

February 2014 - No. 219

# FRUITROP

English edition

## Close-up Southern Hemisphere Apples and pears

**Counter-season  
melon**

**Rekindling  
the fire!**

**Monthly  
reviews**

**Citrus  
and exotics**



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**Definitely not a festive atmosphere!** *It was said that the whole of Southern Europe, including France, was in the doldrums. The crisis and all that... Now it appears that this ill tide has caught up with the Northern countries, where growth was supposedly vigorous, generating wealth, economic development, distribution of revenue; I am of course referring in particular to Germany. In any case, that was my conclusion upon discovering, to my consternation, that the winner of the innovation trophy at the latest edition of the Fruit Logistica fair was... barbecued vegetables! What a feat! What progress! The technology must obviously be cutting-edge, or perhaps it is the service provided, or maybe the handy packaging... Personally, I am still trying to find what benefit it brings to the table. I'd be grateful if any readers could enlighten me. I must have missed something sensational... or else I haven't missed a thing! That would be even sadder, but fitting for this industry which is struggling for renewal and providing inspiration only through marketing gimmicks, which in no way increase the usage value of the products offered to the consumer. On top of the lack of growth, we now have a lack of ideas. It's a grim picture all round...*



Denis Loeillet



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# FRUITROP

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Cécilia Céleyrette

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# Banana

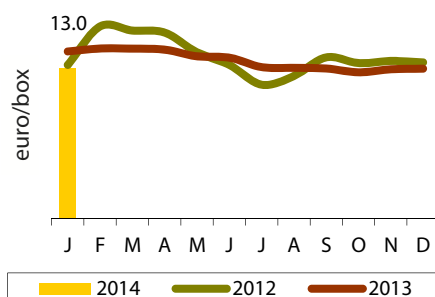
## January 2014

The banana had a disappointing start to the year. Poor conditions at sea caused successive shipping delays, affecting the regularity of the supply. Imports from Africa and the French West Indies remained stable from December, and still 10 % above average. On the other hand, the dollar banana supply continued its rise which had started at the end of 2013: Colombian volumes were slightly short, but Ecuadorian volumes rose to very high levels compared to the shortfalls of the past few years. Costa Rican imports were also up. These quantities were supplemented by stocks built up during the holidays. Sales in Northern Europe were highly dynamic, better than in previous years; while sales to Eastern Europe exhibited a good level thanks to mild temperatures for the season. However, Southern Europe restarted more slowly due to the holidays until week 2 in both Spain and Italy. In addition, there was very high pressure from competing fruits (citruses and apples in high quantities and at low prices). Highly competitive promotions at the yellow and retail stages revitalised sales on the French market, which recovered a better balance toward week 3. In this context, there was no improvement on the early season rates, since the pressure by promotions on green banana prices was high. Rates remained stable from December, and below average. In Germany, contracts with the supermarket sector for Q1 2014 remained unchanged from the end of 2013. In Russia, the market was more difficult due to large incoming shipments from Ecuador, and the Orthodox New Year festivities extending until mid-January.

### NORTHERN EUROPE — IMPORT PRICE

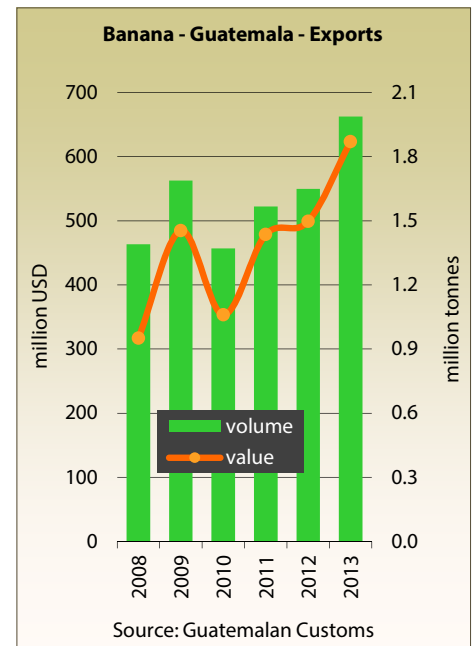
January 2014 euro/box	Comparison	
	previous month	average for last 2 years
13.00	0 %	- 6 %

### Germany - Green price (2<sup>nd</sup>/3<sup>rd</sup> brands)



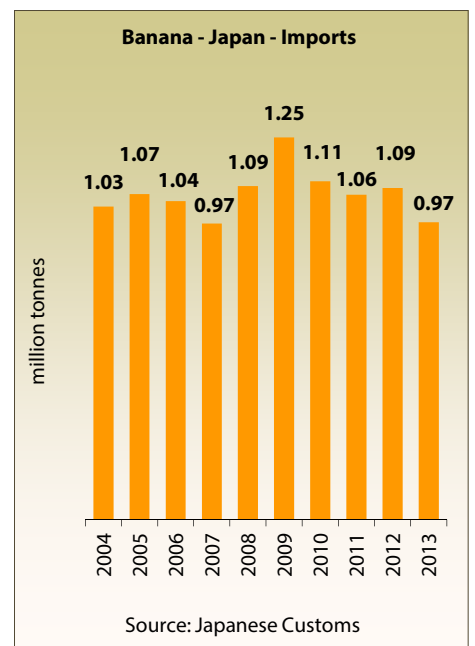
■ **Guatemala rocks the ranking of the world's main banana exporters.** In 2013, Guatemalan banana exports exceeded the 2 million-tonne mark! Up more than 20 % from 2012, this figure should put Guatemala in the world number 3 exporter position, behind Ecuador and the Philippines. Guatemala sends nearly all of its volumes to the US market, providing approximately one-third of its supply, making it the leading supplier.

Source: Reefer Trends



■ **Japan: not a happy banana market.** The economic crisis, which certain analysts are not hesitating to dub a "coma", so prolonged and severe has it proven, is not without consequences on fruit imports. Hence the collapse of the yen in 2013, which lost more than 25 % of its value against the dollar between January and December, did not fix things. The banana, the country's number one import fruit in terms of volumes, has borne the cost. With barely more than 974 000 t, shipments are down and are even for the first time shifting from the practically constant level of 1.1 to 1.2 million tonnes, in place since 2008. Besides the fall in volume, this market is also tending to lose its image of qualitative excellence. The grapefruit is a good example of this: cosmetic standards have been revised downward, and very big fruits, which made up most of the supply, are increasingly tending to be replaced by medium sizes.

Sources: Reefer Trends, Japanese Customs



### EUROPE — RETAIL PRICE

Country	type	January 2014		
		euro/kg	December 2013	Comparison
				average for last 3 years
France	normal	1.54	+ 2 %	+ 4 %
	special offer	1.37	+ 1 %	+ 9 %
Germany	normal	1.29	- 2 %	+ 7 %
	discount	1.18	0 %	+ 11 %
UK (£/kg)	packed	1.16	+ 1 %	- 5 %
	loose	0.76	+ 10 %	- 3 %
Spain	plátano	2.05	- 3 %	+ 14 %
	banano	1.36	- 3 %	+ 4 %

EUROPE



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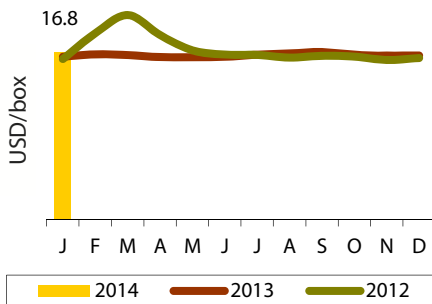
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# Banana

UNITED STATES

USA - Green price (spot)

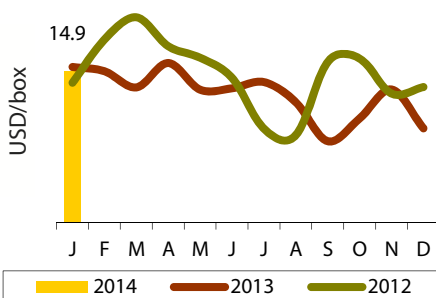


USA — IMPORT PRICE

January 2014 USD/box	Comparison	
	previous month	average for last 2 years
16.30	+ 2 %	+ 4 %

RUSSIA

Russia - Green price

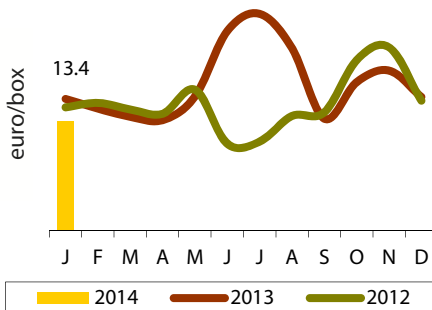


RUSSIA — IMPORT PRICE

January 2014 USD/box	Comparison	
	previous month	average for last 2 years
14.90	+ 14 %	+ 3 %

CANARIES

Spain - Platano green price\*



CANARIES — IMPORT PRICE\*

January 2014 euro/box	Comparison	
	previous month	average for last 2 years
13.40	- 18 %	- 14 %

\* 18.5-kg box equivalent

■ **Bingo! As predicted, the world banana market grew in 2013.** But, as we observed in our January edition, relatively little in terms of unit value. Conversely in terms of volumes sold and trade values, 2013 will go down in the records. If we take as our reference the volumes consumed in the equivalent of half of the world market, i.e. the European Union (27) and US markets, the conclusion is undeniable. These two big destinations consumed 412 000 tonnes of bananas more than in 2012, i.e. volumes of 5 345 000 t and 4 012 000 t respectively. The increase is 5 % for the EU and 4 % for the United States. Of course, the enthusiasm may appear disproportionate in view of the growth rates achieved. But we should remember that the banana market in Europe achieved maturity years ago, and that a 5 % rise is a big event. It is true that we are used to such performances for the United States, though it has still achieved a new record. Never previously had the 4 million-tonne consumption mark been achieved. For the EU, the current level is 100 000 tonnes below

the mark hit in 2008.

In the April edition of *FruiTrop* we will look into the structuring of these markets in detail. For Europe, we can already say that it is imports which have taken advantage of the bounce-back, with a market share in excess of 89 %. Meanwhile, both the dollar sources (+ 6 %) and ACP sources (+ 8 %) have gained ground. European production (- 7 %) has lost ground, especially with its two heavyweights, Canaries and Martinique, both going backwards, though for different reasons.

In the United States, all the traditional sources have gained ground, except for Costa Rica, which has declined by around the same amount as it has surged in the EU. We should note that Guatemala, in a boom phase, is the leading supplier, leaving Costa Rica far behind.

Watch this space in April 2014 for a comprehensive review of the state of the 2013 banana market.

Source: CIRAD



Banana - January to December 2013 (provisional)

tonnes	2011	2012	2013	Difference 2013/2012
<b>EU-27 — Supply</b>	<b>5 181 314</b>	<b>5 097 942</b>	<b>5 345 167</b>	<b>+ 5 %</b>
<b>Total import, of which</b>	4 606 650	3 766 133	3 994 327	+ 6 %
MFN	3 629 757	3 508 959	3 719 883	+ 6 %
ACP Africa	505 106	489 187	546 126	+ 12 %
ACP others	471 786	491 444	514 120	+ 5 %
<b>Total EU, of which</b>	574 664	608 351	565 038	- 7 %
Martinique	178 522	187 029	155 575	- 17 %
Guadeloupe	59 130	63 253	70 446	+ 11 %
Canaries	315 967	337 023	324 997	- 4 %
<b>USA — Import</b>	<b>4 122 682</b>	<b>4 349 715</b>	<b>4 544 602</b>	<b>+ 4 %</b>
Re-exports	516 376	502 544	532 501	+ 6 %
Net supply	3 606 306	3 847 171	4 012 101	+ 4 %

Sources EU: CIRAD, EUROSTAT (excl. EU domestic production) / Source USA: US Customs

EUROPE — IMPORTED VOLUMES — JANUARY 2014

Source	Comparison		
	December 2013	January 2013	2014 cumulative total compared to 2013
French West Indies	=	+ 3 %	+ 3 %
Cameroon/Ghana/Côte d'Ivoire	=↘	- 7 %	- 7 %
Surinam	↘	- 5 %	- 5 %
Canaries	↗	+ 1 %	+ 1 %
Dollar:			
Ecuador	↗	+ 48 %	+ 48 %
Colombia*	↗	- 8 %	- 8 %
Costa Rica	↗	+ 27 %	+ 27 %

Estimated thanks to professional sources / \* total all destinations

# Orange

## January 2014

The market remained very difficult, despite a slight improvement. Sales maintained a slightly below-average level, but did see some rise from December. Furthermore, the Naveline season gradually waned, with Navel and above all Navelate taking over at the end of the month. The bottom of the price range rose slightly for Naveline, with the average rate maintaining a very disappointing level at the import stage, and catastrophic at the production stage. In this highly competitive context, sales of other varieties registered a downturn. Salustiana prices managed to be revised upward at the end of the month. Maltaise prices rapidly waned to reach a below-average level, despite the weakness of the supply.



### Uruguayan citruses: export season on a new footing in 2014.

Things are set for a complete change of direction from 2013! First of all, the harvest should rise by 15 to 20 % and return to an average level, after a light 2013 season due to the frosts. Yet it is probably on the export side that the changes could be greatest. On the one hand, the United States market, where Uruguayan citrus has been authorised since 2013, will for the first time be open from the beginning of the season. On the other hand, the customs regime will be less favourable than previously for exporting to the EU, the number one market for Uruguayan citrus. The exemption from customs duties ended as of 1 January 2014 for this country, as well as Argentina. By way of example, small citrus will be taxed at 16 %.

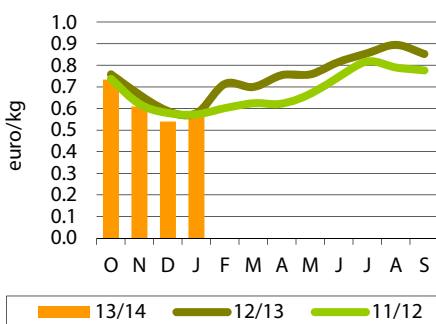
Source: Freshfruitportal

**December frost in California: major citrus losses confirmed in the Central Valley.** The 50 million dollars spent by producers to protect the orchards did not manage to alleviate the effects of the cold spell that struck at the beginning of December. According to the California Citrus Mutual, there are major production

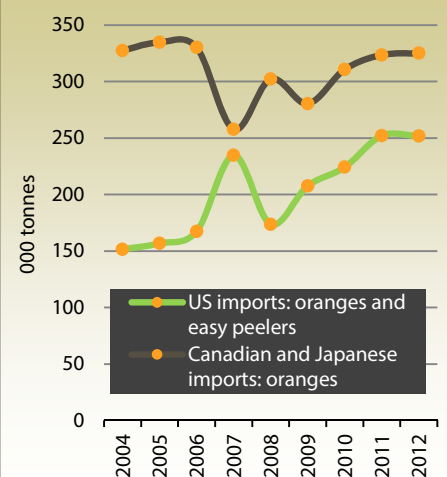
losses, evaluated at slightly over 430 million USD. Not surprisingly, it is small citrus which have paid the heaviest toll: the harvest, which had been at a level of around 440 000 t in recent seasons, was ravaged by temperatures which fell to - 5°/- 6°C, causing 40 % losses. Orange production, which on average weighs in at just over two million tonnes, reportedly suffered a 30 % loss. The losses reported for the lemon, whose cultivation area lies rather on the coastal zone, were just 20 %. The California Citrus Mutual is predicting a curtailed orange season, finishing in mid-May instead of July. The experience of 2007, when the last major frost hit California, provides some lessons about the consequences of this sort of occurrence on international trade. Orange and small citrus imports in the United States rose by approximately 70 000 t (+ 40 %), whereas orange volumes imported by the main markets supplied by California (Japan and Canada) fell by nearly 70 000 t (- 20 %).

Source: California Citrus Mutual

Orange - France - Import price



Citrus - California - Impact of 2007 frost on different markets



Sources: US & Japanese Customs, Comtrade

PRICE	Type	Average monthly price euro/15-kg box	Comparison with average for last 2 years
	Dessert oranges	8.55	- 1 %
Juice oranges	8.70	0 %	

VOLUMES	Type	Comparison	
		previous month	average for last 2 years
Dessert oranges	↗	- 9 %	
Juice oranges	↗	- 17 %	

VOLUMES	Varieties by source	Comparison		Observations	Cumulative total / cumulative average for last 2 years
		previous month	average for last 2 years		
	Spanish Naveline	=↗	- 13 %	Sales up from December, but still at a below-average level. Quality often fragile, and average size range still on the small side.	- 8 %
	Spanish Salustiana	↗	- 17 %	Shipment levels below average.	- 9 %
	Tunisian Maltaise	↗↗	- 47 %	Late start to the season, and import tempo slower than in previous years.	- 47 %

## Easy peelers

January 2014

The market proved fairly satisfactory. Demand maintained a good tempo, focused on a Spanish clementine supply considerably bigger than in previous years (high production, delay to market at the beginning of the season). Prices maintained a good level for the right sizes and the right brands, but remained under pressure for small sizes and standard brands, often of irregular quality. In this context demand for other varieties picked up only at the end of the month, when clementine volumes waned significantly. Prices for Moroccan Nour and Spanish Clemenvilla, Herandine and Ortanique registered an average level, while Israeli Or traded at below-normal basic prices because of the irregular quality of certain batches. Nadorcott volumes were only significant at the end of the month.

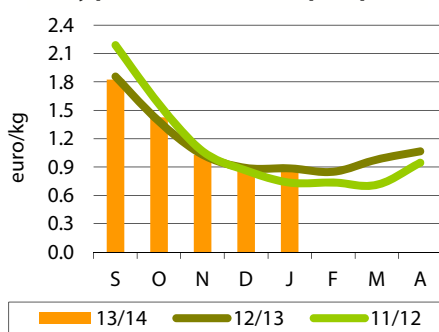


© Régis Domergue

seems to have been confirmed according to the latest information from the *Asociación Tucumana del Citrus*, Argentinean exporters now have access to a big new market. In early February, the Japanese sanitary authorities authorised imports of sweet oranges and certain varieties of small citrus (clementine, Ellendale, Murcott and Nova) from Argentina. However, the sanitary protocol raises questions as to the actual export opportunities. Fruits must undergo a 23-day cold sterilisation treatment at 2.1°C for small citrus, and a 21-day treatment at the same temperature for oranges. Under such heavy constraints Argentinean grapefruit and lemon exports to Japan are still marginal, though the market has been open for a decade.

Source: Reefer Trends

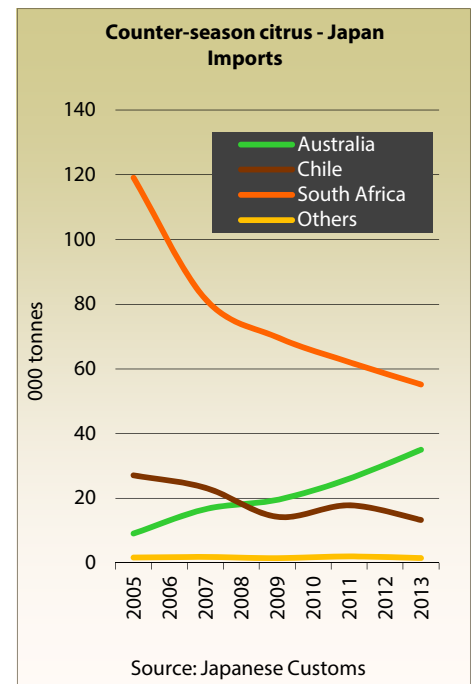
Easy peelers - France - Import price



■ **Easy peeler variety of the month: Ortanique.** This tangerine x orange hybrid, was established in Jamaica. Its external and internal qualities are highly variable according to climate conditions. As a rule, the fruit is of average size to large, with the lower part slightly flattened and often bearing a small embryo. Pulp characteristics—tender and very juicy—are excellent. However, although peel colour is attractive under Mediterranean cultivation conditions, its weak point is that it is very thin and the fruit is difficult to peel.

Source: CIRAD

■ **Argentinean citrus exports to Japan: a virtual opening?** Finally some good news for the Argentinean citrus industry, although its actual extent should probably be put into perspective. While the 40 to 50 % loss of lemon production



Source: Japanese Customs

PRICE	Varieties	Average monthly price euro/kg	Comparison with average for last 2 years
	Clementine	0.84	- 1 %
Hybrids	0.97	+ 29 %	

VOLUMES	Varieties	Comparison	
		previous month	average for last 2 years
Clementine	↘↘	+ 11 %	
Hybrids	↘	- 5 %	

VOLUMES	Varieties by source	Comparison		Observations	Cumulative total / cumulative average for last 2 years
		previous month	average for last 2 years		
Spanish Clementine	↘	+ 25 %	Volumes down from December, but maintaining a high level, well above average. Quality sometimes irregular.	+ 10 %	
Corsican Clementine	↘↘	+ 12 %	Significant volumes in the first half-month, followed by rapid wane: modest production level and strike by the main shipping line.	- 15 %	
Moroccan Nour	↗	- 7 %	Late growth in volumes from the middle of the month. Overall imports considerably greater than in 2013, but below average.	- 7 %	
Spanish Clemenvilla	=	- 6 %	Season in full swing. Volumes slightly below average.	+ 2 %	





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# Grapefruit

January 2014

The New Year did not bring any respite for the grapefruit. The market barely maintained its balance for Florida. Demand was sustained by the usual January promotions. The supply remained fairly moderate, with the scarcity of stocks counterbalancing the above-average imports for the first time this season. Prices remained average for the optimum brands, though the mid-range suffered a dip because of sometimes irregular quality. The market went from bad to worse for Mediterranean fruits. Demand picked up slightly, but the overall supply expanded in the second half-month. Turkish volumes, previously moderate in the EU, grew strongly due to a much less open Russian market. Prices dropped further, reaching a historic low point.

### ■ Brazilian orange cultivation area: the nosedive continues...

The Brazilian orange plantation area shrank by one quarter, i.e. 150 000 ha, between 2011 and 2013, according to CDA. Nearly one quarter of the country's producers have apparently thrown in the towel in recent years. Greening, which takes an increasingly heavy toll on production, and the lack of profitability are reportedly the main factors behind this decline. According to MB agro-consultancy, more than 40 % of production, even in 2012-13, was based on low-tech small producers, whose average yields were less than 600 field crates per hectare. This same source reckons that the profitability threshold is at least 1 000 crates per hectare, in the current context of rising production costs.

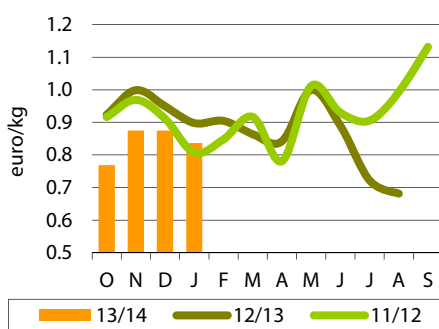
tures in the first part of the season, strong competition from small citruses) plunged prices at the production stage to particularly low levels. Furthermore, the extent of the sorting rejects further aggravated the economic balance. The reject rate climbed to 50 % for some producers, faced with a small size range and a high number of stained fruits. Only good sized fruits were able to be sold for satisfactory basic prices.

Source: Valencia Fruit

Sources: CDA, CEPEA



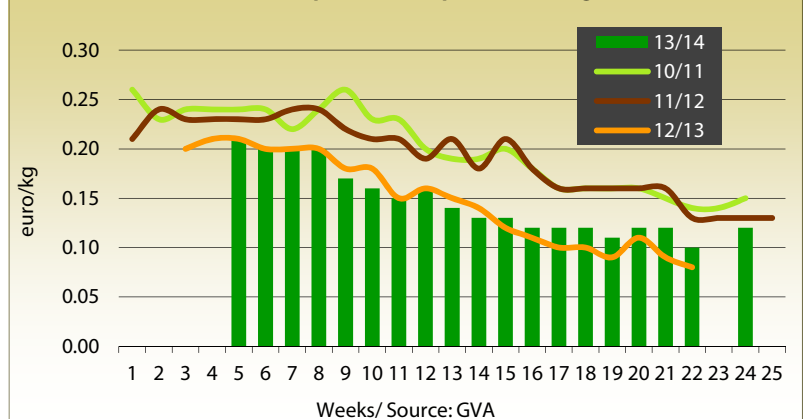
Grapefruit - France - Import price



### ■ Spanish Naveline season: a very poor result.

Spanish producers of this orange variety probably went through one of their worst seasons in 2013-14. The magnitude of the harvest, among the biggest ever recorded, and a context of deflated consumption (high tempera-

Naveline - Spain- Price at production stage



PRICE	Type	Average monthly price	Comparison with average for last 2 years
		euro/box 17-kg box eq.	
	Tropical (Florida)	16.85	0 %
	Mediterranean	9.70	- 5 %

VOLUMES	Type	Comparison	
		previous month	average for last 2 years
	Tropical (Florida)	↗	+ 21 %
	Mediterranean	↗	+ 25 %

VOLUMES	Sources	Comparison		Observations	Cumulative total / cumulative average for last 2 years
		previous month	average for last 2 years		
	Turkey	↗↗	+ 58 %	Second half-month seeing a shift to a very high import tempo, because of the Russian market abruptly flattening.	+ 14 %
	Florida	↗	+ 21 %	Back to an above-average import level for the first time this season. Volumes moderate nonetheless: sorting rejects still high at the production stage because of small size range and cosmetic problems.	- 17 %
	Israel	↔↗	+ 1 %	Combined imports average, but irregular and high from the middle of the month.	- 6 %

# Avocado

## January 2014

The market, still slow and swollen at the very beginning of the month, rapidly recovered. Hass imports, still very big in week 1, temporarily dipped in week 2 (poor weather in the Atlantic, and delayed Chilean shipments), before stabilising at a below-average level in the second half-month (impact of dockers' strike in Chile and a spell of rains in Spain). This tension enabled rates to strengthen, though they only maintained a near-average level. Only the small fruits market (22/24) remained more congested. The slight under-supply of Hass benefitted the green varieties. The market, struggling during the first half-month, proved considerably more buoyant thereafter, enabling good volumes of Israeli Fuerte, Arad and Pinkerton to be sold, in the context of the small Spanish presence.



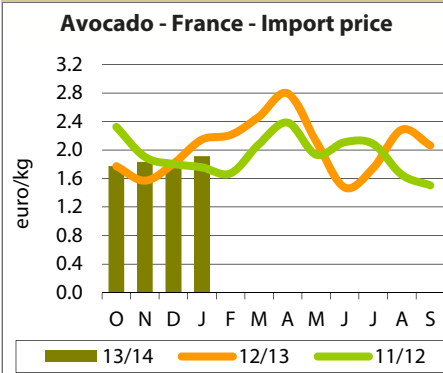
dedicated to annual crops such as maize or sugar cane, developments should also be expected in the fruit growing industry.

Source: rpp.com.pe

■ **US market wide open to avocado imports.** Californian production will be low in 2013-14, as was augured by the very large volumes harvested the previous two seasons. The Golden State's orchards should provide just under 150 000 t, volumes more than down 30 % on the average harvest of the past two seasons. This level is only slightly higher than in 2010-11, when producer returns were through the ceiling. This slump augurs well for Mexico and Peru, the sources supplementing the supply to the US market in spring and summer during the Californian Hass production peak. According to the initial data gathered, Peruvian exporters should nonetheless be able to maintain an export flow to Europe at a level similar to last season, thanks to the rise of the young orchards.

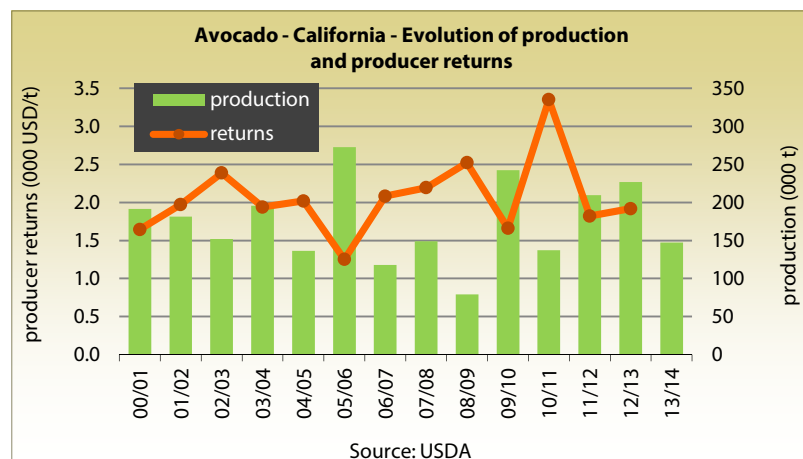
Source: USDA

■ **Peruvian avocado: expansion of Chavimochic.** The third stage in the development of this irrigated area, situated in Libertad province north of Lima, should start in Q3 2014. The five-year objective is to expand the surface areas by 63 000 ha and improve the irrigation on the already existing 48 000 ha. The project, with an estimated cost of 715 million USD, will be co-funded by the Peruvian State and a private Brazilian-Peruvian consortium. Although this land is mainly to be



PRICE	Varieties	Average monthly price	Comparison with the last 2 years
		euro/box	
	Green	5.30-5.60	- 1 %
	Hass	8.00-9.00	0 %

VOLUMES	Varieties	Comparison	
		previous month	average for last 2 years
	Green	↗	+ 14 %
	Hass	⇒↗	+ 22 %



Source: USDA

VOLUMES	Sources	Comparison		Observations	Cumulative total / cumulative average for last 2 years
		previous month	average for last 2 years		
	Chile	↘	+ 41 %	Hass imports down from December, but still well above average, except at the end of the month (impact of the Chilean dockers' strike).	+ 42 %
	Mexico	↘	+ 12 %	Volumes very moderate because of a buoyant market in the USA in the run-up to the Super Bowl, but above average.	+ 29 %
	Israel	↗	+ 16 %	Volumes back to a level considerably above average, particularly for green varieties during the second half-month.	+ 2 %
	Spain	↗	+ 5 %	Imports very slightly above-average, with the considerable rise in Hass compensating for the definite decline in green varieties.	- 17 %



# Mango

## January 2014

The still substantial volumes shipped by Brazil, and the rise of Peru from mid-December, led to congestion of the European mango market, especially since demand remained moderate. The phenomenon intensified in January, in spite of the fall in shipments from Brazil and the rapid rise in Peruvian imports, in a context of slack demand. Due to this over-supply, rates took a downturn, with low price levels. In the second half-month, Brazilian fruits were selling at open prices due to their qualitative deterioration. Meanwhile, the Peruvian supply, mainly comprising small sizes, was struggling to find takers. At the end of the month, large-size Peruvian mangoes saw their rates recover slightly, but small-size mangoes remained just as difficult to sell off, and added to the stocks already available.

Tommy Atkins, distributed primarily on the North European markets, withstood the difficult market conditions better, with sales averaging 3.50 euros/box due to the greater scarcity.

The Brazilian air-freight mango season ended in the second half of January, with fruits of fragile quality suffering stiff competition from Peruvian products. The uninterrupted and substantial flow from Peru dragged the market into a downward spiral in the second half-month. The varying durability of the incoming volumes contributed to this market deterioration, with clearance sales from 2.00-2.50 euros/kg.

### ■ Mango: set for a hot spring.

The West African mango export season is set to be big. The sound flowering period, followed by fruit setting apparently little disrupted by the traditional January Harmattan, should give rise to abundant production, especially in Côte d'Ivoire and Mali. The calendar could be slightly earlier than last year, which was particularly late. If this development is confirmed, the month of April really could be complicated for the European market in terms of supply. The announcement of a rapid cut in Peruvian shipments in March would leave the European market in a context of a wide deficit. This scenario would doubtless lead to the reappearance of multiple sources, varieties and qualities always detrimental to fruit sales. The likely West African surge, in late April-early May, is no more reassuring for sustaining sale prices.

Source: Pierre Gerbaud

### ■ Distortion by the EU's phytosanitary inspection services?

We might criticise the Community institutions for their complex and cumbersome workings, and some indeed are not exactly lightweight. But it is undeniable that the quest for transparency in the European Union's inspection actions cannot be doubted: and here is the proof. Audits were requested by the EU (DG Sanco) in 2011 and 2012 of the Dutch and Belgian phytosanitary inspection services. In particular they were aimed at assessing the appropriateness and efficiency of the phytosanitary inspections conducted at the import stage in order to verify that the Union's requirements are being complied with. The first observation was the disproport-

tion, in both these countries, of the number of product interceptions on the grounds of the presence of harmful organisms (e.g. non-European fruit fly), in relation to the trade volume and the average number of interceptions in the EU.

The conclusions for Belgium highlight in particular:

- the lack of in-depth skills of the personnel in performing efficient phytosanitary inspections;
- the absence or obsolescence of the instructions under a risk-based approach;
- the lack of meticulousness in inspections, which are not always based on representative sampling;
- facilities not enabling phytosanitary inspections to be performed under good conditions.

From there to believing that "dodgy" merchandise flows are deliberately targeted at these countries, it is no big leap!

Source: Pierre Gerbaud



© Rigie Domergue

MANGO — INCOMING SHIPMENTS (estimates in tonnes)							
EUROPE	Weeks 2014	1	2	3	4	5	
	<b>Air-freight</b>						
	Brazil	30	30				
	Peru	50	80	80	120	120	
	<b>Sea-freight</b>						
	Brazil	1 840	1 380	810	480	590	
	Peru	2 700	2 600	4 580	3 430	4 400	

MANGO — IMPORT PRICE ON THE FRENCH MARKET — Euro								
Weeks 2014		1	2	3	4	5	Average Jan. 2014	Average Jan. 2013
<b>Air-freight (kg)</b>								
Brazil	Kent	3.00-4.00	3.50-4.30				3.25-4.15	3.30-3.90
Peru	Kent	4.00-4.20	4.00-4.50	3.80-4.50	3.50-4.00	3.00-3.50	3.65-4.15	3.30-3.95
<b>Sea-freight (box)</b>								
Brazil	Keitt	3.00-4.00					3.00-4.00	
Brazil	Kent	3.00-4.00	2.00-4.00	2.00-3.50			2.30-3.80	2.50-3.65
Peru	Kent	3.00-4.00	2.00-4.00	2.00-4.00	2.00-4.00	2.50-5.00	2.30-4.20	3.10-5.00

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## Pineapple

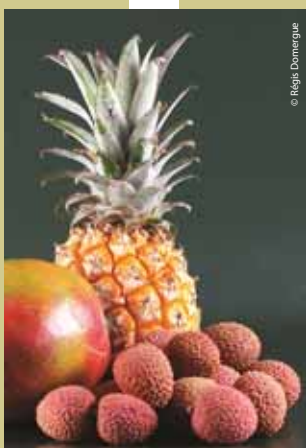
January 2014

As is often the case in January, demand came to a standstill. Nonetheless, there was no steep fall in rates, since the overall size of the Sweet supply was not large. Indeed volumes from Latin America were down, and a number of shipping delays, week on week, led to deferrals and then clashes of incoming shipments. Furthermore, the supply imbalance intensified, and the pressure on sales of the more available sizes 9 and 10 remained high throughout the month.

The promotions organised at the end of the month for the Chinese New Year, however, contributed to considerably reducing the pressure on sales of small sizes. Throughout the month, the Cayenne supply, although restricted, sold rather well, depending on the quality of the batches on offer.

The air-freight pineapple market went through two phases in January. During the first half of the month, the supply, slightly less than demand, had no trouble finding takers. Cameroonian fruits, which formed the majority of this supply, sold well. During the second half-month, a distinct slowdown in demand was observed. The Cameroonian supply remained high, but suffered greatly from irregular quality. During this period, we saw an increase in commercial disputes, arising from the irregular quality of Cameroonian batches initially, and then of some Beninese batches at the end of the month. Over the whole month, the Sugarloaf supply, which remained relatively low, had no trouble selling at between 1.80 and 2.00 euros/kg.

Cyclone Bejisa's path across the Indian Ocean led to a reduced Victoria supply throughout the month. Prices increasingly strengthened as the supply dwindled.



© Régis Domergue

## Litchi

January 2014

In early January, the litchi cargo remaining from the second conventional ship out of Madagascar was selling at a regular tempo, with rates dipping but still above 2.00 euros/kg. Interest from the distribution sectors gradually waned, and the space reserved for the product on supermarket shelves was cut. In the second half-month, the last sea container shipment from Madagascar was received in Rotterdam. The merchandise, of satisfactory quality, nonetheless proved more fragile than previous merchandise, slightly accelerating the fall in rates. The early celebration of the Chinese New Year in late January gave rise to promotions in stores, which helped sell off the last batches. The more random quality of the fruits entailed more frequent sorting, leading to sales at lower prices, especially on the wholesale markets. Meanwhile, the export markets to neighbouring European countries closed to the product bit by bit. Sales increasingly focused on the French market. South African litchis, shipped regularly in limited quantities, were sold

primarily on the North European markets at the beginning of the month. In the second half of January, these products could be found on the French market in the run-up to the Chinese New Year celebrations. The dwindling supply from this source led to price rises. Size XXL fruits achieved the highest prices, and size L the lowest.

At the beginning of the period, Cyclone Bejisa brought the Reunion air-freight litchi export season to an early end. The last batches, shipped at the beginning of week 1, were sold for prices clearly on the rise: 8.50 euros/kg for fruits on the branch, and up to 11.50 euros/kg for trussed litchis. From week 4, some Australian batches of the Wai Chee variety were sold on the French market for around 12.00 euros/kg.

### LITCHI — ARRIVALS (estimates) Tonnes

Weeks 2014	1	2	3	4	5
<b>Air-freight</b>					
Reunion	40	100	80	70	
<b>Sea-freight</b>					
Madagascar		2 550			
S. Africa	160	160	160	160	80

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

Weeks 2014	1	2	3	4	5	January 2014 average	January 2013 average
<b>Air-freight</b>							
Reunion	v	8.00-11.50				8.00-11.50	9.00-11.40
<b>Sea-freight</b>							
Madagascar		2.00-2.20	2.10-2.20	2.00-2.10	1.80-2.00	1.70-1.80	1.90-2.05
South Africa		2.50-2.80	2.25-3.10	2.50-3.25	2.75-3.50	2.75-3.50	2.55-3.20

v: fresh on the vine

EUROPE

### PINEAPPLE — IMPORT PRICE

Weeks 1 to 5	Min	Max
<b>Air-freight (euro/kg)</b>		
Smooth Cayenne	1.70	2.00
Victoria	3.00	3.60
<b>Sea-freight (euro/box)</b>		
Smooth Cayenne	5.00	7.50
Sweet	6.00	9.00

### PINEAPPLE — IMPORT PRICE IN FRANCE — MAIN SOURCES

Weeks 2014	1	2	3	4	5	
<b>Air-freight (euro/kg)</b>						
<b>Smooth Cayenne</b>	Benin	1.85-1.95	1.85-1.95	1.85-1.95	1.85-1.95	1.85-1.95
	Cameroon	1.75-1.90	1.75-1.90	1.70-1.90	1.70-1.90	1.70-1.90
	Ghana	1.85-2.00	1.85-2.00	1.85-2.00	1.85-2.00	1.85-2.00
<b>Victoria</b>	Reunion	3.00-3.60	3.50-3.60	3.50-3.60	3.50-3.60	3.50-3.60
	Mauritius	3.00-3.30	3.00-3.30	3.00-3.30	3.00-3.30	3.00-3.30
<b>Sea-freight (euro/box)</b>						
<b>Smooth Cayenne Sweet</b>	Côte d'Ivoire	5.00-7.50	6.00-7.50	6.00-7.50	6.00-7.50	6.00-7.50
	Côte d'Ivoire	8.00-9.00	8.00-9.00	8.00-9.00	8.00-9.00	7.00-8.50
	Ghana	8.00-9.00	8.00-9.00	8.00-9.00	8.00-9.00	7.00-8.50
		8.00-9.00	8.00-9.00	8.00-9.00	8.00-9.00	7.00-8.50
	Costa Rica	6.00-9.00	6.00-9.00	6.00-8.50	7.00-8.50	7.00-8.50



## Sea freight

### January 2014

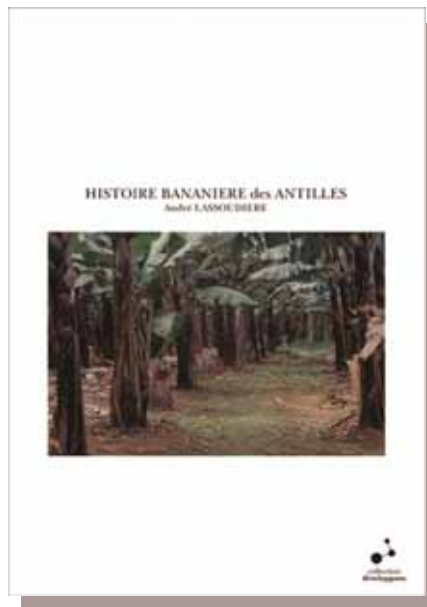
The year began with an imbalance in capacity favouring operators, but the month of January ended with demand for tonnage evaporating and the number of units idling at Cristobal starting to build. The stalling of the charter market took some of the gloss away from the strong start to the year for the seasonal business out of Chile and South Africa, and the liner services for bananas.


Demand for Ecuadorian bananas saw the exit price rise steeply, from below official levels to between USD 12-14 per box FOB in a matter of two weeks. With banana market pricing in the Eastern Med struggling to match the rise in CIF cost, and the container lines offering low prices and more flexibility on intake and discharge than ever before it is not a surprise that cargo defected from the specialized mode. Will this strategy be profitable for the lines in the longer term? Who knows!

After a record year and many months of near-100% utilization, even the smaller segment had started to feel the impact of a dip in demand by early February – with the N Cont to N Africa potato season coming to an end, Morocco ‘in between’ varieties and Nigerian coldstores full of fish, units that came open were not immediately fixed. This may partly have been the result of the release of several vessels in quick succession after the congestion at Mostaganem. However it is also the case that Egyptian citrus into the Black Sea has been slow to start as a result of the instability caused by political problems in Ukraine.

■ “History of the West Indian banana”, by André Lassoudière. To gain a better understanding of the West Indian banana industry, it is useful to put it in a worldwide context. How did the international trade begin? What were the main stages? And then, to present the history of the banana tree itself, and its social role in the West Indies. The history of its cultivation is presented in several periods: genesis (pre-1914), boom (1918-1928), economic crisis (1928-1931), growth (1932-1944), competition (1945-1958), organisation (1958-1978), transition period (1979-1992) and Single European Market (since 1993).

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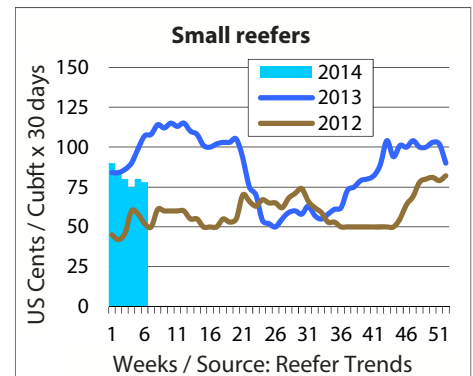
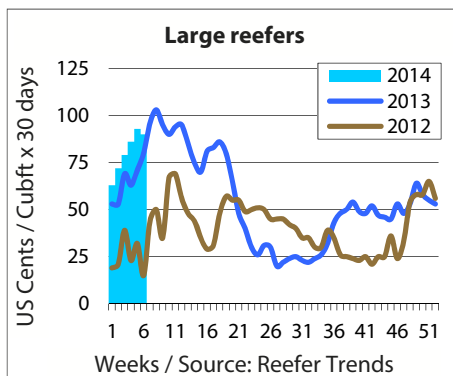
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### MONTHLY SPOT AVERAGE

USD cents/cubic foot x 30 days	Large reefers	Small reefers
January 2014	77	82
January 2013	60	86
January 2012	23	48



## Counter-season melon

### Rekindling the fire!



The situation remains difficult for operators trading in the counter-season melon, since on top of the economic crisis still greatly holding back purchases in European households, there are now great climate uncertainties destabilising consumption and causing big production losses. The response to these constraints varies between operators, depending on their specialisation and their customer portfolio. Hence Latin American countries are further expanding their outlets, while the French West Indies are capitalising on their strong links and their presence on the European market going back more than thirty years! But it seems to be Morocco and Costa Rica which are paying the heaviest toll, destabilised by the competition from other sources (Honduras, Senegal), and the beginning of the European production seasons.



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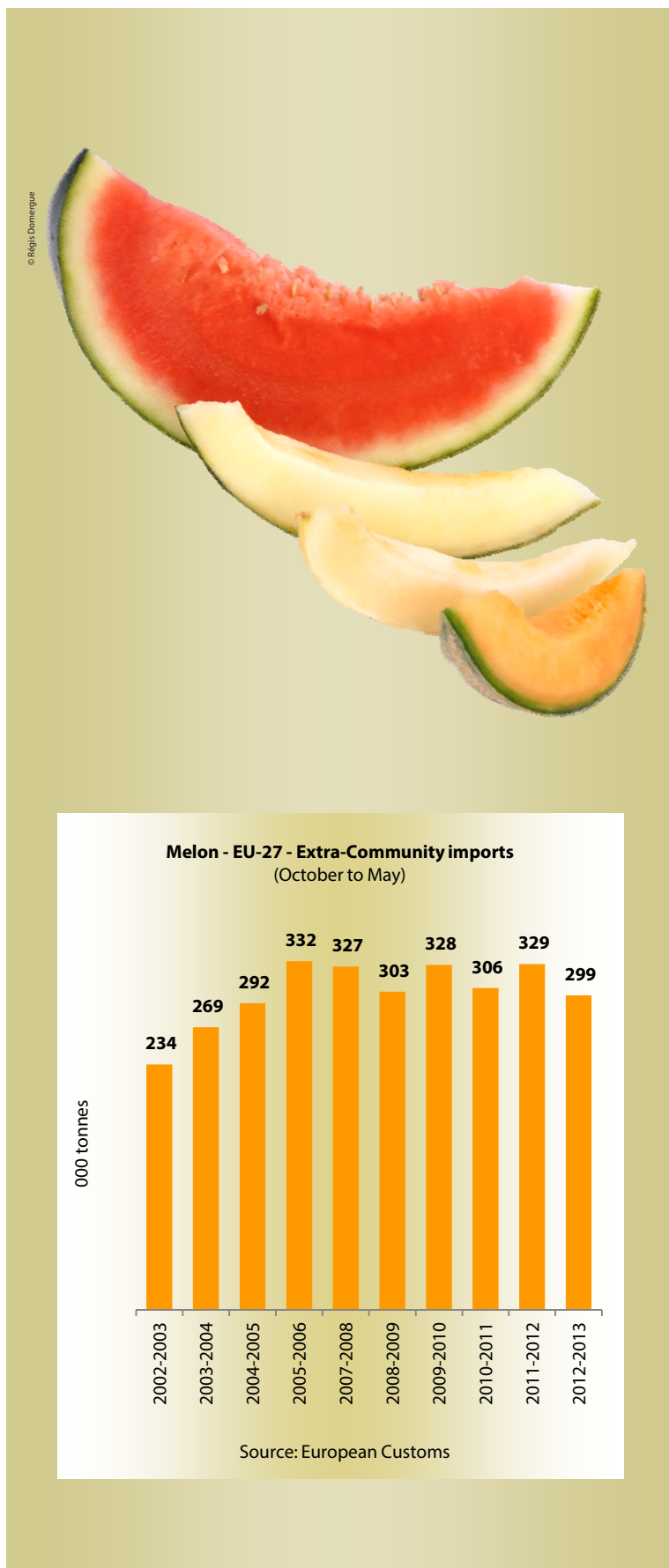
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## 2012-13 season casting a chill

The 2012-13 season was gruelling for all the sources. The season got off to a very slow start due to the deferral of the European season, confirming the lack of opportunities for the import melon before November. Conditions were particularly difficult for Brazil which, besides its sales starting late, also suffered a considerable rise in production costs (+ 20 %) and a fall in potential due to the drought of late 2012. The decrease in its shipments to the European market however was limited (- 4 %). The same was true for Honduras (- 8 %), while Costa Rica saw a steep fall (- 29 %). Yet Senegal, Morocco and the French West Indies also struggled this season, due to a particularly cold spring which slowed consumption considerably. Although import volumes held up, prices were lower than expected, boosting the production trends. Conversely, Panama and also Israel are further cutting back their presence every year.

## Latin American countries firing on all cylinders

In spite of the difficulties encountered particularly on the European market, in 2012-13 Brazil confirmed the consolidation of its overall sales at around 180 000 to 190 000 t (approximately 184 000 t in 2012). The European market, which still represents 82 % of its shipments and remains essential for exporters (150 000 t in 2012-13), should continue to fall gradually (88 % in 2009-10) in favour of other destinations, such as the United States and the various countries with which Brazil has recently signed agreements: Singapore and Hong Kong in Asia, the United Arab Emirates and Saudi Arabia in the Middle East, and Turkey. The diversification should even continue, since following on from the United States in 2012, now Chile has recognised Brazil as disease-free, and is now allowing Brazilian melon imports across its borders.

The 2013-14 season could also confirm this trend, since like last year it began in poor shape, with a slight production delay, with the first volumes only received in around mid-September in Europe (yellow melon, Galia, Cantaloupe). Most of all, it has been hindered by very late market entry in the autumn, given the persistence of local European produce (delayed production), as well as by the increase in customs duties from 5.3 to 8.8 %, with Brazil no longer considered by the EU as a developing

## Melon — European Union — Extra-Community imports

Tonnes	2008-09	2009-10	2010-11	2011-12	2012-13
Brazil	166 953	169 201	134 594	157 056	150 427
Costa Rica	42 567	59 942	65 223	69 820	49 861
Morocco	46 031	50 866	51 480	45 304	47 704
Honduras	22 806	21 697	33 140	31 899	29 076
Senegal	3 110	5 469	8 681	11 190	12 081
Guatemala	183	-	-	2 415	2 945
Panama	12 071	11 017	4 386	3 934	1 982
Israel	3 622	3 702	3 361	1 675	1 171
Dom. Rep.	800	548	754	877	566
<b>Total</b>	<b>302 801</b>	<b>328 296</b>	<b>306 260</b>	<b>329 083</b>	<b>299 473</b>

Source: Eurostat

country as of this season. In addition, the potential has been reduced by the high sanitary pressure and by the lack of rain, leading to very low plant yields in late autumn, and to losses of around 30 to 40 %.

On top of this is the competition from Latin American sources. This applies particularly to Honduras, whose productivity gain in recent years has enabled its exports to broaden, and which is forecasting a further 5 % increase in its potential this season, after the 9 % rise registered last year, primarily due to the growth of varieties such as Honeydew. Nonetheless surface areas for this source are stable, or even slightly down. Present primarily on the US market, it is now targeting outlets other than traditional destinations (USA and Europe), particularly Asia (Japan and Taiwan) and Latin American countries. Costa Rica should again have a fairly strong presence this season, but the rise in production costs and real estate pressure are eating into its exports every year. They reportedly fell further in 2013 down to 119 700 t (- 3 % on 2012), as opposed to 153 000 t in 2008. Shipments to the North American market (62 000 t in 2013) are holding up, but those aimed at the EU are continuing to shrink, now representing just 48 % of shipped volumes.



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## Senegal blowing hot and cold

The 2012-13 season was also complicated for Senegal, Morocco and the French West Indies, due to very poor weather conditions in spring, which slowed down the flow. However, it did confirm the upward surge of Senegal, with exports to the European Union rising a bit more, to 12 081 t (+ 8 % on 2011-12), due to certain importers switching to this source to the detriment of other production zones. This trend should be reconfirmed this year with a slight increase in surface areas, especially since this source enjoys financial support from Europe. Hence surface areas were already up slightly at the end of 2013 for the main operators in place, and should further expand in 2014. Weather conditions have for now been favourable, and the spring season should start around mid-February, 20 February at the latest, for a production peak which should fall around week 12 or 13.

Conversely, surface areas should continue to shrink in Morocco, although its exports last year ended up at the same level as in 2012, which had been characterised by major production losses (hail). The 2013-14 season could even see another considerable reduction in surface areas, not only in the Agadir and Marrakech areas, but also in Dakhla, given the poor price levels obtained last year in France. Hence surface areas could fall to approximately 500-600 ha for Dakhla and Agadir, following a reduction in surface areas for certain operators, but primarily due to the shutdown of one of the region's operators (greenhouses converted for the tomato), although other facilities are conducting trials in the area. Similarly, another fall in production is expected in the

Marrakech area, where surface areas could fall below 1 000 ha for Charentais. However, weather conditions in Morocco have so far been favourable, and the season should begin around 15-20 February, reaching full potential in March.

Moroccan operators could enjoy a small respite at the end of the season, due to the uncertainties weighing down Spanish production following the emergence of New Delhi virus (ToLCNDV) in the Almeria area. This virus, propagated by the whitefly, already hit Spanish courgette production hard in the autumn, and could have consequences on the Spanish 2014 season. Indeed, given the losses caused, producers are hesitating to plant melons, another plant highly sensitive to this virus, and are contemplating switching their land to other produce such as maybe the tomato or aubergine. The Murcia area, where production should be slightly up again, has not so far been affected. In any case, we will need to wait until March's rising temperatures to see whether the first tangible signs of infestation appear.

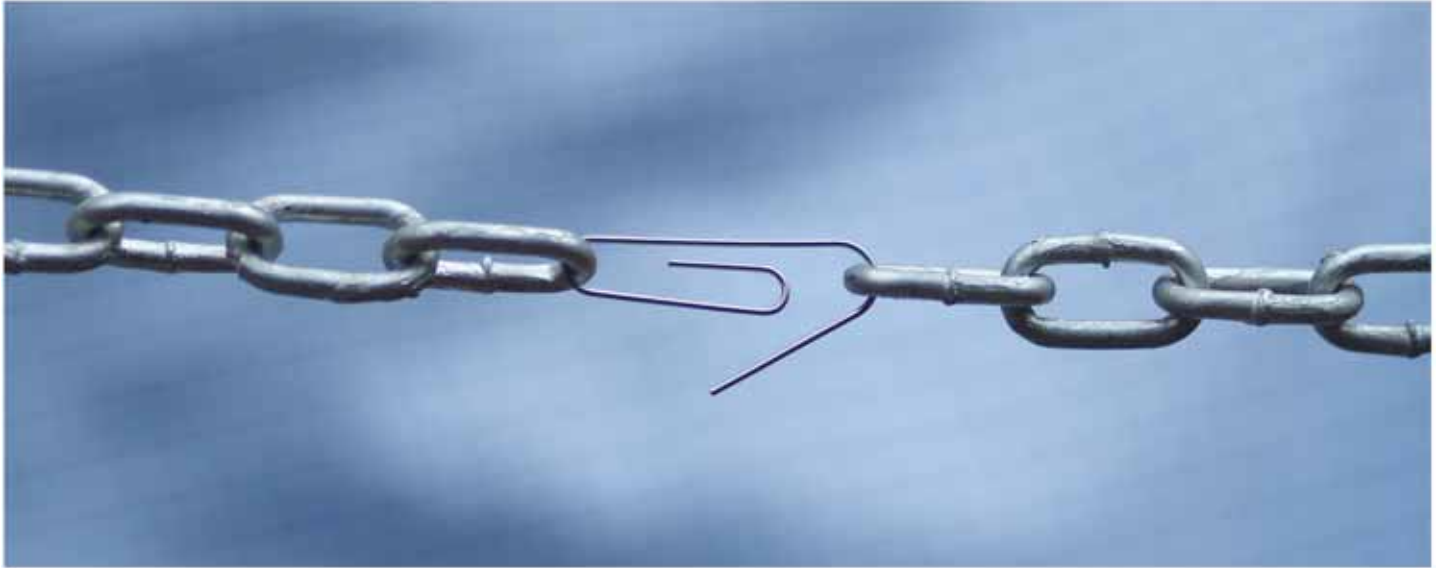
## French West Indies a shining beacon for the past 30 years!

In this highly competitive context, FWI producers should continue to capitalise on the renown of their produce to emerge unscathed. In particular, they hope to be able to finally boost their produce's value using the GPI, as last year's poor climate conditions in Europe (cold) prevented them from taking full advantage of this title. In 2013, this certification related to 1 300 t out of the 2 000 to 2 200 t of Guadeloupe melons exported annually. Operators are hoping to be able to certify 1 600 t in 2014. As a reminder, this procedure, officially recognised by the European Commission in March 2012, involves 23 producers and a potential of 1 800 t. At the moment, the season is set to be promising, with the weather conditions so far favourable. The first volumes were received in late January, and should quickly get moving, with further volumes from Martinique in February, before reaching full potential in late March-early April. Yet the source is also set to celebrate its thirtieth anniversary this year, as it was in 1984 that the first Guadeloupe melons were sold in France. Along with the tonnages from Martinique, its shipments should remain stable, nearing at least 3 500 t. This should also be supported by small volumes out of the Dominican Republic, with production extending from December to March ■

Cécilia Céleyrette, consultant  
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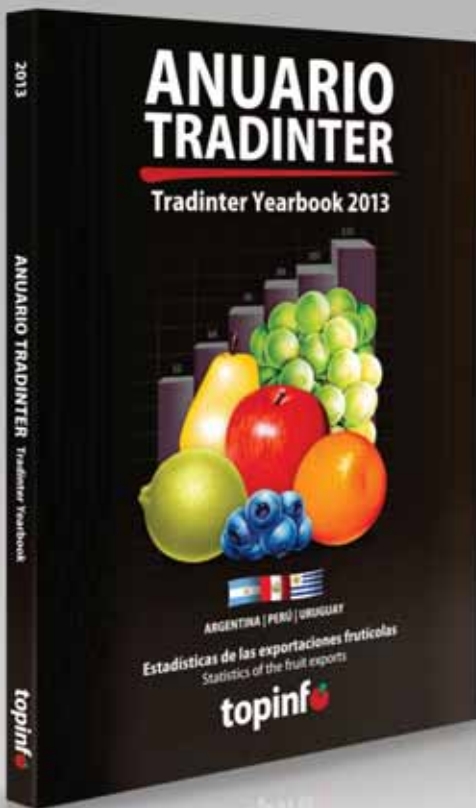
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A report by  
Cécilia Céleyrette

# Apples and pears

## from the S. hemisphere

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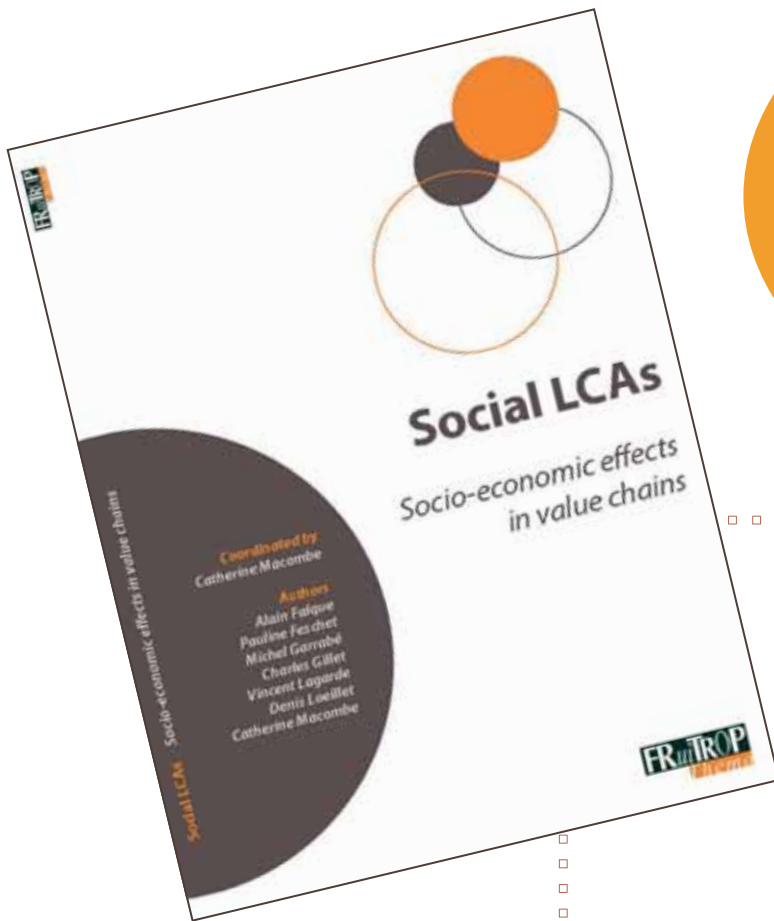
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After several difficult years which have called into question the foundations of the counter-season apples and pears market, 2013 was like a breath of fresh air, invigorating both exporters and importers, especially on the traditional markets (Europe and the United States). Nonetheless, the positive showing of the 2013 season is rather a false dawn than a real beginning to the healing process, since the 2014 season is set to be particularly difficult given the constant rise in production costs; although it is true that the exchange rate should absorb these increases this year. So prudence will again be the order of the day on the traditional markets, where there are still substantial stocks. Yet questions are also emerging about the other markets, Russia or even Asia, which last year were already showing some signs of running out of steam.



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

# Social LCAs

## Socio-economic effects in value chains

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

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



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## Southern Hemisphere apples and pears 2013 season review

Some welcome respite



Given the European and North American shortfalls, the 2013 apples and pears counter-season was expected to be good, and so it was. It should even be ranked among the few vintage years of recent times, with a record export level in volumes (+ 9 % on the 3-year average for apples, and + 8 % for pears), but also in value, helping cover rising production costs upstream. The rise is primarily attributable to the good health of the traditional markets, whereas results are more disparate on the emerging markets.

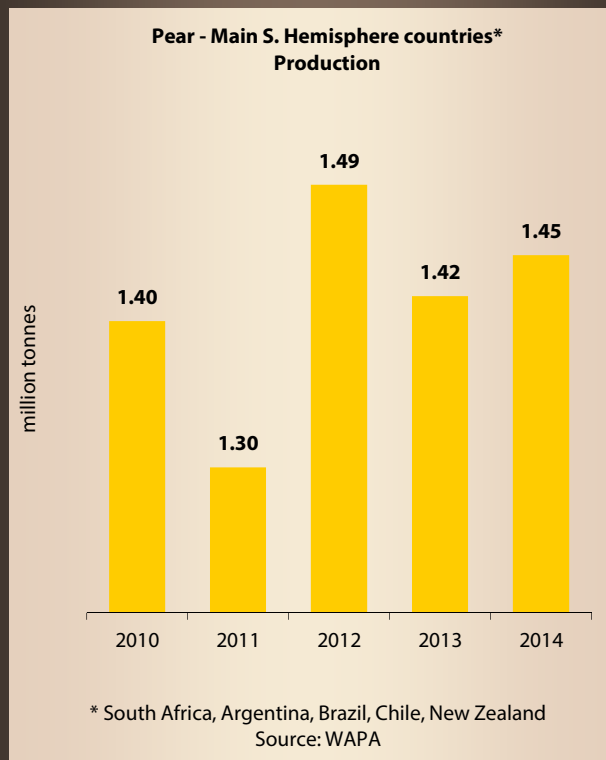
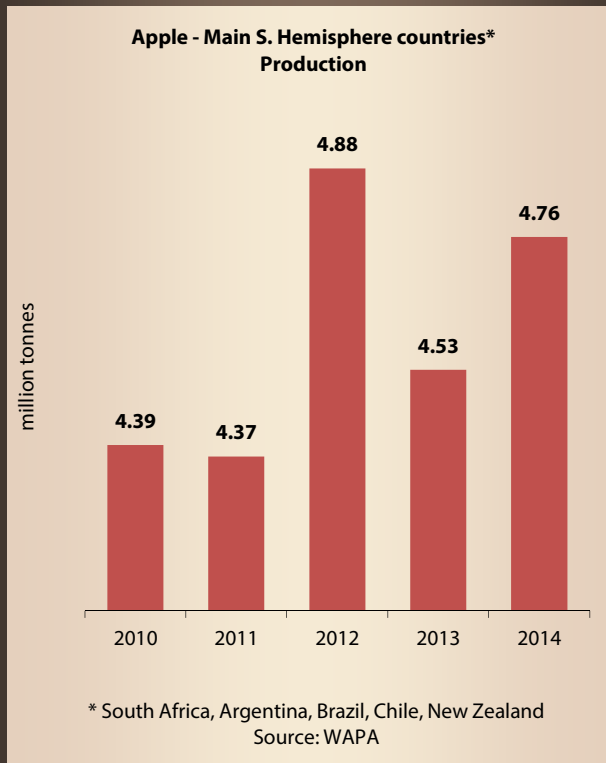
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## Very good results in spite of recurrent difficulties upstream

All the lights were at green in 2013, including the record-breaking production level, both for the apple (4.76 million tonnes, i.e. + 4 % on the 3-year average) and pear (1.45 million tonnes, + 3 %), although the harvest was characterised by a small size range, regardless of producer country. Indeed most sources registered very good potentials, in spite of stagnation of surface areas.

Yet while producers and exporters enjoyed an abundance of fruits, they had to deal with the inevitable social conflicts which are now a backdrop to the beginning of every season. Hence labour costs rose again under worker pressure, especially in Argentina (+ 25 %) and South Africa (+ 10 %), while exports out of Chile were disrupted by the dockers' strike in weeks 14 and 15.

However, the season was boosted by the production shortfall in Europe and the United States. Hence imports rose in Europe, for both apples after a fall of six years (565 800 t, + 24 % on 2012) and pears (266 000 t, + 28 %), yet without recovering their previous levels. There



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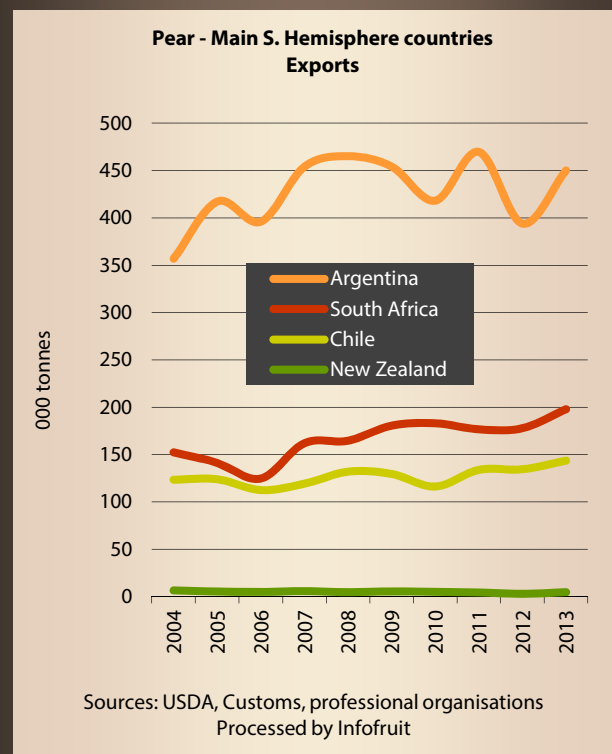
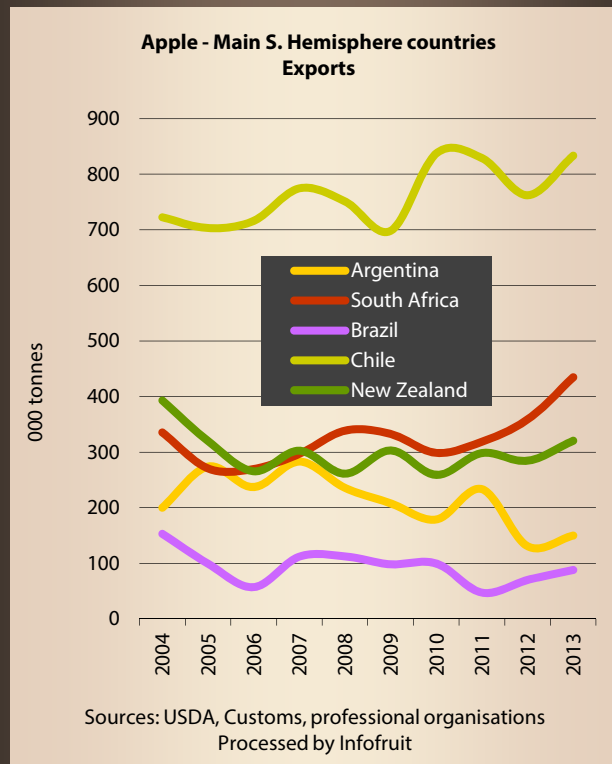




was even a historic import level to the United States, with 214 000 t of apples (+ 40 % on the 3-year average) and 66 400 t of pears (+ 20 %). The increase was a bit more restrained in Russia, with 77 000 t of apples (+ 5 % on 2012; 131 000 t in 2008) and 130 400 of pears (+ 14 % on 2012; 141 000 t in 2008). Similarly, shipments did not really increase to other destinations, where moreover demand was average (970 000 t of apples and 279 400 t of pears).

### A late start for the apple, but with good price levels

The apple season struggled to get going, given the high price levels charged. Hence the first Southern Hemisphere Galas reached Europe in early March, and quoted at 1.25 euro/kg, Northern Europe import stage, they aroused little interest, with the distribution sector favouring other local bi-colour varieties at more attractive prices (Braeburn, Fuji, etc.). So they were slow to reach the market, the process only really





picking up when they were taken up by the supermarket sector from week 17 (late April), leading to price levels being adjusted (1.12 euro/kg, Northern Europe import stage). The range then expanded (Grenny, Jazz, and then Pink Lady), but sales were fluid due to the scarcity of the European supply. Rates were strong, and were even revised upward in late May (1.25 -1.30 euro/kg, Northern Europe import stage).

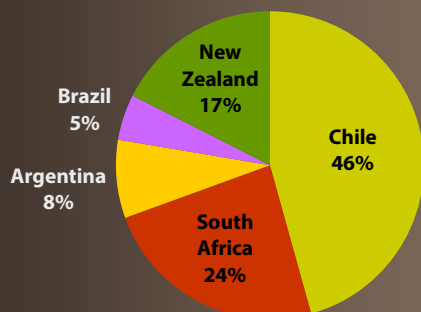
The Gala season finished around late June, causing demand to shift to other varieties, especially club varieties. The growth of the Pink Lady supply from mid-June, however, caused price levels to fall, especially since the seasonal fruit season, though late, began in earnest with the rise in temperatures (late June/early July). So rates for this variety went from 2.20-2.40 euros/kg in week 25 to 2.00-2.10 euros/kg in week 28, French import prices. Sales slowed further with the school holidays and the presence of seasonal fruits, and the season only finished very late for certain varieties such as Grenny, still present on the market in October!

**Apple — Southern Hemisphere**  
Volume market shares by country  
and main destinations in 2013

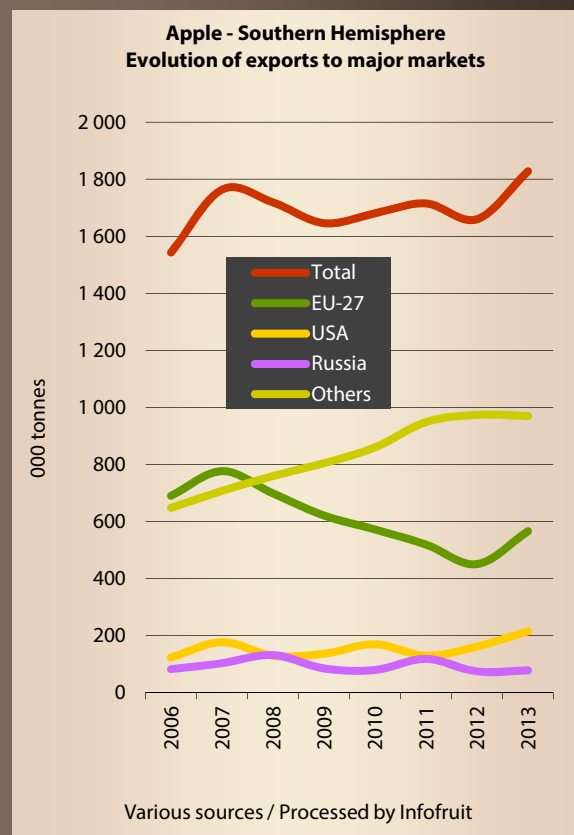
tonnes	EU-27	USA	Russia	Others
<b>Chile</b>	20 %	19 %	4 %	57 %
<b>South Africa</b>	35 %	0 %	3 %	62 %
<b>Argentina</b>	31 %	6 %	17 %	46 %
<b>Brazil</b>	75 %	0 %	0 %	24 %
<b>New Zealand</b>	41 %	15 %	2 %	42 %
<b>Total</b>	<b>31 %</b>	<b>12 %</b>	<b>4 %</b>	<b>53 %</b>

Various sources / Processed by Infofruit

**Apple - Southern Hemisphere**  
Main exporting countries in 2013



Various sources  
Processed by Infofruit

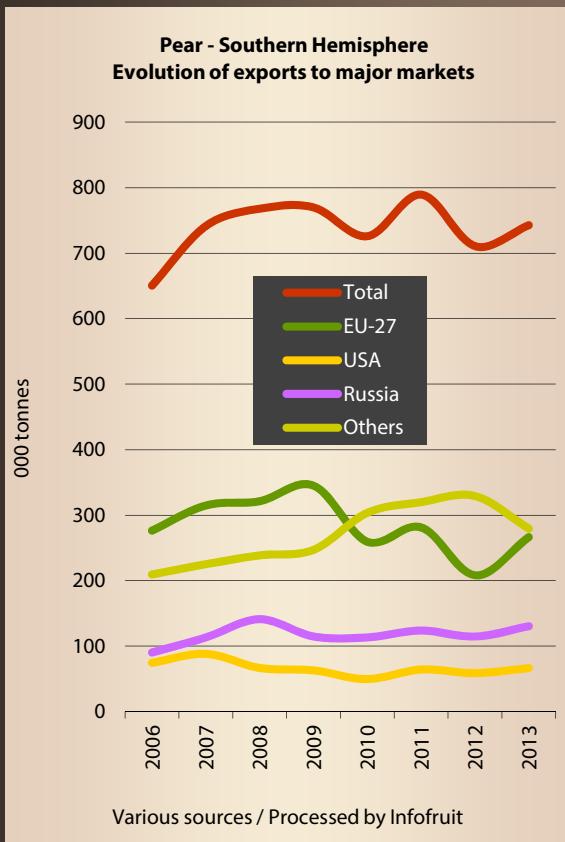


Various sources / Processed by Infofruit

## Strong prices for the pear, but a chaotic season

The pear season was also satisfactory overall, but rather chaotic, which partly restricted the result. Hence although it was set to be promising, the 2013 season was again rather disrupted by the strikes which delayed the harvests and shipments in South Africa, Argentina and Chile, as well as by the steep rise in production costs.

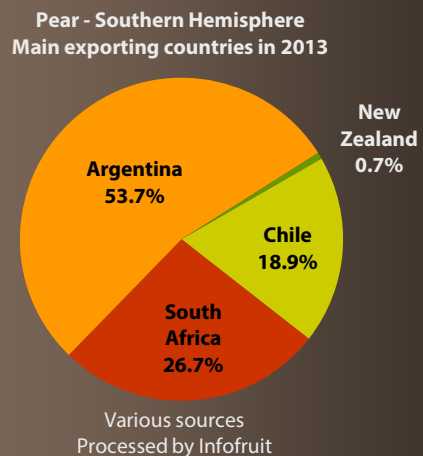
Protests in South Africa, which started in late December 2012, delayed the harvest and the January shipments. Some scarce volumes were able to be shipped in week 2, and the real take-off was shifted to the end of week 5/beginning of week 6, with a wage increase of around 10 %. Similarly, despite a harvest date set at 4 January for the Argentinean Giffard, the strikes held in weeks 2 and 3 greatly disrupted the



**Pear — Southern Hemisphere  
Volume market shares by country  
and main destinations in 2013**

tonnes	EU-27	USA	Russia	Others
<b>Chile</b>	37 %	13 %	4 %	45 %
<b>South Africa</b>	56 %	3 %	11 %	31 %
<b>Argentina</b>	26 %	10 %	26 %	38 %
<b>New Zealand</b>	21 %	44 %	0 %	35 %
<b>Total</b>	<b>36 %</b>	<b>9 %</b>	<b>18 %</b>	<b>38 %</b>

Various sources / Processed by Infofruit







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harvest and complicated exports. Some scarce volumes were able to be shipped at the end of week 3, but the first significant tonnages of Giffard only appeared in Europe in week 6, and of Williams in week 7. Wage negotiations ended in increases of 25 %. By contrast the harvest in Chile went smoothly, though a bit late (week 3) due to the dockers' strikes which paralysed exports in weeks 14 and 15.

However, the price levels on the European market were high (+ 30 % on 2012) from the beginning of the season (1.20-1.30 euro/kg for South African Williams, 12.5-kg box import stage, in week 6), and only really fell in week 12 with the rising pressure from Argentina. Although the European seasons finished early, Comice struggled initially, since the price levels were high (2.00-2.50 euros/kg, import stage at the beginning of the season). The season began particularly late for Abate (week 17), due to the presence of Italy. The market was again hindered from week 13 to week 17 by the sale of overly quick-ripening Argentinean Williams batches, although large volumes were sold in Brazil. Packham quickly reached the North European market (weeks 13 and 14). The market got moving from week 20 (price levels strengthening), but slowed down with the arrival of stone fruits in mid-June (week 24). Sales continued fairly smoothly until mid-July ■

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## Southern Hemisphere apples and pears Prospects for 2014

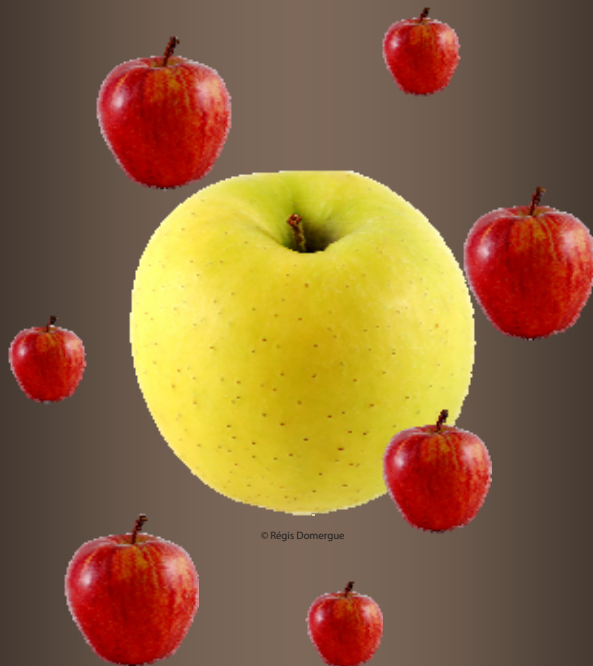
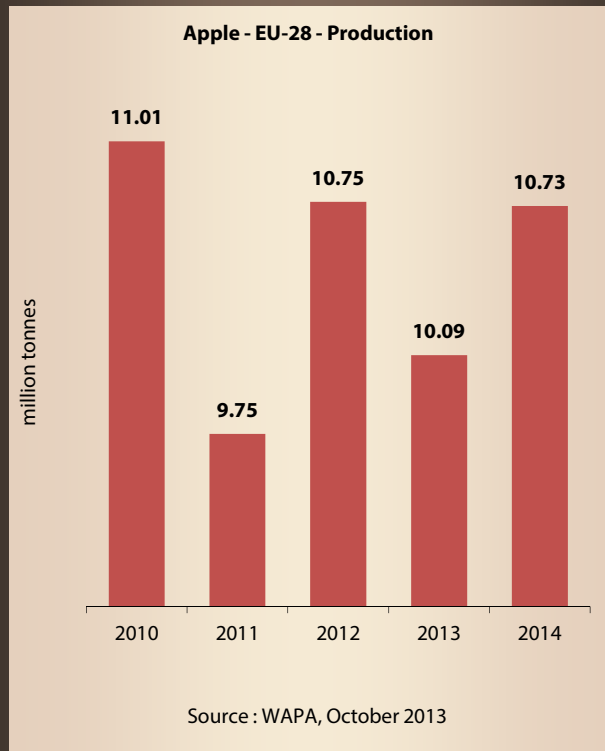
Production and prospects more limited

While the 2013 season put things back on course somewhat, 2014 is once more proving deeply bewildering to operators, faced with a market already well supplied, and with production costs still rising; although the exchange rate trend is stirring some renewed hope. Hence with the production potential short of excess for both the apple (4.67 million tonnes, i.e. - 2 % on 2013) and pear (1.37 million tonnes, - 5 %), operators will need to judge their programmes to perfection.



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## Further cost rises in Argentina, but good prospects in Brazil

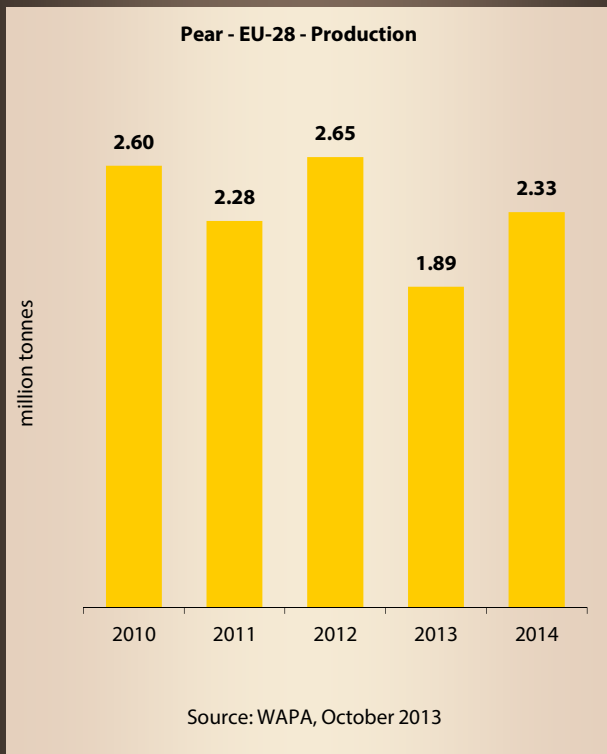
The difficulties encountered on the European market in recent seasons, with an increasingly late end to the European season and the rise in production costs, have above all restricted shipments from early sources such as Brazil and Argentina, for which Europe is a predominant outlet (75 % of apples exported from Brazil). However, Brazilian operators are hoping to increase their export potential this year, despite stable surface areas (38 800 ha, mainly for Fuji and Gala), thanks to a good harvest level (1.2 to 1.3 million tonnes), after a 2012 season somewhat cut short by frosts. They are also banking on diversification of their customer portfolio outside of the European Community, to which they exported 66 400 t last year, to achieve a total of 120 000 t (as opposed to 88 000 t in 2012).

On the other hand, while pear surface areas are stable in Argentina (28 200 ha, of which approximately 45 % Williams and 30 % Packham), they are continuing to shrink for the apple (26 200 ha in 2014), between certain producers shutting down (real estate projects), concentration of facilities and conversion to table grapes in some cases (Mendoza), or to various more profitable crops (maize, sunflower, alfalfa). The harvest should however be at a good level in this country, where for the moment it is estimated to be just under 900 000 t for the apple (- 3 % on 2013) and 764 000 t for the pear (- 2 %). Yet the exportable potential could be less than last year due to the rise in production costs, following the strikes in late 2013, which led to another 20 % wage rise, and to the congestion of the European and North American markets. Thus it could fall by approximately 7 % from 2013 (140 000 t for the apple, and 418 000 t for the pear).

## A slight chill in Chile, but outlets available

Although Chile has maintained its export level in recent years by diversifying its customer portfolio, surface areas have not been growing for several seasons (37 700 ha of apples and 6 500 ha of pears), because of the rising production and freight costs. Hence the apple cultivation stock has aged, and is only holding up thanks to a higher planting density in the last





renewals. Similarly, although some of the surface areas have been replanted with Abate recently, the pear cultivation stock is ageing overall, with Packham still predominant. Hence the first estimates for the 2014 season are for the moment relying on stable production for both the apple (1.4 million tonnes) and pear (287 000 t), but also on the slightly reduced pear export potential (135 000 t), given the congestion of the European market; the apple export potential is down 2 % (815 000 t) due to its wider customer portfolio.

### Small gain in South Africa, with the industry still banking on parity!

The South African apple cultivation stock (covering 22 700 ha) is ageing, with more than 33 % over 25 years old, since planting has been slowed down by the high set-up costs. However, the Golden/Granny dominance (9 800 ha, i.e. 44 % of surface areas) should gradually be replaced within the coming ten years by a range of bi-colour varieties such as Gala, Fuji and Pink Lady (currently 32 % of the stock), and by other more modern varieties such as Kanzi (113 ha in 2012), which should invigorate the industry.

Pear surface areas are continuing to grow, reaching nearly 12 000 ha, although the rate of planting has now slowed down (+ 1 to + 2 % per year), because of high set-up costs and the uncertainty of the markets. Packham is still the leading stock variety, including in the new plantations, but there has been a very significant rise in Abate Fetel (+ 9 to + 10 % per year) in recent years. Furthermore, Forelle is stagnating and Williams decreasing, and the growth in the Early Bon Chrétien supply should be highlighted.

A fall in production and export potential is expected this season, after the high level reached last year, because of the congestion of the European market and the hail storms of late 2013. Thus apple production, estimated at 817 000 t in late 2013, should actually be around 733 500 t (- 10 % on 2012). Pear production could register a decrease of the same order of magnitude, to reach "only" 328 000 t, with a considerable fall for Williams (- 15 % on 2013) and above all for Comice (- 34 %). The exportable potential could fall by 9 % from 2013 for the apple (397 500 t) and by 11 % for the pear (176 000 t), although parity with the rand should boost exports this year.



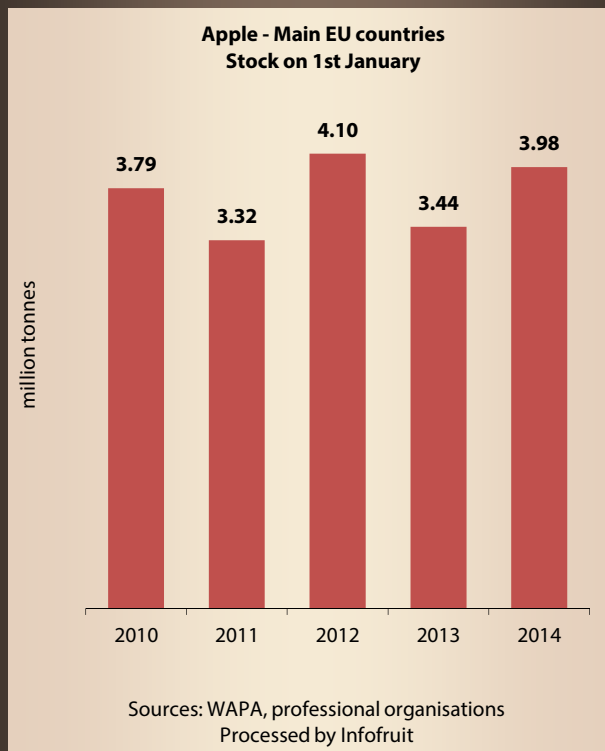
## Adverse alternation effect in New Zealand, but diversified prospects

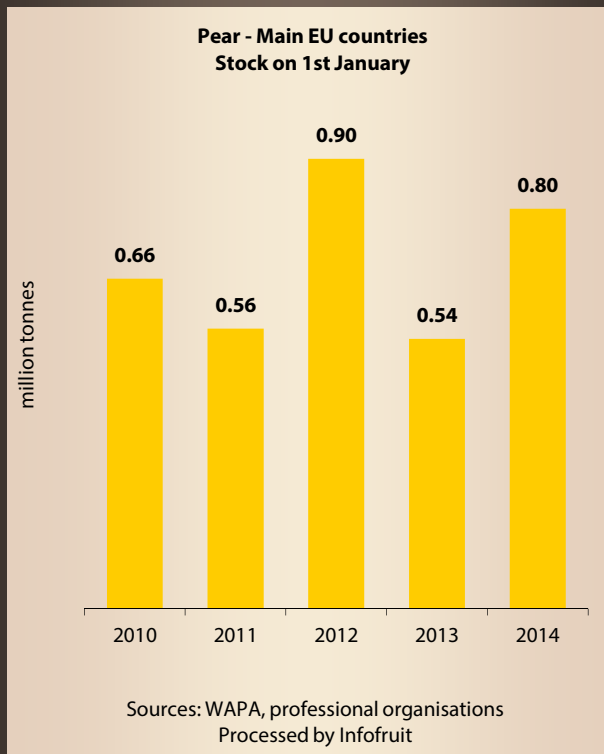
Surface areas are stable in New Zealand (37 700 ha), and new plantations are focused on bi-colour varieties. Gala, Braeburn, Pacific, Jazz and Fuji should continue to dominate the supply in the coming years. The objective of the professionals lies for the moment primarily in consolidating the industry, and a large part of the budget of professional organisations is currently aimed at opening up and widening new markets, particularly in Asia. However, production should fall slightly this year, given an adverse alternation effect and a wet spring (August to October), which boosted development of European canker. The first estimate was at around 495 500 t for the apple (- 4 % on 2013) and 13 700 t for the pear (- 3 %). So the export potential could fall (305 000 t for the apple, i.e. - 5 %), although exporters are hoping to be able to compensate for the caution of European and North American purchasers by developing new outlets.

## Season definitely off to a slightly late start

Although the production potential of Southern Hemisphere countries is short of excess this year, exports could be distinctly slower and value harder to achieve than last year, particularly on the traditional markets. The opening of the European market could come fairly late, since although the 2013-14 European season began promisingly (light market), it was soon delayed because of a production deferral of around two weeks, attributable to a cold and wet spring. Furthermore, high basic prices (1.50 euro/kg for Gala, shipment stage, 2-layer box 170-220 g) prevented the traditional October apple fairs from providing a full boost, whereas mass export shipments were delayed by the late presence of Southern Hemisphere sources, with bi-coloured varieties but most of all Granny.

The pear season was deferred by delayed production, but also by a very slow flow of summer pears, particularly Guyot, the size range of which this year was particularly small. The market re-





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mained very slow in early autumn (late September to mid-November), with a host of varieties and operators, and was disrupted by the last late picks in Benelux, with producers waiting as long as possible to maximum the size. These volumes (cat. Ib and cat. II) had to be sold quickly, over a wider basic price range, slowing as the quality products were destocked. Rates for the latter however fell after the All Saints' holidays, particularly for the predominant small sizes, to speed up destocking of Comice, Conference, Abate or Rocha.

Hence on 1 January 2014 there were still particularly large stocks for both the apple (3.98 million tonnes) and pear (803 900 t outside of France and Portugal), i.e. a market configuration comparable to 2011-12, which does not point to a very quick start to the season. However, Southern Hemisphere Galas and Williams, essential varieties on the shelves, should nonetheless find their place fairly quickly, since the Italian Williams season has now finished and should finish in March for Gala, at least in Western Europe, in line with a near-normal calendar. Price levels should follow local produce levels (1.06 euro/kg, 75-80 mm, 2-layer box for Gala; and 1.15 euro/kg, 65-70 mm for Williams, shipment stage), considerably down on last year's rates ■

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## APPLE — Production (2012)



Apple — The 10 leading producer countries	
million tonnes	2012
China	37.0
United States	4.1
Turkey	2.9
Italy	2.9
Poland	2.0
India	2.0
Iran	1.7
Chile	1.7
Russia	1.4
France	1.4

Source: FAO

## APPLE — Imports (2012)



Apple — The 6 leading importing countries	
tonnes	2012
Russia	1 278 551
Germany	614 362
United Kingdom	482 048
Netherlands	311 096
Mexico	235 893
Spain	231 377

Source: National Customs

## APPLE — Exports (2012)



Apple — The 6 leading exporting countries	
tonnes	2012
China	1 034 635
Italy	976 131
United States	833 249
Chile	801 167
France	726 609
Poland	532 058

Sources: Customs, USDA

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USA — Imports — Main supplier countries						
tonnes	2007	2008	2009	2010	2011	2012
Chile	123 521	93 667	87 497	122 340	91 141	121 917
New Zealand	47 210	32 801	44 518	41 572	33 238	33 978
Canada	31 062	36 035	21 098	20 923	18 547	22 767
Argentina	4 424	2 243	1 885	5 705	4 551	4 718
Others	18	7	33	52	312	73
<b>Total</b>	<b>206 562</b>	<b>165 282</b>	<b>155 775</b>	<b>191 579</b>	<b>147 789</b>	<b>183 453</b>

Source: US Customs

Canada — Imports — Main supplier countries						
tonnes	2007	2008	2009	2010	2011	2012
USA	139 808	131 199	148 111	150 620	159 166	165 253
Chile	23 321	18 361	20 257	24 868	21 476	21 119
New Zealand	8 273	6 953	7 685	7 759	8 070	7 478
China	4 942	6 148	3 551	3 768	2 292	3 409
South Africa	2 995	2 816	1 919	2 334	4 739	2 273
France	84	377	301	502	1 948	597
Argentina	891	251	102	534	376	494
<b>Total</b>	<b>180 528</b>	<b>166 251</b>	<b>182 143</b>	<b>191 717</b>	<b>198 618</b>	<b>202 608</b>

Source: COMTRADE

South America — Imports — Major markets						
tonnes	2007	2008	2009	2010	2011	2012
Mexico	219 814	188 423	222 209	221 301	198 481	235 893
Colombia	68 097	62 521	71 929	84 838	90 208	95 445
Brazil	68 574	55 042	61 343	76 879	96 565	57 920
Ecuador	42 830	44 348	41 670	50 619	51 666	51 415
Peru	25 935	28 289	39 780	47 759	39 456	43 511
Bolivia	14 821	15 674	21 654	24 014	23 035	24 524
Dom. Rep.>	10 263	10 741	11 351	15 405	19 504	20 000
Costa Rica	13 897	14 207	8 336	15 116	15 943	15 779
Guatemala	13 094	11 778	11 689	13 671	14 560	14 043
El Salvador	13 427	12 610	12 262	12 160	12 822	12 128
Honduras	10 512	10 000	9 113	10 000	10 000	11 265
Venezuela	29 006	46 204	31 703	9 187	7 517	8 000
Paraguay	4 295	5 682	5 323	5 061	5 610	5 899
<b>Total</b>	<b>547 344</b>	<b>529 833</b>	<b>560 979</b>	<b>601 757</b>	<b>597 538</b>	<b>607 728</b>

Italics: estimates / Source: COMTRADE

EU-27 — Imports — Main supplier countries						
tonnes	2007	2008	2009	2010	2011	2012
<b>Extra-EU</b>	<b>969 827</b>	<b>813 695</b>	<b>704 056</b>	<b>628 670</b>	<b>604 525</b>	<b>506 083</b>
<b>S. Hemis.</b>	<b>761 014</b>	<b>705 649</b>	<b>636 645</b>	<b>537 035</b>	<b>522 950</b>	<b>458 685</b>
Chile	204 405	211 199	186 318	177 614	170 163	132 879
South Africa	158 598	171 154	144 870	112 839	110 512	120 040
New Zealand	177 243	140 862	165 156	126 588	147 013	115 453
Brazil	104 767	97 453	80 199	70 692	39 840	57 803
Argentina	107 918	79 726	57 629	47 106	49 742	29 247
Uruguay	6 789	4 653	2 190	1 826	5 407	2 783
Australia	1 294	603	284	370	275	479
<b>N. Hemis.</b>	<b>208 813</b>	<b>108 047</b>	<b>67 411</b>	<b>91 635</b>	<b>79 797</b>	<b>28 001</b>
USA	30 996	27 313	26 427	20 060	10 235	10 490
Switzerland	2 324	1 496	655	706	4 957	7 646
Croatia	15 503	3 436	4 710	14 551	11 584	3 945
China	43 535	38 172	18 448	10 979	5 644	3 171
Serbia	40 386	1 131	2 100	12 050	32 246	1 919
Canada	2 352	2 532	1 156	1 558	1 183	829
Others	73 716	33 967	13 915	31 731	13 948	19 397
<b>Intra-EU</b>	<b>2 567 254</b>	<b>2 348 400</b>	<b>2 163 446</b>	<b>2 219 470</b>	<b>2 336 100</b>	<b>2 452 729</b>

Source: EUROSTAT

Other West European countries — Imports — Major markets						
tonnes	2007	2008	2009	2010	2011	2012
Norway	55 249	52 252	51 966	52 195	51 449	51 261
Switzerland	5 417	9 193	9 583	7 564	7 286	5 034
Iceland	3 708	3 315	3 549	3 697	3 757	3 794
<b>Total</b>	<b>64 374</b>	<b>64 761</b>	<b>65 098</b>	<b>63 456</b>	<b>62 492</b>	<b>60 089</b>

Source: COMTRADE

Russia — Imports — Main supplier countries						
tonnes	2007	2008	2009	2010	2011	2012
Poland	210 272	146 188	334 572	347 968	288 832	601 212
Moldova	47 419	66 932	136 503	153 251	183 523	141 575
China	201 339	241 528	175 035	156 253	138 236	126 314
Serbia	31 386	30 900	30 960	88 356	93 692	58 576
Italy	55 137	46 913	45 614	60 431	71 411	55 102
Azerbaijan	71 735	121 108	84 283	40 078	41 960	54 554
France	48 897	59 212	38 666	43 678	48 319	38 464
Chile	28 120	40 442	33 253	38 861	50 602	35 275
Argentina	68 113	72 395	43 219	30 540	59 393	29 537
Belgium	32 143	38 588	38 580	45 337	39 312	23 161
Germany	27 958	24 548	17 138	27 397	23 594	22 846
Ukraine	30 986	27 467	56 874	96 703	35 345	17 749
Netherlands	14 890	25 796	19 226	21 854	16 481	8 478
<b>Total</b>	<b>931 232</b>	<b>1 062 904</b>	<b>1 108 205</b>	<b>1 204 175</b>	<b>1 157 724</b>	<b>1 278 551</b>

Source: COMTRADE

Other Eastern European countries — Imports — Major markets						
tonnes	2007	2008	2009	2010	2011	2012
Belarus	89 989	50 404	62 186	60 324	100 486	145 674
Ukraine	141 022	176 871	251 394	203 061	102 479	93 510
Serbia	-	-	-	-	-	47 471
Bosnia	20 434	25 503	28 308	21 469	14 816	26 289
Croatia	14 392	13 009	14 156	8 839	10 889	13 796
Albania	22 516	15 641	12 928	17 702	11 399	11 469
Montenegro	6 535	6 655	7 877	8 057	7 137	7 487
Moldova	984	1 434	694	1 314	2 578	3 000
<b>Total</b>	<b>294 888</b>	<b>288 082</b>	<b>376 849</b>	<b>319 453</b>	<b>247 207</b>	<b>345 695</b>

Source: COMTRADE

Mediterranean — Imports — Major markets						
tonnes	2007	2008	2009	2010	2011	2012
Egypt	57 168	56 568	49 138	256 235	168 459	221 770
Algeria	91 365	92 565	118 388	113 551	128 620	124 555
Jordan	20 885	20 990	23 496	27 016	28 714	35 010
Israel	3 830	7 732	8 894	9 668	11 266	15 156
Morocco	5 953	6 490	14 188	14 025	14 000	7 643
Turkey	5 037	2 866	4 237	2 643	5 592	3 284
Syria	997	2 699	0	0	0	0
<b>Total</b>	<b>185 235</b>	<b>189 910</b>	<b>218 342</b>	<b>423 137</b>	<b>356 651</b>	<b>407 419</b>

Source: COMTRADE

Japan — Imports — Main supplier countries						
tonnes	2007	2008	2009	2010	2011	2012
New Zealand	-	20	-	-	143	1 894
South Korea	-	1	-	-	5	-
Australia	-	16	63	134	-	-
<b>Total</b>	<b>0</b>	<b>37</b>	<b>63</b>	<b>134</b>	<b>148</b>	<b>1 894</b>

Source: Japanese Customs

Other Asian countries — Imports — Major markets						
tonnes	2007	2008	2009	2010	2011	2012
China	126 636	156 882	176 672	201 005	211 166	187 244
India	64 956	62 348	90 714	106 467	179 015	186 368
Indonesia	145 302	139 819	153 512	197 487	212 685	183 859
Thailand	93 629	105 660	121 058	128 981	123 414	133 090
Kazakhstan	4 847	57 071	145 714	145 000	112 399	122 523
Malaysia	92 113	89 779	97 489	102 851	97 413	101 967
Philippines	71 427	72 939	76 248	70 237	72 319	77 460
Bangladesh	48 543	50 000	50 000	50 000	50 000	50 000
Nepal	18 500	20 000	21 970	38 871	49 179	50 000
Singapore	45 800	47 177	45 828	47 749	44 274	46 695
Vietnam	20 035	25 190	25 080	28 252	30 000	30 000
Pakistan	12 301	9 208	11 154	11 965	16 282	23 917
Sri Lanka	18 026	17 222	20 138	22 385	21 249	21 061
Mongolia	9 607	10 000	10 000	10 000	10 000	10 000
Kyrgyzstan	51 110	38 259	17 303	21 859	9 620	10 000
Azerbaijan	11 736	2 155	9 413	20 939	5 947	2 548
Cambodia	1 319	1 071	1 141	1 520	1 355	774
<b>Total</b>	<b>834 569</b>	<b>903 710</b>	<b>1 072 293</b>	<b>1 204 049</b>	<b>1 244 962</b>	<b>1 236 733</b>

Italics: estimates / Source: COMTRADE

Persian Gulf — Imports — Major markets						
tonnes	2007	2008	2009	2010	2011	2012
Saudi Arabia	147 423	60 711	50 747	176 572	100 000	187 139
Un. Arab Em.	147 566	157 799	160 000	160 000	160 000	160 000
Oman	25 202	34 522	24 548	25 804	22 787	97 451
Kuwait	27 686	27 771	28 000	28 000	28 000	30 000
Iran	0	0	0	8 920	27 712	30 000
Qatar	12 983	16 384	16 384	18 060	18 000	18 000
Bahrain	8 481	15 756	7 743	8 469	9 334	10 000
Yemen	8 421	8 233	6 447	8 000	5 276	6 238
<b>Total</b>	<b>369 342</b>	<b>312 943</b>	<b>287 422</b>	<b>425 825</b>	<b>365 833</b>	<b>532 590</b>

Italics: estimates / Source: COMTRADE

Africa — Imports — Major markets						
tonnes	2007	2008	2009	2010	2011	2012
Benin	8 000	8 000	17 662	15 654	16 000	16 000
Zimbabwe	1 146	628	6 934	10 355	14 225	12 965
Ghana	4 827	4 274	3 977	5 303	6 983	9 852
Senegal	6 711	6 883	7 453	8 319	8 388	8 551
Sudan	10 864	9 606	9 833	10 000	10 000	8 302
Zambia	3 575	5 152	6 464	6 006	7 384	8 000
Namibia	7 314	6 130	6 500	6 500	6 989	7 350
Botswana	7 324	7 294	8 279	7 653	6 176	6 587
Cameroon	2 233	3 765	4 399	5 118	5 912	6 138
Kenya	4 244	5 051	5 372	5 683	5 700	5 700
Swaziland	5 345	5 500	5 500	5 500	5 500	5 500
Côte d'Ivoire	4 769	4 057	4 285	4 557	3 083	3 974
Mauritania	568	844	1 780	2 947	2 510	3 215
Cape Verde	1 572	1 845	2 092	2 211	1 839	1 758
Uganda	1 073	1 041	1 618	1 565	1 762	1 680
Gabon	1 405	1 488	1 490	1 500	1 500	1 500
Tanzania	696	651	1 124	935	1 419	1 400
<b>Total</b>	<b>71 668</b>	<b>72 209</b>	<b>94 761</b>	<b>99 805</b>	<b>105 371</b>	<b>108 472</b>

Italics: estimates / Source: COMTRADE



## The main varieties of apples

photos © Régis Domergue

After *Le pommier*, CTIFL, 2002



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 varietal creation and breeding: suitability for the cultivation environment, for harvesting and packing, taste and technical characteristics (productivity, flowering period, susceptibility to diseases, maintaining 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 — The characteristics of some varieties

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

Source: CTIFL





Apples — Classification of the main varieties grown by type	
<b>Green</b>	Granny Smith and mutants
<b>Yellow</b>	Golden Delicious and mutants — Golden Extreme® Gradigold — Primgold® Deljéni — Tentation® Delblush — Earlygold® Snygold, Ozark Gold — Newgold® Newaphough
<b>Bicolour</b>	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
<b>Red</b>	Red Delicious and mutants — Redwinter® Redaphough
<b>Russet</b>	INRA® Belchard® Chantecler — Reinette du Canada and mutants — Reine des Reinettes and mutants — Reinette Clochard — Reinette de Brive

Source: CTIFL

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



## Growing apples

After *Le pommier*, CTIFL, 2002



### Agronomy

The 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. The 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 scalding (pre-ripening and senescence).

### Harvesting

Apple is a climacteric fruit and its conservability 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 conservability (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 below 5°C between 24 and a maximum of 48 hours after picking. The cold susceptibility threshold varies according to the variety, with many keeping at between 0°C and 1°C. A minimum threshold of 92% relative humidity must be maintained throughout cold storage. Some varieties susceptible to dehydration even require 95%. The effect of cold is enhanced by reducing the oxygen level and increasing that of carbon dioxide.

# Wholesale market prices in Europe

## January 2014

					EUROPEAN UNION — EURO				
					Germany	Belgium	France	Holland	UK
<b>AVOCADO</b>	Air	TROPICAL	BRAZIL	Box			14.00	16.50	
			DOMINICAN REP.	Box			13.20		14.57
	Sea	ARAD FINO FUERTE HASS	ISRAEL	Box	5.00	5.50		5.75	
			ISRAEL	Box	5.00				
			ISRAEL	Box	5.00			5.93	6.68
			CHILE	Box	9.25	10.00	7.63	9.50	
			ISRAEL	Box	9.00		7.94	6.25	
			PERU	Box	9.88				
	Truck	NOT DETERMINED PINKERTON BACON HASS	COLOMBIA	Box			7.81		
			ISRAEL	Box	5.25	5.75	5.42	5.88	
SPAIN			Box					6.98	
SPAIN			Box	10.00		9.00			
<b>BANANA</b>	Air	RED	ECUADOR	kg			4.88		
		SMALL	COLOMBIA	kg			6.90	5.17	
	Sea	SMALL	ECUADOR	kg			1.70	2.65	
<b>CARAMBOLA</b>	Air		MALAYSIA	kg		6.00	4.77	4.91	
	Sea		COLOMBIA	kg				3.47	
<b>CHAYOTE</b>	Sea		COSTA RICA	kg			1.39		
<b>COCONUT</b>	Sea		COSTA RICA	Bag		4.00		15.50	
			COTE D'IVOIRE	Bag			13.75	12.83	
			DOMINICAN REP.	Bag					10.92
			SRI LANKA	Bag				20.10	9.10
<b>DATE</b>	Sea	GLOVE KENTA MEDJOOL	MOROCCO	kg					5.83
			TUNISIA	kg				1.88	
			ISRAEL	kg	7.00		8.00	7.85	6.13
			MEXICO	kg				9.80	
	NOT DETERMINED RAVIER	TUNISIA	kg					6.07	
		IRAN	kg		3.00				
		TUNISIA	kg					1.77	
<b>EDDOE</b>	Sea		COSTA RICA	kg		2.50	1.86		
<b>GINGER</b>	Sea		BRAZIL	kg		2.69			
			CHINA	kg	2.69		3.65	2.91	3.18
			THAILAND	kg	2.69				
<b>GUAVA</b>	Air		BRAZIL	kg			6.15	6.42	
<b>KUMQUAT</b>	Air		ISRAEL	kg			3.78	6.68	
<b>LIME</b>	Air		MEXICO	kg			4.30		
	Sea		BRAZIL	kg	1.36	1.72	1.70	1.75	1.40
			MEXICO	kg		2.00	1.86	1.75	1.80
<b>LITCHI</b>	Air		SOUTH AFRICA	kg			4.50	4.38	
	Sea		MADAGASCAR	kg	2.13	2.50	2.10	2.88	2.28
<b>MANGO</b>	Air	KENT	PERU	kg			4.40	4.25	
		NAM DOK MAI	THAILAND	kg				8.80	
	Sea	ATKINS	BRAZIL	kg				1.38	
		KEITT	BRAZIL	kg				1.13	
		KENT	BRAZIL	kg	0.93		1.19	1.13	0.76
		NOT DETERMINED	PERU	kg	0.94	1.32	1.40	1.13	0.91
		PALMER	BRAZIL	kg					0.95
		BRAZIL	kg					1.25	
	<b>MANGOSTEEN</b>	Air		INDONESIA	kg			9.00	9.00
			MALAYSIA	kg				9.00	



					EUROPEAN UNION — EURO				
					Germany	Belgium	France	Holland	UK
<b>MANIOC</b>	Sea		COSTA RICA	kg			1.35	1.13	
<b>MELON</b>	Air	CHAR. YELLOW	DOMINICAN REP.	kg			4.30		
	Sea	CANTALOUPE	BRAZIL	kg				1.30	1.28
			GUATEMALA	kg					0.86
			HONDURAS	kg				1.40	1.58
		CHARENTAIS GREEN GALIA	MOROCCO	kg			1.80		
			BRAZIL	kg				1.40	1.34
			HONDURAS	kg		1.40		1.50	1.68
		HONEY DEW	BRAZIL	kg				0.93	
		PIEL DE SAPO	BRAZIL	kg				0.93	0.85
		SEEDLESS WATER	BRAZIL	kg				1.06	
		WATERMELON	BRAZIL	kg				1.00	0.95
<b>PAPAYA</b>	Air	FORMOSA	BRAZIL	kg		2.75	3.50	3.09	
		NOT DETERMINED	BRAZIL	kg		3.43	3.50	3.49	
			THAILAND	kg				4.81	
	Sea	FORMOSA	BRAZIL	kg					2.90
		NOT DETERMINED	COLOMBIA	kg					2.08
			ECUADOR	kg				2.09	2.26
<b>PASSION FRUIT</b>	Air	NOT DETERMINED	COLOMBIA	kg	5.50	5.25	5.75	6.00	4.86
		PURPLE	ISRAEL	kg				6.04	
			KENYA	kg		5.13		5.83	
			MALAYSIA	kg				7.07	
			SOUTH AFRICA	kg			6.50		
			VIETNAM	kg			8.00		
		YELLOW	ZIMBABWE	kg		5.00		5.25	
			COLOMBIA	kg			9.00	8.85	
			ECUADOR	kg				8.75	
<b>PHYSALIS</b>	Air	PRE-PACKED	COLOMBIA	kg			9.50	9.05	10.92
	Sea		COLOMBIA	kg	6.25	7.50		6.98	
<b>PINEAPPLE</b>	Air	SMOOTH CAYENNE	BENIN	kg		2.50	2.10		
		VICTORIA	MAURITIUS	Box				13.35	
			MAURITIUS	kg			3.45		
			REUNION	kg			4.00		
			SOUTH AFRICA	Box				11.50	
	Sea	MD-2	BRAZIL	Piece					0.63
			COSTA RICA	Box	8.50	7.75		8.59	
			COSTA RICA	kg			0.90		
			COSTA RICA	Piece					0.83
			COTE D'IVOIRE	kg			0.95		
			PANAMA	Piece					0.85
<b>PITAHAYA</b>	Air	RED	THAILAND	kg			8.00		
			VIETNAM	kg			8.00	6.17	
		YELLOW	COLOMBIA	kg				9.33	
			ECUADOR	kg				9.00	
<b>PLANTAIN</b>	Sea		COLOMBIA	kg			1.07	0.84	
			COSTA RICA	kg					1.35
			ECUADOR	kg			0.90		
<b>RAMBUTAN</b>	Air		MALAYSIA	kg				7.93	
			THAILAND	kg		9.00	9.00		
			VIETNAM	kg			9.00	7.59	
<b>SWEET POTATO</b>	Sea	NOT DETERMINED	EGYPT	kg			1.00		
			SOUTH AFRICA	kg					0.85
		WHITE	COSTA RICA	kg				1.65	
<b>TAMARILLO</b>	Air		COLOMBIA	kg				7.10	
<b>YAM</b>	Sea		BRAZIL	kg					1.46
			GHANA	kg			1.40	1.38	

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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