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FRUITROP

English version

Close-up:
APPLES AND PEARS

Banana in Europe:
report on 2007 prices



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Australian dollar	1.6734
New Zealand dollar	1.9287
Brazilian Real	2.6412
Czech koruna	26.319
Polish zloty	3.6459
Chinese yuan renminbi	10.4799
Estonian kroon	15.6466
Slovak koruna	33.882
Turkish lira	1.7579
South African rand	10.41
South Korean won	1 373.62

Source: Central European Bank



So nothing seems to have changed in the Madagascan litchi sector. At least, this is what the first trade figures seem to show. The litchi armada that swept into European ports at the end of December and competition between the different groups of shippers weighed heavily on prices, sending them into a sudden tumble. Especially as all European operators, with the large retail chains in the lead, had heard that ample quantities would be available. Prices soon sank through the floor. The litchi sector remains a marvellous machine for thrills and spills. Ships steam off desperately when only partially loaded, play at regattas to be first through the Suez Canal, are rerouted to be the first to arrive in Europe, and so on. It is truly the last trade sector where everything is possible and where the most extravagant scenarios are acted out for real.

But nevertheless it actually works. In January 1998, precisely ten years ago, we praised in an editorial the self-limiting to 8 500 tonnes of the quantities shipped from Madagascar as among other things this would ensure a good season. We have now reached 21 000 tonnes. Litchi is distributed today at the European scale and is 'essential' in retailers' fruit displays during the Christmas period. The sector has succeeded, has grown up—often painfully—but is developing. It is doubtless an illusion to think that a sector, whatever it is, has grown up when it has found the balance between supply and demand or between product value and commercial attractiveness. No sector is as wise as this. This is one of the basic principles of the world of fruit and vegetables—nothing is foreseeable and everything is always possible.

Denis Loeillet

C ontents

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Le soleil revient, notre banane aussi.



Après les ravages du cyclone Dean, les producteurs ont mobilisé toutes leurs énergies pour vous offrir à nouveau la meilleure des bananes. Élu pour la 3^e fois Saveur de l'année, elle revient en force à **partir de mi-mars 2008**. La banane de Guadeloupe et Martinique répond aux exigences d'origine et de qualité reconnues par le logo RUP, attribué par la commission européenne.

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Banana in Europe: report on 2007 prices

Strong pressure on import margins

Average is a synonym for mediocre in the banana market dictionary. Although import prices stagnated in 2007 in comparison with 2006, intermediate costs have rocketed. Importers' incomes decreased. Conversely, Latin American producers have succeeded in grasping a larger proportion of the value-added. However, the big winners are European distributors who are consolidating their power over the sector.

The year 2007 was the year of weather. The smallest common denominator of this banana year was found in bad weather. The worst event was hurricane Dean (end of

August) that had very serious effects on the production capacity of the French West Indies (Fruitrop 148, page 3) and other Caribbean islands as well (Jamaica, Saint Lucia, etc.). Gales and floods devastated the south and then the north of the Dominican Republic. Flooding also affected Colombia and Costa Rica. Banana plantations in Ecuador and Central America were hit by cold weather that delayed part of production. Africa suffered serious weather damage—a gale in Cameroon in May seriously reduced the export capacity of the country.

Less can mean more

It should not be concluded that there are no longer any bananas on supermarket shelves. Weather damage did not cause any price tension. Quite the opposite! The illusion of a shortage

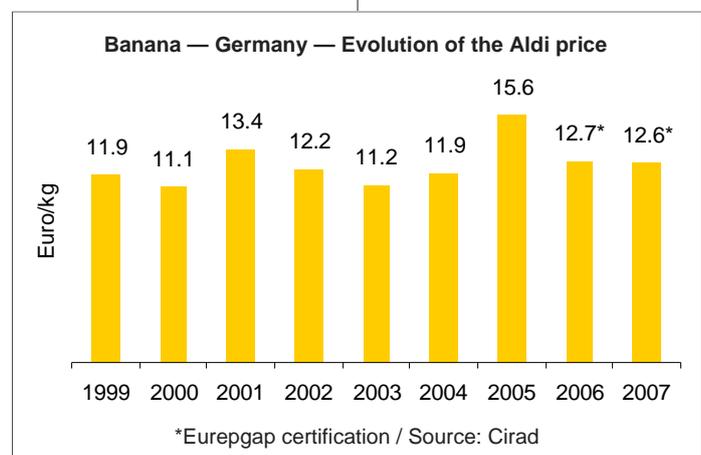
stimulated exports to the EU, with lower prices often being the only way to stand out from the other suppliers and sell large quantities.

Nevertheless, we know that production capacities expressed at time t depend on demand and that a production reserve is always available. It is activated immediately by a lowering of the quality requirements set by importers. Proof of this is found in the supply records. We shall not be able to draw up a precise balance of the supplying of the European and US markets until the June 2008 issue of Fruitrop (No 157). However, it is possible to affirm (see box: banana monitoring) without risking a mistake that the quantities imported by EU-27 increased substantially by some 6% (figures to September 2007) after a phenomenal 13% increase in 2006. The United States displayed the same trend for the first nine months of

2007 with a 5% increase. The increase was smaller in Russia where, over the whole year, the gain was a probable 3% over 2006, but this is 15% more than in 2005.

In spite of this fresh inflow of banana on the market, satisfaction can be drawn from the absence of the highly disturbing quantities of spring 2006 that were shipped from Guatemala and caused a lasting slump on the European market.

2007 was also the second year of the new EU import regime with the EUR 176 per tonne tariff still levied on imports from third countries and on ACP bananas in excess of the quota. There has been much discussion within and outside the European Commission – MFN contact group and during the examination of the complaints by Ecuador and the United States but this has not yet led to a compromise on the



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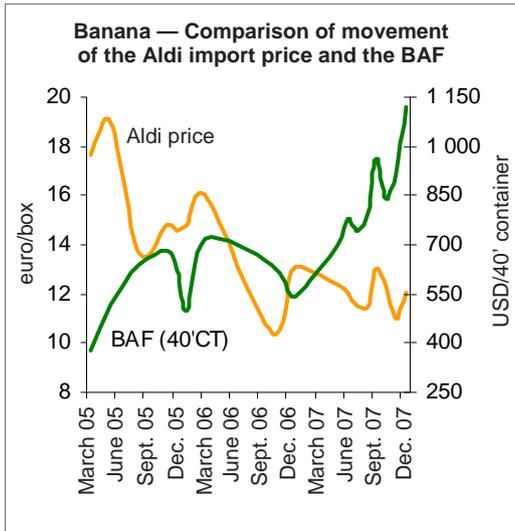
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reduction of the tariff.

Lower highs and higher lows

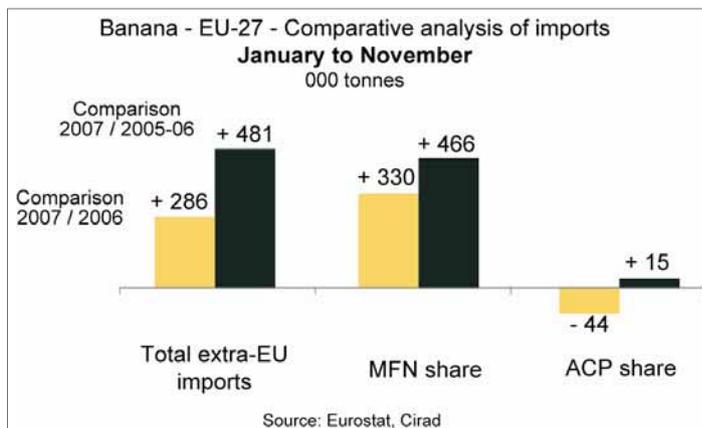
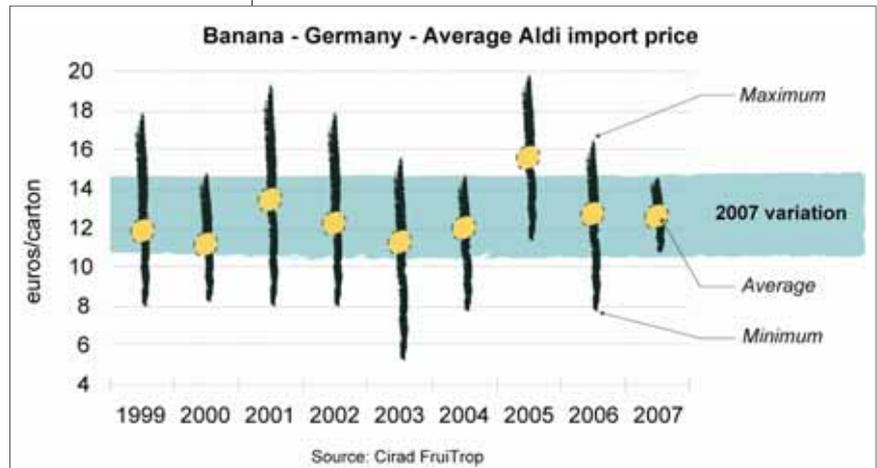
As in 2006, performance as regards prices was mixed. Reference prices (Aldi import price) were practically identical at EUR 12.6 per box in 2007 in comparison with

abundant. The 2004 and 2006 slumps seem to have quietened the enthusiasm of European operators who have now soft-pedalled on imports during this period.

The very low high point observed in 2007 (EUR 14.60) shows the inability of the import link of the chain to increase trading prices for supermarket chains. The improvement of market conditions will never be lasting enough to allow a significant, lasting increase in prices. In an open system, supply has an annoying tendency to pop back up on the market immediately and so 'de-seasonalisation' seems to be taking place. But beware of making a mistake. The good situation now in early 2008 should be seen in relative terms. Import prices are rising but only reaching very classic levels.

EUR 12.7 in 2006. If the very unusual 2005 is left out, the average was very slightly above that for 2001-2006. And 'average' is doubtless the term that best describes the movement of import prices. The amplitude of variation of the Aldi prices was twice as narrow as in preceding years. In 2007, the difference between the lowest and highest weekly prices was EUR 3.8 per box while it had been nearly EUR 9 in 2006 and EUR 7 in 2004. It is true that the 2007 summer dip was not as marked as those of 2006 or 2004. This partly explains why the low point of the year was higher than EUR 10.00 per box. There are several reasons for the good behaviour of the banana market in summer 2007: cold and rainy weather favourable for this fruit and unfavourable for its competitors and supply that was not over-

We have seen that the average annual price in 2007 hides substantial breaks in the everyday functioning of the market. It also hides a tremendous change in cost structure

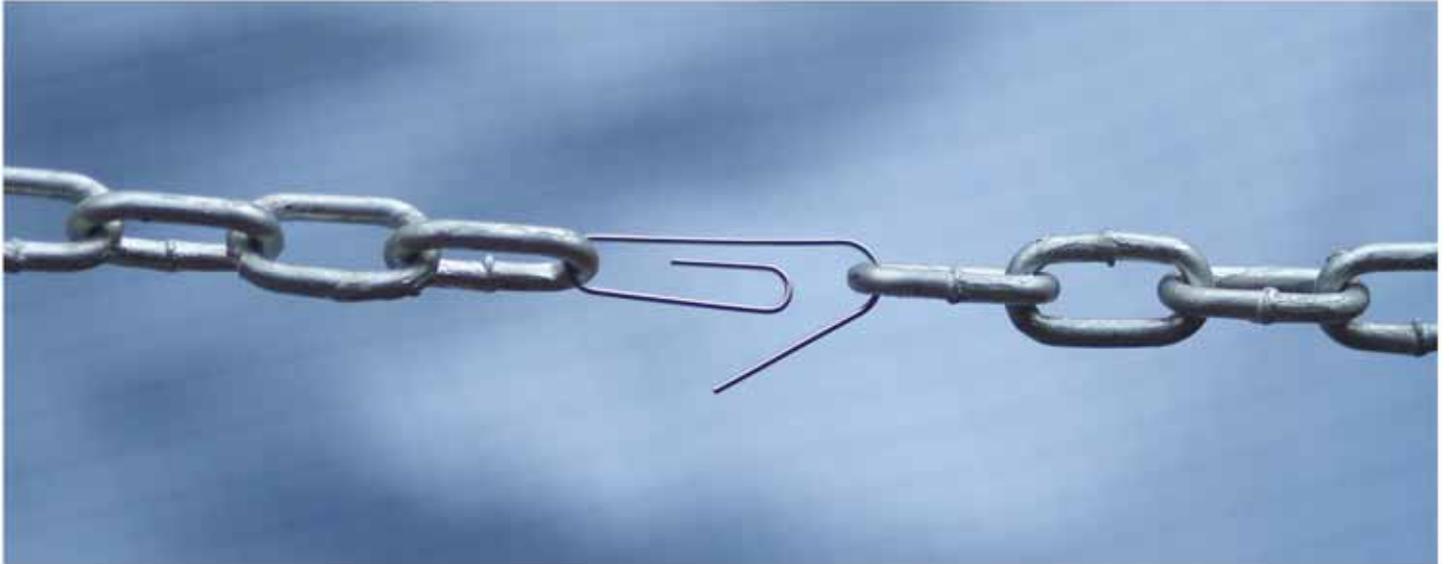


and analysis should be taken further. Three major changes can be seen: the increase in freight costs, the increase in producer price and the application of customs dues to all the bananas imported from dollar zones and to over-quota ACP bananas.

Strongly rising intermediate costs

Freight costs increased by 10 to 15% (reefer spot reference) in 2007 in comparison with the 2004-2006 average, with peaks at + 65 and + 89% in May and January respectively. The increase results from higher oil prices. The Bunker Adjustment Factor (BAF) used to correct freight rates using the cost of oil has doubled in 12 months and tripled since the beginning of 2005! And the impact of

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First published in 2003, it provides a number of services for users along the reefer logistics chain: the Reefer Trends weekly charter market brief is *the* benchmark publication for the specialist reefer business – it tracks the charter market for reefer vessels, as well as fruit and banana production and market trends that influence charter market movement.

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reefer trends



Simba France-Del Monte out to conquer Mars

Simba France wishes to create a new occasion for purchasing and eating bananas during the day, using the logistics of Del Monte, distributed by Simba in France. For this, it proposes to adapt supply to the demand of consumers who have less and less meals at home and would like a more balanced diet. Chocolate bars and sweets had better watch out. The recipe recommended with the 'Gourmet' formula consists of bananas packaged singly and a 10-fruit showcase suitable for all types of outlets: snack bread and pastry sellers, fast food and catering, neighbourhood groceries, delicatessens, hotels, etc. From the trade angle, Simba France guarantees to deliver its customers a set number of fruits per package

(56 fingers), standard unit weight (130 to 150 g) and regular supply.

more expensive fuel does not stop at the dock. An increasing number of European purchase centres in Europe require that the seller (importer or ripener) handles road transport in Europe.

Spot purchases at production have also been more expensive. The price negotiated in Ecuador has become very much in favour of producers who choose this sales method. Another proof of the increase in the price of produce is that the Costa Rican government decided to raise the reference price paid to producers from 1 January 2008 to USD 6.45 per box.

The customs tariff was raised from EUR 75 to 176 per tonne in 2006, that is to say from EUR 1.39 to 3.26 per box. This steep increase on 1 January 2006 conceals a different distribution of the expense. Some operators have lost quota rent and pay customs dues at more than double the previous rate while others paid customs dues but no longer had to purchase import certificates.

Distributors take the power

For importers, continued downward pressure on import prices and the rocketing of intermediate costs also means the capture of value by the downstream link in the chain. The reform of the common market organisation of bananas in 2006 led to the destructuring of the European market and a search for a new framework and fresh balance. Power was strongly concentrated at the import stage and has shifted slightly

towards the production stage with the increase in spot prices but above all towards the tail of the chain. Figures clearly prove this new distribution of forces. Retail distributors are now succeeding in damping the import price by means of strongly dispersed competition in supply but have not given an inch as regards the retail price of bananas (see boxes). The added value is now in the hands of distributors. Three options are available to intermediate operators:

reorganising supply in order to master it, persuading retail distributors to release value-added or creating supplementary added value. The first two solutions are utopian in a liberalised market. The third solution would seem to be the most virtuous one. Varietal innovation, creativity applied to packaging, distribution and consumption and also new ways of selling produce to consumers are all pathways that operators are beginning to explore. What seemed to be minor in 2006 is becoming essential in 2007, forming the one and only way of consolidating or even saving an industry ■

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The movement of banana prices in Europe in 2007

United Kingdom

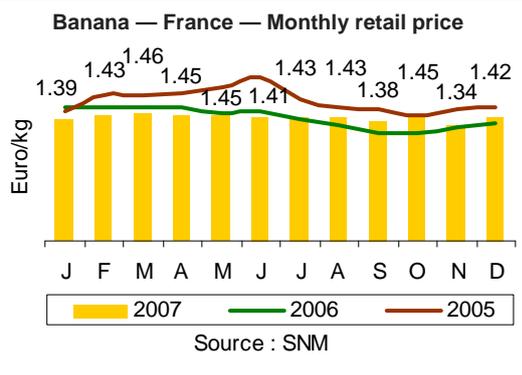
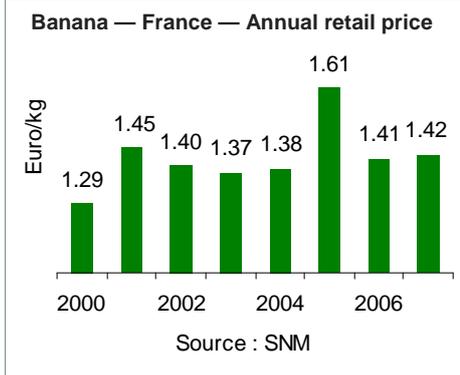
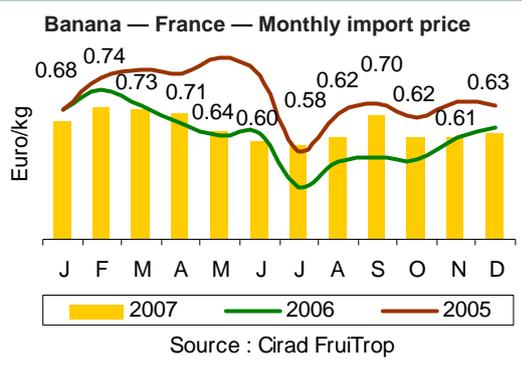
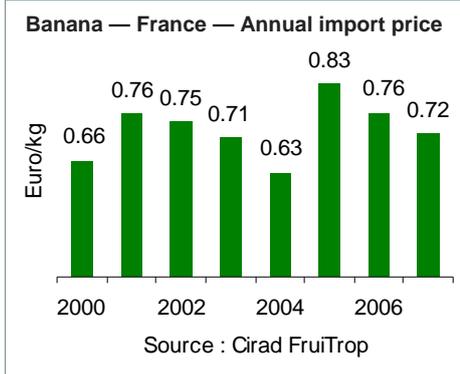
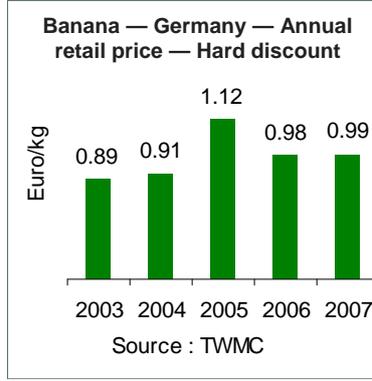
A retail price war raged furiously in the United Kingdom in 2007. Price levels for loose banana reached hitherto unseen low levels. The annual average price fell by 5% for loose fruits (80p per kg in 2007 against 84p in 2006) and by 7% for packaged goods. This moderate decrease hides the movements that occurred during the year. The price of loose bananas lost more than 8% in May, regained a little ground in September as a result of hurricane Dean and then fell again by 15% to 69p per kg in November and December. Conversion of these prices into euros shows that they are close to German discount store prices, that is to say slightly less than EUR 1.00 per kg. There was no respite for packaged fruits. The price fell by 11p per kg from January to December and seems to have stabilised at slightly less than £1 per kg (EUR 1.4 per kg).

France

The average import price was EUR 0.62 per kg in 2007, a 6% increase in comparison with the figure for 2006. The rise was made possible by a satisfactory first quarter, no summer slump and September sales benefiting from the effects of hurricane Dean on supply. The last quarter was disappointing. Market shares changed considerably as a result of the total or partial destruction of production in Guadeloupe and Martinique. While the French supplier zones were regaining their natural market, their enforced absence opened the door to dollar zone suppliers, who took 20 to 30% market shares in the last four months of the year. African supplies were adjusted, using volumes generally destined for other markets to consolidate the French market share at slightly over 70%. Retail prices in 2007 remained practically the same as those of 2006: EUR 1.42 per kg. Special offer prices fell by 4% to EUR 1.25 per kg—the three-year average (2005 excluded). Although it is difficult to identify an underlying trend, 2007 nonetheless confirms the phenomenon of very low special offer prices every three or four weeks; this feature had already been observed in the last quarter of 2006. Promotion operations (the proportion of shops with a special offer on bananas) fell further to 21% in comparison with 24% in 2006. The retail price: import price ratio decreased a little to 2.10 against 2.3 in 2006. The difference between retail price and import price also decreased by 5 cents, returning to EUR 0.76 per kg.

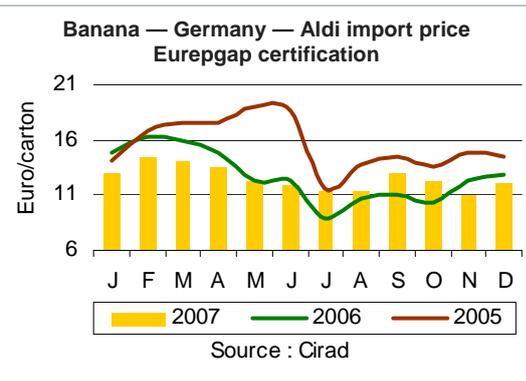
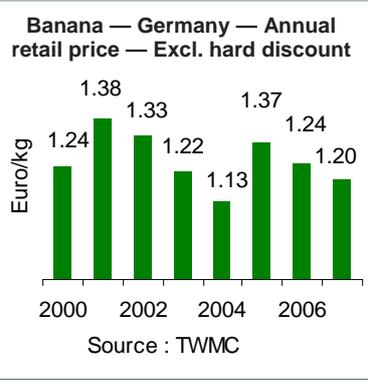
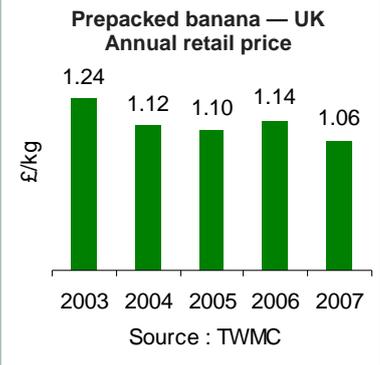
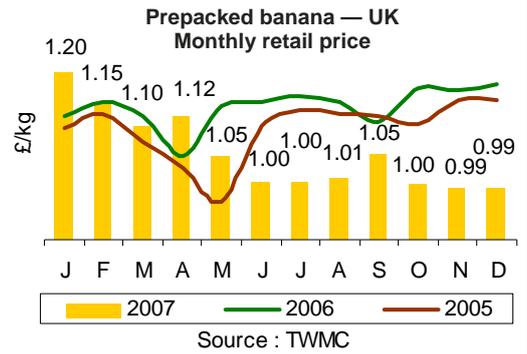
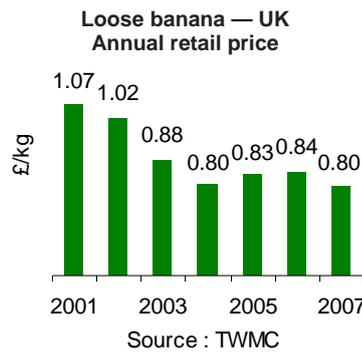
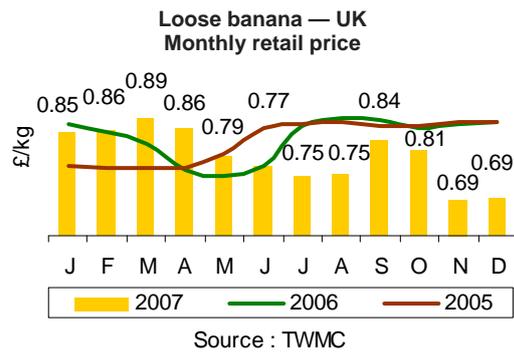
Banana — Indicators			
Year	% special offers*	Retail price / special offer price euro/kg	
		Difference	Ratio
2000	32	0.68	2.26
2001	26	0.78	2.15
2002	27	0.79	2.40
2003	25	0.78	2.39
2004	25	0.77	2.26
2005	23	0.81	2.04
2006	24	0.79	2.26
2007	21	0.76	2.15

* percentage of stores surveyed (over 1 500 sq. m) running special offers /Source : SNM, CIRAD



Spain

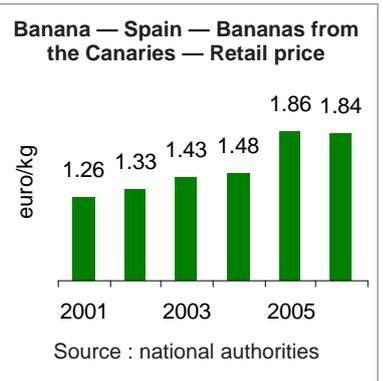
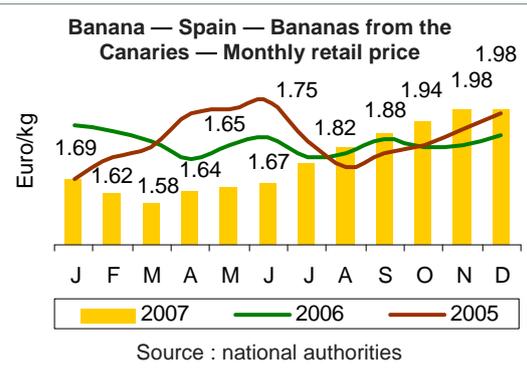
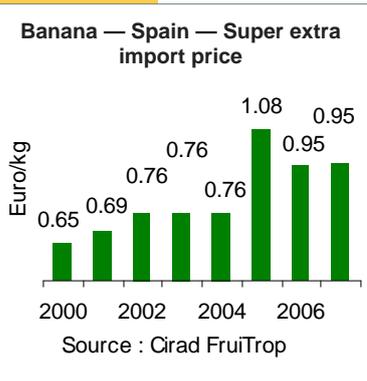
The Spanish market is holding up well against liberalisation. This is shown by the movement of the quay price of Canary Island bananas (super extra) that from July onwards was sometimes much higher than the prices recorded during the excellent year 2005. The average annual price was stable at EUR 0.95 per kg (super extra). The market does not seem to have felt the effects of liberalisation. Retail prices reached dizzy heights during the four last months of the year at between EUR 1.88 and EUR 1.98 per kg! Analysis of this price movement in relation to market releases of Canary Island bananas shows a very strong and simple mechanism of cause and effect. Both retail and quay prices are at their lowest when large volumes arrive from the Canaries and at their highest when the volumes decrease.



Germany

The Aldi import price, a reference for the rest of Europe, was similar in 2007 to the level observed in 2006: EUR 12.6 per box. Its intra and inter-annual movements are not discussed here again (see preceding article). Retail prices in both traditional shops and hard discount stores were stable in comparison with 2006 at EUR 1.2 and 0.99 per kg respectively. If the atypical year 2005 is excluded, German hard discount stores have increased their prices by more than 10% since 2006. Traditional distributors have hardly changed theirs at all as they were 3% down in 2006 and stable at the three-year average (2003, 2004 and 2006). The difference between retail prices and import prices increased slightly (4%) and the retail price:import price ratio was unchanged at 1.7 (as in 2004 and 2006).

There is nothing surprising in this verification of the famous law of supply and demand. What is fascinating in this case is the ability of the Spanish market to manage itself. It acts as if it were disconnected from the pressure exerted by dollar banana supplies. It is true that hurricane Dean eased the quantities of French bananas sold on the Spanish market. More generally, it can be considered that it is also a sign of the success of the Spanish model that has succeeded since 1993 in conserving its market more or less, and the liberal banana system with it.





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Apples

The 2007 apple season marked the return to a balance between the northern and southern hemispheres after several years of problems. However, the season was enhanced by particularly favourable market conditions in the northern hemisphere resulting from the European production deficit and the frost that hit citrus in California, stimulating apple exports to the United States. Nevertheless, the stabilising of the orchard area in most southern hemisphere countries following economic difficulties (low prices, increased production and transport costs, less favourable exchange rates) and increased demand on certain markets (Russia, the Asian markets, the Middle East and the processing industry) should strengthen this balance in the years to come.

In contrast, the pear market is not yet fully consolidated, with the overlapping of southern hemisphere 'Williams' and 'Packham's' and the development of European supplies, especially of 'Conference' and 'Abate'. Market equilibrium also requires better balancing of the European market and the Russian market, where demand is increasing.



and pears

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Apples and pears: counter-season supply in Europe

Stabilising?



After a stabilisation phase at the end of the 1990s, European apple imports increased strongly until 2004. They thus doubled from 1997 to 2004, increasing from 482 000 to 882 000 tonnes. The various slumps that then hit the market resulted in a stabilising of shipments, leading to a certain balance today at around 900 000 tonnes. It is pointed out that this is still less than 10% of EU supplies. However, the situation has changed in the last decade with changes in a number of parameters such as exchange rates and production costs, obliging some suppliers to change their export strategy. This has mainly benefited South American suppliers. Pear imports are also increasing but much less strongly than apple. A total of slightly more than 300 000 tonnes is imported today in comparison with 250 000 tonnes ten years ago.

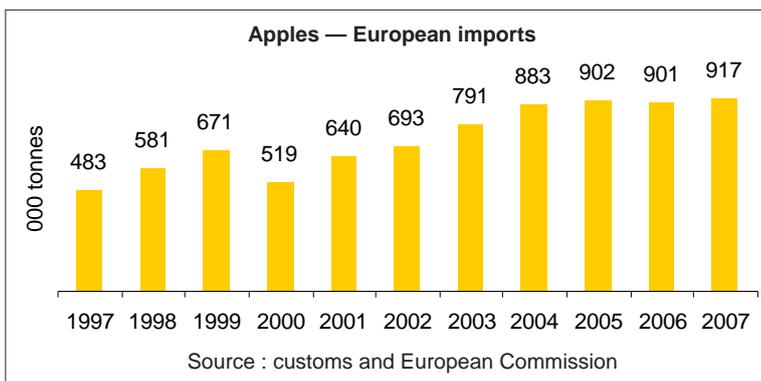


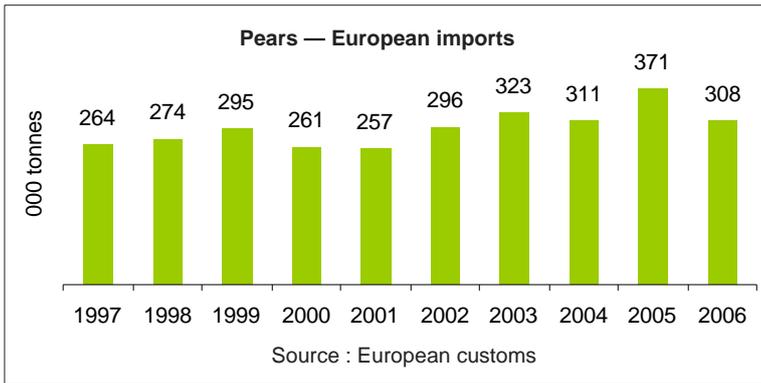
been less than 300 000 tonnes in recent years, with less than 200 000 tonnes for Europe, as a result of increased competition from South American countries and an unfavourable exchange rate both against the euro and the US dollar. The New Zealand apple industry was already suffering from deregulation and was unable to face up unscathed to these economic difficulties and more than 10% of the orchard was grubbed up. However, it has started restructuring and nearly a hundred operators have already joined the export-oriented Pipfruit Market Panel. In addition to the recognised high quality of its production, New Zealand is now focusing on varietal innovation in order to maintain its lead over its South American competitors. An association grouping the various sector stakeholders has thus been formed to continue experimentation. Thus, after 'Gala' and 'Braeburn' (70% of production), New Zealand is investing in 'club varieties' such as 'Pink Lady' and 'Tentation' but above all in the variety 'Jazz' whose early performance on the European market is promising. This ENZA exclusive variety has been marketed since 2004. Production should double each year and reach 10 million boxes in 2012.

All that jazz in New Zealand!

New Zealand production was particularly had hit by the slumps that have shaken the apple industry. It thus lost its leading position on the European market in 2005. After peaking in 2005 (320 000 tonnes, including 219 000 for the EU market), exports have

In contrast, European imports of New Zealand pears are very limited at 1 600 tonnes, consisting mainly of 'Comice'.





This supplier country still relies on its broad varietal range, even if some cultivars are gradually abandoned to the benefit of others that are more profitable and more modern. Thus the areas under 'Rose Marie', 'Beurrée Hardy', 'Flamingo' and 'Comice' are decreasing while those under the three main varieties 'Packham's' (28%), 'Bon Chrétien' (20%) and 'Forelle' (22%) are unchanged.

Larger Chilean exports

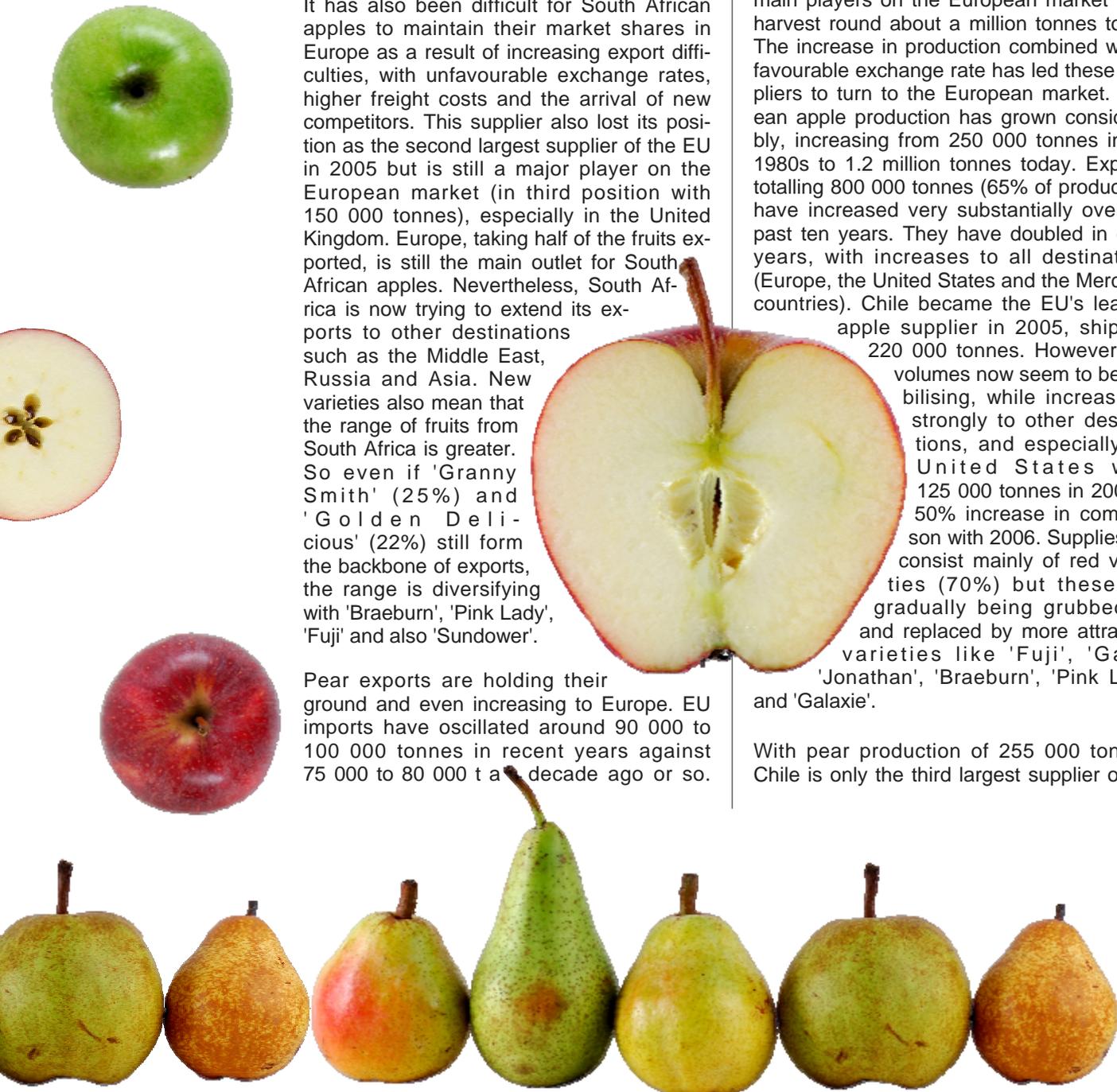
South African orchards have grown tremendously over the past decade and the three main players on the European market each harvest round about a million tonnes today. The increase in production combined with a favourable exchange rate has led these suppliers to turn to the European market. Chilean apple production has grown considerably, increasing from 250 000 tonnes in the 1980s to 1.2 million tonnes today. Exports, totalling 800 000 tonnes (65% of production) have increased very substantially over the past ten years. They have doubled in eight years, with increases to all destinations (Europe, the United States and the Mercosur countries). Chile became the EU's leading apple supplier in 2005, shipping 220 000 tonnes. However, the volumes now seem to be stabilising, while increasingly strongly to other destinations, and especially the United States with 125 000 tonnes in 2007, a 50% increase in comparison with 2006. Supplies still consist mainly of red varieties (70%) but these are gradually being grubbed up and replaced by more attractive varieties like 'Fuji', 'Gala', 'Jonathan', 'Braeburn', 'Pink Lady' and 'Galaxie'.

South African apples still rolling

It has also been difficult for South African apples to maintain their market shares in Europe as a result of increasing export difficulties, with unfavourable exchange rates, higher freight costs and the arrival of new competitors. This supplier also lost its position as the second largest supplier of the EU in 2005 but is still a major player on the European market (in third position with 150 000 tonnes), especially in the United Kingdom. Europe, taking half of the fruits exported, is still the main outlet for South African apples. Nevertheless, South Africa is now trying to extend its exports to other destinations such as the Middle East, Russia and Asia. New varieties also mean that the range of fruits from South Africa is greater. So even if 'Granny Smith' (25%) and 'Golden Delicious' (22%) still form the backbone of exports, the range is diversifying with 'Braeburn', 'Pink Lady', 'Fuji' and also 'Sundowner'.

Pear exports are holding their ground and even increasing to Europe. EU imports have oscillated around 90 000 to 100 000 tonnes in recent years against 75 000 to 80 000 t a decade ago or so.

With pear production of 255 000 tonnes, Chile is only the third largest supplier of the



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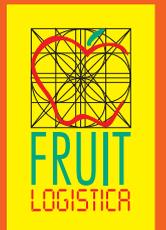
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 **Messe Berlin**

European Union, with volumes of around 50 000 tonnes that are tending to decrease. 'Packham's' and 'Beurré Bosc' alone form 60% of exports.

Strong advance of Brazilian apples

Increased Brazilian production, hitherto mainly devoted to the domestic market (85%), has resulted in growing exports. This supplier naturally turned to the European Union, which is still the main destination, taking 80 to 90% of the volumes exported. Shipments to Europe have increased strongly from 20 000 tonnes in 1997 to 95 000 tonnes in 2007, that is to say a four-fold increase in tonnage. The funds devoted to promotion operations on foreign markets should also make it possible to develop 'Fuji' exports alongside 'Gala'. The two varieties now form the greater part of Brazilian orchards.

Argentina expanding strongly

As in Brazil, the greater proportion of the apples grown in Argentina (80%) are sold on the domestic market. However, the economic slump that shook Argentina in 2002 and resulted in devaluation of the peso, together with a chronic decrease in exports to Brazil for reasons of increased domestic production and phytosanitary problems contributed to the redeployment of exports to the European community and development in Russia. European imports of Argentinian apples have increased by 43% over a 10-year period. The traditional red varieties are gradually being replaced by more modern varieties such as 'Gala', 'Braeburn' and even 'Granny Smith'.



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tina explored the Russian market to which it now exports more than 95 000 tonnes. Most of the produce shipped consists of 'Williams' and 'Packham's', with 37 and 33% of production respectively. Stress is now laid on the rationalisation of freight and load grouping.

The increase in imports during the season

EU imports of Chinese 'Fuji' have also increased considerably over the last ten years. Nevertheless, in view of the economic difficulties encountered in Europe, especially in the early 2000s, imports of Chinese apples stabilised at around 40 000 tonnes after record shipments of more than 60 000 tonnes in 2004. In contrast, shipments of 'Ya' and 'Nashi' pears are still increasingly steadily, especially for northern Europe.

Imports of US apples are stable overall at about 30 000 tonnes. In contrast, pear imports are tending to decrease steadily (4 800 tonnes in 2006 against 11 300 tonnes in 1997) ■

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Apples and pears EU-27 imports in 2006		
tonnes	Apples	Pears
Total, of which	773 088	307 685
New Zealand	166 095	1 640
South Africa	151 669	87 893
Chile	220 250	46 232
Argentina	97 331	143 789
Brazil	55 285	-
China	33 431	18 772
United States	30 600	4 852

Source: Eurostat

Although exports make it possible to shift surplus apple production, they are determinant for Argentinian pear as nearly 70% of production is exported. Indeed, Argentina is the EU's leading pear supplier. However, as the European market cannot accompany the development of domestic production, Argentinian



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Apples and pears: the European counter-season

The end of the slump?

The 2007 season marked the end of the slump that had affected the apple industry since 2004. It can even be said that the produce sold smoothly so that most varieties fetched decent prices once again. Only 'Braeburn' lagged behind as a result of the increase in supplies in several southern hemisphere countries, the shortage of outlets in Europe and a very early start to the new European harvest.

Although the pear season was satisfactory in terms of volume, prices were somewhat disappointing.



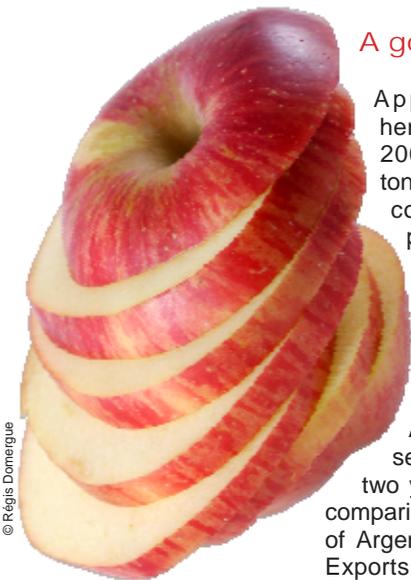
to the European Union. However, this strong increase is accounted for to a considerable extent by the particularly favourable market conditions in the northern hemisphere (a record deficit in Europe and citrus hit by frost in California).

A good year for apples...

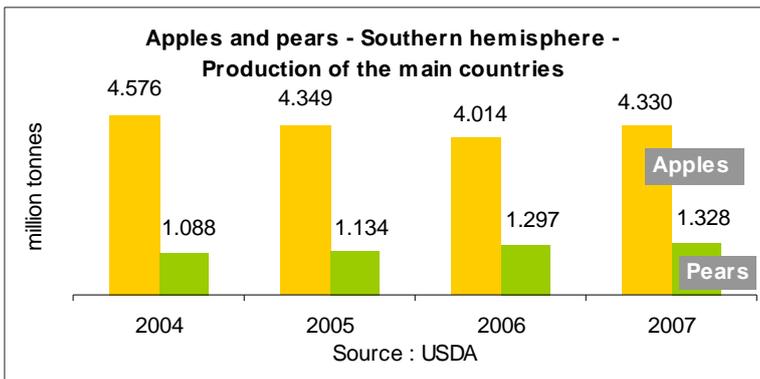
Apple production in the southern hemisphere returned to a good level in 2007, with a total of some 4.3 million tonnes, that is to say an 8% increase in comparison with 2006. However, this potential is distinctly smaller than the pre-2005 harvests that approached 4.5 million tonnes as much grubbing up has been performed in New Zealand. In fact, these figures result from the stabilising of the orchard areas in the latter country, in South Africa and in Chile. In contrast, the season marked the return of Brazil after two years of very small harvests (+ 33% in comparison with 2006) and, to a lesser degree, of Argentina (+ 6% in comparison with 2006). Exports returned to a very good level with a total of 1.75 million tonnes (13% more than in 2006), of which 770 000 tonnes was exported

...but slightly disappointing for pears

Likewise, at 1.3 million tonnes, pear production potential in the southern hemisphere was 3% greater than in 2006, confirming the increase in production in Argentina. Total exports increased by more than 5% in comparison with 2006. Provisional European customs figures also confirm an increase in exports from these countries (313 000 tonnes). Nevertheless, the performance was mixed as the market remained fairly competitive for both 'Williams' and 'Packham's', and prices were disappointing. Exports of 'Williams' were strongly concentrated at the beginning of the season as very hot weather during the last days of the harvest accelerated ripening. Competition with 'Abate Fetel' from Italy was also strong at the beginning of the season, as the crop in Italy reached a record level in 2006-2007. Competition in sales of 'Packham's' was also very lively between southern hemisphere suppliers, with late appearance as a result of the record 'Conference' harvest in northern Europe ■



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Apples and pears: the northern hemisphere season

Good prospects in 2007-2008



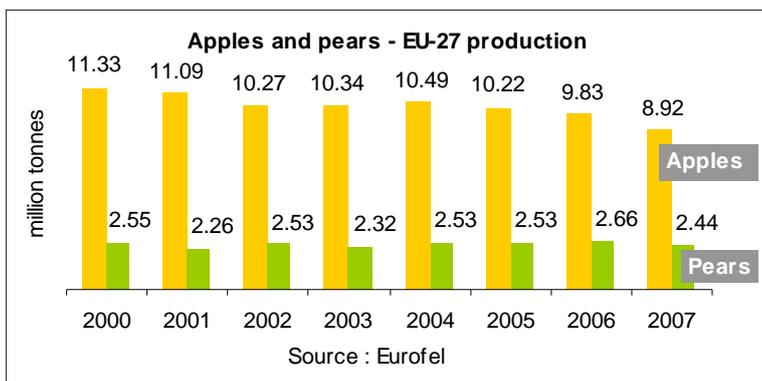
The particularly mild 2006-2007 winter had effects on flowering in most European production zones. The first harvest potential estimate released at the Prognosfruit conference in August 2007 indicated some 8.5 million tonnes of apples, 13% down on 2006-2007. However, the figure was revised upwards in most western European countries (EU-15) as a result of September rainfall that increased fruit size. The total deficit in EU-27 in comparison with 2006 is thus reported to be 9%. The harvest in EU-15, initially 2% up on 2006-2007, is thus probably slightly larger (+ 8%, that is to say 7.2 million tonnes), with much larger crops in northern Europe. The 10 new member-states produced only 1.7 million tonnes, the smallest harvest of the past decade, with a 45% deficit in comparison with 2006. Likewise, it is reminded that the US crop potential was somewhat reduced by bad weather: frosts in the spring and drought in the summer. This year, US apple production totals 4.2 million tonnes, a small harvest in comparison with the two preceding seasons (4.5 million tonnes in 2006 and 4.4 million in 2005) and 7% down on 2006.

The European pear crop has been mediocre this year with a marked decrease

in production in southern Europe, with deficits of 9% in Italy (including 5% in 'Abate'), 10% in Portugal, 15% in Spain and 11% in France in comparison with 2006. In contrast, the increase in orchard area in northern Europe resulted in increased 'Conference' pear production in Benelux (+ 4% in Belgium and + 6% in the Netherlands in comparison with 2006—two new records).

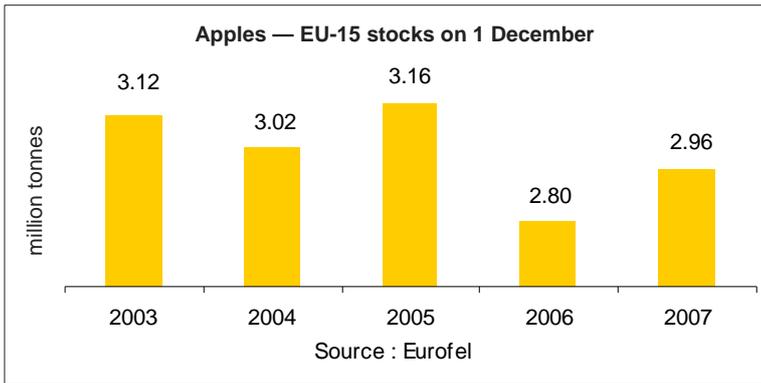
Good first part of the European season

The start of the 2007-2008 season was particularly laborious in Europe as the crop was three weeks early in the north of western Europe, strongly overlapping with the production zones in the south. This pressure from supply weighed heavily on price levels. However, the excellent prospects of industry resulting from the strong deficit in Poland made it possible to allocate large volumes to this sector where the market is growing strongly, especially as production in China, a major player on the world concentrate market, also has a serious deficit this year (- 20 to - 25% in comparison with 2006-2007). Large volumes were also cleared via shipments to destinations outside the EU as demand is continuing to increase in Russia, the Middle East and Asia.

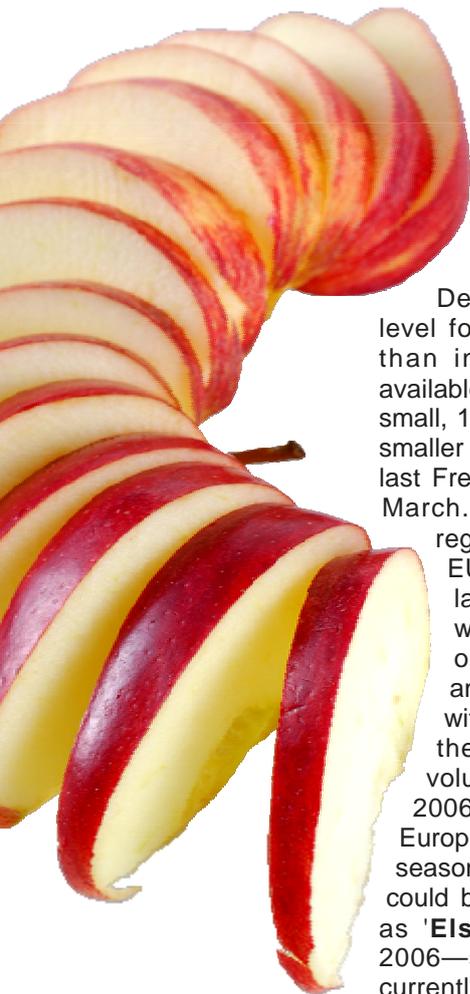


Small European stocks...

Although EU-15 production was 8% larger than in 2006, apple stocks on 1 December 2007 were only 5 to 6% larger than in the previous year; this is a poorish level in comparison with years pre-2006. Operators are fairly confident about the second part of the season as sales are distinctly brisker than in the last season (+ 11% in Germany, + 1 to 2% in France and + 12% in the



northern Italian production areas at the end of 2007). Releases should continue strongly in 2008 as demand from industry is still strong with high price levels and good export demand, especially from outside the EU.



...but some concern about bicolour fruits

The market should be particularly clear for varieties such as **'Red Delicious'**, whose production decreases year after year; western European stocks of the variety on 1 December 2007 were at the lowest level for a number of years, 8% smaller than in 2006. Likewise, as in 2006, available quantities of **'Granny Smith'** are small, 1% larger than in 2006 and distinctly smaller than in 2005. It is reminded that the last French season finished very early—in March. There are no major worries as regards **'Golden Delicious'** either as EU-15 stocks are only 3% larger than last year's small level. The market was very clear last season from May onwards. However, fairly substantial amounts of **'Gala'** are still available, with stocks running 25% greater than the very small 2006 level. But the volume is similar to the years before 2006 with much larger outlets outside Europe; this promises a normal end to the season, that is to say in March. Difficulties could be caused mainly by varieties such as **'Elstar'** (+ 19% in comparison with 2006—stocks as large as in 2004) that currently limit exports of bicolour fruits to the German market and whose season could be longer than it was last year. This situation may also limit sales of **'Jonagold'/'Jonagored'**, stocks of which are 11% greater than in 2006 but in line with the average of preceding years. The

situation of **'Braeburn'** is worrying as stocks are 21% larger than in 2006 and distinctly larger than in preceding years. Stocks of **'Fuji'** are also at their highest for a number of years (+ 27% in comparison with 2006). **'Pink Lady'** stocks are also increasing as well (+ 8% in comparison with 2006) but should clear without too much difficulty.

Releases are satisfactory in the United States with December sales 3% larger than in 2006 and 6% greater than the average for the last five years. US stocks on 1 January 2008 were 2% down on 2007 (1% higher than the average for the last five years). Stocks of **'Red Delicious'** are particularly short (- 12% in comparison with 2007 and 6% lower than the average for the last five years). Stocks of **'Golden Delicious'** are 18% up on those of 2007 but 10% lower than the average for the last five years. In contrast, stocks of **'Gala'** are fairly large, running 26% higher than those of 2007 and 35% higher than the average for the last five years. Stocks of **'Granny Smith'** are 10% smaller than those of 2007 and 3% higher than the average for the last five years. **'Fuji'** stocks are 7% down on 2007 and 3% down on the average for the last five years.

A promising second part of the season but uncertainty remains

The pear market also seems to be settling down fairly quickly. Operators display confidence as the southern European season should finish early. Stocks of **'Abate Fetel'** have decreased rapidly and were 17% smaller at the end of 2007 than at the end of 2006. This would indicate an early finish to the season at the end of February or in March at the latest in spite of a voluntary slowing of releases. Similarly, northern European operators have good hopes as releases are large with numerous outlets (Russia, southern Europe). However, these fruits should remain present until July in Belgium and probably until August in the Netherlands. Price levels are distinctly higher than last year's especially for small fruits (< 70 mm) that are in short supply ■

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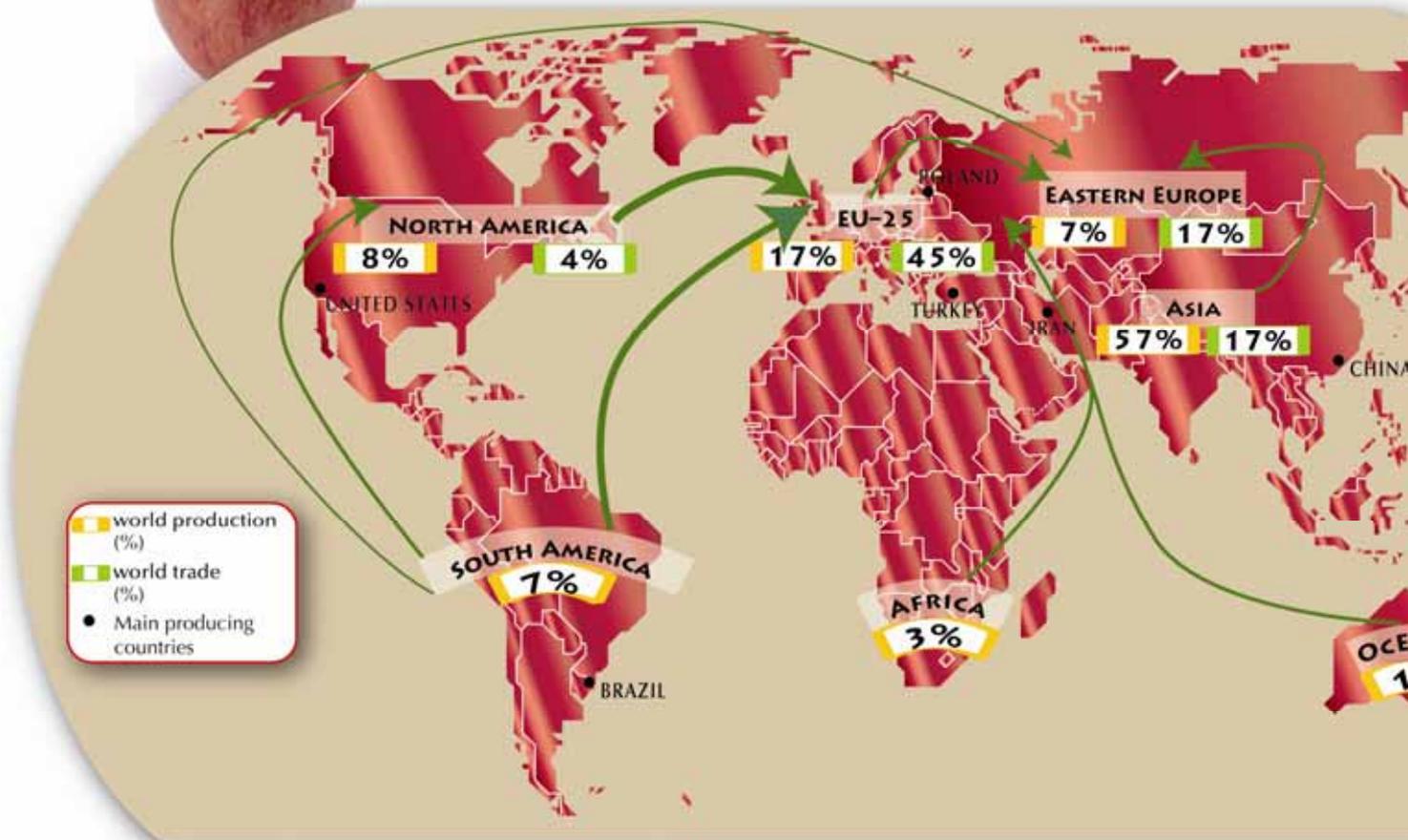


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APPLES

production 63 million tonnes
international trade 6.7 million tonnes



Apple — United States imports

tonnes	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Total	158 710	141 971	164 167	163 894	157 120	170 354	186 622	207 378	122 773	156 689
Chile	26 611	37 285	42 971	43 706	57 685	62 540	90 288	113 259	54 415	82 619
New Zealand	52 508	41 649	61 285	71 474	48 442	60 367	51 166	57 708	32 353	37 417
Canada	63 069	41 166	42 668	38 358	38 740	43 366	37 268	30 336	33 789	34 893
Argentina	1 904	1 105	2 660	2 071	3 262	1 659	4 713	2 295	1 510	1 512
China	0	0	0	0	0	78	0	20	117	172
Japan	43	42	35	43	46	46	58	61	407	61
Thailand	0	0	5	0	0	0	0	0	6	14
India	0	0	0	0	0	0	0	0	0	3
Brazil	280	0	345	473	0	0	239	2 248	0	0
South Africa	14 054	18 206	13 972	6 772	8 771	2 226	2 851	1 434	157	0
Others	240	2 519	226	998	174	72	38	19	19	0

Source: US customs

Apple — Japanese imports

tonnes	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Total	710	150	221	308	594	2 339	120	108	18	124
Korea	51	22	108	39	251	1 411	1	-	2	-
Australia	-	-	-	110	247	650	120	108	16	124
United States	404	105	-	159	96	278	-	-	-	-
New Zealand	254	9	112	-	-	-	-	-	-	-
France	-	12	-	-	-	-	-	-	-	-
Nepal	-	1	-	-	-	-	-	-	-	-

Source: Japanese customs (code 080810000)

Apple EU imports by entry point

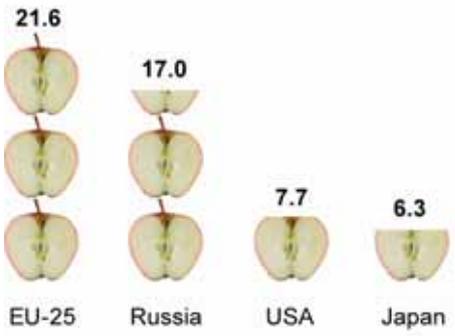
Portugal	2%		3%
Germany	8%		3%
Sweden	4%		3%
Italy	4%		3%
France	1%		4%
Spain	5%		8%
Belgium	22%		11%
UK	32%		30%
Netherlands	18%		31%

1996-1997

Source: Eurostat



Apple
Per capita consumption (kg/year)



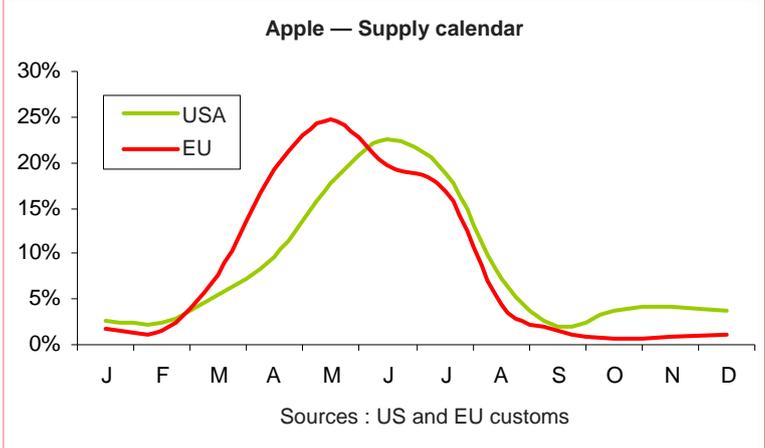
Sources: FAO, customs & Cirad

Apple World production	
2006-07 average	tonnes
World	63 139 891
China	25 042 525
United States	4 488 750
Iran	2 661 901
Turkey	2 286 017
Poland	2 189 922
Italy	2 152 360
France	1 781 061
India	1 739 000
Russia	1 695 000
Chile	1 350 000
Argentina	1 271 536
Germany	919 507
Brazil	855 960
Japan	825 350
Spain	717 455

Apple World exports	
2005	tonnes
World	6 879 240
China	852 510
Italy	723 950
United States	685 440
France	654 080
Chile	564 740
Netherlands	444 360
Poland	427 040
Belgium	352 780
New Zealand	318 610
Argentina	273 700
South Africa	262 750
Moldavia	135 700
Iran	132 330
Spain	102 010
Brazil	99 330

Apple World imports	
2005	tonnes
World	6 658 490
Germany	773 570
Russia	723 580
United Kingdom	514 220
Netherlands	320 100
China	262 160
Belgium	225 530
Spain	224 830
Mexico	195 170
France	184 510
Canada	159 060
Saudi Arabia	146 430
Indonesia	126 970
United States	122 770
Sweden	111 950
Austria	101 530

Sources: FAO



Apple — EU-25 imports — Main extra-EU suppliers, excluding Eastern Europe

tonnes	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Total extra-EU, of which	864 728	678 650	783 249	671 425	729 943	801 780	872 671	902 685	926 815	784 860
Total Southern hemisphere	527 147	539 550	655 926	484 326	598 099	648 530	734 675	795 054	820 344	711 735
Chile	131 712	144 788	179 905	91 159	143 362	158 094	177 697	179 157	225 158	224 289
New Zealand	161 195	130 623	183 851	167 070	175 819	206 039	198 628	213 746	219 958	178 238
South Africa	131 135	179 818	158 341	121 631	152 725	148 085	181 893	180 147	156 821	151 852
Argentina	79 806	68 461	77 051	41 329	87 427	73 372	97 682	91 722	121 292	97 378
Brazil	19 721	10 308	49 679	57 052	31 662	57 487	69 010	122 947	88 320	53 442
Uruguay	936	3 008	4 406	2 595	3 534	3 142	5 219	5 326	6 661	3 596
Australia	2 643	2 543	2 693	3 489	3 571	2 312	4 546	2 010	2 136	2 940
Total Northern hemisphere	45 462	55 845	64 895	43 870	48 412	49 901	60 102	105 122	95 703	68 573
China	877	1 219	1 900	4 010	7 949	14 922	28 409	62 658	50 289	33 513
United States	36 528	46 188	55 454	32 384	33 957	28 769	28 258	37 242	39 857	30 600
Canada	8 057	8 439	7 540	7 477	6 506	6 209	3 436	5 222	5 558	4 460
Others*	292 118	83 255	62 428	143 229	83 432	103 350	77 894	2 509	10 768	4 552
Intra-EU	1 640 779	1 753 508	1 900 193	1 876 630	1 779 872	1 887 024	2 050 049	2 192 439	2 271 427	2 459 219

* mainly Eastern Europe until 2004 / Source: Eurostat (code 080440)





Apples and pears: southern hemisphere season

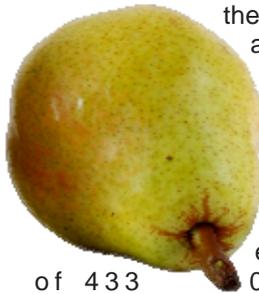
2008 looks like a peaceful year



The parameters of the 2008 season resemble those of 2007 fairly closely. Year-on-year production is stable overall but 4.58 million tonnes smaller than in 2004 as a result of the grubbing up of orchards in New Zealand at the end of 2005. However, supply should increase a little in the coming years with the growth of young orchards of bicolour fruits, particularly in Chile but also in Argentina and Brazil.

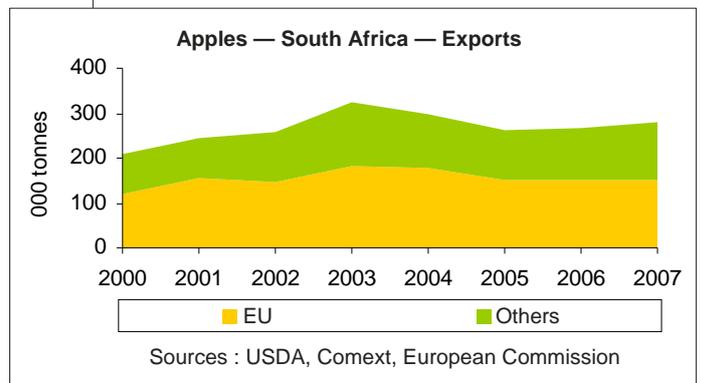
A very slight deficit in New Zealand but good prospects for exports

The areas under orchard—especially apple—seem to be stabilising after the severe grubbing up operations at the end of 2005. However, areas are still gradually diminishing because of pressure from housing and switches to other crops such as onion, potato, maize and grapes. Preliminary estimates forecast a total of 433 000 tonnes of apple and 14 700 tonnes of pear, meaning a fall of about 5% for both crops in comparison with 2007. Two cold spells hit the main production area at Hawkes Bay, reducing the crops of late varieties like 'Braeburn' and 'Jazz'. In contrast, production is normal in the Nelson area. Fruit size should be



normal. The production calendar is also close to normal, running just a few days late.

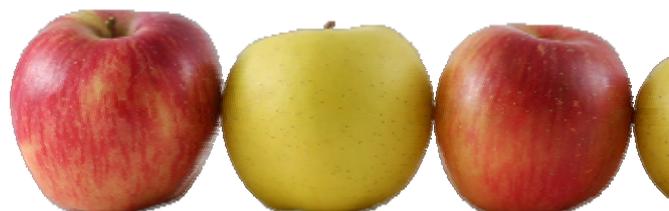
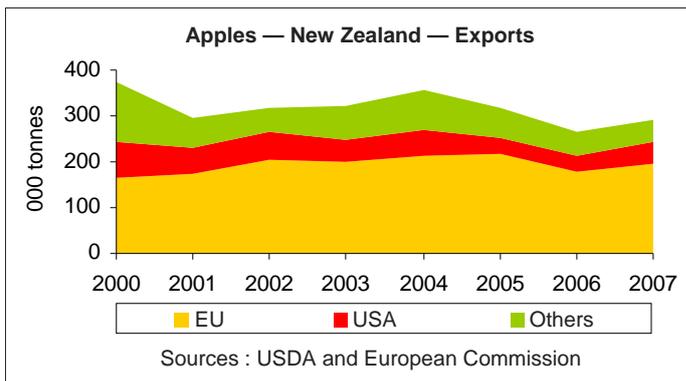
Exports should therefore be slightly smaller than last year's but operators hope for greater profitability as the New Zealand

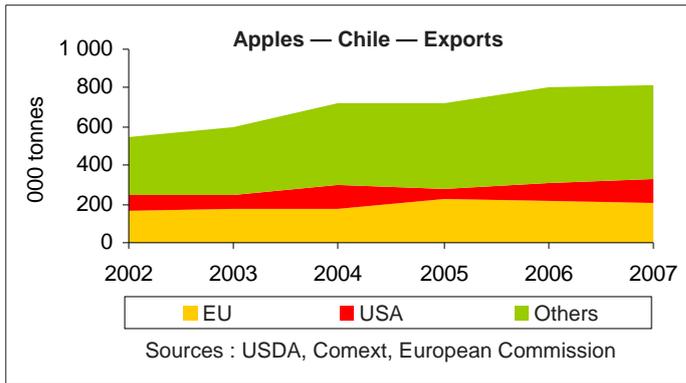


dollar has depreciated. However, exports to Australia are still forbidden. The experts do not predict the reopening of this market before 2010, if it does reopen.

Stability in South Africa

A slight increase in South African production is expected this year as a result of overall satisfactory weather conditions as regards temperature and precipitation. However, the first forecasts presented here might be revised downwards a little because of hail. Apple production should therefore be similar to that of 2007, reaching 650 000 to 690 000 tonnes. The pear deficit might be more marked (330 000 tonnes). As regards fruit size, pears will tend to be small and apples medium-sized.





South African exports should be stable or even up a little this year as the exchange rate is less unfavourable than used to be, with a total of about 280 000 tonnes of apple and 130 000 tonnes of pear. Shipments to the European Union should be stable and those to Malaysia and the Middle East will probably continue to increase. Exports to China should also increase in the coming years thanks to the recently signed agreement for the importing of Chinese 'Fuji' into South Africa. It is emphasised that this year South African operators will also focus on the domestic market where prices are continuing to rise (+ 11% in comparison with 2006).

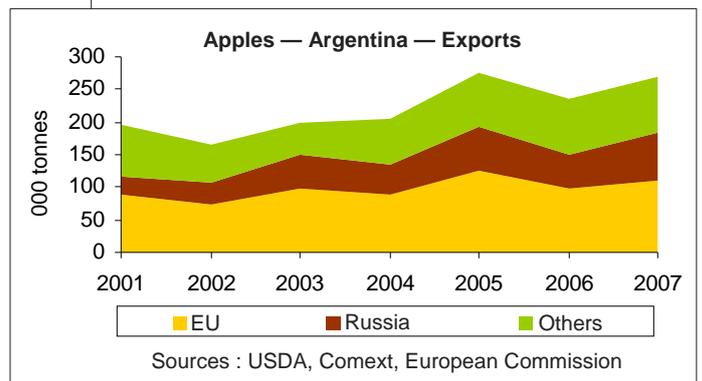
A fresh increase in Chilean potential

After increasing markedly, it would seem that orchard areas have stabilised for the moment in Chile, given the increase in production costs and a less favourable exchange rate. However, production potential is still increasing because of the switching from red to bicolour varieties ('Fuji', 'Gala', 'Braeburn', 'Jonathan', 'Pink Lady' and 'Galaxie'). Weather conditions were very good in winter 2007, with no major incidents. Flowering—stimulated by many hours of cold—was abundant. As a result, the 2008 crop could well reach 1 374 000 tonnes of apple, still rising at 10% more than in 2007, and 257 000 tonnes of pear, a 2% increase in comparison with 2007.

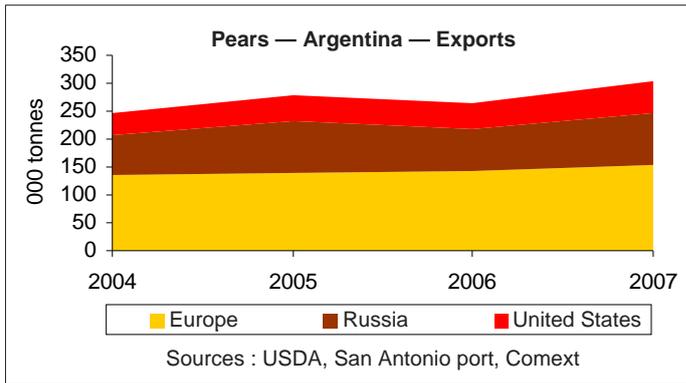


However, fruit size should be average. The harvest calendar is close to normal.

Apple exports should reach at least last year's levels and may be larger, given the good prospects on the two main destinations. The rebalancing between the European market and the US market may continue as prices are high in the United States and prospects fairly clear. However, the strong euro also encourages exports to Europe. In contrast, pear exports may decrease further, in particular to the European Union, because of increasing competition from Argentina.



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An average harvest in Argentina, but good opportunities

The areas under apple and pear are stable overall in Argentina. The winter was particularly hard and production was slightly affected by very hard frosts in mid-November that affected the Rio Negro Valley. In contrast, the crop should be 5 to 10% larger in the Mendoza area; this would be a return to the 2006 level. The decrease in production concerns above all the red varieties whose potential was already limited this year by alternate bearing, to which these varieties are very susceptible. Some sources even forecast a 30% decrease against 2007 for this varietal group. However, the dip is compensated by the start of production in young orchards and 'Gala' in particular. The total crop



should therefore amount to 1 million tonnes this year, a 9% decrease in comparison with 2007. Given this decrease in potential, exports could be reduced a little, although both Europe and Russia are very attractive this year. Total shipments should therefore be around 250 000 tonnes. Likewise, a slight decrease (3 to 4%) in pear production is expected in comparison with last year, making the crop similar to that of 2006 (700 000 tonnes). However, decreased production is also mitigated by the start of picking in young orchards. But weather conditions enhanced the growth of the remaining fruits and so large fruits may form a slightly larger proportion of the 'Williams' crop than last year, with more 70+ mm (80 fruits), and above all of 'Packham's' with 70% large fruits in comparison

with 60% last year. Although the Russian market is the main outlet for Argentinian pears, the strength of the euro may stimulate shipments to the European market this year.

Average harvest in Brazil

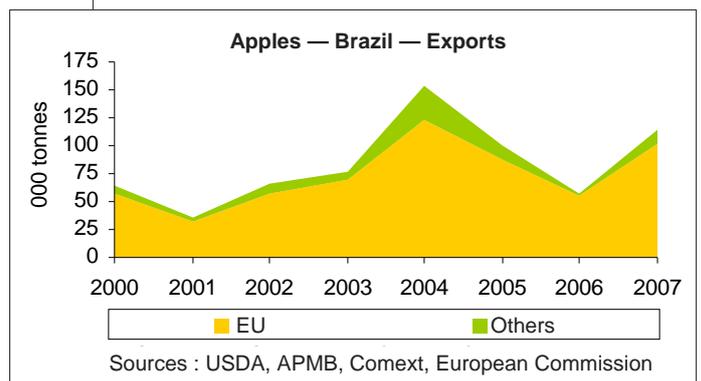
The apple crop should be slightly smaller than last year's as a result of the alternate bearing phenomenon, with a fall of 10 to 15% in comparison with 2007 especially in the Vacaria zone, and the hailstorms that hit this region. The production calendar should be normal, with picking starting at the end of January. Total exports should be around 100 000 tonnes and will also begin at the usual time (first week of February).

Good export prospects

In the light of all this, a calm apple season can be expected for most varieties, perhaps with the exception of 'Braeburn'. Total exports from the southern hemisphere should therefore be similar to last year's or very slightly down as a result of the deficit for certain suppliers such as New Zealand, Brazil and Argentina. Chilean exports may continue to increase even though they reached very high levels in 2007.

Likewise, even though stocks are still substantial in northern Europe, sales of southern hemisphere pears can be expected to be fairly fluid because total European stocks are not large ■

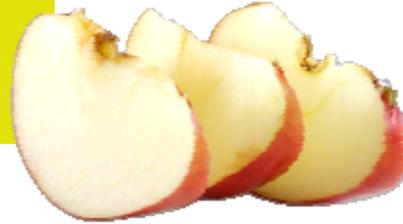
Cécilia Celeyrette, Consultant
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Growing apples

After *Le pommier*, CTIFL, 2002



Agronomy

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

Pests and diseases

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

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

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

Harvesting

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

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

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

Post-harvest

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

© Photos Régis Domergue





The main varieties of apples

After *Le pommier*, CTIFL, 2002

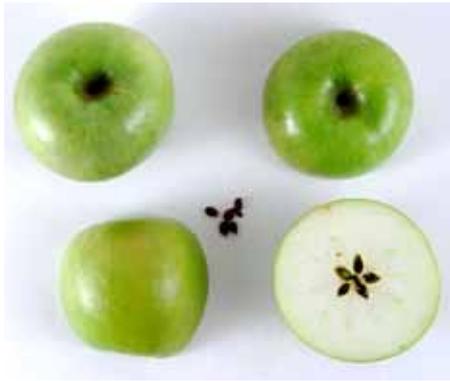
Apples — Classification of the main varieties grown by type	
Green	Granny Smith and mutants
Yellow	Golden Delicious and mutants — Golden Extrême® Gradigold — Primgold® Deljéni — Tentation® Delblush — Earlygold® Snygold, Ozark Gold — Newgold® Newaphough
Bicolour	Akane — Belle de Boskoop and mutants —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

Source: CTIFL

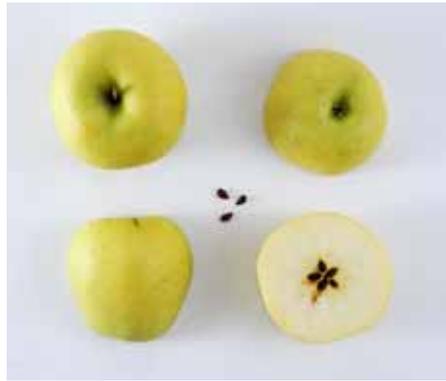
Varieties

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

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



Granny Smith



Golden



Braeburn



Pink Lady®



Gala



Red Chief®

© Photos Régis Domezgue

The characteristics of some varieties

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

Source: CTIFL





Indicators

The main fruits	In shares by total volume and expenditure on fruits for the month in France		
	%	Volumes	Expenditure
Apple	24	20	
Easy peelers	21	21	
Orange	13	10	

Pages

The trends for the main produce of the month significantly influence the overall situation of the fruit market. A column entitled 'Indicators' discussing these fruits precedes the pages devoted to a selection of exotic and citrus fruits.

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NOVEMBER 2007

Apple

Market recovery was confirmed after a difficult start to the season. Stocks available at the beginning of the month were in line with the average but larger than in 2006. However, sales on the domestic market were more fluid. Furthermore, exports to the traditional markets (UK, Spain, etc.) really got off the ground while overseas sales held at a good level. Prices were stable and similar to those of 2006.

Nov. 2007 / Nov. 2006

Price	=	Vol.	=↗
-------	---	------	----

Easy peelers

Market performance was fairly good. The average monthly price was slightly lower than average but the quantities sold reached a record level. The balance is passable for Spain and satisfactory for Corsica and Morocco.

Nov. 2007 / Nov. 2006

Price	=↘	Vol.	↗
-------	----	------	---

Orange

The pattern of the market remained very unusual as a result of the continuing of the South African 'Valencia' season. Sales of 'Naveline' from Spain were thus very slow, especially as consumer interest seemed to be focused on easy peelers. However, the monthly price was fairly satisfactory. Spanish producers maintained their prices because of the small production volume.

Nov. 2007 / Nov. 2006

Price	↗	Vol.	↘
-------	---	------	---

Sea freight

The Time Charter Equivalent (TCE) monthly average figure for November may not please owners and operators of top end tonnage. Because of the supply/demand imbalance it is undoubtedly true that during the month there was often a large discrepancy between TCE yields for vessels fixed on TC and those fixed on a lumpsum basis - the monthly average factors in returns on fixtures from both modern and vintage tonnage.

Nov. 2007 / Nov. 2006

large reefers	↘	small reefers	↘
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Notes concerning market appraisal methodology

The statistics on the following pages are estimates of quantities put on the market in France. They are only calculated for the main supplier countries and are drawn up using information on weekly arrivals or market release statements by representative operators. The figures in the 'Main fruits' section above are provided by the CTIFL, with SECODIP being the source. The data published in the French market pages are provided solely as a guide and CIRAD accepts no responsibility for their accuracy.



© Denis Loelliet

Banana

NOVEMBER 2007

After a very laborious end of October, the market improved gradually but remained difficult. Supply had been very substantial in October but returned to close to an average level. The deficit of African fruits increased to 10% and shipments from the West Indies were limited to a few batches from Guadeloupe (production loss caused by hurricane Dean). Above all, arrivals of dollar bananas were much smaller with a return to normal volumes from Ecuador after the avalanche of fruits received in October as productivity had decreased as a result of difficult weather conditions and the prices paid in Europe were not particularly encouraging. The decrease was slightly modulated by the still strong presence of Colombia. Exports from Costa Rica remained moderate.

Meanwhile, demand regained vigour in spite of the fairly cool weather that was not propitious for consumption during the last two-thirds of the month. Retail prices were attractive in Germany, the United Kingdom and France, where numerous retail promotion operations were run.

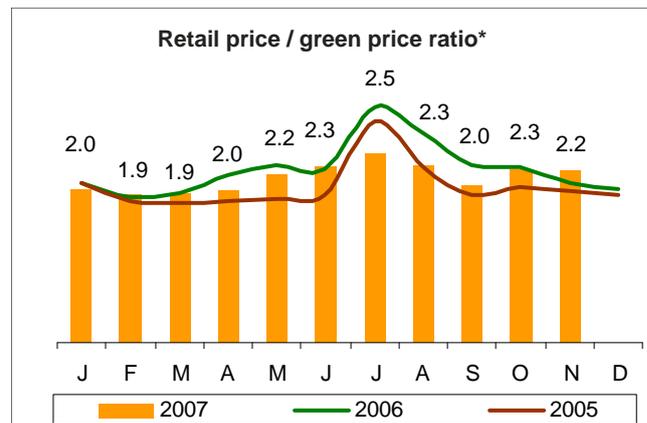
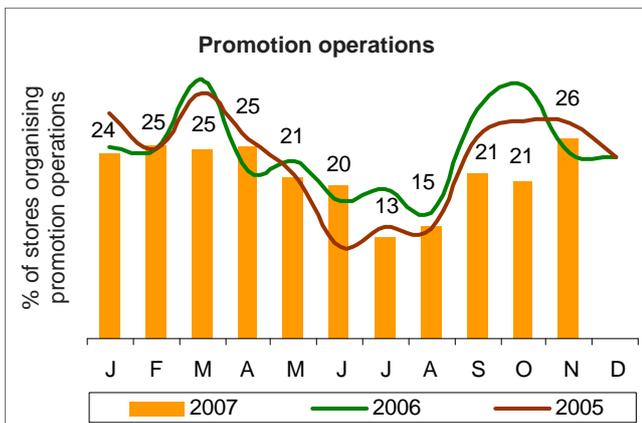
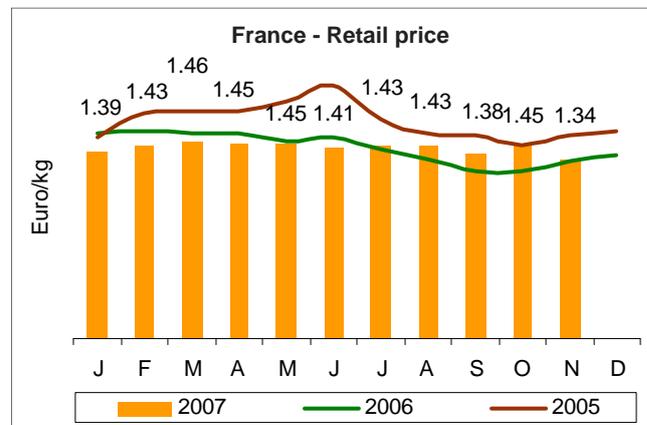
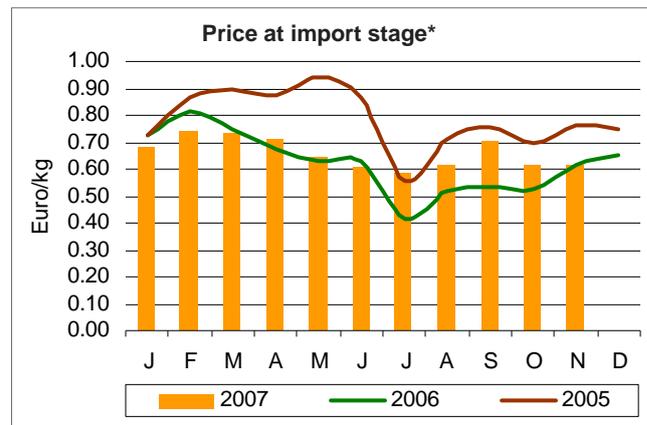
In spite of a steady increase in quay prices throughout the month, the average monthly price was well below average for fruits from all supplier countries. With the exception of Canary Island bananas, prices hit lows rarely seen at this time of year with a supply shortage of only 10%.

Monthly and annual comparisons	
Volumes*	EU reference price**
November 2007 / October 2007	
↘ - 3%	= 0%
November 2007 / November 2006	
↘↘ - 41%	= 0%

* Arrivals from Africa/West Indies

** Aldi price

French banana market — Indicators



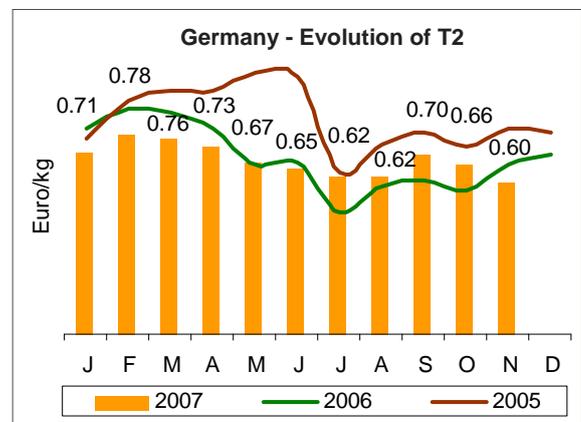
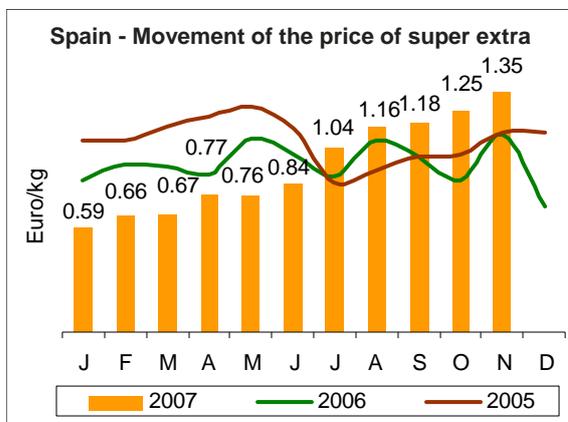
* Africa origin

European banana market — Indicators

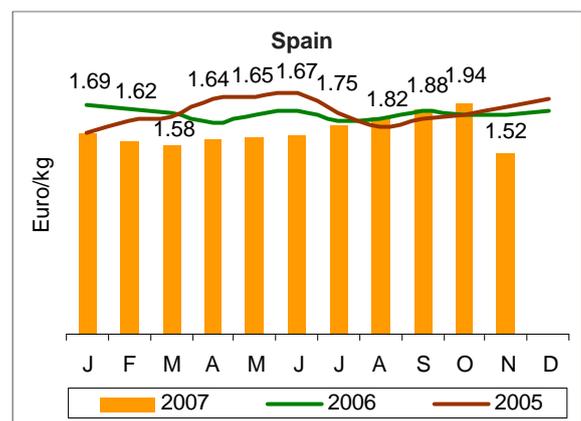
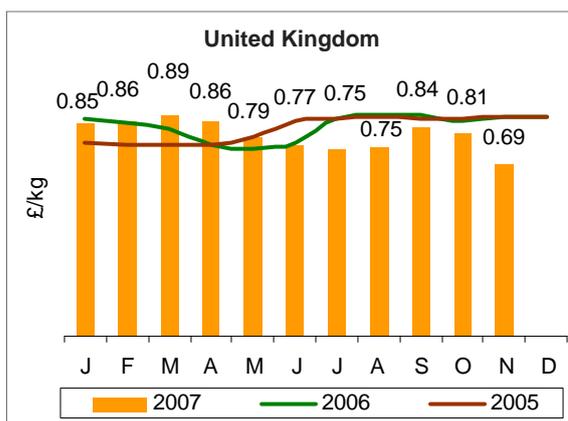
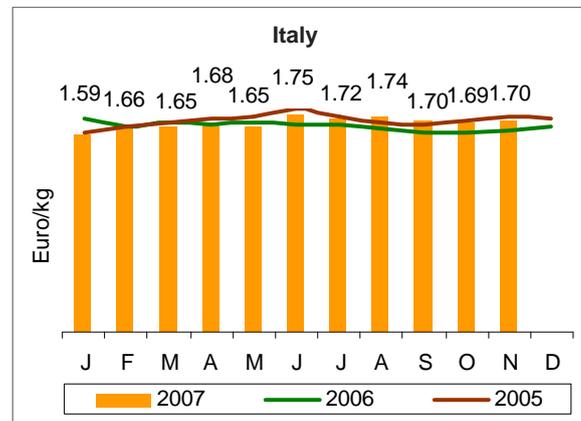
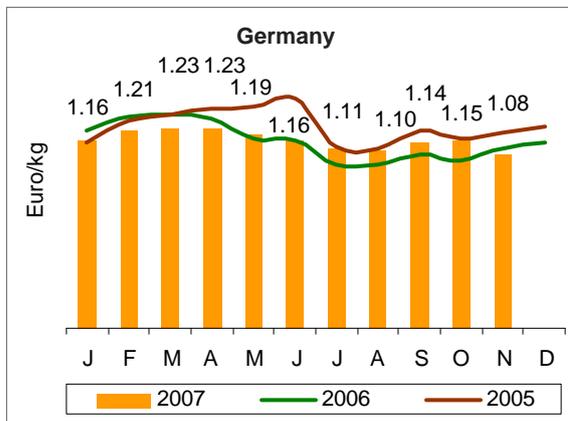
Main origins in Europe

Tonnes	November 2007	Comparisons (%)		Total season 2007	Season comparisons (%)	
		2007/2006	2007/2005		2007/2006	2007/2005
Martinique	-	- 100	- 100	137 080	- 25	- 33
Guadeloupe	1 631	- 62	- 73	36 867	- 13	- 25
Canaries	24 181	+ 8	- 12	303 001	+ 7	+ 6
Côte d'Ivoire	16 257	- 13	- 21	153 573	- 19	- 19
Cameroon	19 438	- 25	- 12	197 495	- 15	- 15
Ghana	4 761	+ 48	-	31 152	+ 90	-

Green price in Europe



Retail price in Europe



Sources: CIRAD, SNM, TW Marketing Consulting



Avocado

NOVEMBER 2007

Performance was fairly disappointing as the market was difficult during the first part of the month. Supply of 'Hass' was larger than average and too much for comparatively dull demand. Large quantities of Chilean 'Hass' remained with stocks available at the end of October and massive arrivals during the first fortnight of November, whereas shipments from Mexico remained at an average level. The fall in prices that started in October continued until mid-month. In this context, it was difficult for the green varieties to find their position on the market. Sales of 'Ettinger' from Israel were laborious and prices fairly disappointing in spite of moderate arrivals. Spanish operators remained fairly discreet.

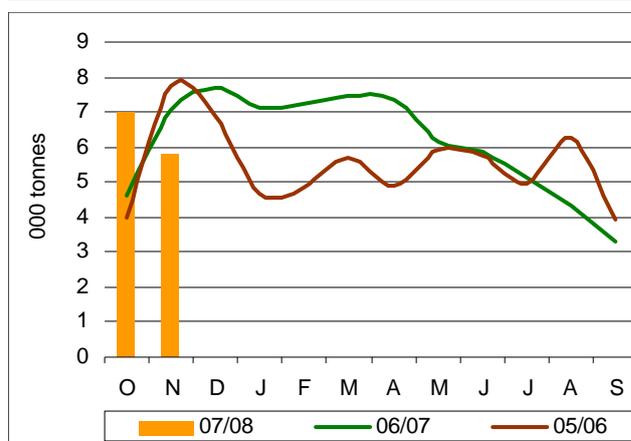
The market began to clear in mid-month. Total supplies of 'Hass' returned to an average level after the decrease in arrivals from Chile because of the only moderate quantities remaining to be picked and the recovery of the US market. Prices of 'Hass' started to creep up a little and sales of green varieties were more fluid.

Monthly and annual comparisons

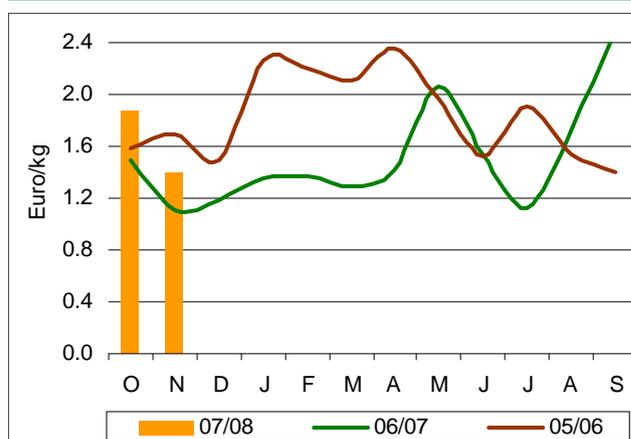
Volumes	Price
November 2007 / October 2007	
↘ - 16%	↘↘ - 26%
novembre 2007 / novembre 2006	
↘ - 17%	↗↗ + 26%

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	November 2007	Comparisons (%)		Total season 2007/2008	Season comparisons (%)	
		2007/2006	2007/2005		07-08/06-07	07-08/05-06
Kenya	34	-	+ 198	5 616	- 18	- 28
Mexico	1 475	+ 35	- 31	3 347	+ 24	- 16
Chile	1 589	- 2	+ 119	4 448	+ 6	+ 116
Israel	1 808	- 41	- 35	2 554	- 33	- 22
Spain	929	- 24	- 56	2 136	- 5	- 28
Total	5 835	- 17	- 25	18 101	- 77	- 77



Orange

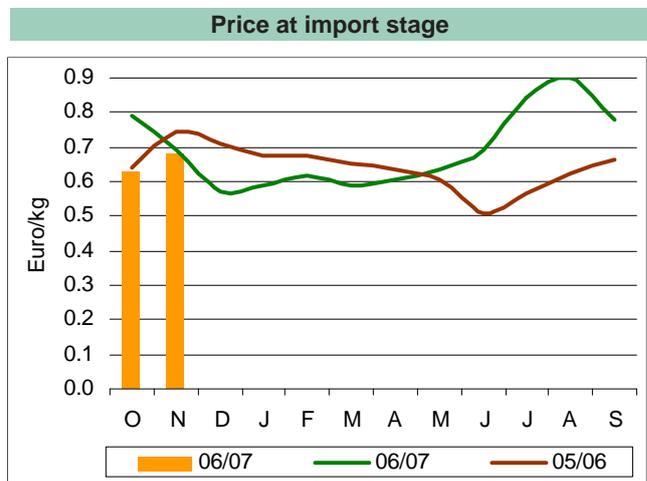
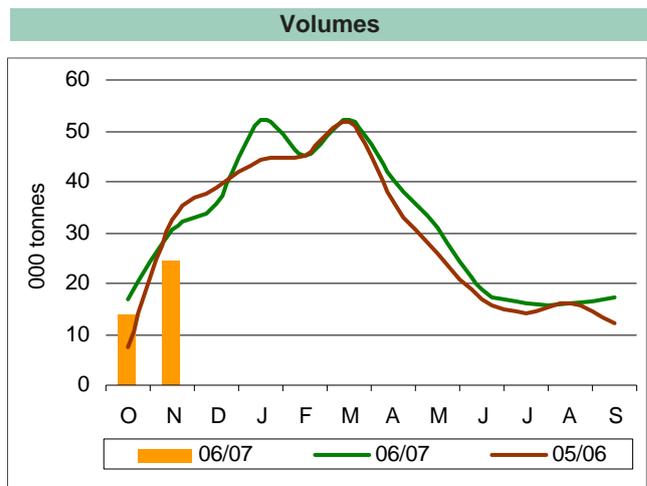
Monthly and annual comparisons	
Volumes	Price
November 2007 / October 2007	
↗ + 75%	↗ + 8%
November 2007 / November 2006	
↘ - 21%	⇒ - 1%

NOVEMBER 2007

The market configuration remained very unusual as a result of the extending of the South African 'Valencia' season. The very large volumes arriving until the end of October enabled professionals working with South African fruits to remain very present on the European market throughout November. Some distributors kept their South African line until the end of the month, especially as the price policy of operators was very aggressive in order to clear stocks of these fruits.

In this context, 'Naveline' from Spain only managed to gain its position on the market very gradually. However, the harvest was small at about 30% less than the three-year average and this encouraged producers to keep their prices high. The seasonal downward trend could not be avoided but prices at the shipping stage held at a distinctly higher level than both 2006 and the average price. A few quality problems were observed, in particular in fruits from Andalusia.

Estimated market releases in France



Estimated market releases in France by origin						
Tonnes	November 2007	Comparisons (%)		Total season 2007/2008	Season comparisons (%)	
		2007/2006	2007/2005		07-08/06-07	07-08/05-06
Spain	24 160	- 21	- 26	26 985	- 29	- 22
Total	24 160	- 21	- 26	26 985	- 29	- 22



Grapefruit

© Eric Imbert

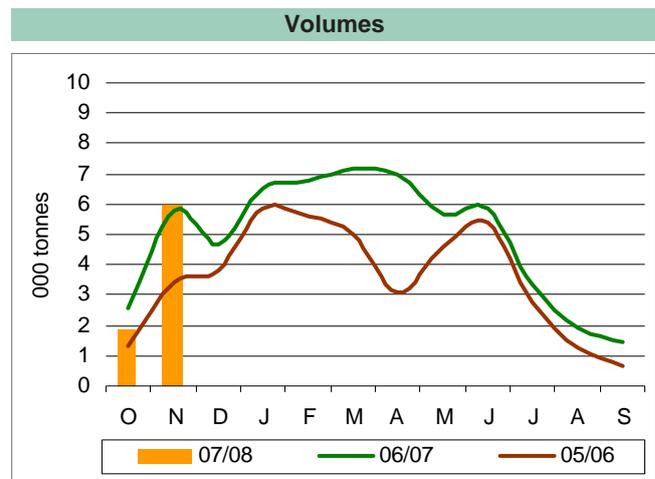
Monthly and annual comparisons	
Volumes	Price
November 2007 / October 2007	
↗↗↗ + 227%	↗↗ + 20%
November 2007 / November 2006	
↗ + 3%	↗ + 10%

NOVEMBER 2007

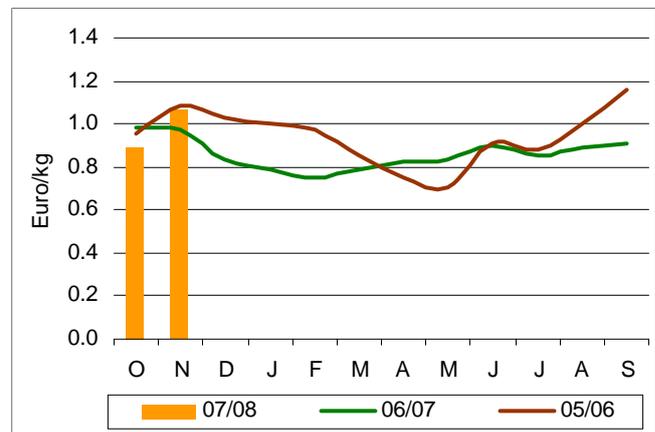
The range of supply broadened considerably and returned to above the three-year average after a beginning of the winter season marked by very moderate October shipments from northern hemisphere producer countries. Picking in Florida started in earnest at the beginning of the month when the fruits had attained—late—a better size. Shipments to the EU began to increase markedly in mid-November and demand was very brisk, especially for the best brands.

The market was then more competitive for the Israeli operators who had hitherto benefited from the lack of fruits from Florida. Nonetheless, the volumes of Israeli fruits sold in November were way above average, as had been the case in October. The lead gained in the marketing programme was not lost. Turkish presence remained very discreet in the European Union as fruit size was still limited and shipments were focused on eastern Europe. Cyprus and Spain completed supplies from the Mediterranean and Mexico and Honduras topped up tropical grapefruit. Prices displayed their seasonal downward movement but held at a good level—distinctly higher than in 2006.

Estimated market releases in France



Price at import stage



Estimated market releases in France by origin						
Tonnes	November 2007	Comparisons (%)		Total season 2007/2008	Season comparisons (%)	
		2007/2006	2007/2005		07-08/06-07	07-08/05-06
Florida	4 370	- 3	+ 260	4 556	- 14	+ 226
Israel	893	+ 21	+ 29	1 792	+ 30	+ 25
Turkey	732	+ 36	- 52	1 197	- 13	- 38
Total	5 995	+ 3	+ 74	7 545	- 6	+ 58



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Easy Peelers

NOVEMBER 2007

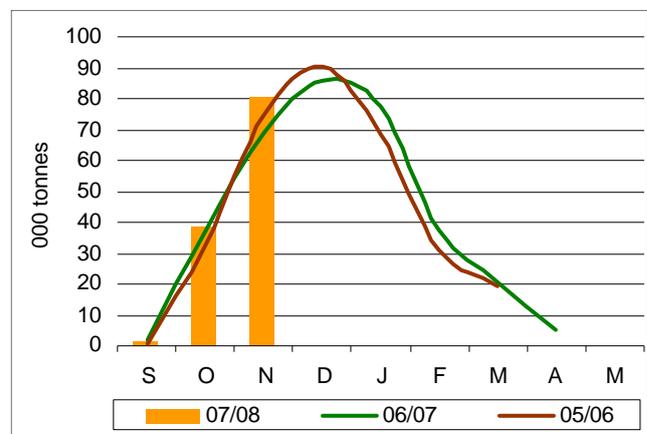
Good market performance. The average monthly price was slightly lower than average but the volumes sold reached a record level. Demand was particularly brisk as the fruits available were of very good quality and temperatures often lower than the seasonal average and very favourable for consumption. The only exception was the second third of the month when the weather was warmer. Thus the volumes sold by Spanish operators—mainly 'Nules' clementines and then 'Clemenvilla', were much larger than normal, especially on the French market. Prices held well at the production stage, given the small crop. In contrast, a dip was seen at the shipping stage in mid-month following the period of uncertain demand mentioned above. Fruits from the other supply origins also performed well. Both the volumes sold and the average monthly price were higher than average.

Monthly and annual comparisons

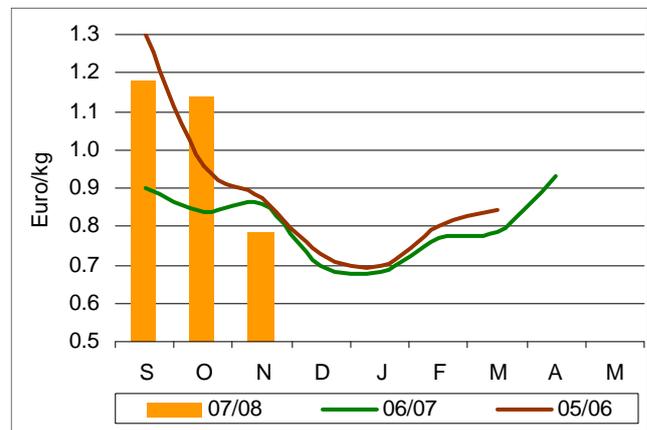
Volumes	Price
November 2007 / October 2007	
↗↗↗ + 107%	↘↘ - 31%
November 2007 / November 2006	
↗ + 17%	↘ - 8%

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	November 2007	Comparisons (%)		Total season 2007/2008	Season comparisons (%)	
		2007/2006	2007/2005		07-08/06-07	07-08/05-06
Corsica	7 182	+ 2	+ 54	7 469	+ 4	+ 52
Morocco	5 038	+ 5	- 11	5 304	+ 2	- 8
Spain	68 658	+ 20	+ 6	108 501	+ 13	+ 11
Total	80 878	+ 4	+ 18	121 274	+ 12	+ 12



Litchi

Litchi — Arrivals — Estimates in tonnes					
NOVEMBER 2007	weeks 2007	45	46	47	48
	By air				
	Mauritius	2	5	35	30-35
	South Africa	-	10	20-30	40-60
	Madagascar	-	20-30	170	150-200
Réunion	-	-	5-10	15-25	

After the interruption in supplies of October, litchi sales resumed in November with the start of the export season in the Indian Ocean countries (Mauritius, South Africa, Madagascar and Réunion). Litchi production in the region returned to more normal levels after the particularly late start to the season in 2006. The price of the litchis shipped by the different countries supplying the European market decreased as supplies gained momentum, falling by nearly 50% between the first deliveries and the end of the month.

Litchi supplies from the Indian Ocean were upset in 2006 as a result of adverse weather conditions during fruiting in the orchards. This resulted in a late start to the season and sales were therefore more concentrated in time for the fruits shipped by air that start the season. Natural conditions in 2007 resulted in a more normal beginning of the season. The first batches were shipped from Mauritius in Week 45. Shipments generally start in Week 44 but this was not possible as a result of fairly cool weather during fruit growth and heavy rain until the start of the harvest, delaying and hindering picking. The first batches of fresh fruits on the branch were soon overtaken in terms of volume by destemmed, sulphur-treated litchis. Fruits on the branch continued to sell but in limited quantities to specialised fruiterers whereas sulphur-treated fruits, whose price fell rapidly, were sold at wholesale markets and also by some supermarket chains.

Sales of sulphur-treated fruits started in Week 46 and gained momentum rapidly with large deliveries from Madagascar followed in Week 47 by the first batches from South Africa, increasing overall supply volume. The strong increase in tonnage resulted in a marked decrease in prices. The highest prices in the ranges shown were for sales at the beginning of the week and the lowest for those at the end of the week. The strong decrease in price in the second half of November is accounted for in particular by the rapid increase in the tonnages arriving and also the comparatively sluggish demand. Even when sold at moderate prices, litchi are still expensive at the retail stage and this does not encourage shoppers to repeat their purchases very often. However, the fall in price favoured the sale of litchi by some supermarket chains and by traditional retailers. Supermarket sales started slowly as fruits

exported by sea would be available before Christmas, the peak period for sales.

The quality of the fruits shipped by air was considered to be satisfactory after the first batches that were only just ripe. The medium size of the fruits was also noted. The quality of litchis on the branch remained mediocre as the shells oxidised rapidly and colour was often uneven.

Sales of Indian Ocean litchi were fairly small in the first half of November on other European markets. Sales only increased there after the increase in supplies in Week 47.

The sea litchi season started officially in Madagascar on 24 November, with forecasts of 20 000 palettes loaded on five ships that were to arrive one after the other in European ports from Week 50 onwards

Litchi — Import price on the French market — Euro/kg							
Weeks 2007		45	46	47	48	November 2007 average	November 2006 average
By air							
Mauritius	fresh/on the branch	13.00	12.00-13.00	9.00-10.00	6.00-7.00	10.00-10.75	7.50-8.50
	sulphur treated	-	7.50-8.00	5.20-7.50	4.00-4.50	5.55-6.65	5.90-6.80
Madagascar	fresh/on the branch	-	-	-	4.00-7.00	4.00-7.00	5.00-5.50
	sulphur treated	-	7.00-7.50	5.30-7.50	4.00-5.00	5.40-6.65	4.80-5.65
Réunion	fresh/on the branch	-	-	10.00-12.00	8.00-9.50	9.00-10.75	8.65-10.30
South Africa	sulphur treated	-	-	5.80-7.00	4.00-5.20	4.90-6.10	6.50-7.25



Mango

© Christian Dieler

Mango — Weekly arrivals — Estimates in tonnes					
NOVEMBER 2007	Weeks 2007	45	46	47	48
	By air				
	Brazil	70	100	100	80
	By sea				
	Brazil	3 450	3 900	3 250	4 200

The market for Brazilian mango shipped by sea remained fairly stable in November. Deliveries were regular but smaller than those during the same period in 2006. Brazil shipped most of the mango sold on the European market in November. Arrivals increased at the end of the month, weighing on prices, which dipped slightly. The Spanish season continued and finished at the end of the month with 'Keitt' at steadily falling prices. The air mango market was more difficult with deliveries greater than demand sending prices downwards.

Supplies to the European market changed in November when the Israeli season ended at the beginning of the month with 'Keitt' mangoes selling at about EUR 3.00 to 4.00 per box. A few remaining batches were sold in the following weeks but were no longer representative of supplies. This season, Israel exported about 13 700 tonnes of mango in comparison with 10 400 tonnes in 2006. Spain finished its deliveries of 'Osteen' and 'Kent' at the beginning of the month and shipped dwindling quantities of 'Keitt' until the end of November. The quality of Spanish fruits was more uneven and prices fell until the end of the month. Price ranges for these goods gradually broadened according to fruit ripening; this was often very fast and resulted in slashed prices. The Spanish export season finished rapidly as a result of this problem. The European market was then supplied mainly by Brazil, with increasing quantities arriving,

complemented by exports from Ecuador and then from Peru. Fruits from the latter supplier were to be found above all in the northern European countries and very occasionally on the French market. While the quality of 'Tommy Atkins' and 'Kent' from Brazil was satisfactory, it was more difficult to find takers for the first batches of 'Kent' from Ecuador and Peru because of serious lack of colour and often under-ripeness. The latter feature soon affected prices, which remained lower than those fetched by Brazilian fruits.

Sluggish demand resulted in a lacklustre market throughout the month. Prices were fairly stable during the first three weeks of November and then dipped at the end of the month as supply increased and also because of the greater unevenness in the quality of 'Kent'. In contrast, prices of 'Tommy Atkins' from Brazil remained more stable, with deliveries

decreasing in comparison with those of 'Kent'.

On the air mango market, shipments from Brazil increased markedly in November. Supply was dominated by 'Kent' from Brazil, resulting in competition with Haden from the same country, delivered in smaller quantities from the beginning of the month onwards. The poor profitability of these fruits led to importers halting their orders and turning to 'Kent'. Dull demand soon resulted in the accumulation of stocks although the keeping qualities of the fruits kept prices fairly stable at first. However, ripening fruits in the second half of the month obliged operators to clear stocks at prices starting at EUR 2.00-2.50 per kg. This trend accelerated further as a result of transport strikes in the Paris area that affected a good number of sales, in particular to traditional retail channels.

Mango — Import prices on the French market — Euros							
Weeks 2007		45	46	47	48	November 2007 average	November 2006 average
By air (kg)							
Brazil	Haden	3.00-3.20	-	-	-	3.00-3.20	3.25-3.70
Brazil	Kent	3.00-3.80	3.00-4.00	3.00-3.50	3.00-3.30	3.00-3.65	3.70-4.50
By sea (box)							
Brazil	Tommy Atkins	3.00-4.00	3.00-4.00	3.00-4.00	3.00-4.00	3.00-4.00	3.00-4.15
Brazil	Kent	5.00-5.50	5.00-5.50	5.00-5.50	4.00-5.50	4.75-5.50	6.40-8.10
Ecuador	Kent	4.00-4.50	4.00	3.50	3.00-4.00	3.60-4.00	4.60-5.70
By road (box)							
Spain	Keitt	-	8.00-8.50	5.00-8.50	5.00-6.50	6.00-7.80	9.25-11.50



Pineapple

© Denis Loeillet

NOVEMBER 2007	Pineapple — Import price		
	Euros	Min	Max
	By air (kg)		
Smooth Cayenne	1.50	1.80	
Victoria	2.00	3.50	
By sea (box)			
Smooth Cayenne	5.00	8.00	
Sweet	5.00	8.50	

November was faithful to the rule and was particularly difficult for pineapple sales. Supplies of 'Sweet' from Costa Rica were particularly substantial while demand dwindled throughout the month. The situation was no better on the air market. Demand was very slow and insufficient to handle the quantities available. However, prices did not fall dramatically. Sales on the 'Victoria' market were as quiet as during the preceding months. In contrast, supply and demand woke up towards the end of the month and the market suppliers became more varied.

Even if operators expected larger quantities of fruits from Latin America, and especially from Costa Rica, they were all caught short by the scale of the shipments. The market took about 3 500 palletes in a mere 10 days during the peak period for arrivals (Weeks 45 and 46). Demand decreased from 1 November onwards and the trend continued for the whole month. In this situation, Del Monte continued the very aggressive price policy that it had started at the beginning of the month, with on-quay prices of around EUR 7.00 per box, a figure much lower than the brand's usual practice. This brought pressure on the other brands who had to lower their prices immediately. The situation was at its most critical in Week 46. The incoming volumes and lack of demand resulted in increasingly large stocks of 'Sweet' of uneven quality that did not keep well. In spite of the launching of supermarket promotion operations in Week 46, clearance sales were increasingly numerous while a reduction in volumes from Latin America was announced. It was sought not only to clear stocks more rapidly by also to start December under better conditions. Paradoxically, the situation for 'Smooth

Cayenne' was not as catastrophic as that of 'Sweet'. It is true that sales suffered from the low 'Sweet' prices but it would seem that several factors prevented the worst on this market. First, supplies of 'Smooth Cayenne' were small throughout the month. Then demand was good—especially on the eastern European markets, whereas sales in France depended to a considerable degree on the operators and distribution channels used. Finally, quality was fairly even in spite of problems of colour that were not always well mastered at the production stage. The decrease in volumes from Latin America was confirmed at the end of the month. Unfortunately, stocks were still too large to hope for an improvement between Weeks 49 and 50.

Demand for pineapple shipped by air was small throughout the month. The All Saints Day holiday at the beginning of November did not help. Demand was insufficient to take the volumes available. However, prices held and there was a feeling that the balance was only just maintained. The arrival of larger volumes from Benin and Cameroon upset the situation and

prices began to fall. Batches from these origins were available at very low prices (EUR 1.50 per kg); this applied in particular to fruits such as 'sugarloaf' pineapple that changed hands at prices as low as EUR 1.70 - 1.80 per kg. From Week 47 onwards, some operators chose to reduce their supplies in the hope of creating a shortage that would give a fresh boost to demand. This was successful insofar as sales were concluded on a firmer basis in the last week of the month. The price of 'sugarloaf' fruits even firmed, with transactions at about EUR 1.90 - 2.00 per kg at the end of the month.

The situation on the 'Victoria' pineapple market was one of great morosity. There was practically no demand during the first three weeks of the month, together with what was considered to be over-supply from Côte d'Ivoire and Ghana. The decrease in volumes from these two origins in Week 47 resulted from a diversification of supply that had a negative impact on prices. However, demand for this small festive exotic increased at the end of the month.

Pineapple — Import prices on the French market — Main origins — Euros

Weeks 2007		44	45	46	47	48
By air (kg)						
Smooth Cayenne	Benin	1.70-1.80	1.70-1.80	1.65-1.80	1.70-1.80	1.70-1.80
	Cameroon	1.70-1.80	1.70-1.80	1.50-1.80	1.65-1.80	1.65-1.80
	Côte d'Ivoire	-	-	1.70-1.80	1.70-1.80	1.70-1.80
	Ghana	-	-	1.60-1.70	1.60-1.70	1.60-1.70
Victoria	Côte d'Ivoire	2.00-2.50	2.00	2.00	2.50-3.00	2.50-3.00
	Ghana	-	-	-	2.50-3.00	2.50-3.00
	Réunion	3.30-3.50	3.30-3.50	3.00-3.50	3.30-3.50	3.30-3.50
	Mauritius	-	-	-	2.80-3.00	2.80-3.00
	South Africa	-	2.80	2.50	2.50-3.00	2.50-3.00
By sea (box)						
Smooth Cayenne	Côte d'Ivoire	6.00-8.00	5.00-8.00	5.00-7.50	5.00-7.00	5.00-7.00
Sweet	Côte d'Ivoire	7.00-8.50	5.00-7.00	5.50-8.00	5.00-6.00	5.00-6.00
	Cameroon	7.00-8.50	5.00-7.00	5.50-8.00	5.00-6.00	5.00-6.00
	Ghana	7.00-8.50	5.00-7.00	5.50-8.00	5.00-6.00	5.00-6.00
	Costa Rica	6.50-7.00	6.00-7.00	5.00-6.50	5.00-5.50	5.00-6.00



Sea freight

NOVEMBER 2007

The Time Charter Equivalent (TCE) monthly average figure for November may not please owners and operators of top end tonnage. Because of the supply/demand imbalance it is undoubtedly true that during the month there was often a large discrepancy between TCE yields for vessels fixed on TC and those fixed on a lumpsum basis - the monthly average factors in returns on fixtures from both modern and vintage tonnage.

November is rarely an exciting month on which to report: the charter market is between the southern hemisphere old season citrus and new season deciduous - it is therefore heavily dependent on additional banana activity. This year was no different - the reason for the weak market was that the Ecuadorian weather kept banana production low - with so much more fruit this year shipped in industrial, liner services, the limited volume of excess fruit was traded at some very high numbers, precluding Spot activity. High bunkers and relatively weak banana markets in the Mediterranean added to the misery.

After reaching an all-time high of 5.60 NOKs per share in January 2007, the Green Reefers share price slipped

30% to around 3.80 NOKs by the end of the month. Its Q3 results were poor - it has thus far failed to fully assimilate the 20 vessels it purchased in Q1 while it has also had problems filling the US port coldstores it invested in last January. How will it respond? By remaining as exposed to Spot trading in the next 12 months as it has in 2007 is a high risk strategy - a more active charter market should pay dividends for a modern fleet. Equally if demand for capacity is weaker in 2008 than 2007 then it must hope for uplift in its core North Atlantic fish business.

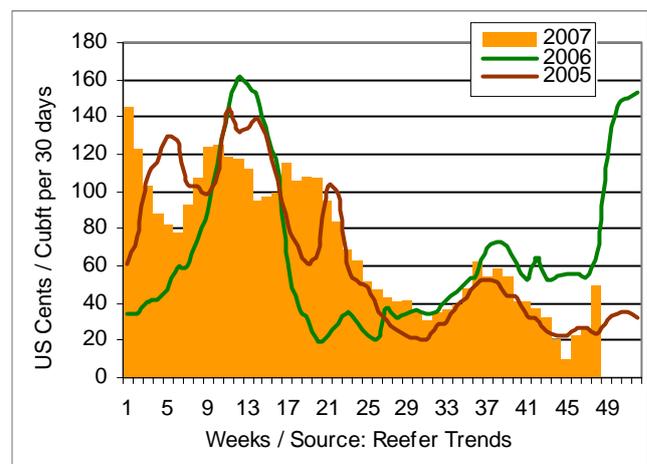
Elsewhere Lithuanian reefer owner Limarko had no such problems: it recorded a EUR4.44m net profit on a turnover of EUR30m, up 46% on the corresponding numbers for 2006.

Monthly spot average

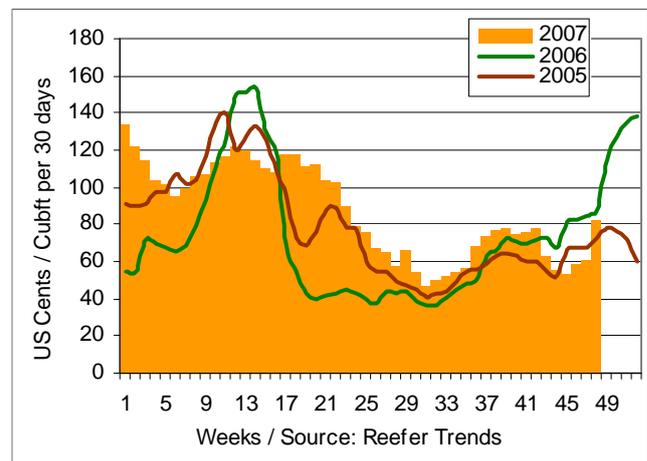
US\$cents/cubic foot x 30 days	Large reefers	Small reefers
November 2007	28	64
November 2006	59	84
November 2005	23	56

Weekly market movement

Large reefers (450 000 cuft)



Small reefers (330 000 cuft)



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Wholesale market prices in Europe

November 2007

					EUROPEAN UNION — IN EUROS				
					Germany	Belgium	France	Holland	UK
AVOCADO	Air	TROPICAL	BRAZIL	Box			12.20		
	Sea	ETTINGER	ISRAEL	Box	6.00	6.75	4.25	5.50	
		HASS	MEXICO	Box			6.25		
			PERU	Box				8.16	
			SOUTH AFRICA	Box				8.16	
			CHILE	Box		7.00	6.25	8.00	
		NOT DETERMINED	ISRAEL	Box					6.96
			SOUTH AFRICA	Box					6.26
			CHILE	Box					6.26
BANANA	Air	RED	ECUADOR	kg				6.13	
		SMALL	COLOMBIA	kg		6.57	5.60		
	Sea	SMALL	ECUADOR	kg			1.50	2.13	
CARAMBOLA	Air		MALAYSIA	kg	4.29		4.86	4.20	5.11
	Sea		MALAYSIA	kg	3.29	3.61		3.21	
COCONUT	Sea		COSTA RICA	Bag				3.50	
			COTE D'IVOIRE	Bag		8.90	6.15	8.00	
			DOMINICAN REP.	Bag			7.50	6.63	9.21
			SRI LANKA	Bag				13.00	
DATE	Sea	NOT DETERMINED	ISRAEL	kg		3.30		2.72	
			TUNISIA	kg				1.83	1.60
		MEDJOOOL	ISRAEL	kg	7.40	6.90	7.50	7.55	6.75
			SOUTH AFRICA	kg		7.60			
			UNITED STATES	kg	8.40				
GINGER	Sea		BRAZIL	kg	1.77	1.78	1.78	2.26	2.23
			THAILAND	kg	1.38				1.66
			CHINA	kg				1.90	1.60
GUAVA	Air		BRAZIL	kg			4.00	4.55	
			THAILAND	kg		5.50			
KUMQUAT	Air		BRAZIL	kg					3.72
			ISRAEL	kg	4.25	4.25	5.50	3.88	4.95
LIME	Air		MEXICO	kg			3.65		
	Sea		BRAZIL	kg	1.16	1.13	1.50	1.22	1.63
			MEXICO	kg			1.66	1.63	1.70
LITCHI	Air		MADAGASCAR	kg			8.00		
			MAURITIUS	kg		9.00	9.00	7.84	
			SOUTH AFRICA	kg	6.50				
MANGO	Air	HADEN	BRAZIL	kg				3.58	
		KENT	BRAZIL	kg			3.90		
		NOT DETERMINED	THAILAND	kg				6.90	
	Sea	PALMER	BRAZIL	kg	3.00			3.13	
		NAM DOK MAI	THAILAND	kg	9.00				
		ATKINS	BRAZIL	kg	0.94			1.00	
		HADEN	BRAZIL	kg				1.00	
		KEITT	BRAZIL	kg		1.12		1.13	
		KENT	BRAZIL	kg		1.12		1.53	
			ECUADOR	kg			1.06	1.13	
			NOT DETERMINED	BRAZIL	kg			1.85	

					EUROPEAN UNION — IN EUROS					
					Germany	Belgium	France	Holland	UK	
MANGOSTEEN	Air		THAILAND	kg			8.40	9.00		
MANIOC	Sea		COSTA RICA	kg		0.85	0.85	0.86		
PAPAYA	Air	NOT DETERMINED	BRAZIL	kg			3.00	2.55	2.34	
			COTE D'IVOIRE	kg			2.75			
	Sea	FORMOSA NOT DETERMINED	BRAZIL	kg				2.78		
			BRAZIL	kg	1.14	1.71		1.25		
			COTE D'IVOIRE	kg				0.85		
			ECUADOR	kg				1.57		
		MALAYSIA	kg					1.81		
PASSION FRUIT	Air	PURPLE	COLOMBIA	kg		5.00	5.75	5.51		
			KENYA	kg		5.00		4.63		
			SOUTH AFRICA	kg	5.00					
			ZIMBABWE	kg		5.80		4.63		
			YELLOW	COLOMBIA	kg	7.00	6.24	7.80	6.19	
PERSIMMON	Air		ISRAEL	kg		1.80	1.60	1.40	1.74	
PHYSALIS	Air		COLOMBIA	kg	5.41	5.75	8.38	5.63	6.37	
			SOUTH AFRICA	kg					4.87	
	Sea		COLOMBIA	kg				5.00		
PINEAPPLE	Air	SMOOTH CAYENNE	BENIN	kg			2.05			
			CAMEROON	kg			1.80			
			GHANA	kg			1.75			
		VICTORIA	COTE D'IVOIRE	kg			2.50			
			MAURITIUS	Box					10.00	
			MAURITIUS	kg			3.50			
	Sea	MD-2	REUNION	kg			3.75			
			SOUTH AFRICA	Box	11.00	10.50		10.38		
			COSTA RICA	Box	6.42	6.00	7.25	7.00		
			ECUADOR	Box		6.00				
		SMOOTH CAYENNE	COTE D'IVOIRE	Box			7.30			
			GHANA	Box			6.50			
PITAHAYA	Air	RED	ISRAEL	kg	3.25			4.25		
			THAILAND	kg	6.00		8.40			
			VIET NAM	kg				6.09		
		YELLOW	COLOMBIA	kg				7.60		
			ECUADOR	kg				6.67		
PLANTAIN	Sea		COLOMBIA	kg			0.95			
			COSTA RICA	kg				0.79	0.43	
			ECUADOR	kg			0.70			
RAMBUTAN	Air		THAILAND	kg	7.25		8.40	6.58	8.70	
			VIET NAM	kg		6.75		6.50		
SWEET POTATO	Sea		BRAZIL	kg			1.30			
			EGYPT	kg			0.75			
			HONDURAS	kg					1.15	
			ISRAEL	kg	1.17	1.13	1.06		1.43	
			UNITED STATES	kg				1.75		
TAMARILLO	Air		COLOMBIA	kg	5.60	6.20	8.40	5.01		
YAM	Sea		BRAZIL	kg			1.70			
			COTE D'IVOIRE	kg			1.25			
			GHANA	kg			1.10			

Note: according to grade

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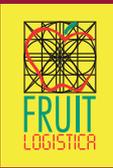


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