

Mango

European market

2016 source by source review

With a new imports record in 2016, the European mango market is exhibiting rude health, and indeed glimpses of margins for development. The growth in import volumes do not seem to have adversely affected the sale price, proving that the sector is doing well. True, Peru is still experiencing difficulty in finding the right place among the ranks of international mango suppliers. The industry should stabilise in the coming years...

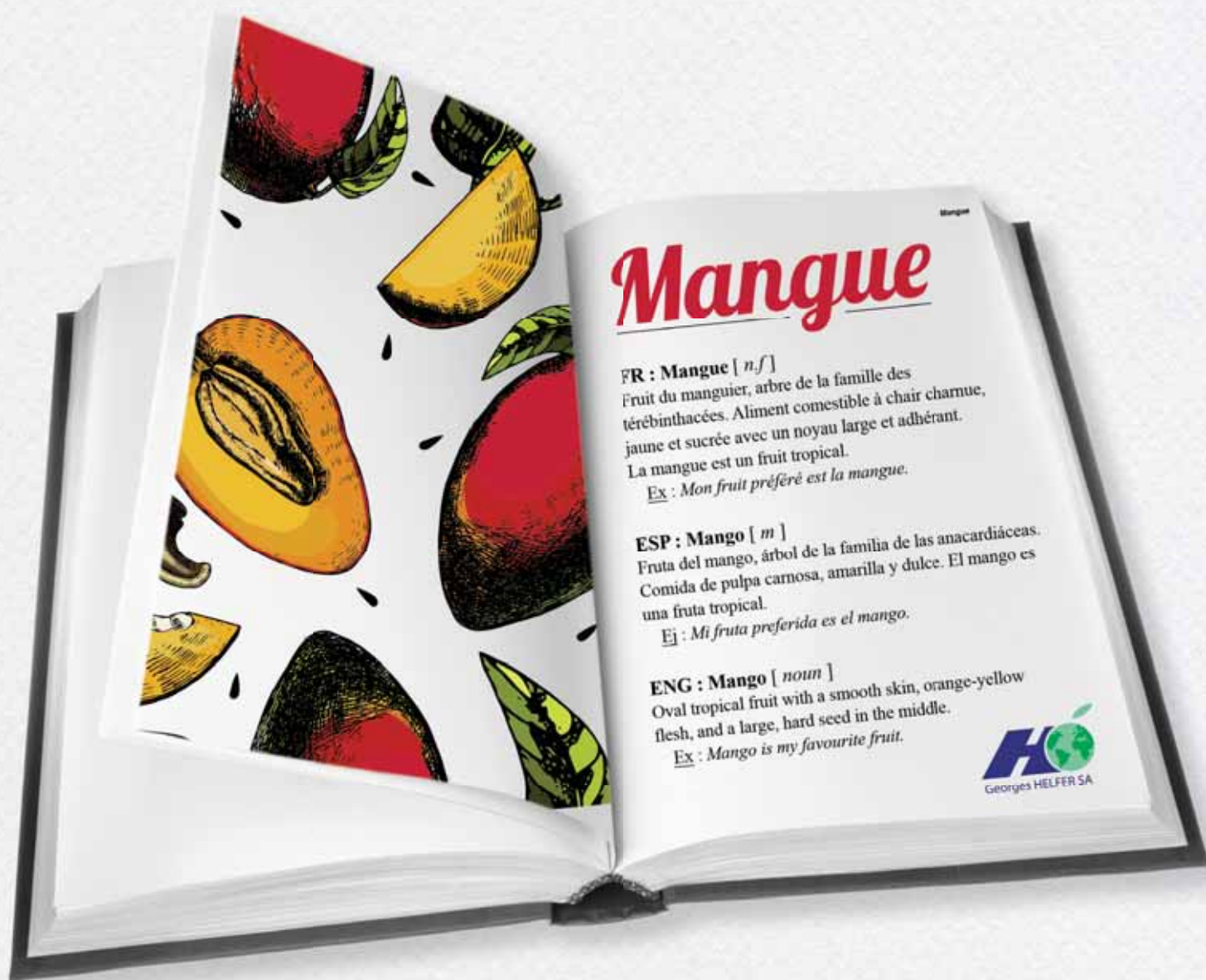


© Denis Loelliet

At

Georges Helfer

*we speak the language of the mango,
to bring you the best fruits from around the world*



40 years'
experience

6
sources

**BRAZIL, PERU, CÔTE D'IVOIRE,
MALI, SENEGAL, MEXICO**

8 sales reps

4 ripening chambers
in Rungis

2000
tonnes per year

Georges Helfer - RUNGIS
1, avenue de L'Europe - Ent. 133
Tel: + 33 1 45 12 36 50

Georges Helfer - PLAN D'ORGON
Z.I du Pont-717, avenue des Vergers
Tel: + 33 4 90 73 19 19

www.georgeshelper.com
contact@helperfrance.fr

Brazil

A solid mainstay

Year after year, Brazil proves to be the essential mango supplier to the European market. Indeed, it aims the majority of its exports at the European Union, with clear and long-standing success. Volume adaptation and a year-round spread have helped Brazil avoid oversupply crises, which were frequent during its boom a decade or so ago. Closely followed in Peru, the number two mango suppliers to Europe, it is maintaining its supremacy with shipments of around 100 000 to 110 000 tonnes per year. It sends more modest volumes to the North American markets (30 000 to 35 000 t), since they are more heavily supplied by major exporter countries, chief among which is neighbouring Mexico.

Brazil's mango potential ultimately remains relatively untapped in view of its capacities. For the moment, it is the only source capable of supplying export fruits year-round, playing on the varieties cultivated and the geographic diversity of its production zones. While Nordeste packs in the largest part of the country's production, the Sao Paulo region provides fruit over longer periods. The dynamism of the Brazilian industry is also derived from its large domestic market, though this does not compete with the export sector. There are a wide range of local varieties supplying the local market, with consumption of exportable fruits remaining marginal.

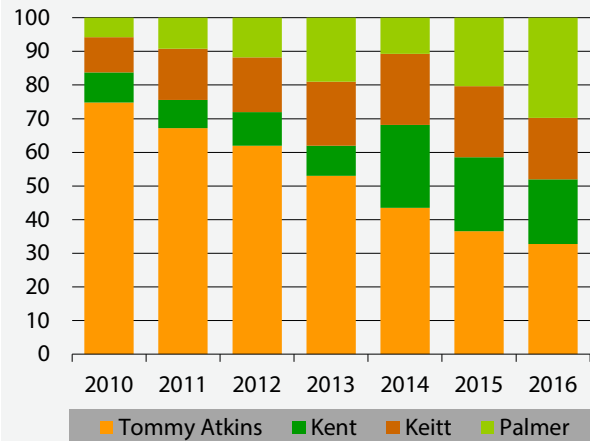
Kent

Tommy Atkins

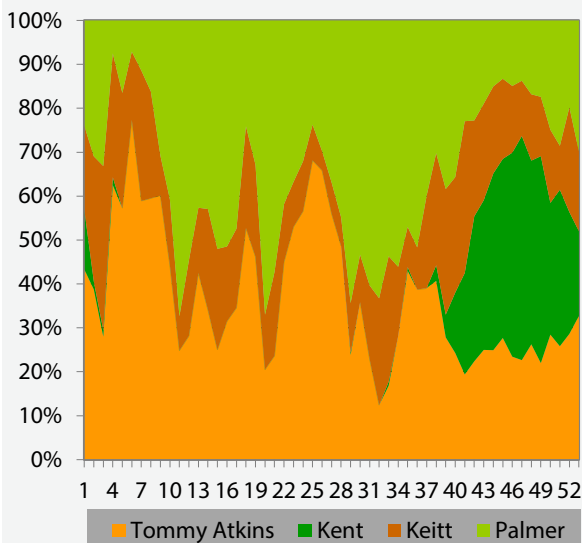


© Régis Domergue

Mango - Brazil - Evolution of exports by variety (in % / Sources: Brazil, Pierre Gerbaud)



Mango - Brazil - Varietal breakdown of weekly exports to Europe in 2016
(Sources: Brazil, Pierre Gerbaud)

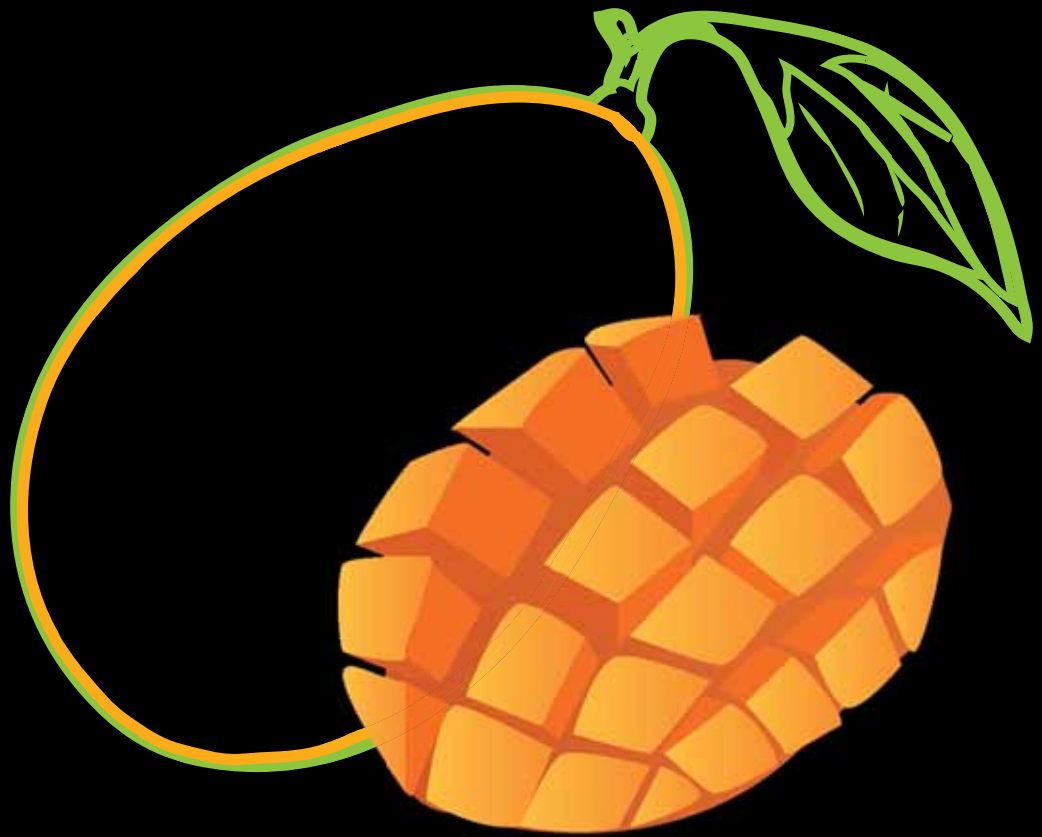


Varietal shift

The Tommy Atkins variety hitherto accounted for the majority of Brazilian production and exports, excluding local varieties. Characterised by medium-sized fruits, high productivity, good coloration and resistance to transport and certain diseases, this variety has gradually been abandoned by the commercial sector. Its lack of flavour and above all the presence of fibres in its flesh have been the main reasons for it being abandoned by several markets. To cope with this change, the Brazilian producers have switched to other varieties. Kent remains to this day the mango benchmark for international trade in the West. More difficult to cultivate, more seasonal and less prolific, it has been restricted to the end-of-year period, the most appropriate for its production and trade. Major orchard modifications have been made to achieve satisfactory and profitable Kent production. Outside of this specific period, other varieties had to be found, suitable in terms of production and markets. Haden, initially trialled, was ultimately abandoned in favour of Keitt and Palmer. Keitt



A year-round supply of
triggered mangoes!



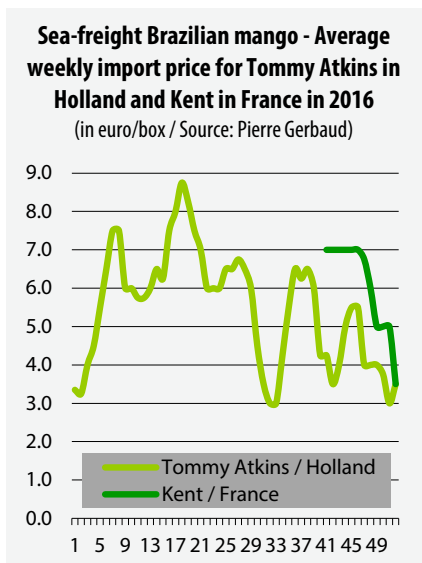
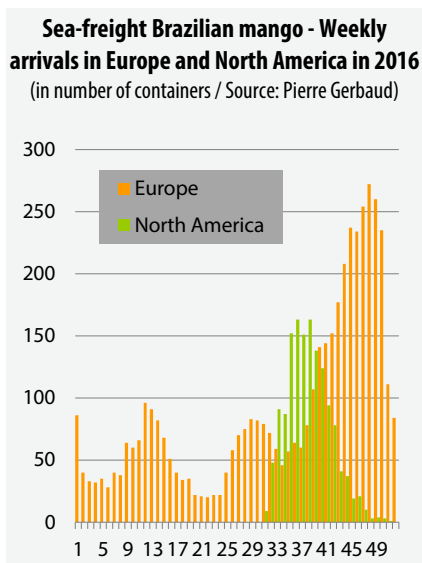
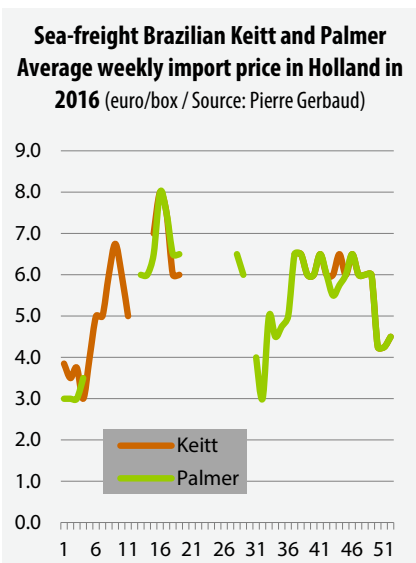
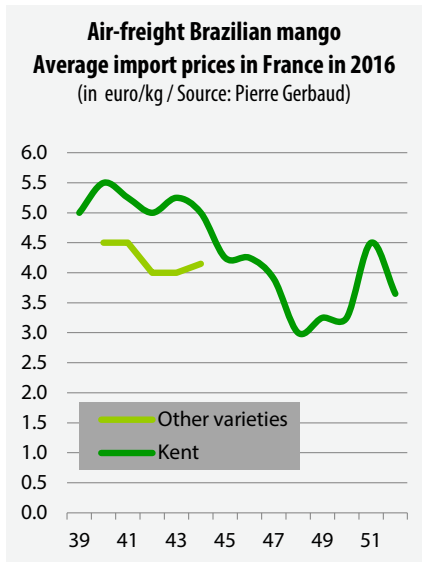
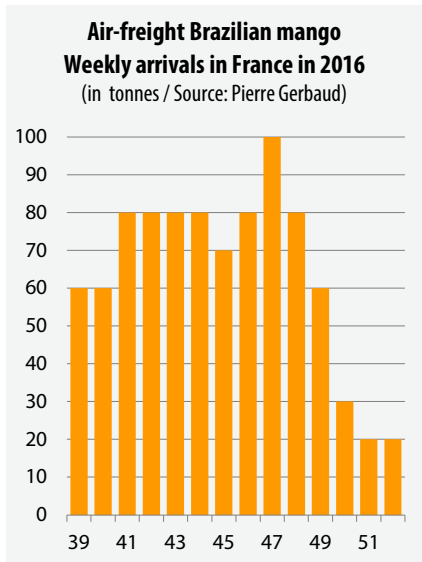
Tél. +33 4 91 11 18 40 - 41 - 44 — MIN710b Les Arnavaux 13014 Marseille Cedex, France



has progressed in recent years, doubling its proportion of Brazilian shipments, going from 10 % to 20 %. Palmer has seen remarkable development. Practically absent from Brazilian exports eight years ago, it represented nearly one third of shipments to Europe in 2016, i.e. nearly as much as Tommy Atkins. In summary, Brazilian exports, in 2016, comprised one-third Tommy Atkins, one-third Palmer and one-third Kent and Keitt. Not only are the varieties other than Tommy Atkins rising in volumes to Europe, but their presence on the markets is extending over increasingly long periods. Palmer seems to have more and more fans, especially in Northern Europe and the Iberian Peninsula. This variety on maturity exhibits an attractive coloration, has a pleasant flavour, and is in addition free from fibres. In this context of varietal change, Tommy Atkins seems increasingly demoted to an adjustment role in the overall European supply. It reaches full steam in the inter-campaign periods,

such as in March/April between the Peruvian and West African campaigns, or in September/October between the Senegalese and Israeli campaigns, on the one hand, and the start of the Brazilian Kent campaign in October, on the other hand.

Going on the price curves, the 2016 Brazilian campaign went well. The rapid end to the Peruvian campaign in spring was particularly favourable for Brazilian produce, which made up for the quantitative shortfall at this time of the year. Conversely, the end of the year proved much more difficult, given the early start to the Peruvian campaign, leading to overlap between these two sources, leading prices into a downward spiral. This end-of-year profile, already observed two years ago, was ultimately more harmful to Peruvian exporters, at the beginning of their campaign, than to their Brazilian counterparts nearing the end of the season ■



Un livre des Éditions Quæ



Développement durable et filières tropicales

Estelle Biénabe, Alain Rival,
Denis Loeillet, éditeurs

2016, Coéd. Quæ, AFD, Cirad

Collection Cirad - AFD *Agricultures et défis du monde*

336 pages

ISBN 978-2-7592-2475-3, référence 02519

29 euros

Disponible au format numérique sur www.quae.com

Un cap politique et diplomatique majeur a été franchi en 2015. Les trois sommets internationaux, organisés à Addis Abeba sur le financement du développement, à New York au siège des Nations unies avec l'adoption des objectifs du développement durable, à Paris avec un accord

universel sur le climat, se complètent pour forger un cadre d'action rénové et ambitieux pour le développement durable. Les agricultures du monde sont au cœur des défis globaux. Dans un contexte de mondialisation portée par des flux commerciaux et financiers plus intenses, des risques sanitaires globalisés et une évolution rapide des comportements alimentaires, les filières tropicales - liens entre les agricultures et les autres secteurs économiques - connaissent de profondes transformations techniques, économiques et sociales. Face aux préoccupations environnementales et sociales que soulève leur expansion, les filières sont de plus en plus à l'initiative de démarches de développement durable.

Les mutations liées aux filières s'opèrent de manière différenciée et cet ouvrage se propose d'en rendre compte. Fruit des recherches et de l'expérience de chercheurs et agents de développement, ces contributions discutent le rôle des filières et de leurs transformations au regard du développement durable, comme vecteurs de développement, espaces d'innovation, objets d'évaluation et arènes de régulation. Le Cirad et ses chercheurs, acteurs du système de recherche public français agissant avec des partenaires au Sud, et l'AFD et ses agents, sont les témoins et les accompagnateurs des changements techniques, biologiques et institutionnels qui traversent le monde agricole et les sociétés.

Estelle Biénabe, docteur en économie du développement agricole, chercheur au Cirad, a coordonné des projets sur les dynamiques de restructuration des marchés dans les pays du Sud. Ces travaux couvrent l'analyse des filières et les questions d'accès aux marchés des petits producteurs.

Alain Rival, biologiste et physiologiste moléculaire, est enseignant et chercheur sur les variations épigénétiques et les applications biotechnologiques à l'amélioration des plantes tropicales. Il a coordonné des projets en Afrique, en Amérique latine et en Asie.

Denis Loeillet, agro-économiste, est responsable de l'Observatoire des marchés du Cirad, et de la revue *FruiTrop*. Il participe à l'élaboration d'un système d'intelligence économique au sein des filières fruits et légumes et à la méthodologie d'évaluation des impacts sociaux des chaînes de valeurs.

éditions
Quæ

Peru

A mixed campaign

As the number two mango supplier to the European market after Brazil, Peru is stepping up its presence every year with increasingly abundant quantities. In 2016, it shipped nearly 83 000 tonnes to the European Union, i.e. a rise of nearly 6 000 t on the previous campaign. Conversely, it is outstripping Brazil on the North American markets. Peru generally occupies the trade niche extending from mid-December to mid-April, between the Brazilian winter campaign (Kent period) and the West African sources campaign. In February and March, it is often the only supplier to the European markets, with substantial quantities. The most sensitive periods for Peru are the transitions with the campaigns of the other major sources. The period from December to mid-January can prove complex if Brazil is still shipping large quantities and Peru, at the beginning of its campaign, has an early and abundant harvest. In this configuration, the influx of Brazilian and Peruvian merchandise complicates the sales conditions, which can be manifested by considerable price falls. This was the case in January 2016, with Peru shipping quantities in excess of the absorption capacities of the recipient markets. The price of Peruvian mangoes was stuck at around 3.00 euros/box.

The sizing breakdown also represents a market disruption factor. Demand is more focused on median sizes, with

some variations between periods and the targeted commercial circuits. Yet mango production is characterised by harvests comprising mainly small-sized fruits at the beginning of the season, followed by a relative and often fleeting balance, with the tables then turned in favour of large sizes. These variations partly explain the price versatility, and sometimes the differences registered in the price range. From mid-February, the market recovered with available stocks sold off, and a reduction in Peruvian shipments. In mid-March, it saw a reverse phase, i.e. soaring prices given the shortfall created by the gradual end of the Peruvian campaign and by the late start of the West African campaign. These good prices probably helped boost the season's economic results, though only partially because of the modest volumes concerned.

The air-freight campaign also had an uneven 2016. After a fairly buoyant beginning of the year, the air-freight market deteriorated considerably in late January because of an increase in Peruvian shipments. Furthermore, the receipt of air-freight quality batches arriving by sea, and sold at lower prices (3.50 euros/kg), also contributed to scrambling the market. It gradually recovered in mid-February thanks to smaller shipments. In late February, a new increase in volumes during the winter holidays halted the recovery and probably aggravated the price wavering.



© Denis Loeillet

The best of exotics are now part of our range!

High quality, various origins
and fruits available all the year round...



... the expertise of specialists
at the service of our customers!

Conception TPC : 01 41 31 58 90 - Photo : Stew Patrikian©

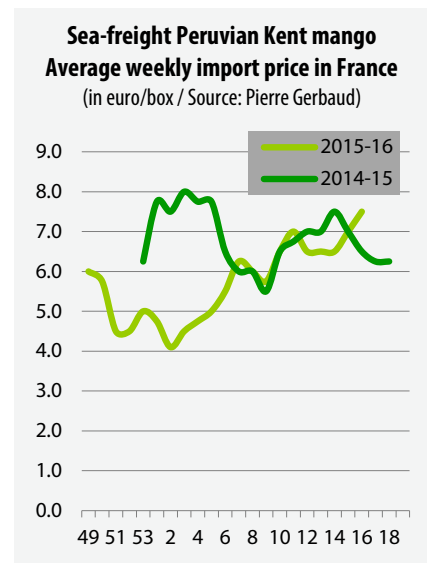
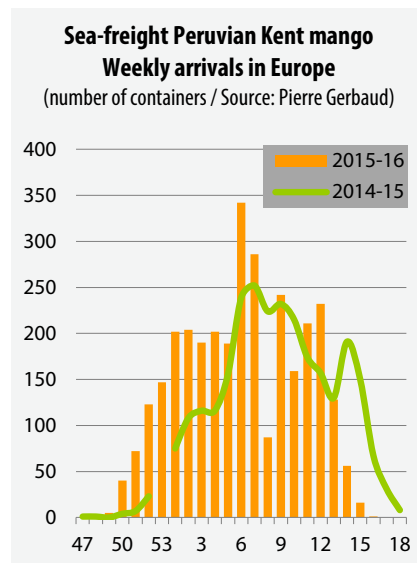
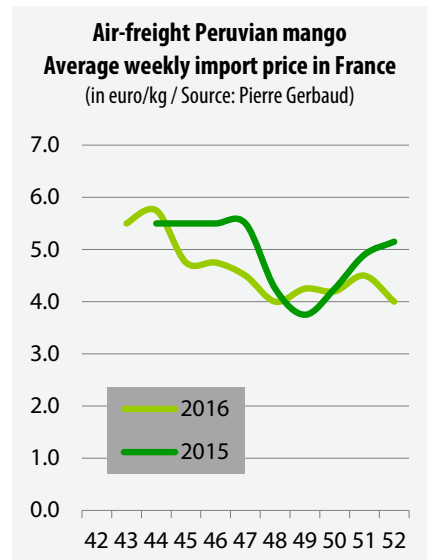
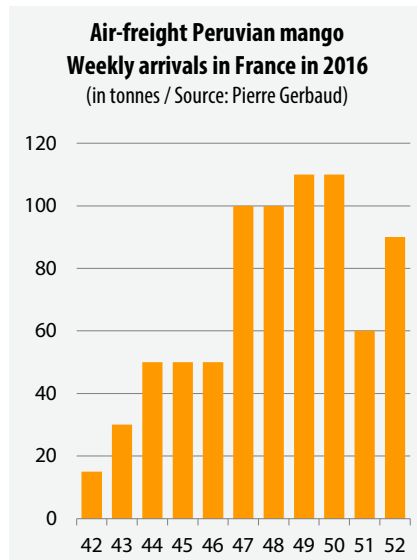


31, Avenue de l'Europe - Zone des Entrepôts - Bât. I 9
BP 70122 - 94538 Rungis Cedex - FRANCE
Tel +33 (0)1 46 87 30 00 - Fax : +33 (0)1 45 12 96 74
g.burunat@commercial-fruits.com



The slow sell-off of merchandise caused a distinct deterioration in fruit quality, especially over-maturity. With shipments still large in the first half of March, the market saturation required clearance sales for the most fragile batches. Certain Peruvian batches sold from 2.00 euros/kg. The reduction in incoming shipments and the acceleration of demand for the Easter holidays helped the market recover, and prices get back to more normal levels, although still near cost price.

The Peruvian mango exports profile is similar to Brazil's a few years ago. The high number of exporters doubtless puts a strain on the Peruvian industry's figures, by generating external and internal competition due to the rough control of the flows. The fairly abrupt variation in shipments between periods has always caused jolts in sales, and therefore in prices charged. While price falls are often rapid, the recovery is, from experience, always slow. While the rate variation is due, among other things, to the volumes received, the particularly long transport times for Peru generate an accordingly greater inertia. The quest for other trade outlets and the development of the domestic market could perhaps help better divide exportable volumes between the recipient markets ■



West Africa

Increasingly significant

The African sources have constantly increased their shipments to Europe for several years. This exponential trend is continuing, and indeed intensified in 2016. Between 2013 and 2015, the West African sources (Côte d'Ivoire, Mali and Burkina Faso) had already increased their shipments by nearly 9 000 tonnes, reaching 33 000 t in total. This result should be readily disregarded, since in 2016 they exported more than 43 000 t to Europe. If we add Guinea and Senegal, whose campaigns are on a different schedule, the total is well in excess of 50 000 t. Of course, of the three featured sources, the main one is still Côte d'Ivoire, but volumes from Mali and Burkina Faso are far from anecdotal, and they contribute to the joint momentum in the European market supply from April to July.



Côte d'Ivoire

A strange but good campaign

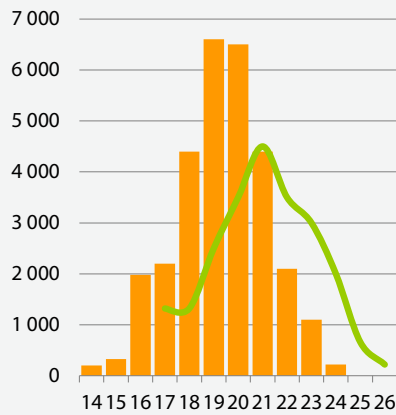
Sea-freight mango increasingly popular

Throughout the campaign, many operators highlighted the lack of produce from the African sources, especially Côte d'Ivoire. The country did actually export a "mere" 30 000 tonnes, i.e. over 7 000 t more than the previous campaign! True, the transition from the Peruvian campaign to West Africa was again fairly late this year. Strange to think that recurrently, before the first ten days of April the fruits had not reached physiological maturity, and so could not be exported, meaning they reached the market 10 to 15 days later. However this cannot be put down to any negligence by the Ivorian public authorities, which set a fairly early campaign start, from the first week of April. Unfortunately, they arrived after the Easter holidays. The first Kent shipments reached the European market in the third week of April. Prices gradually sagged, but remained fairly firm until mid-May. They then saw a more distinct fall, without coming undone as was the case in previous campaigns. This shorter market campaign ended in the second half of June.

Overall, the sea-freight campaign went satisfactorily, going by the price level in view of quantities on the market. Several years ago, things were rather different, with volumes 60 % smaller. It seems that better division of quantities between the various European markets is behind

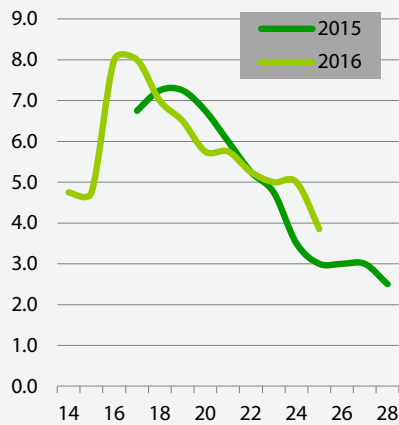
**Sea-freight Ivorian mango
Weekly arrivals in France**

(in tonnes / Source: Pierre Gerbaud)



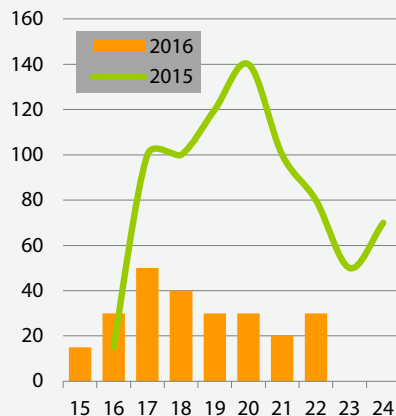
**Sea-freight Ivorian mango
Average weekly import price in France**

(in euro/box / Source: Pierre Gerbaud)



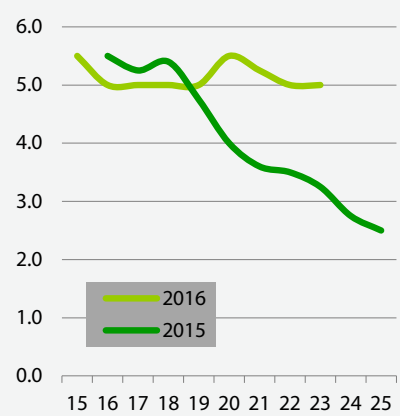
**Air-freight Ivorian mango
Weekly arrivals in France**

(in tonnes / Source: Pierre Gerbaud)



**Air-freight Ivorian mango
Average weekly import price in France**

(in euro/kg / Source: Pierre Gerbaud)



these results. West African mangoes have found better direct outlets, favouring a more harmonious division. In addition, they are now recognised for their quality by recipient markets which, hitherto paid little heed to these sources. The shorter routing times compared to certain South American sources enable better fruit maturation prior to shipment. The availability of Kent for most exports and Keitt in a lesser quantity also represents an asset for the recipient markets.

**A more limited
air-freight campaign**

Exports were smaller and better divided than last year, when exporters shipped massive quantities to cope with the shortfall of air-freight produce. This led to continuous, steady sales. Starting in mid-April, the Ivorian air-freight campaign finished in early June. Prices remained strong and high throughout the period, although they had collapsed from mid-May last year, with low rates and clearance sales for highly mature fruits.

The apparently satisfactory results must not conceal the difficulties of the Ivorian industry. In phytosanitary terms, interceptions upon entry into the European Community amounted to 10 in 2016, the same figure as in 2015. Furthermore, the logistical problems are scarcely surprising for a source which packs its steeply rising shipments into the month of May alone (70%). If the Ivorian mango flow stabilises, adaptations will probably need to be found to limit current malfunctions, due to the progress of volumes but also the short duration of the campaign.

© Régis Domergue

France

Reveler continuing slowly, but improvement still to come on the French market. The sales tempo has maintained an average level, still higher for green than yellow bananas. The smaller presence of competing fruit and those promotions that are in place are gradually helping interest in the banana. In addition, the supply has been more moderate. African volumes have maintained a downward trend, with levels nonetheless above average. The FWI showed more interest very early (EPI) and some dollar bananas supplies have been available. Hence the stocks accumulated at the end of the year are slow in disappearing, though they are subsiding, and green banana prices have strengthened slightly, though levels are still disappointing and below average.

EU Arrivals

Week	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Martinique	563	927	28%	1 350	-75%	-27%																									
Guadeloupe	1 188	1 714	-33%	2 502	-10%	-63%																									
TOTAL FWI Ivory Coast	5 291	5 521	-4%	10 812	10%	14%																									
Cameroon	5 305	1 092	-32%	1 851	25%	30%																									
Ghana	759	12 523	-9%	23 873	19%	26%																									
TOTAL Africa	11 955	799	-35%	1 319	-24%	-51%																									
Surinam	520	15 006	-13%	28 099	-3%	-5%																									
TOTAL	13 063	15 006																													

Germany

German market struggling to pick up and ease. Fruit availability has remained greater than market needs. On the one hand, incoming shipments have remained large and the stocks accumulated over the previous weeks have remained available, in particular proportions. On the other hand, despite the end of the school holidays, sales on the local market have only risen slightly, but not weak to absorb the fruits available. Similarly, on the export markets, despite picking up slightly, the pressure had held up and prices have remained competitive. In this context the market has not yet regained its balance, and despite a slight rise, the market prices remain unsatisfactory for this season.

Green Prices

2nd / 3rd brands
 € / box
 11.50 / 12.50 (13.00)

Retail Prices Germany

Product: BANANAS, Size: ALL, Origin: ALL

Wholesale Prices Germany

Product: BANANAS, Size: FIRST BRANDS, Origin: ALL

EU - 28 reference price

Week 2 / Week 1
 2017 / ave 14-16

Reference price

Week 2
11.65
 US \$ / box
 - 0.25 \$
 - 5 %

Weekly banana market report

Comprehensive and relevant European market monitoring

- Production trends
- Detailed review of the main European markets
- Detailed import prices for each market
- Supply levels



Annual subscription price: €3 000 pre-VAT
 (approx. 48 editions per year)

E-mailed out on Thursdays

Contact: info@fruitrop.com

or www.fruitrop.com/en/ciradshop/subscribe



Mali

Following in the wake of Côte d'Ivoire

With an additional thousand tonnes or so in 2016 from the previous year, Mali has consolidated its place as the number two mango supplier to the European from March to July. In spite of being landlocked, the source's exports are on the rise by air freight, sea freight and road freight.



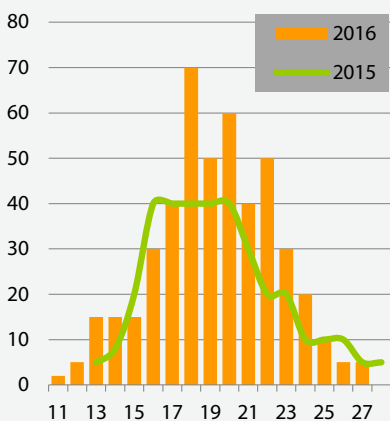
A more regular air-freight campaign

Air-freight exports went rather well in 2016. Since the initial incoming shipments enjoyed a favourable context on the European markets. The supply levels were limited, with on the one hand the gradual end of the Peruvian campaign, and on the other hand, the moderation of air-freight shipments from Côte d'Ivoire, which in previous years shipped large quantities between the start of the campaign and the arrival of the first sea-freight shipments. Mali took advantage of this situation to export Amélie, which sold steadily to connoisseur consumers from the second half of March. It exported some Valencia at the same time, the high prices from the start of the campaign dipped in April as Kent shipments progressed to rapidly dominate the market. These fruits sold at high prices until mid-June, when competition from Mexico and Senegal was gaining strength.

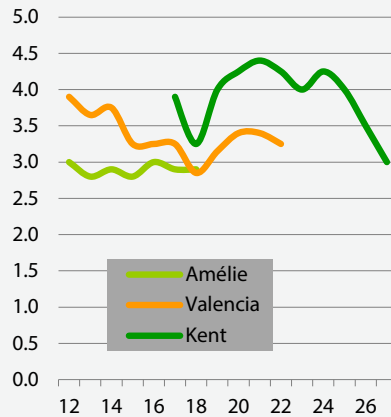
A strong sea-freight campaign

The 2016 export campaign excluding air-freight extended over two months. Initiated with the first Ivorian shipments, the Malian campaign finished in late June, distinctly earlier than the previous year. The concentration of shipments over a shorter period could have had an impact on sale prices, especially since the Malian shipments peak coincided more or less with the greater Ivorian peak. The better division of volumes between the various European markets doubtless limited the massive supply effect potentially affecting rates. Hence the price of Kent from Mali sagged in the first half of June, though maintaining fairly strong levels. It then climbed during the second half of June when incoming shipments from Senegal and Israel were still moderate.

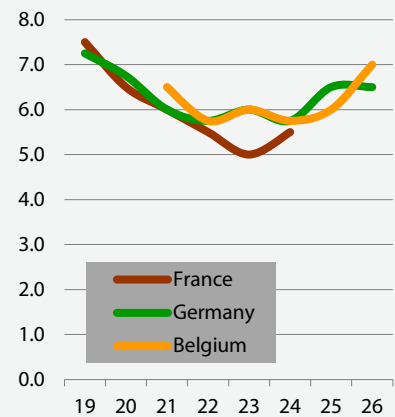
Air-freight Malian mango
Weekly arrivals in France
(in tonnes / Source: Pierre Gerbaud)



Air-freight Malian mango
Average weekly import price in France
in 2016 (in euro/kg / Source: Pierre Gerbaud)



Sea-freight Malian mango
Average weekly import price in Europe
in 2016 (in euro/box / Source: Pierre Gerbaud)



The logistics out of Mali remain complex and costly. The main channel remains Côte d'Ivoire, via the port of Abidjan, well-structured for the fruit trade. For the Sikasso region, this route seems the most rational. For the Bamako region, the journey to the port is longer. Also, the route via Dakar is favoured by certain exporters. The road-freight time is offset by the shorter sea voyage to Europe. Nonetheless road-freight has not been abandoned. Lorry transport from Mali to Europe might appear daring, or even unrealistic. However, it seems that trials have been undertaken. Bearing in mind that Mali is developing regional trade, especially in the mango, aimed at Senegal, Mauritania and also Morocco, is it not now within touching distance of Europe?

While Malian fruits are gradually winning over the European markets, they still have flaws, the most concerning of which is fruit fly infestation. Mali holds the unwanted record for the number of interceptions by European phytosanitary services in 2016. The European Commission requested the Malian authorities, as it did for Côte d'Ivoire two years ago, to draw up a programme to manage this scourge in order to contain any contaminations. So Mali will be under close surveillance in 2017!

Burkina Faso

Exports consolidated

In 2016 Burkina Faso followed the tempo set by Côte d'Ivoire and Mali, with a rise in exports of 1 600 tonnes from 2015, going from 4 400 to 6 000 t. Just over 400 t were shipped by air-freight, and 5 600 t by sea-freight or road-freight. This performance marks a downturn in air-freight exports due to a lack of freight capacity and a fairly rapid halt to shipments due to interceptions for fruit fly infestation. Conversely, the sea-freight performance was more positive, with a clear increase.

The air-freight campaign began in mid-March with shipments of Amélie and Valencia, which represented an alternative to the last Peruvian mangoes, which still suffered from a fragile quality. Their prices were stable but not very high (between 3.00 and 3.50 euros/kg on average), with these varieties not the most popular on the European markets. With the first Kent

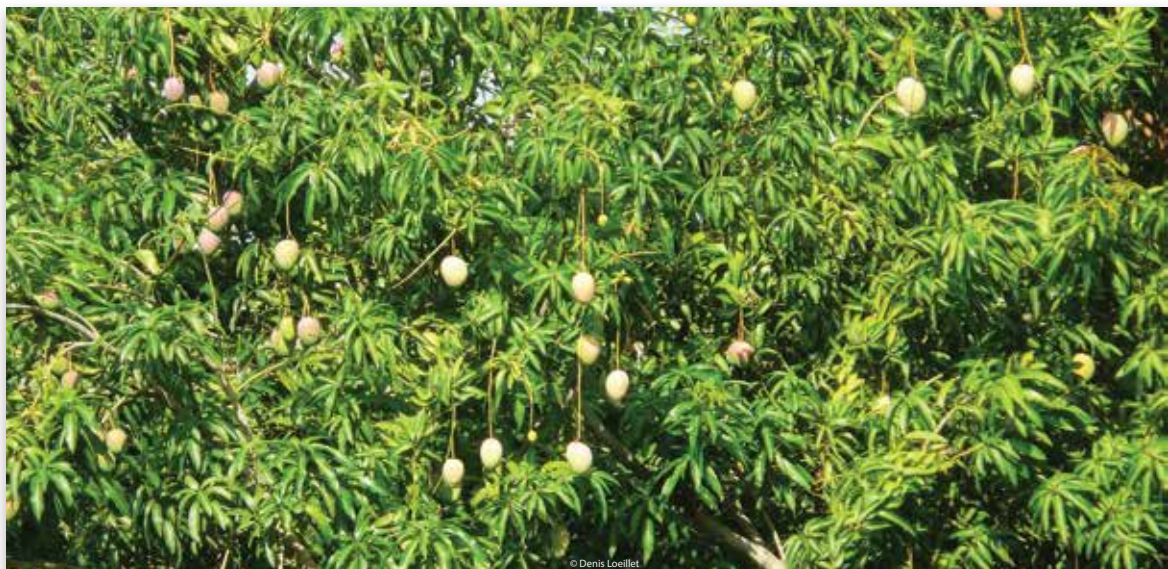
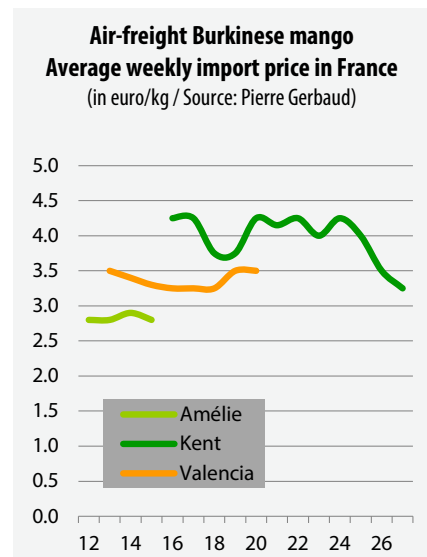
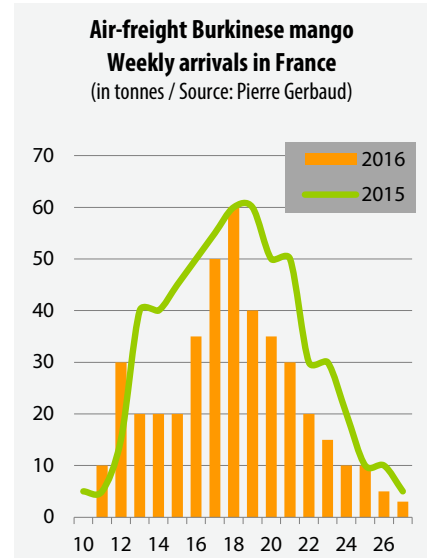


© Denis Loeillet

in mid-April, Amélie and Valencia became more difficult to sell. Kent regularly sold at above 4.00 euros/kg until mid-June. The last batches received in the second half of June were traded on a downward trend, because of the competition from new sources (Senegal and Mexico), the lower quality of the end-of-campaign fruits and the lack of reliability in phytosanitary terms.

Sea-freight exports imitated those of Mali, obtaining more or less the same prices. They were curbed by the lack of availability of containers in this landlocked country, and by the additional transport costs to the loading port, which make Burkinese mangoes less competitive than those of its neighbours. To overcome this handicap, the source has simultaneously switched to other outlets to exploit its abundant production (around 100 000 t). Dried mango production has revitalised in recent years to reach 1 930 t in 2016, with more than 90 % exported (it takes approximately 15 kg of fresh mango to obtain 1 kg of dried mango). Burkina Faso has a good brand image in terms of quality for the dried mango, often sold under the organic label on the international market. Production of mango-based processed products also enables some of the production to be used. This is reportedly the case for approximately 40 000 t aimed at the processing sector to make juice, jam, etc., for the local and regional markets. Finally, the country also ships mangoes to the neighbouring Sub-Saharan and North African countries. Although still modest, these shipments involve around 2 000 t.

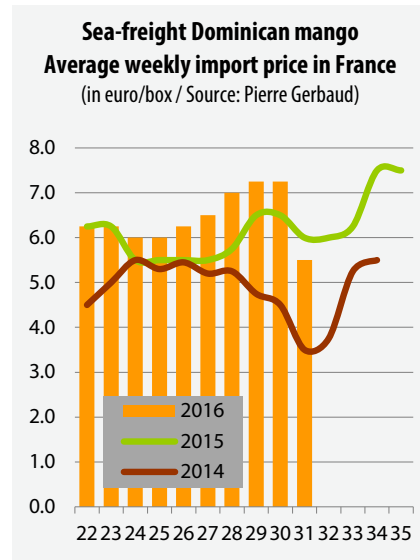
The landlocked location of this source remains a major constraint for exports on the international market. Yet, paradoxically, it represents a driving force for exploring other exploitation avenues, especially drying which seems to be gaining importance. The phytosanitary aspects are also posing obstacles for exports to Europe. In 2016, sixteen batches were intercepted on entry to the European Union because of the presence of fruit fly larvae. Although this is a long way from the interceptions suffered by Malian mangoes, this factor remains a threat to Burkinese exports ■



Dominican Republic

Solid presence against a backdrop of concern

The Dominican Republic has consolidated its place among the suppliers to Europe, with 14 000 tonnes of exports in 2016, i.e. one thousand or so more than in 2015, under more difficult conditions. The 2016 campaign was marked by a start in late May, a bit earlier than in 2015, whereas the market was burdened with large concentrated incoming shipments from West Africa. Dominican fruits sold steadily at fairly firm rates. Yet in mid-June they suffered from major quality problems, with sudden fungal attacks damaging the batches in transit. Very rapidly, the operators reacted by stopping shipments from the least reliable structures, favouring those likely to ensure a superior quality level. This selection and self-discipline enabled the campaign to be continued with occasionally smaller quantities, with no apparent effects on the campaign results overall. In July, rates became stronger given the smaller overall shipments. However, the campaign drew to a more rapid end as August began, due to the inability to supply quality produce, while Israeli exports were peaking. This campaign was marked by the quality problem, an unusual phenomenon for this source. According to the operators, the fungal attacks were due to particular meteorological conditions due to the El Niño phenomenon, highly intense this year in the Caribbean ■



Senegal

Stabilisation

Mango exports from Senegal to Europe seem to be stabilising after a remarkable rise since 2010. They have been set between 10 000 and 11 000 tonnes for the past three campaigns, but have practically doubled for the past five years. Senegal is one of the sources supplying the European market during the summer period, overall from June to August, sometimes spilling over into September. Its shipment comprise almost exclusively Kent, enabling it to occupy a specific niche when the other sources on the market have little or no fruits of this variety. This is particularly the case in August when Mexico is finishing its campaign and Israel is shipping Omer, Shelly, Lily or Keitt instead.



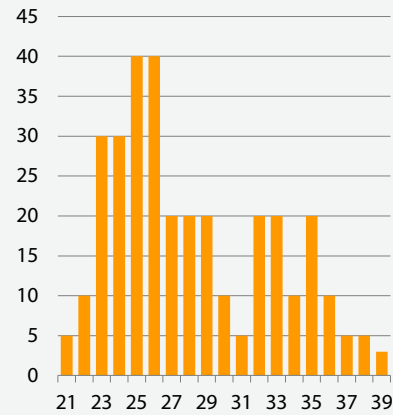


Since the European market is fairly short of air-freight mango in late May-early June, conditions proved favourable for Senegalese exporters to begin the campaign earlier than the previous year. The sale price of Senegalese fruits, high for the first shipments, rapidly fell as the supply progressed, amplified by incoming Mexican shipments. The price was also dipping due to the fragile quality of the fruits. In late June, the air-freight mango rate reached its lowest level of the campaign. Certain European operators actually suspended procurement due to the rapidly deteriorating quality. However Senegalese exports continued until September, though with limited quantities, prices of which picked up little by little, though without regaining their early-campaign level. Air-freight volumes to Europe are estimated by Senegal's DPV at approximately 325 tonnes.

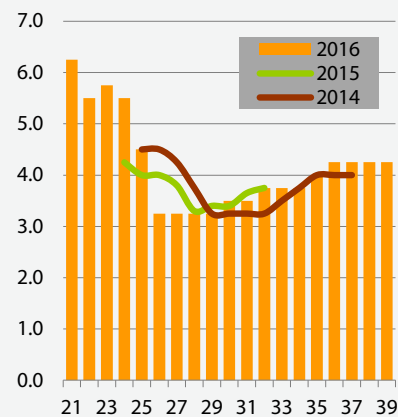
Although on a smaller scale, the sea-freight campaign was also longer than in 2015. It began in mid-June and finished in mid-September. Approximately 10 600 t were shipped, broken down into 14 % in June, 30 % in July, 51 % in August and 5 % in September. Their rates fluctuated in line with the overall supply to the European market. Hence the campaign opening prices were around 6.00-7.00 euros/box, up in July when Senegal was the sole Kent supplier. They then reached their maximum of around 7.50-8.00 euros/box. They dropped thereafter, on the one hand because of the Israeli campaign kicking off with significant volumes, and on the other hand, the qualitative deterioration of certain batches. Price ranges expanded significantly, with an average of 4.00 to 5.50 euros/box until the end of the campaign in September.

Senegal is now in the leading pack of mango suppliers to the European Union, more particularly during the summer period. Its production calendar, out of synch with the other West African sources, extends the presence of African fruits in Europe, with a seemingly unanimously recognised taste quality. The improvement of cropping and post-harvest techniques had helped better preserve fruit quality, in particular for sea-freight fruits. Beyond the volumes bound for Europe, which have stabilised for three years, Senegal has also supplied the regional market (Gabon, Mauritania, Morocco). Nearly 5 000 t of mango went onto these continental distribution circuits, primarily via road-freight. Finally, the third pillar of the country's mango industry, the processing sector, absorbed 3 600 t of products during the campaign ■

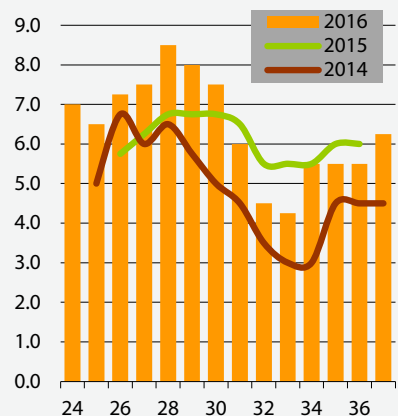
Air-freight Senegalese mango
Weekly arrivals in France in 2016
(in tonnes / Source: Pierre Gerbaud)



Air-freight Senegalese mango
Average weekly import price in France
(in euro/kg / Source: Pierre Gerbaud)



Sea-freight Senegalese mango
Average weekly import price in France
(in euro/box / Source: Pierre Gerbaud)



Mexico

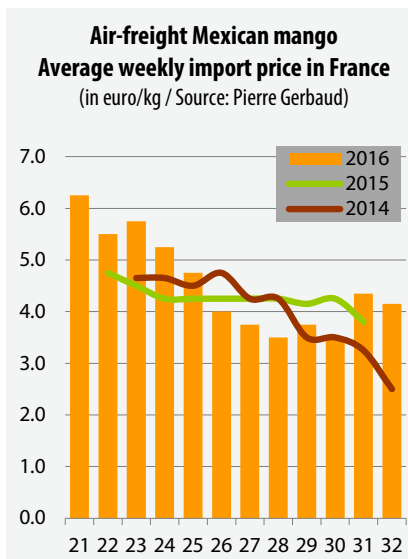
A fragmented presence

Mexico, one of the world's leading mango exporters, has a paradoxically low profile on the European market. The extent of its territory enables it to produce mangoes virtually year-round. By virtue of their proximity, the North American markets receive nearly all the exportable fruits from this source. The NAFTA framework also facilitates trade with the United States. That is doubtless why the European market is proving less attractive for Mexican exporters. So Mexico performs a secondary role in European procurement, at the very least in terms of quantity. For several years, it found a commercial niche by shipping air-freight mangoes, taking over from the West African sources and before the height of the Israeli campaign. After a 2015 campaign rising to 3 060 t, Mexican operators again increased their shipments with 3 360 t exported in 2016. True, this was a limited move, but it was positive especially because these were air-freight mangoes sold in limited quantities.

The Mexican campaign was a little more protracted than in 2015, beginning from the second week of May and extending until mid-August, i.e. a good two weeks more. Sales proved difficult throughout the campaign. While rates seemed high at the beginning of the campaign, they rapidly dropped in June until the end of the season. Mexican Kent exhibited uneven quality, with in particular heterogeneous coloration. In the first half of the campaign, purchaser preferred less expensive African sources. The wide division of Mexican fruits between a growing number of recipients also contributed to the commercial difficulties, intensifying the competition between operators on the same market. Finally, from July the first quality problems appeared, impeding any desires for rate increases. Some higher quality brands obtained stronger prices, though often for limited volume. Mexico remains a spot supplier to the European markets, its main asset being able to provide Kent at a time when it is less common on the markets ■



© Denis Loelliet



© Denis Loelliet

Israel

An earlier campaign

After a 2015 campaign slightly down on the previous one, marked by steeply expanding exports, 2016 seems to be a season of winning back the European markets for Israel. Climbing from 13 800 t in 2015 to 15 600 t in 2016, the source has consolidated its position as the summer supplier to the European market. Air-freight and sea-freight exports started simultaneously this year, somewhat earlier than 2015. The first batches were shipped from late June, whereas traditionally Israel begins its campaigns at best in mid-July. The first shipments comprised Aya and Maya, rapidly followed by Omer and Shelly. Kent and Keitt took their turns from early August to late September. In August, on a market with a lighter air-freight mango supply, the prices of these products strengthened, while Mexican volumes waned and Senegalese mangoes experienced quality problems. The price then dropped in September, while the Spanish campaign was progressing.

The sea-freight, after beginning in late June, progressed gradually to achieve its peak in mid-August. The quantities then dwindled until late September. Exports comprised Kent until the second half of August, with Keitt then taking over. Throughout the period, Israel also shipped Omer (Kasturi), Shelly, Lily, etc. Sale prices followed the flows, peaking in the first half of August when volumes were at their maximum and only Senegalese produce was competing. Puerto Rican and Dominican shipments were withdrawn following quality problems. In addition, Israel supplied Kent, whereas these two sources shipped the slightly less popular Keitt. The campaign calendars for Israel and Spain complemented each other well, aiding a seamless transition between the two sources, and also providing the European market with one of the most diversified times of year in terms of varieties ■



Maya

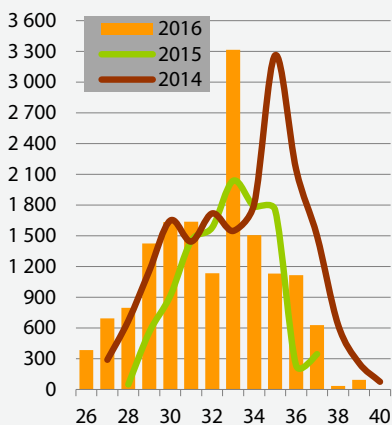


Aya

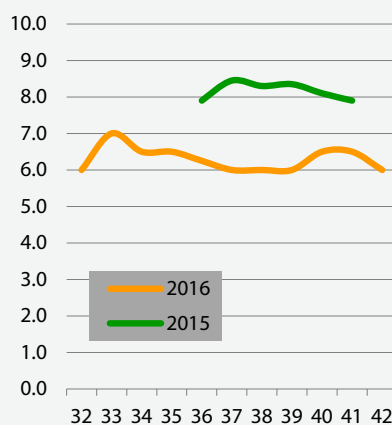


Shelly

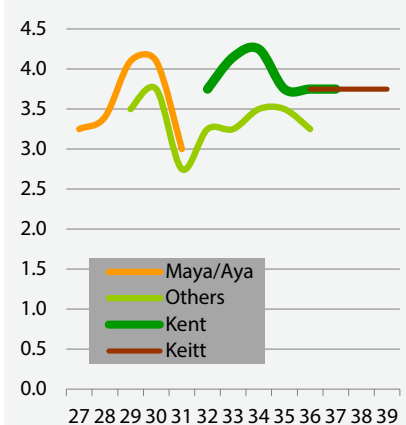
Sea-freight Israeli mango
Weekly arrivals in France
(in tonnes / Source: Pierre Gerbaud)



Sea-freight Israeli mango
Average weekly import price in France
(in euro/box / Source: Pierre Gerbaud)



Air-freight Israeli mango - Average weekly import prices in France in 2016
(euro/kg / Source: Israeli Ministry of Agriculture)




Galilee

...Direct from the field.



2 Hasadna st. ,Or –Yehuda , 60220, Israel

Tel: 972-3-6539025 | **Fax:** 972-3-6539016/26

Mail: galilee@galil_export.com



Spain

Back to 2014

The 2016 campaign was another good year for Spain. The trade enjoyed good operating conditions, although the early summer forecasts were not achieved, as is often the case with the European Union's only real mango producing source. This is not an expression of pride for the industry operators, merely a reminder of an agricultural reality. The Spanish mango is based within a zone favourable for its cultivation, and is subject to its meteorological variations doubtless more keenly than elsewhere. Like last year, the strong summer heat reduced tree fruit bearing, causing a lot of fruit drop-page. The phenomenon was not as intense as in 2015, enabling large volumes to be sold, estimated at 18 000 to 20 000 t as in 2014. This result should be placed in perspective with Spain's production potential, which has constantly risen in recent years. The entry into production of new orchards should make itself felt in the forthcoming campaigns. Fruit droppage in early summer will of course not have the same consequences, with a production potential of 30 000-35 000 t.

The sale of Spanish mangoes enjoyed a convergence of favourable factors in 2016. The rapid end of the Israeli campaign in the first half of October and the slow progress by Brazilian exports left a fairly wide opening for Spanish fruits. After shipping a few pallets of Tommy Atkins in late August-early September onto an under-supplied European market, Spain stepped up its shipments with Osteen, an iconic variety for this source. The supply increased from the second half of September, reaching a peak in the first half of October. The quantities then dwindled until the end of the month, when Keitt took over throughout November. Meanwhile, Spain supplied Kent from mid-September to mid-October, and Irwin in September and October.

In terms of sales, Irwin and Kent prices were similar to last year, at between 4.00 and 5.00 euros/kg, with some peaks of up to 5.50 euros/kg for limited volumes and on a market little affected by the Brazilian competition at this time. Some Irwin batches sold at lower prices, especially in the second half of October when they partly comprised large sizes. This small-fruited variety was well received for its superior quality in terms of coloration and presentation. The large sizes did not fit this description so much, and rapidly depreciated (2.00-3.00 euros/kg). Kent prices also fluctuated during the campaign. In October, shipments of highly mature fruits widened the price range, to more than 2.00 euros/kg in amplitude at times.

Osteen



© Carolina Dawson

Measuring Up



TROPS

100% Quality and Reliability

The strength of our products is based on our requirements as producers. That is why our avocados are at the top of the podium, whether they are carefully harvested from the trees in the south of Spain or imported from our partners.

TROPS



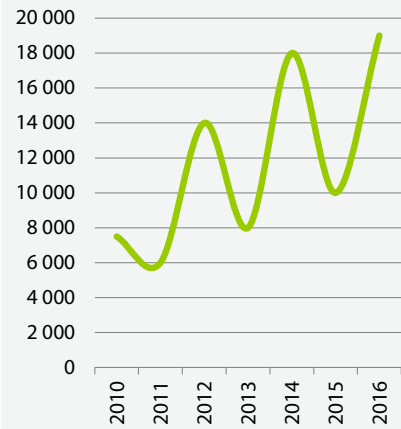
Given the magnitude of the shipments this year, it was a tough ask to sell them on the same price footing as the previous year, when volumes were particularly scarce. Almost the same level at the beginning and end of the campaign, Osteen rates dipped considerably in September in mid-harvest, with differences of up to 4.00 euros/box from the previous year. Yet with lower prices for larger volumes, it is not clear that the economic results of this campaign are worse than those of 2015. In November, there was a less marked presence of Spanish Keitt, especially on the wholesale markets, where they were widely available in previous campaigns. True, the Brazilian competition became more tangible at this time, but this does not explain this apparent ebb. It is likely that some of the Spanish Keitt was sold directly by the big supermarket chains, since at the end of the Spanish campaign, numerous supermarket promotions for these products could be observed.

Spain has joined the leading pack of sources supplying the European mango market. It is now in fourth or fifth place in terms of volumes. The proximity of the recipient markets enables fruits to ripen longer on the tree. While Osteen remains Spain's typical variety, its supply is diversified by the albeit limited availability of Irwin, Kent and Keitt; they also contribute to expanding the varietal range usually available on European markets, focused solely on Kent ■



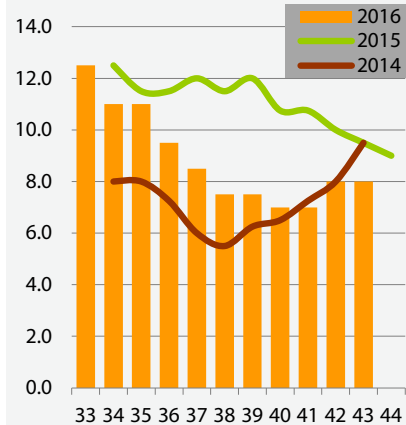
Mango - Spain - Evolution of exports (estimates)

(in tonnes / Source: Pierre Gerbaud)



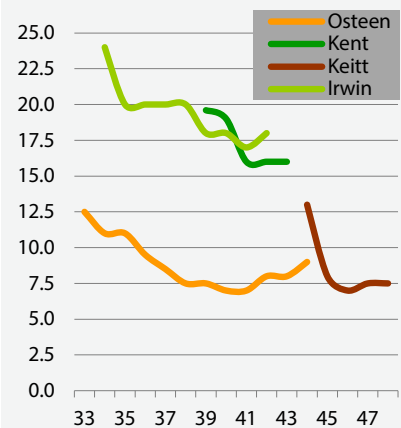
Spanish Osteen mango Average weekly import price in France

(in euro/box / Source: Pierre Gerbaud)



Spanish mango - Average weekly import price by variety in France in 2016

(in euro/box / Source: Pierre Gerbaud)





RG
Reyes Gutiérrez
frutas tropicales

365
*Healthy
by
Nature* **DAYS**

Camino de Málaga s/n
Apdo. de Correos 65 - 29700
Vélez-Málaga (Spain)
Tel. +34 952 505 606

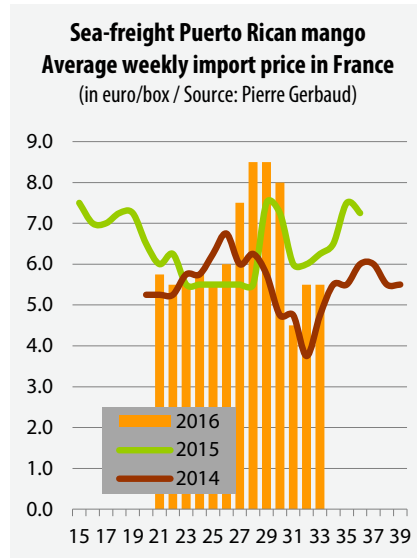


Puerto Rico

Back to growth

In 2015, Puerto Rican exports were down on previous years, at 7 400 t. In 2016, they exceeded their highest level to reach nearly 11 500 t, over a more concentrated period than usual. The first shipments reached Europe in the second half of May, after beginning one month earlier the previous year. The same applied to the end of the campaign which closed in mid-August, after extending until early September in 2015. The profile of the Puerto Rican campaign was fairly similar to that of the Dominican Republic, a geographically similar source. From mid-June to mid-July, some of the fruits earmarked for export exhibited fungal attacks, rarely detected in this supplier country. Stricter selection enabled shipments to continue, at a time when the European market proved to be more modestly supplied. Sale prices literally took off with averages going from 5.50 to 8.00 euros/box. Yet as July changed to August, prices dropped given the bigger supply, a fall in demand and the qualitative deterioration of the fruits ■

Pierre Gerbaud, consultant
 pierregerbaud@hotmail.com



© Guy Bréhinier