

Litchi

South Africa

A mediocre campaign



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South Africa, the number two supplier to the European market during the winter, has had a lean and mixed campaign this year. It is hard to know the exact figures of the shipment quantities, as European Customs classifications bracket the litchi together with several other tropical fruits also exported by this country. We might roughly estimate that South African exports were around 1 500 t for the last campaign, as opposed to nearly 2 900 t the previous year.

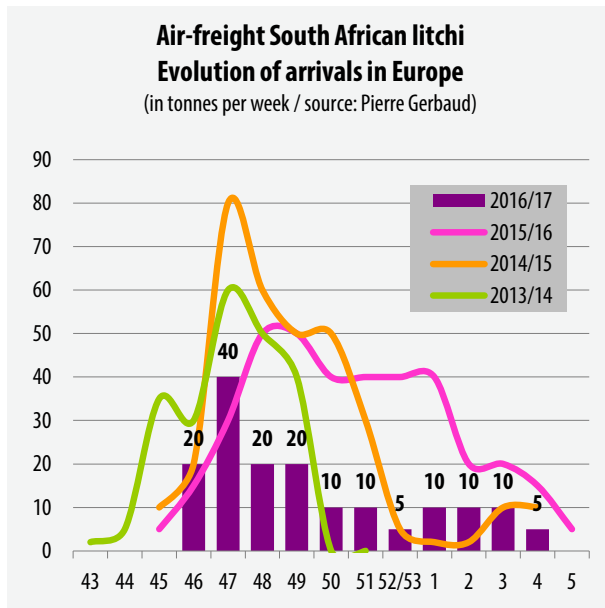
The first air-freight batches reached the European market in week 46, at the same time as for competing origins. After the sale of some Fai Zee Siu variety batches at high prices, Mauritius variety litchis struggled to find a place on a sluggish market already abundantly supplied. In the previous campaigns, South African litchis quite naturally found their place thanks to their sizing and their taste quality. This year, lacking coloration and taste, they were often abandoned by the distribution sector and consumers in favour of Madagascan fruits, which better met their expectations in spite of their more heterogeneous sizing and their sometimes higher prices. In week 49, the price drop led to a near-suspension of the air-freight campaign. However, it resumed at the beginning of the year for four to five weeks, with on-stem fresh fruits firstly of the Mauritius

variety, and then in the second half of the month, Red McLean variety. This beautifully coloured produce revived the economic results of the air-freight campaign, with high and stable prices. The volumes sold doubtless meant that the delay in the start of marketing could not be made up, but did mitigate the adverse impact.

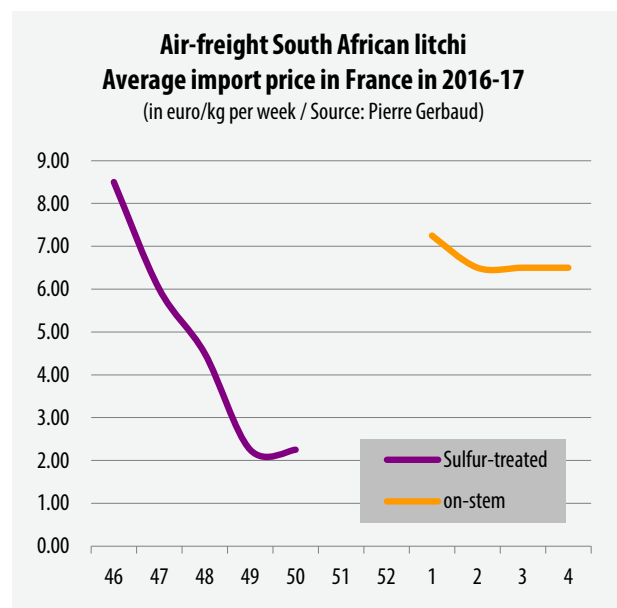
The sea-freight campaign proved to be no better. The first volumes, received in week 51, were apparently well below those of previous campaigns. The weather conditions and in particular heavy precipitation in the production zones delayed or even prevented harvests. They also had an influence on fruit quality. Three-quarters of the batches comprised small sizes, which struggle to earn value. There too, the lack of coloration and mediocre flavour of the fruits counted against the product. In addition, their short storage life, with the appearance of mould, ended up repelling customers, all the sooner as the Madagascan supply was exhibiting good quality. Against this competition, the South African campaign finished rapidly in mid-January, despite some marginal batches sold in February, but without rates picking up and with no interest from consumers, who considered that the litchi season was already over ■

Pierre Gerbaud

Air-freight South African litchi
Evolution of arrivals in Europe
(in tonnes per week / source: Pierre Gerbaud)



Air-freight South African litchi
Average import price in France in 2016-17
(in euro/kg per week / Source: Pierre Gerbaud)



Litchi

Mozambique

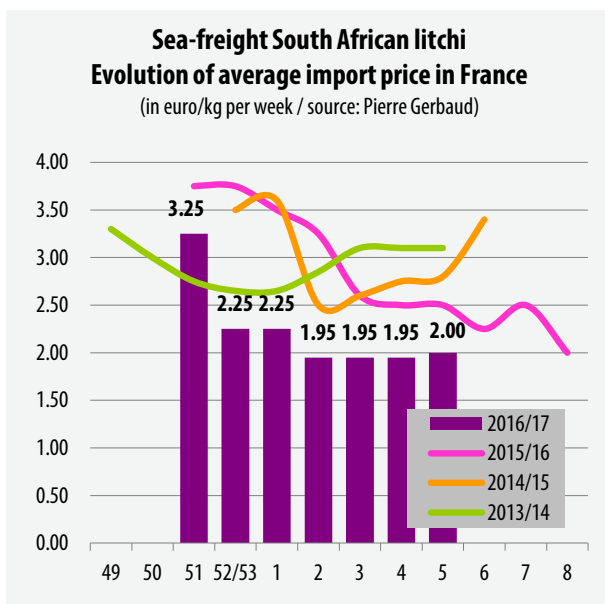
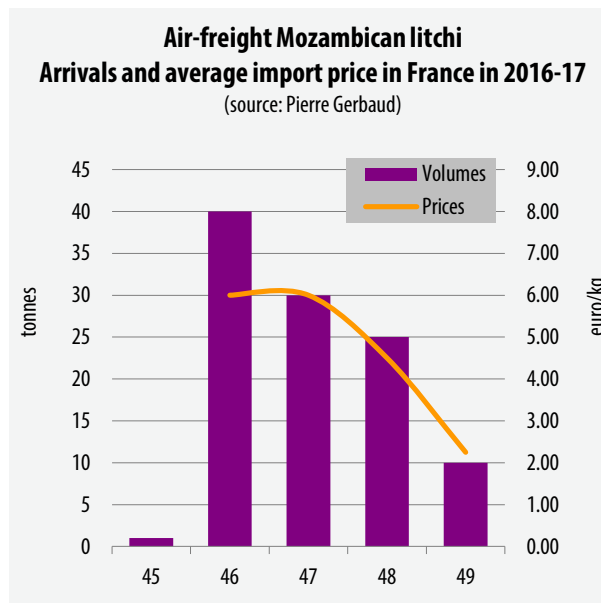
In South Africa's wake



© Guy Brehmer

For the third consecutive campaign, Mozambique took part in the litchi marketing campaign with just over 100 t, thereby marking a small rise and a foothold on the European markets. The campaign followed a similar pattern to South Africa's. Rates rapidly deteriorated in a context of lively competition for average-quality produce. Mozambique's exports remain closely linked to South Africa's, with most of the facilities involved in the product being subsidiaries or branches of South African companies. The country's potential is probably distinctly greater than what it has achieved in recent campaign. Yet this origin has recently gotten into this venture, and it will take a few more years to establish a long-term presence on the European markets. The boom is over, a consolidation phase must follow ■

Pierre Gerbaud



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