CLOSE-UP:
APPLES and PEARS

Banana prices in Europe in 2010: fasten your seat belts!

Citrus and exotics: monthly reviews
SCB
QUALITY FRUITS WEAR A CROWN
www.compagniefruitiere.com
No. 185 January 2011

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**Booster shot needed!** Food riots do have a good side as they are blessing for the farming sector. This may be cynical but is true nonetheless. The world has not been interested in either the quantity or the quality of its food bowl for years or even decades. Obesity is endemic in the North but now in some parts of the 'South' too. Elsewhere, populations, including rural populations, suffer from malnutrition. Meanwhile, arable land is used for petrol stations or theme parks. The regulations refuse the agricultural sector its right to be different. It must become liberalised. At the international level, nutrients are like minutes of phone calls and the only chips around are silicon ones. The agricultural parts of development aid packages have been reduced to a miniature scale. Most of the states themselves do not consider their farming sectors to be strategic. This is shown in an article by International Food Policy Research Institute (IFPRI) researchers who point out that Botswana and Nigeria devoted less than one percent of all aid received in 2007 to agriculture. In 2003, Africa adopted the Comprehensive Africa Agriculture Development Programme (CAADP) and countries undertook to devote 10 percent of their budgets to agriculture but only eight African countries have attained or exceeded this objective. An average of 5 to 7 percent of GDP is devoted to food production in Africa. This is hardly more than the defence budgets of certain North African countries (5 percent of GDP in 2008). Funds are thus needed for the sector but it is also necessary to promise it a future. Farmers must have confidence in prices and be sure of having outlets if they are to invest. Finally, farming should be treated with consideration. It is the only way to attract back to the sector young people who prefer for the moment to be crammed in the southern megalopolises, to live from hand to mouth and to dream only of emigrating to the supposed eldorados of the North.

**Direct from the markets**

- **Avocado:** Strong negative alternative bearing expected for Californian avocado in 2011 — An even lighter 2010-11 avocado season than expected for Chile.
- **Exotics:** Mango variety of the month: Kent — Deadly fungus hits the Ceara export pineapple sector in Brazil — Slight decrease in papaya imports in the United States after a decade of growth.
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- **Citrus** (orange, easy peelers and grapefruit): Chinese citrus production in 2010-11: a pause in growth — Florida feels the chill and the concentrated orange juice market hots up — Citrus planting in Spain in 2008-09: from bad to worse! — Variety of easy peeler of the month: Or from Israel — Texan shippers can now sell their fruits in other US states again — Increasing threat of greening in California — Exports of Argentinian fruits: a useful yearbook!
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**Wholesale market prices in Europe**

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Denis Loesillet

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**Cover photograph:** Régis Domergue
Your avocado specialist for 25 years...

- Market leader in South African Avocados. All varieties and Organic production.
- Year round supply of avocados from Brazil, Chile, Dominican Republic, Israel, Kenya, Mexico, Peru... quality every day
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The market was still very sluggish at the beginning of the month and then recovered markedly. However, the supply of green varieties was fairly ample and the slight deficit in Spanish fruits together with the marked deficit in shipments from Mexico were amply compensated by quite large deliveries from Israel. However, supply of ‘Hass’ was no more than average. Deliveries from Chile, the main supplier of the European market, were normal while the larger than usual shipments from Israel were counterbalanced by a deficit in Spanish produce and especially in fruits from Mexico. In addition, demand perked up a week before Christmas in some countries such as France, with promotion operations. Prices firmed noticeably in this context for both ‘Hass’ and green varieties, reaching above-average levels at the end of the month for high-quality produce.

Strong negative alternate bearing expected for Californian avocado in 2011. Alternate bearing should have a negative effect on the coming Californian avocado season. The first 2011 harvest estimate issued by the California Avocado Commission is for about 125 000 t, a fall to nearly half of the 2010 volume. In this context, Mexican exporters should concentrate more strongly than ever on the United States market and may well be very little present in the EU during the first half of 2011.

An even lighter 2010-11 avocado season than expected for Chile. Volumes exported should total some 85 000 t in 2010-11, half the that of the preceding record-setting season. In an interview in the journal Estrategia, the president of the ‘Comite de palta’ made a reminder that this very sharp fall is caused by natural alternate bearing and frost during the 2010 southern winter. The figure does not reflect the normal export potential of the country where avocado orchards covered more than 39 000 ha in 2007 according to the cadastral department (CIREN).
December 2010

The European mango market was fairly poor at the end of the year. The downward trend observed in November was confirmed and accelerated, especially in the second half of December. Supply from Brazil was substantial until the third week while shipments from Peru increased in parallel. Cumulated arrivals from these sources formed large quantities on a market where demand accelerated in the run-up to Christmas but not as strongly as in preceding years. The periods of snow and intense cold that hit Europe in December also contributed to the degradation of market conditions as regards both supply and distribution/consumption. The large volumes available also featured a mismatching of supply quality and buyers’ expectations. The quality of a proportion of the Brazilian produce was fragile, with occasional fungal attacks and short keeping life. Most of the Peruvian mangoes were small and quality fairly mediocre overall. The first ship carrying Madagascan litchis from Madagascar was expected at the end of Week 50, operators limited their orders for the transition period in order to avoid the accumulation of stocks of air litchis when the first sea litchis were released on the market. This resulted in a decrease in supply in Week 50 and an increase in prices. Lack of enthusiasm for the fruit was felt in the sales volume this year. A degree of consumer reserve was observed, especially for fresh litchis from Réunion whose price fell gradually until the end of the month. The price has never been as low for goods of satisfactory quality.

The late docking of the first ship at Zeebrugge on 18 December meant that market release for the weekend before Christmas was not possible even though unloading was carried out nonstop as soon as the ship was at quay. Appalling weather (a snowstorm and very low temperatures) during unloading further slowed the delivery of produce to professionals. This also slowed transport logistics and made it more complex to get the fruits to their final destination. As there was no weekend of sales before Christmas, prices were lower than they had been during the previous season. They then lost ground when the second ship arrived at Vlissingen on 22 December. Christmas was too close and the sale of its cargo was delayed until after the celebrations. An unexpected feature sent sea litchis from Madagascar into a downward price spiral. Several German distributors had commissioned analyses of residual sulphur in litchis from Madagascar, and these revealed substantial excesses with reference to authorised residue limits and sales were suspended. The closing of the German market, accounting for 30 to 40% of imports from Madagascar, resulted in the transfer of volumes to the other European markets. These additional volumes on unprepared markets caused a fall in prices even though the intrinsic quality of the fruits was satisfactory in spite of their rather small size.

The latent problem of residual sulphur in Madagascan litchi caused an open crisis this year when exporters had reduced volumes in the hope of selling at better prices. This important event calls into question the very viability of the litchi sector in Madagascar.

Mango — Arrivals (Estimates) Tonnes

<table>
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<th>Weeks 2010</th>
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Litchi — Arrival Estimates Tonnes

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Litchi — Import Price on the French Market — euro/kg

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Mango — Import Price on the French Market — Euro

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Pineapple

December 2010

Snow and cold strongly affected sales and the delivery of batches of ‘Sweet’ in December. Demand remained fairly mediocre overall. Shipments from Latin America and above all Costa Rica increased in Week 49. Unfortunately, the produce was fairly unbalanced with very few sizes 9 and 10 for which several promotion operations were run. Release of the other sizes was thus not easy and operators often had to allow for the carry-over of sales from one week to the next to maintain a certain market balance. The week before Christmas was the only period with dynamic sales but prices were not exceptional. Demand fell rapidly after Christmas and at the end of the year operators were fairly concerned about the evolution of the pineapple market.

Supply of ‘Smooth Cayenne’ increased strongly and steadily throughout the month. Sales were mainly outside France on the Eastern European markets that were still interested in this variety. A few promotion operations in France also favoured sales. Prices remained stable and, as for ‘Sweet’, demand slumped just after Christmas.

Sales on the air pineapple market were fairly slow during the first fortnight of the month. With supplies becoming scarce as airports closed because of bad weather, demand became stronger and transactions were often concluded at much higher prices. Sales of ‘Sugarloaf’ pineapple from Benin also became firmer and more dynamic as soon as supply decreased overall and sold in the range of EUR 1.80 to 2.10 per kg over the whole month.

‘Victoria’ supply increased throughout the month. However, although demand was fairly mediocre in the first three weeks it became particularly strong in the last fortnight, confirming once again the festive aspect of this fruit.

Mango variety of the month: Kent. Bred in 1932 in Florida from so-called ‘Brooks’, it bears comparatively large fruits, ranging from 440 g to more than 1 kg on young trees. Much appreciated by both the upstream and downstream ends of the sector, yields are medium but with a high proportion of export quality fruits. Fruit colour is attractive and the tasty flesh is firm and ripens very gradually. It is grown in most of the countries supplying Europe, where it is considered to be the yardstick for mango. However, considerable variations in colour and size according to the production zone can lead to sales problems.

Deadly fungus hits the Ceará export pineapple sector in Brazil. The presence of Fusarium wilt, a fungal disease, seems to have put the export pineapple sector on its knees in this province in the Nordeste. Exports had peaked at more than 1 600 containers in 2007 before gradually dwindling to 700 in 2009. No container had been loaded at the end of November 2010.

Slight decrease in papaya imports in the United States after a decade of growth. Avocado is not the only Mexican fruit to have benefited from the setting up of agreements for the liberalisation of trade with the United States within the framework of NAFTA. The efforts made in promotion by Mexican exporters have made it possible to double papaya consumption in a decade. Nearly 80% of imports are from Mexico, reaching 156 000 t in 2009. The quantity is reported to have fallen slightly to 150 000 t in 2010.

<table>
<thead>
<tr>
<th>Papaya — United States — Imports</th>
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<tr>
<td>tonnes</td>
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<tr>
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<td>124 355 156 394</td>
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<td>Dom. Rep. 2 481 1 201 1 089 987</td>
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<td>Panama 7 - 22 - 99 507 265</td>
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<td>Others 31 114 187 137 58 24 30</td>
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Sources: US Customs, www.propapaya.org

PINEAPPLE — IMPORT PRICE IN FRANCE — MAIN ORIGINS

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<td>6.50-8.50</td>
<td>7.00-9.00</td>
<td>6.00-8.00</td>
</tr>
</tbody>
</table>
SUPPLIERS OF QUALITY PRODUCE
Des producteurs au service de vos consommateurs

- AVOCADO
- LYCHEE
- ORANGE
- MANGO
- RIPE & READY
- ORGANIC
December 2010

Small supply enabled the market to stand up well to the very marked seasonal dip in demand. Cold weather weighed on consumption and disturbed logistics throughout Europe, accentuating the slowing of sales resulting from the change in retail ranges to the benefit of exotics. However, shipments were light or very light from all source groups. In dollar bananas, the volumes from Colombia were average. However, cold weather continued to limit production in Ecuador and exporters preferred Russia and above all the United States to the European market. In addition, Costa Rican professionals also continued to prefer the US market to the EU. Arrivals from Africa were also very moderate. Above average volumes from Ghana did not make up for the recurrent deficit in fruits from Cameroon and a marked decrease in shipments from Côte d'Ivoire caused by the political crisis there. Finally, West Indian production continued to suffer from the effects of hurricane Tomas. As a result, prices firmed at the beginning of the month on all the European markets. The average monthly price was distinctly above average except in Spain where the market was nevertheless not as difficult as it had been in preceding months. Outside the EU, the Russian market was very satisfactory even though shipments were larger than average.

- **Banana in the United States**: difficult to believe. United States banana imports are breaking records month after month. It took only 10 months in 2010 to attain total 2009 consumption, that is to say a little more than 3 million tonnes! The growth rate is currently 22% in comparison with 2009 and 8% in comparison with the average for 2007-09. It is true that banana is a crisis-busting fruit par excellence but suppliers are attracted above all by the market conditions. Indeed, import prices have been at their highest for three years (see article in this issue). The sources in Central and South America have clearly opted in favour of the USA at the expense of the EU. Exports from Costa Rica, Colombia and Ecuador are increasing strongly in the US and holding ground at best in the EU. The rise of secondary sources is also observed on both the European and American markets: Brazil, Mexico, Nicaragua, etc. EU imports increased by a tiny 1% in the first ten months of 2010. Those from the MFNs (dollar sources) lost 12% and those from ACP countries increased by 9%. The Dominican Republic, strongly developing projects (in Ghana and Surinam) and Côte d'Ivoire covered the whole of this increase. The Dominican Republic is firmly in the lead among ACP supplier countries with 252 000 t shipped to the EU in 10 months. The 300 000 t level should be reached at the end of December. CIRAD’s estimate of total European supply (imports + European production) shows a 3% decrease in October 2010 in comparison with 2009 (- 14 000 tonnes). In the first 10 months of the year, supply is estimated to have totalled 4.3 million tonnes, a 2% increase in comparison with the same period in 2009.
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Hall 25,
Stand C-03.
Banana

USA — IMPORT PRICE

<table>
<thead>
<tr>
<th></th>
<th>December 2010</th>
<th>Comparison</th>
</tr>
</thead>
<tbody>
<tr>
<td>USD/box</td>
<td></td>
<td>previous month</td>
</tr>
<tr>
<td>15.60</td>
<td>0%</td>
<td>+ 6%</td>
</tr>
</tbody>
</table>

Russia — Green price

<table>
<thead>
<tr>
<th></th>
<th>December 2010</th>
<th>Comparison</th>
</tr>
</thead>
<tbody>
<tr>
<td>USD/box</td>
<td></td>
<td>previous month</td>
</tr>
<tr>
<td>15.3</td>
<td>-20%</td>
<td>+ 5%</td>
</tr>
</tbody>
</table>

Spain — Green price - Platano*

<table>
<thead>
<tr>
<th></th>
<th>December 2010</th>
<th>Comparison</th>
</tr>
</thead>
<tbody>
<tr>
<td>euro/box</td>
<td></td>
<td>previous month</td>
</tr>
<tr>
<td>12.70</td>
<td>-1%</td>
<td>- 16%</td>
</tr>
</tbody>
</table>

Colombian banana: a small year in 2010. Colombian banana exports are estimated to have totalled 92 to 93 million boxes in 2010 according to information from AUGURA reported in Reefer Trends. This decrease after the 95 million boxes recorded in 2009 is thought to be the result of an unfavourable dollar exchange rate and the December rains that resulted in the loss of about 2000 hectares of the 44 500 hectares of plantations in the country.

Source: AUGURA

A new supplier country for the Ukraine market. Indian bananas appeared on tables in Ukraine at the beginning of the year. According to the importer responsible for the trial, the Arkadiya company, in addition to being sweeter and having more flavour, Indian bananas are 20% cheaper than those from Ecuador. World leader with a harvest in excess of 23 million tonnes, has a great range of cultivars (Cavendish and also fig types such as 'Poovan'). Ukraine imported an average of some 250 000 t of bananas in 2008-09, 90% of which were from Ecuador.

Source: Freshplaza

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Source: Freshplaza

**EUROPE — IMPORTED VOLUMES — DECEMBER 2010**

<table>
<thead>
<tr>
<th>Origin</th>
<th>November 2010</th>
<th>December 2009</th>
<th>cumulated total 2010 compared to 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>French West Indies</td>
<td>- 25%</td>
<td>+ 4%</td>
<td></td>
</tr>
<tr>
<td>Cameroon/Ghana</td>
<td>- 19%</td>
<td>- 12%</td>
<td></td>
</tr>
<tr>
<td>Surinam</td>
<td>- 36%</td>
<td>+ 23%</td>
<td></td>
</tr>
<tr>
<td>Canaries</td>
<td>+ 5%</td>
<td>+ 13%</td>
<td></td>
</tr>
<tr>
<td>Dollar:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ecuador</td>
<td>- 18%</td>
<td>+ 1%</td>
<td></td>
</tr>
<tr>
<td>Colombia*</td>
<td>- 4%</td>
<td>+ 2%</td>
<td></td>
</tr>
<tr>
<td>Costa Rica</td>
<td>na</td>
<td>na</td>
<td></td>
</tr>
</tbody>
</table>

*total all destinations

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Direct from the markets

Orange

December 2010
The market remained very difficult. Large volumes of ‘Naveline’ were still available at the production stage in Spain. In parallel, demand was not as dynamic as that for easy peelers despite the cold weather that was favourable for consumption. Prices were still distinctly lower than average at the import stage and hit the bottom at production. Supply—especially on the French market—was completed by a few batches of ‘Salustiana’ from Spain.

### Chinese citrus production in 2010-11: a pause in growth.
The harvest forecast of about 23 million tonnes of citrus (all kinds) marks a dip of nearly 2 million tonnes in comparison with the last season—the equivalent of more than the entire production of Morocco! This decrease resulting from adverse weather conditions (cold and rain during flowering in some regions) does not call into question China’s position as the largest producer in the world. And it is not a break in the growth dynamics of Chinese citrus production. The planted area increased by 90 000 to 130 000 ha per year from 2006 to 2009 and orange planting is reported to have continued. The government is still encouraging the development of the sector via direct aid for production (subsidised plants, etc.) and packing (construction of cold stores, etc.). As an example, the 5-year plan for the development of Guanxi province includes a 60 000-ha increase in orchard area by 2015. But will growth continue to be as brisk in the coming years? Phyto-sanitary problems are still a serious constraint (greening is endemic) and production costs are increasing rapidly, reaching USD 6 700 per ha in some provinces: + 20% for agricultural inputs and + 10 to 20% for labour, that is to say USD 12 to 13 per day.

Source: USDA-FAS

### Florida feels the chill and the concentrated orange juice market hots up.
Will concentrated orange juice futures equal the record of USD 0.20 per lb set at the end of 2006? Be that as it may, prices have increased almost continuously since mid-December in spite of lacklustre consumption in the United States. The decrease in supply from Florida is the cause once again. In early January, USDA reduced its harvest forecast for the second time, taking it to 140 million boxes instead of 143 million. But the first estimates of losses resulting from December frosts mean that another dip will be forecast in the February update (10% of early and spring varieties).

Source: USDA

### Citrus — China — Detail by produce

<table>
<thead>
<tr>
<th>Type</th>
<th>Production (million tonnes)</th>
<th>Area (000 ha)</th>
<th>Main provinces</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orange</td>
<td>5.50</td>
<td>735</td>
<td>Jiangxi, Sichuan, Guanxi</td>
</tr>
<tr>
<td>Easy peelers</td>
<td>12.25</td>
<td>800</td>
<td>Guangdong, Hunan, Zhejiang</td>
</tr>
<tr>
<td>Shaddock</td>
<td>2.60</td>
<td>na</td>
<td>Pinghe county (Fujian)</td>
</tr>
<tr>
<td>Lemon</td>
<td>0.25</td>
<td>30*</td>
<td>Anyue county (Sichuan)</td>
</tr>
</tbody>
</table>

*estimates / Sources: USDA - FAS, Chinese Ministry of Agriculture
December 2010
The market was fairly satisfactory given the strong supply volumes. Moroccan exports concentrated on Russia and Canada were moderate, as were Corsican shipments (production shortfall). In contrast, easy peelers from Spain were strongly present. The ‘Clemenvilla’ season started to peak and shipments of ‘Nules’ clementines were large. However, the cold spell that hit the whole of Europe stimulated demand. Still difficult at the beginning of the month, the market regained balance. Prices firmed and approached average at the end of the month for high-quality produce.

Varieties

<table>
<thead>
<tr>
<th>Varieties by source</th>
<th>Comparison</th>
<th>Observations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clementine from Spain</td>
<td>📈 + 15%</td>
<td>Peak season for ‘Nules’ with large supply. Size mainly medium to small.</td>
</tr>
<tr>
<td>Clementine from Spain</td>
<td>📉 - 21%</td>
<td>Volumes less than average in the EU. First ‘Nour’ at the end of the month.</td>
</tr>
<tr>
<td>Clementine from Corsica</td>
<td>📉 - 16%</td>
<td>Volumes smaller than average and focused on the French market.</td>
</tr>
<tr>
<td>Clemenvilla from Spain</td>
<td>📉 - 1%</td>
<td>Supply only average. Harvest smaller than the preceding season and the average.</td>
</tr>
</tbody>
</table>

Variety of easy peeler of the month: Or from Israel.

‘Or’ is a hybrid of ‘Temple’ and ‘Dancy’ and was bred by the Volcani Center in Israel. It is a medium-sized fruit recognisable by fairly marked grooves running from the base of the peduncle and the occasional presence of a small fruit embryo. The skin is fairly pale orange, of medium thickness and is easily removed. The segments are soft and juicy with few pips. The flavour is very pleasant thanks to a good sugar:acid balance.

Source: Consejeria Agricultura Communidad Valenciana
We offer you the best of Morocco.
**Grapefruit**

**December 2010**

The market remained difficult but the pressure eased. Demand was very slow with grapefruit sent to the back of the shelf as happens every December. However, deliveries of both tropical and Mediterranean grapefruit were somewhat light. Arrivals from Florida were limited for most of the month. Likewise, those from Turkey and Israel were smaller than average. The volumes from inter-season sources (Mexico and Cuba) were sold at the beginning of the month. In this context, importers succeeded in reducing the pressure of their stocks but without succeeding in raising prices, which remained at an average level.

- **Texan shippers can now sell their fruits in other US states again.** The quarantine rules forbidding all citrus shipments from Texas to California, Arizona and Florida were lifted at the beginning of January. The measure was applied in October 2010 after the discovery of Sweet Orange Scab, a fungal disease, near Houston. The suspension of quarantine is justified by the demonstration that the disease is not spread by processed nursery stock or fruits treated using standard procedures in packing lines. This is a great relief for the Texan citrus industry as a large proportion of production—275 000 t of fruits—is shipped fresh to other states.

- **Increasing threat of greening in California.** The Asian citrus psyllid, the vector of the devastating greening disease, is gaining ground in California. Detected in the south of the state (San Diego and Imperial counties) in 2008, it has gradually moved northwards and was observed 300 km from the frontier in Ventura county at the end of 2010. The coastal fringe of the Californian citrus zone now reads positive, as does the south of Central Valley. Fortunately, the large orange and easy peeler zones in the centre (Fresno, Tulare and Kern counties) are still free of the insect.

- **Exports of Argentinian fruits: a useful yearbook!** The Topinfo company sells a yearbook assembling the main statistics covering fruit exports from Argentina. It shows movements in volume and value by destination and even by exporting company for most produce. A welcome initiative. The publication is available from:

  Topinfo marketing SA,
  marketing@top-info.com.ar
  Tel.: 54 1147926419

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**Source:** The Monitor

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**Source:** Central Valley Business Time

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**Source:** FruiTrop

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**Source:** Tradinter Yearbook 2010 Topinfo

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December 2010

December was unusual in that chartering activity, modest though it was, remained constant throughout the month despite the yuletide festivities and high exit price for Ecuadorian bananas. The Open List remained tight and the charter market ended the month on a rising trend. The smaller segment continued to benefit from additional potato orders and Mauretanian fish requirements – supply and demand were roughly in balance. The month was characterised by extraordinary climatic events on either side of the Atlantic: exceptional rainfall associated with the La Niña weather pattern was responsible for the temporary closure of the Panama Canal; the shutdown of the interoceanic waterway had only ever occurred once previously - during the 1989 US military invasion of Panama to topple President Noriega. The backlog of vessels created led to several units missing their delivery dates. The extreme rainfall also submerged large swathes of banana production in Colombia, also causing damage to infrastructure. Uniban/Fyffes Joint Venture Turbana was forced to charter in a vessel as cover for its weekly US position. How much of a shortage to banana supply the damage will cause will become apparent as 2011 develops. Meanwhile arctic conditions in the Baltic forced the earliest declaration of Institute Warranty Limits for St Petersburg in living memory – these are trading limits imposed by the hull insurers on the ship restricting the vessel sailing into ice hazards. The icing up of the River Neva coincided with a rush by poultry charterers to have their cargo duty declared in port before the quota application date of 31 December. After an early December surge South African grape shipments dipped dramatically causing container line services to run light and the cancellation of the second NYKCool/Seatrade VSA vessel. Of more consequence to the specialised reefer business is that Chilean grape exports are forecast to rise 6% to 850K MT. Almost all the Chilian grapes exported to the US are shipped in reefer vessels, while the vast majority of South African grape exports are shipped on third party liner services.

Gale warning for the reefer sector. Increasing competition from refrigerated containers is making reefer professionals very pessimistic. Container lines have multiplied in recent years, especially between the northern and southern hemispheres, and hitherto untouched sectors such as banana are now hard hit. Quoted in a recent article in the Financial Times, the managing director of Seatrade affirmed that the overall world fleet could shrink by half in ten years. The trend seems to be operating as 144 of the ships in service of sufficient size to serve the international market are more than 20 years old and hardly any replacements are currently planned.

New port infrastructure in Ecuador devoted to containerised shipping of bananas. DAMCO, a subsidiary of MAERSK, the world specialist in container transport, has recently constructed new port infrastructure dedicated to bananas in the port of Guayaquil. It avoids breaks in the cold chain. Containerised Ecuadorian banana exports increased from 50 000 containers (40’) in 2006 to 112 000 in 2010.

The British National Health Service promotes fruit and vegetable consumption. ‘Change4Life’ is a programme launched by the NHS to promote healthy eating. The government has not hesitated to dip into its pocket to offer consumers some 5 million vouchers for healthy products including fruit and vegetables. Qualifying for these reductions just requires the filling in of a small questionnaire. The vouchers can be used for apples, clementines, grapes, root vegetables and Asda own brand potatoes.

MONTHLY SPOT AVERAGE

<table>
<thead>
<tr>
<th></th>
<th>Large reefers</th>
<th>Small reefers</th>
</tr>
</thead>
<tbody>
<tr>
<td>December 2010</td>
<td>44</td>
<td>81</td>
</tr>
<tr>
<td>December 2009</td>
<td>50</td>
<td>73</td>
</tr>
<tr>
<td>December 2008</td>
<td>72</td>
<td>85</td>
</tr>
</tbody>
</table>

Source: Reefer Trends, South East Shipping News

Sources: Financial Times, Reefer Trends

Change4Life promotes fruit and vegetable consumption.

The independent news and information service for the reefer and reefer logistics businesses
THE BEST FRUIT AT THE RIGHT MOMENT

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Analysis of markets is necessarily a very relative operation and should always be approached in a measured manner. It is rare to be able to show clear lines, monolithic profiles or major trends. The banana market is an exception to this rule. This is doubtless one of the features that make it fascinating for analysts, overflowing with opportunities for commercial operators and terrifying for the banks handling the cash side. For various reasons, the banana market has surprises for us every year. It takes the most hardened forecasters by surprise, twists econometric models and sends round the bend the politicians who would like a year, just one year, without their being asked to explain, negotiate, calculate and take specific measures for one or other member of the sector.

One could warble on for a long time about the specific character of the banana trade. You first talk about fresh produce that is very sensitive to weather (especially when the latter gets out of hand), very political, much purchased, very internationalised and finally interacting very closely, or possibly dependent on, other food chains, especially in the fruit sector. In short, banana is a living item that is part of the diet of hundreds of millions of people and cannot be handled at the international level in the same way as nuts and bolts or banking services. But that is another story...

Big dipper enthusiasts had a marvellous time in 2010. With no let up in momentum, prices soared and swooped throughout the year. In the end the average price was the same as in preceding years. But this was no comfort for operators whose production costs had increased. Bananas were saved by capricious weather once again. But until when?

Having got that out of the way, let’s get back to what happened in 2010. The morale of operators was tested to the limit. Surprisingly, this serious depression was not reflected in the movement of average import prices (the reference being the Aldi import price). These fell by 4% (from EUR 14.0 to EUR 13.5 per box) in comparison with 2009, which had been a comparatively good year. Comparison with the 2007-09 three-year average did not show an unfavourable trend either. 2010 prices were thus stable. So the explanation for the very morose climate in the banana business should be sought elsewhere. We have long known that the banana sector is not exactly peaceful. Shocks are numerous and unpredictable in both regulations and trades and their effects are incalculable. Switches in trend are also very fast. The year 2010 is a condensed version of all this. We have swung from one extreme to the other throughout the year, with no time to breathe. In the end, the average is like those of previous years but the dynamics throughout the year has been closer to madness than to the classic pattern—if such a thing exists—of the market.
Not for nervous people

The graph opposite shows the unreasonable extent of variations. For eight months of the year the Aldi import price was either rock bottom or sky high (with the reference period being the four years from 2007 to 2010). Only the spring (from March to May depending on the country) escaped these sudden variations as the transition from low to high prices was slow. The market woke up early but slowly, especially in Germany. Indeed, it took three months (from March to May) for the market to swing from an extremely low price (the lowest of the decade) to a high point (the highest of the decade with the exception of 2005). The improvement was late but much sharper in France, which was late starting as the market was stuck in a very unfavourable situation until April before going from one extreme to the other in just a few weeks.

In France again, the trade situation was very poor from August to October whereas Germany seems to have mastered risks during the summer for some years now. Everybody remembers summer 2006 as the war games played then have left traces. Supply schedules now seem to be better controlled. This is doubtless one of the explanations for the favourable movement of prices during this period. Another is the structure of the supply of competing fruits—this is radically different in the two countries. French summer fruit production is large and France is a hub for the shipment of Spanish produce and so sensitivity to supply variations is strong during the summer.

What is all the more harmful for France is that keeping the banana market in good order during the summer makes it possible to get off to a good start when schools open again in September after the holidays. In any case, this is what
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comparative examination of prices indicates. In September, France paid once again (prices fell by 5% from August to September) while in Germany prices remained at their highest August and September levels for the last four years. October was more difficult almost everywhere. Finally, the market recovered very violently in November.

The year was thus bad for nerves and cash balances even if the situation differed a little from one country to another. Mention can be made of the disastrous 2010 season in Spain. In spite of the policy of voluntary withdrawal of produce by growers (8 to 10% of the volumes shipped to mainland Spain), green prices did not get very far, even at the end of the year when they rocketed everywhere in Europe. The average import price of Super Extra category fruits fell to EUR 13.3 per box, 25% lower than in 2009. Such a level had not been observed since 2001!

A squeeze on margins

The situation was dramatic for the first four months of the year in all European countries and this strongly affected annual economic figures. During this period, prices fell by 4 to 8% in Germany and from 9 to as much as 16% in France (in comparison with the 2007-10 average). The fact that it was a period of strong banana consumption made it even worse. It is when French banana consumption is 38% (2009 figure) of annual total supply. Finally, as regards comparison of neighbouring markets, sudden price movements were a feature of France in 2010. Falls and increase both reached 15%. As said above, the annual average price is a very poor reflection of this true market depression. Indeed, the transaction price does not incorporate changes in cost structure and the prices of some items increased tremendously. Oil was at more than USD 90 per barrel at the end of 2010 (after dipping to USD 40 in early 2009), paper pulp increased by 20% in 2010, taking the rise to 50% since the low point observed in March 2009. And there were other clear signs. All the large multinationals announced plans to reduce their supply schedules. They wish to work on improving their margins.

Banana saved by a deluge

The year 2010 was thus full of ups and downs. Trying to find explanations for these repeated breaks shows that, as often, there is not necessarily a single explanation. However, it would seem that a fairly classic examination of supply is necessary to understand the situation. The European market was strongly encumbered in February and March. Monthly EU supply in...
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March (CIRAD estimates) increased by 8% in comparison with March 2009. A full study will be published in the traditional Focus on Banana to be published in the May issue of \textit{FruiTrop} devoted to banana. Fortunately, the market was not very generously supply with competing fruits—especially citrus!

But the real turning-point of the season was in the spring when the market was saved by floods and execrable weather conditions that hit red fruit production in Spain and Morocco. Even summer fruits were affected, leaving a clear market for banana, the last fruit that Europeans would dream of eating when the weather turns warm.

Unfortunately, the strong pressure of world banana supply exceeded demand again from August onwards. Exports from Colombia were an average 17% greater than in 2009 for two months. Everybody thought that this was another period of strong depression—the second in just a few months—even if once again the new 2010-11 citrus season from October onwards took a while to get going and to be felt on the market.

More than this was needed to turn the market around. And the heavens came to the rescue of the banana sector once again! Good news kept on coming, at least for the green banana market. On the one hand, poor weather conditions reduced the supply of fruits to Europe once again—pip fruits this time. On the other, floods, cold weather, hurricanes, storms and quality problems reduced the export potential of almost all the banana production zones. Sighs of relief! The market had been saved again. The price curve finally reversed at the end of October and absolute records for increases were beaten week after week until the end of the year. Prices even exceeded EUR 14 per box during the week before Christmas.

The annual supply balance is not yet available but it can already be said that the relation between the movement of green prices and that of the volumes sold is more than enigmatic. It is seen below that green prices and retail prices in the United States are peaking and that consumption is breaking historical records in spite of it all. In the EU, in spite of the excitement as regards volumes mentioned above, low prices have not favoured a consumption recovery. The volumes sold in the first nine months of 2010 were stable in comparison with those of 2009 (+2%) and a balance should be achieved at the end of the year. Retail prices are not the cause. In contrast, they have fallen almost everywhere. The United Kingdom stands alone with prices that are tending to rise. Here again, the annual average hides periods of ferocious price wars between retail distributors. But it is also the sign of a British market where there is a great deal of contractualisation of import volumes. A kind of US market on a small scale.
Russia: multiplied by two

As in neighbouring Poland, the Russian market is one in which excess is dominant. Prices vary by 100% from one week to the next. The low point was hit this summer with slightly more than USD 8 per box CIF St Petersburg and the high point was in March with USD 17. The market seems to have gained a certain balance in 2010. Indeed, except for this volatility, annual price movements are markedly out of phase with what is observed in the EU. It is true that January was particularly difficult but in February prices obeyed a classic trend that lasted until the end of the year, remaining at a good level but not rocketing as they did in Western Europe. The annual price was finally stable at USD 13.3 per box.

Something to think about

But is everything that I have just described related to or independent of the deregulation of the banana market that was set in motion in 2006 and that has accelerated since the end of 2009? In a previous issue of FruiTrop (183, November 2010, pages 15 to 21), we discussed at length the idea that the European market is becoming increasingly vulnerable and henceforth only weather damage can serve the regulation function that used to be partly served by the common organisation of the banana market. The year 2010 is a striking example of this new situation, which has the advantage of simplifying forecasters’ work. The European banana market is now directly indexed to water surface temperatures off Ecuador (the El Niño and La Niña phenomena). Liberalisation is thus operating. Reality now closely matches the forecasts of the gloom-mongers who were against deregulation. But at what price? It seems that the United States is refusing to follow this path. The country of ‘Deregulation? After you.’ can be proud of its excellent banana balance. All the signals are green. Consumption is at a record level. It took only ten months of supply in 2010 to match the total for the whole of 2009! The target is annual growth of 20%. As regards prices, the market has held at above USD 15.5 per box for three years (see box). This performance amazes many.

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USA 1, EU 0

In 2010, the average price of banana (not volume-weighted) was USD 15.7 per box, that is to say EUR 11.8 (using an exchange rate of EUR 1 to USD 1.33). Allowing for the customs dues of EUR 2.7 per box to be paid for the same produce landed in Europe (not counting differences in logistics costs), this price level (11.8 + 2.7 = EUR 14.5 per box) means that the US market is much more profitable than Europe. Indeed, the monthly Aldi reference price was EUR 13.5 per box in 2010. The USA clearly has the edge. Estimated value-added is around one euro per box! But what is the mysterious reason that causes the American market to hold its ground while the European market plummets? It is very simple. The American market is not organised by means of regulations but by traders who release produce on the market. Without even mentioning agreement, use of annual contracts is widespread in the US. This gives the market rigidity that benefits established suppliers and gives them more protection against external events, and especially fluctuations in supply. In 2008, all American operators succeeded in imposing a substantial rise in green prices on retail distributors, arguing that this was necessary because intermediate costs had rocketed. In March 2008, oil was more than USD 100 per barrel (USD 144 in July 2008) and the international price of paper pulp (NBSK) reached USD 900 per tonne. The 2008 economic downturn followed, easing pressure on the prices of inputs and sea freight. But this did not lead to a fall in prices in the US. Quite the opposite. They even reached an average of USD 16 in 2009, an all-time record. It will be very instructive to see whether the market maintains its original position in 2011. There is no reason for a change as the same causes have the same effects and the prices of intermediate costs started to increase again in 2010 and this should logically lead to maintaining the same price policies.

In terms of dynamics, the American green price followed the pattern of the European green price very closely but at a higher level. Prices were comparatively poor at the beginning of the year and then rose strongly in the spring, nudging USD 19 per box in July. The East Coast stood out throughout the year. The Gulf market was particularly sluggish at the beginning of the year until the trend changed.

The retail price remained fairly high in 2010 at USD 1.3 per kg. The index fell by 5% after two years at a very high USD 1.35 per kg. There is no seasonal variation. Prices fluctuated between USD 1.26 and 1.28 per kg throughout the year.
### France

**Banana - France - Monthly retail price**

<table>
<thead>
<tr>
<th>Year</th>
<th>J</th>
<th>F</th>
<th>M</th>
<th>A</th>
<th>M</th>
<th>J</th>
<th>A</th>
<th>S</th>
<th>O</th>
<th>N</th>
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</thead>
<tbody>
<tr>
<td>2010</td>
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<td>1.47</td>
<td>1.50</td>
<td>1.40</td>
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<td>1.44</td>
<td>1.47</td>
<td>1.50</td>
<td>1.40</td>
</tr>
<tr>
<td>2009</td>
<td>1.32</td>
<td>1.44</td>
<td>1.50</td>
<td>1.40</td>
<td>1.38</td>
<td>1.46</td>
<td>1.46</td>
<td>1.44</td>
<td>1.47</td>
<td>1.50</td>
<td>1.40</td>
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Sources: SNM, Cirad-FruiTrop

**Banana - France - Annual retail price**

<table>
<thead>
<tr>
<th>Year</th>
<th>2002</th>
<th>2004</th>
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<th>2010</th>
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<td>1.38</td>
<td>1.47</td>
<td>1.41</td>
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Sources: SNM, Cirad-FruiTrop

**Banana - France - Special offer retail price**

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<th>Year</th>
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<td>1.25</td>
<td>1.28</td>
<td>1.31</td>
<td>1.26</td>
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</table>

Sources: SNM, Cirad-FruiTrop

**Banana - France - Estimated monthly import price**

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<tr>
<th>Year</th>
<th>J</th>
<th>F</th>
<th>M</th>
<th>A</th>
<th>M</th>
<th>J</th>
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<tbody>
<tr>
<td>2010</td>
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<td>0.66</td>
<td>0.72</td>
<td>0.63</td>
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<td>0.67</td>
<td>0.67</td>
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<td>2009</td>
<td>0.65</td>
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Source: Cirad-FruiTrop

**Banana - France - Annual import price**

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Source: Cirad-FruiTrop

### United Kingdom

**Loose banana - UK - Monthly retail price**

<table>
<thead>
<tr>
<th>Year</th>
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<th>F</th>
<th>M</th>
<th>A</th>
<th>M</th>
<th>J</th>
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<td>1.00</td>
<td>1.00</td>
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<td>0.77</td>
<td>0.66</td>
<td>0.69</td>
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<tr>
<td>2009</td>
<td>0.88</td>
<td>0.92</td>
<td>1.01</td>
<td>1.00</td>
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<td>0.82</td>
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<td>0.69</td>
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Source: TWMC

**Loose banana - UK - Annual retail price**

<table>
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<tr>
<th>Year</th>
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<th>2004</th>
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<th>2010</th>
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<td>0.80</td>
<td>0.83</td>
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Source: TWMC

**Prepacked banana - UK - Monthly retail price**

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Source: TWMC

**Prepacked banana - UK - Annual retail price**

<table>
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<th>Year</th>
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<th>2005</th>
<th>2007</th>
<th>2009</th>
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<tbody>
<tr>
<td>Price</td>
<td>1.23</td>
<td>1.12</td>
<td>1.10</td>
<td>1.13</td>
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Source: TWMC

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The market for southern hemisphere apples and pears is gradually waking up. The timid recovery observed in 2010, mainly in emerging markets (Asia, Russia and the Middle East), should spread to the traditional markets (Europe and the United States), especially as these have a deficit resulting from decreased orchard area and poor weather in spring 2010.
Chile still the leader in apples

Apple growing was dynamic in most southern hemisphere countries until five years ago. Production increased from less than 1 million tonnes in 1970 to nearly 5 million tonnes in 2010. However, the curve has since flattened with only 3% growth from 2005 to 2010 as the economic downturn halted changes (except for reconversion) in the planted area. Production increased markedly in Argentina in the early 1970s, then in South Africa in 1975 and finally in Chile, Brazil and then New Zealand in the early 1980s. However, the New Zealand orchard area decreased in the early 2000s because of the rise of the South American countries, that were more competitive, and the development of the kiwi crop. Production was then only 450 000 t. In contrast, volumes have been maintained in Argentina and Brazil with potential of some 1.2 million tonnes. It is still increasing in Chile and South Africa where the increase in area is moderate but where yields are growing (planting density, young orchards). Chile is by far the leading producer country with 1.6 million tonnes and South African coproduction has now reached 800 000 t.

Argentina dominates pear production

Pear production has also increased very strongly in the southern hemisphere in the last three decades. Indeed, volumes tripled between 1970 et 2010, increasing from a little less than 400 000 t to 1.2 million tonnes in the four main producer countries in the zone (Argentina, South Africa, Chile and New Zealand), that is to say a growth rate of 20 to 40% per five-year period. However, development stopped in the early 2000s but seems to be resuming, at least in Argentina (770 000 t in 2010 in comparison with 500 000 t from 1995 to 2005). The increase was more gradual in South Africa (330 000 t in 2010 against 200 000 to 300 000 t from 1995 to 2000) and production now seems to be stable in Chile (200 000 t) and New Zealand (11 000 t) after decreasing from 1995 to 2000.
Although apple production has stabilised or is still increasing slightly, exports from the main southern hemisphere countries had increased until 2004 and have since been very uncertain. Because of the economic downturn, this has resulted in recent years in a decrease in volume (from 1.7 million tonnes in 2007 to 1.6 million tonnes in 2010) and above all in value and returns for producers. Indeed, it is necessary to take into account the unfavourable exchange rate (strong local currency and falling dollar), increased production costs (energy, fertiliser, spraying, plant material) and also the economic evolution of the southern hemisphere countries where labour costs increase continuously.

However, the decrease has been tempered by the steady growth of customer portfolios. Chile is the best example as it has a broad spread of export destinations (about a hundred countries and numerous bilateral agreements) and has succeeded in maintaining export growth, except in 2009. Thus, even if shipments to the European market have decreased (200 000 t in the last two years against 220 000 to 225 000 t in preceding years), those to Russia have been at a good level (37 900 t) and those to the United States very good (122 322 t). Presence of the other sources is minor in the USA (Argentina 5 600 t, Brazil 910 t, South Africa 26 t). Shipments have also returned to a good level to destinations in the Middle East (58 500 t to Saudi Arabia and 28 760 t to the United Arab Emirates), Asia (51 300 t to Taiwan) and Latin American countries (58 000 t to Colombia and 40 500 t to Ecuador).

Likewise, while pear production has continued to increase, the development of exports has been more uncertain, with a strong decrease in 2010. This is the result in particular of the decrease in shipments of Argentinian pears to Russia (phytosanitary constraints and the economic downturn) from 116 000 t in 2008 to 95 000 t in 2010 and to Brazil (94 000 t in 2010 in comparison with 132 000 t in 2009). However, the decrease in exports to the European market, especially in 2010 (258 000 t in 2010, that is to say 25% less than in 2009) from all production sources results mainly from the development of domestic production in Italy and Northern Europe; this should intensify in the years to come. Shipments to the US market from all sources have also decreased (less than 50 000 t in 2010 in comparison with 63 000 t in 2009). Only South Africa, with a very broad range of pears, has continued to develop. Except in Europe (106 000 t, that is to say 13% less than in 2009), it has displayed significant growth in most markets: 16 900 t to Russia (+11%), 8 400 t to UAE (+57%), 6 700 t to Malaysia (+44%) and 3 800 t to the North American market (+14%).

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After a laborious, encumbered 2009 as a result of the economic downturn and the slowing of demand in Europe, in the United States and in emerging countries, trade recovered in 2010 in particular with Asia and Russia, while the traditional markets were slow in waking up. Combined with a production deficit in some source countries such as New Zealand and Argentina, the situation finally led to a decrease in shipments to the European Union.

**Good potential in apples, small deficit in pears**

Apple production was moderate overall in the southern hemisphere in 2010 as a result of the stabilisation of the orchard area, but the main producer countries nonetheless harvested 4.89 million tonnes, a 2% increase in comparison with 2009. Indeed, production was very good in Brazil, Chile and South Africa but markedly short in Argentina and to a lesser extent in New Zealand.

In contrast, the pear market was lighter with a harvest of only 1.29 million tonnes in the main southern hemisphere producer countries. This is an 11% decrease in comparison with the large 2009 harvest but in line with performance from 2006 to 2008 (2% greater than the average of the last 5 years).

**The apple season started late**

Apple shipments from the main southern hemisphere supplier countries decreased slightly in 2010 with some 1.45 to 1.60 mil-
lion tonnes depending on the source. This is 1 to 2% less than in 2009 and can be compared with totals of more than 1.75 million tonnes in 2007 and 2008. All supply sources lost ground, except for Chile. The export season for southern hemisphere apples started particularly late, especially for the European market, as stocks of locally grown apples were still large. A total 2.83 million tonnes had been landed in Europe at the end of January (+ 3% on 2009) while US stocks were 10% smaller than those of the previous year. Requests for EU certificates were 69% down on those of 2009 in February and still 34% down in March. This lateness nonetheless enhanced the release of local apples. Shipments therefore speeded up from April onwards and the market then benefited from the very late start of summer fruits (running three weeks behind). Nevertheless, it was not possible to fully make up for the late start of the season. EU import volumes finally lost 8% in comparison with 2009, reaching only 574 000 t. This is 21% less than the 5-year average, with a volume equivalent to that of the early 2000s whereas the total had oscillated around 700 000 to 800 000 t until 2008. In fact, a proportion of the produce was shipped to other destinations like Russia and, above all, Asia.

**Pear sales very slow**

The beginning of the season was even slower for pears because of very large European stocks totalling 488 000 t in February. This is 65% more than in 2009 and 27% more than in 2008. The very first batches of ‘Williams’/‘Bon Chrétien’ from South Africa arrived only at the end of January (Week 4) and the first ‘Williams’ from Argentina reached destination at the end of February. However, the market continued to be very sluggish until mid-March, especially as more of the fruits were too small. The first ‘Comice’ from South Africa appeared in mid-March but sales were very laborious for all operators. The season for Northern European ‘Comice’ ended very late and the produce was concentrated on the French market as Italian operators, holding substantial stocks of ‘Abate Fetel’, had not purchased much ‘Comice’ from overseas in 2010. The season therefore continued until early July with very low prices, especially for small fruits. The market for ‘Williams’ from Argentina settled down in May when the number of operators decreased but sales continued until the end of June. The situation was the same for sales of ‘Beurré Hardy’. The ‘Packhams’ market was also fairly chaotic with a difficult start to releases in May and then accelerating sales in June.

Pear exports were therefore reduced considerably, reaching only about 672 000 t according to USDA. This was 13% less than in 2009. A marked decrease in shipments from Argentina (- 19%) was noted but decreases were observed from all sources with the exception of South Africa whose export potential was normal. The decrease was marked above all in shipments to traditional destinations like Europe (225 000 t, 30% less than in 2009) and even the North American markets (49 800 t, - 21%)
GROUPE AZ FRANCE
La filière qualité sur mesure

Stand GF Group
Hall 2.2-Stand B-09

FRUITLOGISTICA
BERLIN
Du 9 au 11 Février
2011
Growing deficit of southern hemisphere apples in Northern Europe

With the smallest tonnage since 2007, the European apple harvest fell to 9.36 million tonnes, a further decrease of 15% in comparison with 2009. The decrease results from structural factors following the financial difficulties experienced by producers after two very bad seasons (with a decrease in orchard area, especially in Southern Europe) aggravated by conjunctural factors (bad weather conditions before and after flowering in Northern Europe and above all in Eastern Europe).

Thus production has been slightly lower in the two main supplier countries in Southern Europe: Italy (2.07 million tonnes, 7% down on 2009-10) and France (1.54 million tonnes, 7% down) as a result of decreases in orchard areas. However, in Spain (505 000 t, up by 7%), the decrease is masked by last year’s substantial deficit. Production there has probably decreased by 5% in comparison with the average for the last 3 years.

Production in Northern Europe was seriously affected by bad weather in the spring. In comparison with 2009-10, crops decreased by 17% in Germany (886 000 t), 15% in the Netherlands (340 000 t), 27% in Belgium (251 000 t) and 3% in the United Kingdom (205 000 t). The deficit is large above all in Eastern Europe with the Polish crop 33% down in comparison with 2009 (1.7 million tonnes, 25% less than the 3-year average) but after two substantial years. At 1.86 million tonnes, the Russian harvest was 17% down on that of 2009, a generous year, but only 9% down on the 3-year average. The figure for Belarus is 40% down on 2009, with a harvest totalling 150 000 t. However, the harvest was very good in Ukraine (856 000 t), gaining 5% on 2009 and 15% on the 3-year average. The market was also lighter internationally with only small pressure from China (30 million tonnes), with the figure being 9% down on the large 2009 harvest but at a good level nonetheless (+ 1% on the 3-year average) and a reasonably proportioned US
harvest (4.3 million tonnes, that is to say 2% down on 2009 and 2% up on the 3-year average).

The harvest shortfall was less marked for early varieties such as 'Gala' (1 million tonnes, 7% down on 2009), 'Granny Smith' (316,000 t, an 8% decrease). However, the fall was very marked for most of the other later bicolour varieties and especially those grown in Northern Europe such as 'Jonagold' (515,000 t, a 30% decrease) and 'Jonagored' (157,000 t, a 23% decrease), although this followed a large harvest, and also for 'Idared' (597,000 t, a 23% decrease), 'Ella' (a 24% decrease) and even 'Braeburn' (291,000 t, a 14% decrease). In addition, production of 'Golden Delicious' fell further to 2.4 million tonnes, 8% down on 2009 and 4% smaller than the 3-year average.

European pear shortage aggravated by losses in Italy

This year's European pear production is very small at 2.16 million tonnes, 18% down on 2009 and 12% down on the 3-year average, because of the decrease in orchard area (especially in Southern Europe) and bad weather. In contrast with apple, the deficit is also very marked in Southern Europe and particularly in Italy as the main autumn/winter pear production zone (Emilia-Romagna) was seriously affected by hail in the spring. As a result, the Italian harvest did not exceed 655,000 t (24% down on 2009 and 23% down on the 3-year average), making it by far the smallest harvest of the decade as the figure was 966,000 t in 2006 and 759,000 t in 2008. The decrease in Portugal was smaller than initially forecast at 13% less than in 2009 according to ANP while the potential gained ground in Spain (+ 3%) after last year's deficit. However, the decrease in France is considerable with a harvest of 174,000 t (at 14% less than in 2009 it is the second smallest of the decade) because of the decrease in orchard area.

The deficit is also large in Northern Europe as a result of bad weather and in spite of an increase in the planted area. Harvest tonnages were 228,000 t in Belgium (- 26%) and 267,000 t in the Netherlands (- 11%) but 2009 production was large in both countries. The 'Abate Fetel' crop was small at 199,000 t (- 35%) as was that of 'Comice' at 91,000 t (- 22%). 'Rocha' production was down by some 13%. The deficit should be less marked for winter pears although the 'Conference' harvest is down by 15% to 766,000 t after the large 2009 harvest in Northern Europe and allowing for the return of Spanish production (total only 2% smaller than the 3-year average).

Very good start to the season for both apples and pears

The 2010-11 season has started very well, given the small potential expected (no storage problems), especially as remaining stocks of southern hemisphere apples were small, even if the last shipments (late varieties, 'Pink Lady') were slightly larger than those of last year (+ 8 to + 11% in June and July). Trade in early apples was therefore particularly fluid in Southern Europe in spite of a shortage of larger fruits (few calibre 75 mm or more), with prices nearly 40%
higher than those of 2009-10 (75-80 mm)—for example for ‘Gala’ right at the beginning of the season.

However the market then became a little sluggish as it always does when the harvest has started in all production zones. But the very rapid setting up of exports to Northern European countries and Russia (‘Granny Smith’ and bicoulour fruits as well) together with overseas exports (with the euro losing ground) made it possible to limit the fall in prices in all European countries. Furthermore, the excellent trend in the industrial market—especially juice—also helped to keep trade busy. In fact prices on this market continued to rise in all the European markets, including Poland, reaching nearly EUR 230 per tonne in France at the end of 2010.

The pear season also got off to a good start. The ‘Guyot’ season went particularly well but that of ‘Williams’ was a little disturbed in September by the very late end of the summer fruit season. However, the autumn pear season started under good conditions. The small crop in the Benelux countries and Italy limited the pressure of supply at the beginning of the season and the volume held in normal cold storage. Producers were thus soon able to master their stocks and sell their produce. Prices soon rose, in particular for ‘Abate’ from Italy and ‘Conference’ from the Benelux countries and this also enhanced the sale of other pears such as ‘Rocha’. Only ‘Comice’ sales were lacklustre partly because of uneven quality (colour, skin defects, woodiness, shelf life, etc.).

A small market in 2011, with the possible exception of a few varieties

The second part of the season will be very light as regards apples as European stocks are small at 3.73 million tonnes (12% less than in 2009), especially in Northern Europe. Indeed, on 1 December 2010 stocks were 25% down in the Netherlands (202 000 t) and Germany (312 000 t), the lowest level of the last five years, and 28% down in Belgium (122 500 t) with a shortfall in
'Elstar' (135 737 t in Europe as a whole, that is to say -38%) and 'Jonagold'-'Jonagored' (352 180 t -32%).

Substantial volumes of 'Gala' (349 868 t, +3%) remained in Europe in early December and this should decrease rapidly if extra-European demand remains as strong as it was at the end of the year. Prices had already increased noticeably at the end of November for the largest fruits (EUR 0.95-1.10 per kg for 75-80 mm single layer tray ex-store in France) and should continue to rise at the beginning of this year, even if the shortage of large fruits is a little less marked in the northern production zones (Val de Loire, Northern Europe). The prices of smaller fruits also seemed to be firming at the end of the year.

In contrast, stocks of 'Braeburn' were distinctly smaller at the end of last year (181 200 t on 1 December in Europe as a whole, that is to say -10%), with volumes decreasing in most countries.

Sales of club varieties have been good since the beginning of the season. French stocks of 'Cripps Pink' were nevertheless 15% higher than in 2009 on 1 December, given the potential.

Main export sales of 'Granny Smith' have been steady, with end of years stocks similar to those of 2009 at 161 000 t on 1 December (-3% in comparison with 2009).

However, some varieties such as 'Golden Delicious' do not benefit fully from this good market trend as production was hit hard both in France and in the other European countries by russetting and also poor keeping quality caused by a high sugar content after hot summer weather. The market was therefore particularly sluggish at the end of the year, especially as certain outlets such as Algeria or Spain were cruelly lacking. European stocks on 1 December were nonetheless 4% smaller than in 2009, with decreases in most countries except for Spain and Austria.

Likewise, the European market should be fairly light in pear even though the high prices of certain varieties such as 'Abate' and 'Conference' to a lesser extent have slowed releases considerably. European stocks totalled only 683 000 t on 1 December (-13% in comparison with 2009).

However, Italian stocks were still 27% lower on that date as although release of 'Abate' were very slow (-38%), sales switched to other varieties and especially 'Conference' (+25%) which displayed a marked deficit in the second part of the season (44 500 t of 'Conference' on 1 December in Italy, that is to say -30% already).

Stocks were fairly substantial in Northern Europe and especially in Belgium were 144 300 t still remained in 1 December (+1%), with 138 000 t of this being 'Conference' (+4%, making it the largest stock of the last five years). However, stocks were down by 12% in the Netherlands where 150 000 t of pears nevertheless remained in stock, the second highest level of the decade.

Portuguese stocks are not decreasing very fast. The total was still 122 100 t on 1 December with sales distinctly smaller in November than they had been in 2009. Prices are still fairly firm at shipment from Portugal as there are numerous outlets (South Africa and Europe) and may well increase from the beginning of 2011.

Likewise, Spanish stocks are large given the large harvest after the 2009 deficit. At 123 036 t on 1 December (+40%), including 81 000 t of Conference (+59%), stocks were the largest for the last five years.

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After two years of crisis and very slow sales, the market could become tense in 2011 with the economic recovery and requirements on certain markets following the production shortage in Europe, Russia, Asia and the United States and limited southern hemisphere production resulting from the stagnation of production areas in recent years.

Chile still on course

The Chilean apple and pear sector should conserve in 2011 the progress made in previous years or even intensify its expansion policy. It succeeded in staying on course in 2010 in spite of weather problems (the El Niño phenomenon) and the earthquake in February. Production thus reached 1.36 million tonnes of apple (+7% on 2009) according to USDA while exports of this fruit approached 800 000 t according to ASOEX (+15%) in spite of a very late start to the season as a result of economic difficulties and late stock disposal, especially in Europe. The pear harvest was a little short at 262 000 t (-6% according to USDA), while exports decreased by 12% according to ASOEX (111 700 t).

The Chilean strategy should not be very different in 2011. Potential in apple is currently forecast to be 1.3 million tonnes (USDA estimate), only 4% less than the large 2009 harvest following the stagnation of orchard area (37 300 ha) and frosts that severely affected certain production zones. The pear harvest could be 4% down (251 000 t). Promotion operations for Chilean fruits run by the CFFA will mainly target emerging countries in Central and Eastern Europe (Poland, Ukraine, Russia and Turkey) with the aim of developing both the range and consumption. Like last year, those aimed at Western Europe—essentially Germany, the United Kingdom, France, Italy and Spain—where price is still the driving force in trade negotiations, will be focused on major clients with the objective of...
making Chile a special partner for fresh fruits and to highlight quality aspects, especially from the environmental point of view (cultural practices, carbon footprint, etc.).

Brazil going for nearby markets

Brazilian apple production was fairly good last year at 1.257 million tonnes (+ 3% on 2009), even if part of the crop was sold for processing as hot weather in the spring and at the beginning of the summer affected fruit quality and especially size. However, exports were probably close to the 2009 figure (98 000 t) as Brazil benefited from smaller exports from the other southern hemisphere sources to its main market, Europe, to which it shipped over 95 000 t (+ 22%). Nevertheless, operators are focusing increasingly on other outlets such as nearby markets and the domestic market where the financial risks are smaller and where there is scope for the growth of consumption. Thus, the shipment pattern could benefit these destinations even more markedly this year, given the expected decrease in potential (5% less than in 2010). The El Niño phenomenon affected production lastingly, with rainfall causing serious flooding in some places—as in the Santa Catarina region—that even damaged infrastructure. In contrast, fruit size should be better this year.

Government help for the Argentinian sector

Argentinian presence on export markets should be stronger in 2011 after last year's small apple and pear harvest resulting from bad weather (late frosts and gales) that affected flowering: 830 000 t of apples (11% down on 2009), the smallest harvest of the decade, and 650 000 t of pears (- 14%) according to USDA. Apple exports are reported to have decreased by 13% (180 000 t) and pear shipments by 20%, with shipment decreases of 34% to the EU, 27% to Brazil, 31% to the USA and 4% to Russia. As the Argentinian apple and pear sector has been severely hit by the economic downturn, the number of growers should decrease further. Indeed, returns have been very seriously hit in recent years by economic conditions (unfavourable exchange rate, strikes), especially as labour and power costs have risen by 25% since 2009. Planted areas are therefore tending to shrink, with small growers abandoning in particular. As a result, the government has awarded aid worth USD 5.5 million for
farms of less than 20 ha. In the main production zones, a quarter of farms are smaller than 10 ha. However, exports should recover after last year's decrease, supported by the government that in June 2010 set up the 'National Fruit Table' to improve fruit quality and the competitiveness of the sector. Today, production potential is estimated to be 990 000 t of apples (9% more than in 2009) and 790 000 t of pears (+ 22%).

**South Africa turning to the East**

The South African apple and pear sector was also much affected by the effects of the economic downturn, with the exchange rate (strong rand) continuing to be unfavourable. As a result weak sterling strongly limited exports to the United Kingdom (- 21% in comparison with 2009 at the end of August), the main destination for South African apples. However, apple production has been at an average level at 750 000 t and, in spite of exporters' efforts, shipments were 13% down at 300 000 t as a result of the points mentioned above and the late presence of the European crops. Pear production has been normal at 348 000 t and export volumes have been maintained with 181 000 t shipped, although sales have been very laborious.

Apple exports to Russia have decreased distinctly, totalling 3 000 t in 2010 (- 53% on 2009) and still 14 000 t in 2008. In contrast, shipments to Malaysia continued (30 109 t, + 2%) and also to the United Arab Emirates (14 000 t, + 2%). Potential for 2011 is reported to be normal. Exporters should nonetheless concentrate on the more profitable emerging markets this year and possibly the domestic market, even if Europe remains the main destination in terms of volumes.

**New Zealand takes measures**

2010 was a particularly bad year for New Zealand apple producers. The potential was 6 to 7% smaller than that of 2009 (between 420 000 and 440 000 t depending on the source) because of bad weather and alternate bearing of 'Braeburn'. Sales were also very difficult, especially on the European market as 'Estar' and 'Jonagold'/Jonagored' from Northern Europe were still available very late. Exports therefore dipped by 14% (261 000 t), with a very marked 24% decrease in shipments to the European market (124 000 t, with - 16% 'Gala' and - 27% 'Braeburn') and a 9% decrease in those to the United States. The financial returns were catastrophic, especially for 'Braeburn' which fetched only NZD 9 against around NZD 17 in recent years. In contrast, the potential for pear was less affected (14 100 t) but exports fell by 18% to only 4 700 t and shipments to the European market fell by 20% to 1 600 t.

The sector therefore decided to take new measures for the better management of exports, especially of 'Braeburn'. An agreement was thus made under the direction of Pipfruit New Zealand that will collect information from exporters for the better matching of produce and markets, especially as regards size. The organisation has already received the support of about 95% of exporters and should also manage the quantities sold to the juice industry (large fruits) that form about 25% of total volumes. Exporters will also favour markets that are an alternative to Europe and especially Asia where prices are distinctly more profitable and where exporters are now negotiating fixed prices. However, scope for action is still limited as these markets take above all varieties such as 'Fuji', 'Rose' and 'Beauty'. Exporters are nonetheless counting on the variety 'Envy' for increasing shipments to the zone in the future. In Europe, they should work more with the more profitable British market than with continental countries, especially at sterling has stabilised and the euro is still falling. Production potential in 2011 should be fairly good with, in particular, a positive alternate bearing year for 'Braeburn' with 4.5 million boxes expected in comparison with 3.6 million last year.

Cécilia Céleyrette, Consultant
c.c.celeyrette@infofruit.fr
**Apple — EU-27 imports — Extra-EU main supplier countries excluding Eastern Europe**

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<tbody>
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<td>969,827</td>
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<tr>
<td>Total S. hemisphere</td>
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<td>224,289</td>
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<td>151,852</td>
<td>158,598</td>
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<td>2,136</td>
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<td>1,294</td>
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<tr>
<td>Total N. hemisphere</td>
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<td>43,870</td>
<td>48,412</td>
<td>49,901</td>
<td>60,102</td>
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<td>62,658</td>
<td>50,289</td>
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<td>United States</td>
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<td>33,957</td>
<td>28,769</td>
<td>28,258</td>
<td>37,242</td>
<td>39,857</td>
<td>30,600</td>
<td>30,996</td>
<td>27,313</td>
<td>26,427</td>
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<tr>
<td>Canada</td>
<td>7,540</td>
<td>7,477</td>
<td>6,506</td>
<td>6,209</td>
<td>3,436</td>
<td>5,222</td>
<td>5,558</td>
<td>4,460</td>
<td>2,352</td>
<td>2,532</td>
<td>1,156</td>
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<tr>
<td>Others*</td>
<td>62,428</td>
<td>143,229</td>
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<td>103,350</td>
<td>77,894</td>
<td>2,509</td>
<td>10,768</td>
<td>4,552</td>
<td>131,930</td>
<td>40,039</td>
<td>21,336</td>
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<tr>
<td>Intra-EU</td>
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<td>1,876,630</td>
<td>1,779,872</td>
<td>1,887,024</td>
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<td>2,192,439</td>
<td>2,271,427</td>
<td>2,459,219</td>
<td>2,567,254</td>
<td>2,348,400</td>
<td>2,162,992</td>
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* mainly Eastern Europe until 2004 / Source: Eurostat (code 090810)

---

**Apple — Supply calendar**

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<thead>
<tr>
<th>Year</th>
<th>Total</th>
<th>USA</th>
<th>EU</th>
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<td>2008</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td></td>
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</table>

**Sources:** US and EU customs
Varieties

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

<table>
<thead>
<tr>
<th>Variety</th>
<th>Type</th>
<th>Sugar ° Brix</th>
<th>Acidity g/l malic acid</th>
<th>Texture and flavour</th>
<th>Firmness kg/cm²</th>
</tr>
</thead>
<tbody>
<tr>
<td>Granny Smith and mutants</td>
<td>Green</td>
<td>10-12.5</td>
<td>6.5-8</td>
<td>Firm texture, very crisp and very juicy, acidulous flavour.</td>
<td>6-8</td>
</tr>
<tr>
<td>Golden Delicious and mutants</td>
<td>Yellow</td>
<td>12-15</td>
<td>4-6</td>
<td>Crisp and juicy texture, acidulous, sweet flavour.</td>
<td>5-7</td>
</tr>
<tr>
<td>Braeburn and mutants</td>
<td>Bicolour</td>
<td>11.5-14</td>
<td>5-7</td>
<td>Crisp and very juicy texture, aromatic flavour, good sugar:acid balance.</td>
<td>6.5-8</td>
</tr>
<tr>
<td>Pink Lady® Cripps Pink</td>
<td>Bicolour</td>
<td>13-15</td>
<td>6-7</td>
<td>Crisp texture, firm and juicy, sweet, acidulous and aromatic flavour.</td>
<td>5-6.5</td>
</tr>
<tr>
<td>Gala and mutants</td>
<td>Bicolour</td>
<td>12-14</td>
<td>3-5</td>
<td>Crisp, very juicy, sweet flavour.</td>
<td>5-7</td>
</tr>
<tr>
<td>Red Delicious and mutants</td>
<td>Red</td>
<td>10-13</td>
<td>2-4</td>
<td>Crisp and juicy texture but neutral flavour.</td>
<td>5-6.5</td>
</tr>
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</table>

Source: CTIFL
The characteristics of some varieties

<table>
<thead>
<tr>
<th>Some mutants</th>
<th>Normal cold</th>
<th>Controlled atmosphere</th>
<th>Ultra Low Oxygen (ULO)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Duration (months)</td>
<td>T (°C)</td>
<td>Duration (months)</td>
</tr>
<tr>
<td>Challenger® Dalivair, Early Smith® Jim Brian</td>
<td>5</td>
<td>0-1</td>
<td>6-7</td>
</tr>
<tr>
<td>Golden X 972, Smoothee® CG10 Yellow Delicious, Golden Reinders®, Lysgolden® Goldenir, Belgolden® Goldensheen, Calgolden® Elbee, Pink Gold® Leratess, Rosagold® Quemoni, Bertanne</td>
<td>6</td>
<td>0-1</td>
<td>8</td>
</tr>
<tr>
<td>Hillwell® Hidala, Braesun® Braecest, Jobrun® Aurora, Marin® Eve, Mahanared® Redfield</td>
<td>5</td>
<td>0-1</td>
<td>7</td>
</tr>
<tr>
<td>Royal Gala® Obrogala, Gala Must® Régal Prince, Buckeye Gala</td>
<td>4</td>
<td>0-1</td>
<td>5-6</td>
</tr>
<tr>
<td>Standard types: Topred Delicious, Early Red One® Erovan Types spur: Starkrimson, Redchief® Campsur, Stark Spur Ultra Red®, Flatar, Scarlet Spr® Evasni, Super Chief® Sandige</td>
<td>4-5</td>
<td>0-1</td>
<td>6</td>
</tr>
</tbody>
</table>

Apple — Classification of the main varieties grown by type

<table>
<thead>
<tr>
<th>Green</th>
<th>Granny Smith and mutants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yellow</td>
<td>Golden Delicious and mutants — Golden Extrême® Gradigold — Primgold® Deljéni — Tentation® Delblush — Earlygold® Snygold, Ozark Gold — Newgold® Newaphough</td>
</tr>
<tr>
<td>Bicolour</td>
<td>Akane — Belle de Boskoop and mutants — Braeburn and mutants — Cameo® Caudie — 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</td>
</tr>
<tr>
<td>Red</td>
<td>Delicious Rouges and mutants — Redwinter® Redaphough</td>
</tr>
<tr>
<td>Russet</td>
<td>INRA® Belchard® Chantecler — Reinette du Canada and mutants — Reine des Reinettes and mutants — Reinette Clochard — Reinette de Brive</td>
</tr>
</tbody>
</table>

Source: CTIFL
Agronomy

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

Growing apples

After Le pommier, CTIFL, 2002

Harvesting

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

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

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

Post-harvest

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

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 phytoplasms.

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

The main storage diseases of apple are Penicillium mould, Alternaria rots, spots and scald (pre-ripening and senescence).
## Wholesale market prices in Europe

### December 2010

#### WHOLESALE MARKET PRICES IN EUROPE — DECEMBER 2010

**EUROPEAN UNION — IN EUROS**

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<th>Country</th>
<th>Unit</th>
<th>Price</th>
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<th>Unit</th>
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No. 185 January 2011

51
### EUROPEAN UNION — IN EUROS

| MANGOSTEEN | Air | INDONESIA | kg | | | | Belgium | France | Holland | UK | |
| Sea | THAILAND | kg | | | | | | | | |

| MANIOC | Sea | COSTA RICA | kg | 1.32 | 1.13 | 1.01 |
| | | | | | | | | | | |

| MELON | Air | CHARENTAIS | CASTALOUP | CHARENTAIS | GALIA | HONEY DEW | SEEDLESS WATER | WATERMELON | |
| Sea | SENEGAL | kg | 4.00 | | | | | | |
| | BRAZIL | kg | 1.70 | 1.25 | | | | | |
| | BRAZIL | kg | 1.75 | | | | | | |
| | MOROCCO | kg | 1.35 | | | | | | |
| | BRAZIL | kg | 1.45 | 1.55 | | | | | |
| | ISRAEL | kg | 1.25 | | | | | | |
| | BRAZIL | kg | | | | | | | 1.00 |
| | COSTA RICA | kg | | | | | | | 0.86 |
| | BRAZIL | kg | | | | | | | 0.96 |
| | BRAZIL | kg | | | | | | | 0.80 |

| PAPAYA | Air | FORMOSA | NOT DETERMINED | |
| Sea | BRAZIL | kg | 3.28 | | |
| | BRAZIL | kg | 3.60 | 3.38 | | |
| | BRAZIL | kg | 1.88 | | | | |
| | ECUADOR | kg | 2.06 | 2.02 | | | | |
| | MALAYSIA | kg | | | | | | | 2.36 |

| PASSION FRUIT | Air | NOT DETERMINED | PURPLE | |
| | COLOMBIA | kg | 6.75 | 5.50 | |
| | KENYA | kg | 4.65 | 4.50 | 3.85 | |
| | REUNION | kg | 14.00 | | | |
| | SOUTH AFRICA | kg | 5.00 | | | |
| | ZIMBABWE | kg | 4.65 | 6.20 | 4.68 | |
| | COLOMBIA | kg | 8.00 | 8.03 | | |

| PERSIMMON | Sea | ISRAEL | kg | 1.85 | 1.33 |

| PHYSALIS | Air | PREPACKED | |
| Sea | COLOMBIA | kg | 9.50 | 7.91 | |
| | COLOMBIA | kg | 5.42 | 5.63 | | |

| PINEAPPLE | Air | SMOOTH CAYENNE | VICTORIA | |
| Sea | MD-2 | GHANA | kg | 2.05 | | |
| | MAURITIUS | Box | 11.00 | 12.50 | | |
| | MAURITIUS | kg | 3.65 | | | |
| | REUNION | kg | 3.70 | | | |
| | SOUTH AFRICA | Box | 11.00 | 10.75 | | |
| | COSTA RICA | Box | 8.87 | 9.25 | 8.68 | |
| | COSTA RICA | kg | 0.95 | | | |
| | ECUADOR | Box | | | | | 6.20 |

| PITAHAYA | Air | RED | YELLOW | |
| Sea | VIET NAM | kg | 5.73 | 6.38 | |
| | COLOMBIA | kg | 9.20 | 9.09 | | |
| | ECUADOR | kg | | 2.67 | | |
| | VIET NAM | kg | | | | |

| PLANTAIN | Sea | COLOMBIA | kg | 0.97 | 0.97 | |
| | | ECUADOR | kg | 0.93 | | |

| RAMBUTAN | Air | THAILAND | kg | 7.38 | | |
| | VIET NAM | kg | 6.75 | 7.38 | | |

| SWEET POTATO | Sea | EGYPT | kg | 0.90 | 0.84 | |
| | HONDURAS | kg | 1.50 | | | |
| | ISRAEL | kg | 1.72 | 1.47 | | |

| TAMARILLO | Air | COLOMBIA | kg | 6.32 | 5.90 | |
| | ECUADOR | kg | 6.32 | | | |

| YAM | Air | BRAZIL | kg | 2.65 | | |
| Sea | COTE D'IVOIRE | kg | 1.00 | | | |
| | GHANA | kg | 1.25 | 1.15 | | |

Note: according to grade

These prices are based on monthly information from the Market News Service, International Trade Centre UNCTAD/WTO (ITC), Geneva. MNS - International Trade Centre, UNCTAD/WTO (ITC), Palais des Nations, 1211 Geneva 10, Switzerland

T. 41 (22) 730 01 11 / F. 41 (22) 730 09 06
OPPORTUNITY TO ACQUIRE FARMLAND WITH WATER RIGHTS IN PERU

38,000 hectares of premium undeveloped fertile agricultural land will be sold in lots of 250, 500 and 1,000 hectares with water rights at a public auction. Successful bidders will acquire the land with irrigation infrastructure that allows pressurized water. Lots will have access to public road networks, ports and to the national electricity grid.

OLMOS IRRIGATION PROJECT

COUNTER-SEASON CROPS TO DIVERSIFY OFFER IN US, EUROPE AND ASIA

EXTENSIVE SEAMLESS LOTS OF UNDEVELOPED LAND

ATTRACTION CLIMATE AND FARMLAND FOR A GREAT VARIETY OF CROPS

ATTRACTION PLATFORM FOR FOREIGN INVESTMENTS WITH A SOLID LEGAL FRAMEWORK

Auction website: WWW.SUBASTAOLMOS.COM
www.h2olmos.com
contacto@h2olmos.com
Growing and delivering fresh produce