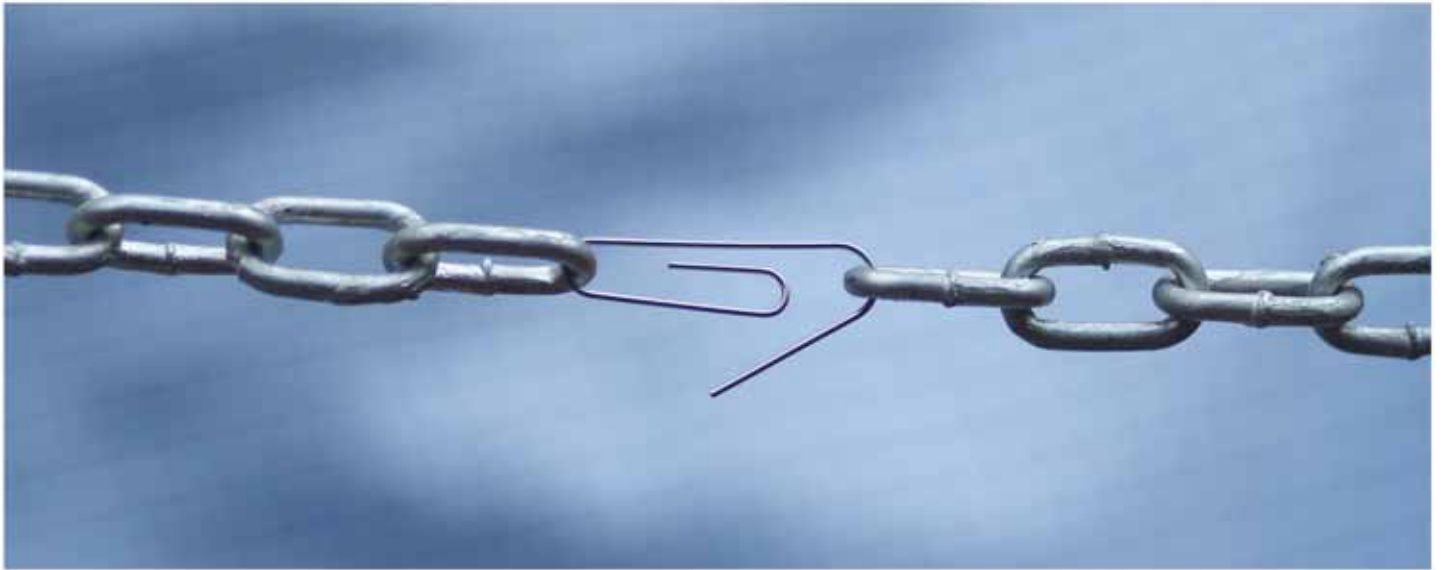
					EUROPEAN UNION — EURO				
					Germany	Belgium	France	Holland	UK
AVOCADO	Air	TROPICAL ETTINGER FUERTE	BRAZIL	Box			14.0	14.5	
			PERU	Box	4.8				
			ISRAEL	Box					6.3
			KENYA	Box			3.8	4.5	4.0
			PERU	Box	4.8	8.5	4.3		5.8
		HASS	SOUTH AFRICA	Box		7.5	6.3	6.5	
			KENYA	Box		8.0	4.4		
			PERU	Box	9.0	11.8	8.7	9.1	
			SOUTH AFRICA	Box	9.0		8.6	8.5	
			Truck	NOT DETERMINED PINKERTON ETTINGER FUERTE HASS	SOUTH AFRICA	Box			
	SOUTH AFRICA	Box						7.0	
	SPAIN	Box			4.8				
	SPAIN	Box			4.8				
	SPAIN	Box			9.0	11.8	10.8		
BANANA	Air	RED SMALL	ECUADOR	kg				6.5	
			COLOMBIA	kg		6.3	7.3		
			ECUADOR	kg				5.2	
	Sea	SMALL	ECUADOR	kg			1.8		
CARAMBOLA	Air		MALAYSIA	kg		4.7	4.6	3.9	3.9
	Sea		MALAYSIA	kg				3.1	
CHAYOTE	Sea		COSTA RICA	kg		1.5	1.6	1.5	
COCONUT	Sea		COSTA RICA	Bag				15.5	
			COTE D'IVOIRE	Bag			8.0	12.0	13.8
			DOMINIQUE	Bag					16.1
DATE	Sea	MEDJOL	ISRAEL	kg	7.2	8.3	8.0	7.1	5.6
			MEXICO	kg				8.8	
			SOUTH AFRICA	kg				8.3	
		NOT DETERMINED	TUNISIA	kg				1.8	1.8
EDDOE	Sea		BRAZIL	kg				1.5	
			COSTA RICA	kg		2.1	1.6		
GINGER	Sea		CHINA	kg	0.9		1.6	1.3	1.0
			THAILAND	kg	1.6			1.3	
GUAVA	Air		BRAZIL	kg				5.8	
			THAILAND	kg		6.8			
KUMQUAT	Air		BRAZIL	kg					3.8
			ISRAEL	kg			4.5		
			SOUTH AFRICA	kg				4.9	4.9
LIME	Air		MEXICO	kg			4.2		
	Sea		BRAZIL	kg	0.9		1.5	1.1	1.4
			MEXICO	kg	1.1		1.9	1.4	1.3
LITCHI	Air		THAILAND	kg				8.3	
MANGO	Air	KENT	BURKINA FASO	kg			2.4		
			COTE D'IVOIRE	kg			4.3		
			MALI	kg			3.2		
	Sea	NAM DOK MAI ATKINS	THAILAND	kg				6.0	
			BRAZIL	kg				1.5	1.6
			GUATEMALA	kg				1.1	
		KEITT	BRAZIL	kg				1.3	
			COSTA RICA	kg					1.4
			NICARAGUA	kg	1.6			1.3	
		KENT	COTE D'IVOIRE	kg			1.7		1.7
			PERU	kg				1.3	

					EUROPEAN UNION — EURO				
					Germany	Belgium	France	Holland	UK
MANGOSTEEN	Air		INDONESIA	kg				7.2	
			THAILAND	kg			9.5		
			VIET NAM	kg		8.0			
MANIOC	Sea		COSTA RICA	kg		1.3	1.3	1.2	
MELON	Sea	CHARENTAIS	MOROCCO	kg			0.9		
		GALIA	COSTA RICA	kg					0.9
		HONEY DEW	COSTA RICA	kg					0.8
PAPAYA	Air	FORMOSA NOT DETERMINED	BRAZIL	kg				3.0	
			BRAZIL	kg	3.5		3.4	3.9	
			COLOMBIA	kg					3.3
			THAILAND	kg				4.7	
	Sea		BRAZIL	kg				1.8	2.1
			ECUADOR	kg	1.8	1.9		1.9	2.1
PASSION FRUIT	Air	NOT DETERMINED PURPLE	COLOMBIA	kg			5.5	5.3	4.6
			KENYA	kg				4.8	4.8
			SOUTH AFRICA	kg	5.3		6.5	5.3	
			ZIMBABWE	kg				4.6	
		YELLOW	COLOMBIA	kg				8.0	
PERSIMMON	Sea		BRAZIL	kg				3.9	
			SOUTH AFRICA	kg	2.4				3.5
PHYSALIS	Air		COLOMBIA	kg				7.3	7.2
	Sea		COLOMBIA	kg	5.4		6.7	6.5	
PINEAPPLE	Air	SMOOTH CAYENNE VICTORIA	GHANA	kg			2.1		
			MAURITIUS	Box		12.3		12.8	
			MAURITIUS	kg			4.0		
			SOUTH AFRICA	Box				11.3	
	Sea	MD-2	BRAZIL	Box					9.2
			COSTA RICA	Box	7.0			7.8	8.1
			COSTA RICA	kg			0.8		
			COTE D'IVOIRE	Box					9.2
PITAHAYA	Air	PURPLE	VIET NAM	kg				6.4	
		RED	VIET NAM	kg		5.7	9.0		
		YELLOW	COLOMBIA	kg				9.2	
			ECUADOR	kg		6.1		7.2	
	Sea	PURPLE	VIET NAM	kg				2.8	
PLANTAIN	Sea		COLOMBIA	kg			1.1	1.1	
			ECUADOR	kg			1.2		
RAMBUTAN	Air		THAILAND	kg				6.6	
			VIET NAM	kg		7.0	9.5		
SWEET POTATO	Sea		BRAZIL	kg				1.3	
			EGYPT	kg			1.1		
			HONDURAS	kg					1.2
			ISRAEL	kg			1.3		
			SOUTH AFRICA	kg			1.0		1.3
TAMARILLO	Air		COLOMBIA	kg		6.5		6.4	
YAM	Sea		GHANA	kg			1.3	1.2	

Note: according to grade

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