Easy peelers

All well... for the moment

Unsurprisingly given the overall expansion in surface areas, the Southern Hemisphere easy peelers supply will continue to expand in 2017. Nonetheless, the expected increase in volumes is relatively moderate, and within the reach of the very open world market, especially the European and the US markets. Conversely, the forthcoming campaigns are set to be more heavily supplied.

All the supplier countries, except for Argentina, have registered rising or at least stable export potentials. Volumes from South Africa, the origin which controls more than one third of the world market, are reportedly up by 8 % to reach the 200 000-t mark for the first time. This increase should of course be credited primarily to the late varieties, whose export potential has doubled in four years. Peru, which in just a few years has become the world number two exporter, also has a rising potential (+ 8 %). Chile is not to be outdone, with its volumes available for the world market exceeding 100 000 t for the first time, and practically doubling in the space of four years. Australia and Uruguay, more modest suppliers with exports of around 40 000 to 50 000 t, have registered stable potentials. Only Argentina, which was still head-and-head with South Africa at the beginning of the decade among the world's top exporters, will continue its plunge into the depths for both cyclical (weather) and structural reasons.

Meanwhile, the context seems more promising. As the bulk of the increase in the counter-season supply is in the late slot, interference with Californian or Mediterranean production remains limited. However, the boom in the late easy peelers cultivation area is just as spectacular in the Mediterranean (see **FruiTrop** 246).

Easy peelers – European Union – Imports from Southern Hemisphere

in tonnes	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
South Africa	53 378	52 683	54 790	68 412	70 389	65 261	65 100	57 755	70 030	80 939	85 306	94 938	115 396
Peru	16 611	24 924	25 728	18 469	30 981	23 414	33 200	41 925	48 536	44 139	48 733	47 125	47 840
Uruguay	23 548	33 519	36 336	34 359	31 046	33 948	37 200	24 160	19 431	15 421	17 028	10 061	5 954
Argentina	33 023	26 403	39 271	33 022	36 243	47 020	39 800	32 130	24 025	15 818	11 998	4 068	3 915
Chile	10 925	6 770	7 618	6 950	4 886	2 249	1 400	1 560	1 314	1 012	1 481	3 318	2 869
Australia	756	456	710	652	926	2 214	500	220	463	1 903	665	1 918	821
Brazil	2 584	3 288	2 059	93	441	378	200	102	310	112	336	269	-
Total	**142 647**	**148 776**	**167 143**	**162 971**	**175 929**	**175 157**	**177 400**	**157 853**	**164 109**	**159 344**	**165 547**	**161 696**	**176 795**

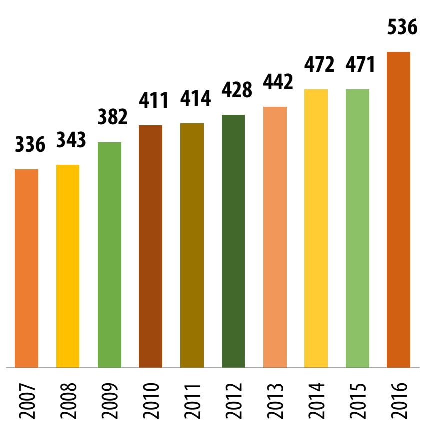
Source: Eurostat

Easy peelers – Southern Hemisphere – Export forecast

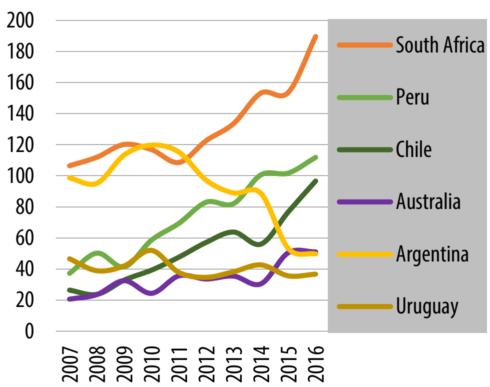
in tonnes	2017	compared to	
		2016	2013-2016 average
South Africa	200 000	+ 5 %	+ 27 %
Argentina	33 000	- 34 %	- 53 %
Peru	120 000	+ 7 %	+ 21 %
Uruguay	36 000	- 2 %	- 6 %
Australia	50 000	- 2 %	+ 19 %
Chile	110 000	+ 14 %	+ 50 %
World	**549 000**	**+ 3 %**	**+ 14 %**

Professional sources, Shaffe, CGA

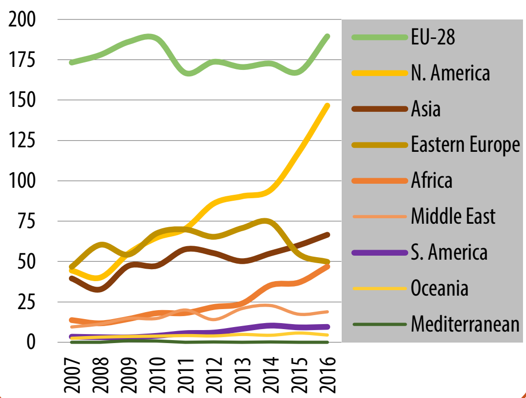
Easy peelers - Southern Hemisphere
Exports (in 000 tonnes / source: Customs)



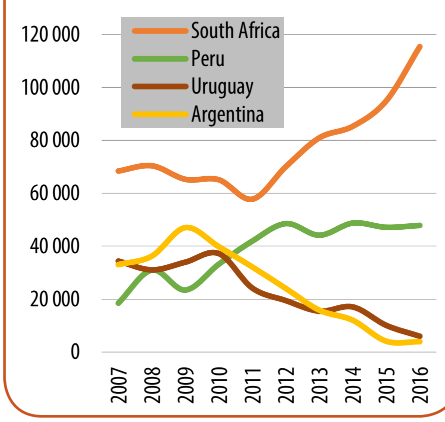
Easy peelers - Southern Hemisphere
Exports by supplier country
(in 000 tonnes / source: Customs)

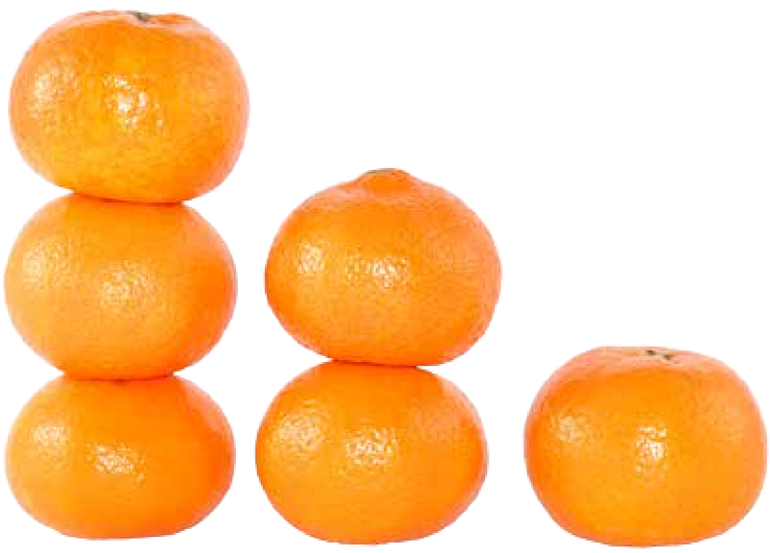


Easy peelers - Southern Hemisphere
Exports by destination
(in 000 tonnes / source: Customs)



Easy peelers - EU-28 - Imports
from Southern Hemisphere
(in tonnes / source: Eurostat)





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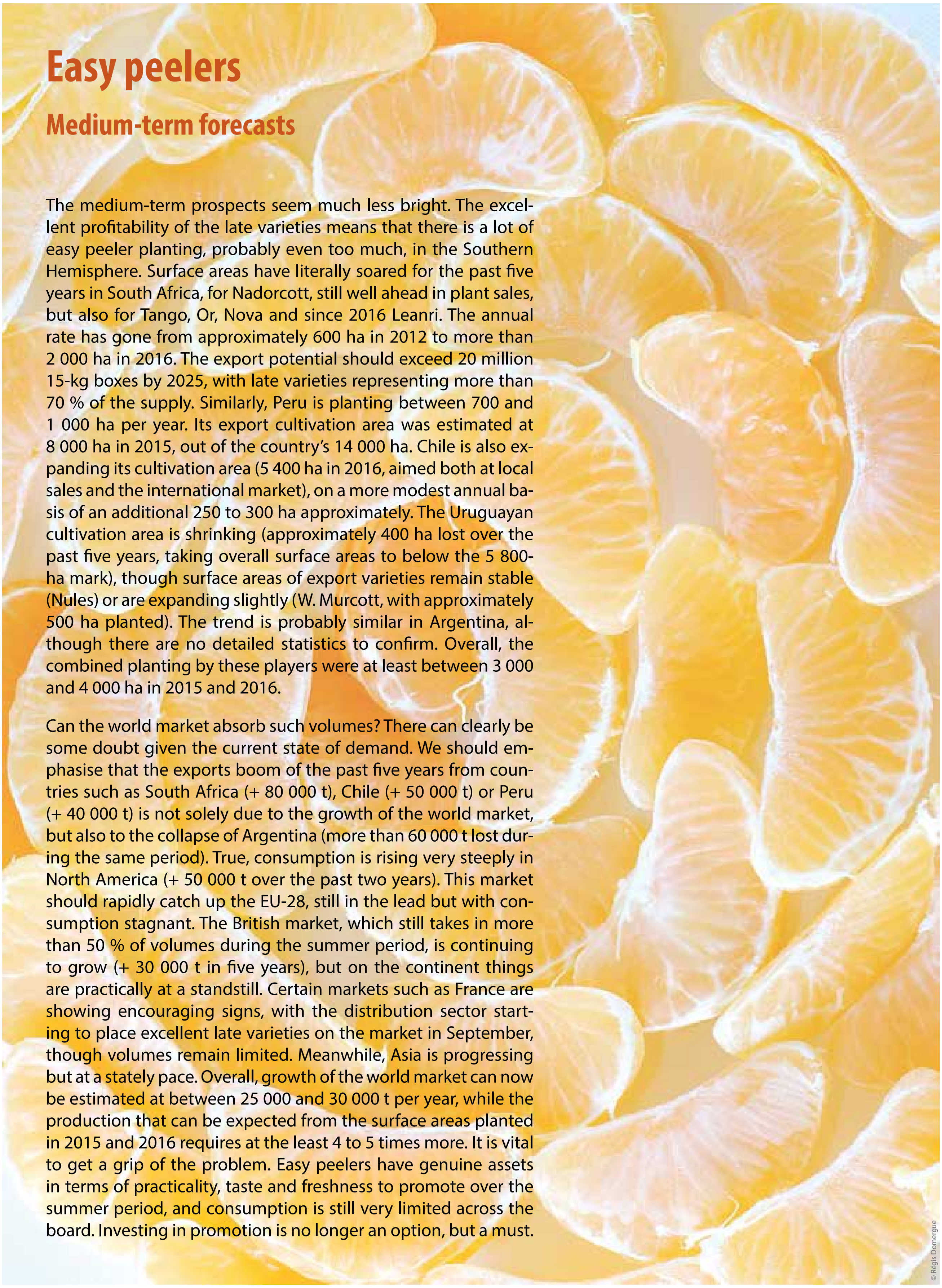

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Medium-term forecasts

The medium-term prospects seem much less bright. The excellent profitability of the late varieties means that there is a lot of easy peeler planting, probably even too much, in the Southern Hemisphere. Surface areas have literally soared for the past five years in South Africa, for Nadorcott, still well ahead in plant sales, but also for Tango, Or, Nova and since 2016 Leanri. The annual rate has gone from approximately 600 ha in 2012 to more than 2 000 ha in 2016. The export potential should exceed 20 million 15-kg boxes by 2025, with late varieties representing more than 70 % of the supply. Similarly, Peru is planting between 700 and 1 000 ha per year. Its export cultivation area was estimated at 8 000 ha in 2015, out of the country's 14 000 ha. Chile is also expanding its cultivation area (5 400 ha in 2016, aimed both at local sales and the international market), on a more modest annual basis of an additional 250 to 300 ha approximately. The Uruguayan cultivation area is shrinking (approximately 400 ha lost over the past five years, taking overall surface areas to below the 5 800-ha mark), though surface areas of export varieties remain stable (Nules) or are expanding slightly (W. Murcott, with approximately 500 ha planted). The trend is probably similar in Argentina, although there are no detailed statistics to confirm. Overall, the combined planting by these players were at least between 3 000 and 4 000 ha in 2015 and 2016.

Can the world market absorb such volumes? There can clearly be some doubt given the current state of demand. We should emphasise that the exports boom of the past five years from countries such as South Africa (+ 80 000 t), Chile (+ 50 000 t) or Peru (+ 40 000 t) is not solely due to the growth of the world market, but also to the collapse of Argentina (more than 60 000 t lost during the same period). True, consumption is rising very steeply in North America (+ 50 000 t over the past two years). This market should rapidly catch up the EU-28, still in the lead but with consumption stagnant. The British market, which still takes in more than 50 % of volumes during the summer period, is continuing to grow (+ 30 000 t in five years), but on the continent things are practically at a standstill. Certain markets such as France are showing encouraging signs, with the distribution sector starting to place excellent late varieties on the market in September, though volumes remain limited. Meanwhile, Asia is progressing but at a stately pace. Overall, growth of the world market can now be estimated at between 25 000 and 30 000 t per year, while the production that can be expected from the surface areas planted in 2015 and 2016 requires at the least 4 to 5 times more. It is vital to get a grip of the problem. Easy peelers have genuine assets in terms of practicality, taste and freshness to promote over the summer period, and consumption is still very limited across the board. Investing in promotion is no longer an option, but a must.

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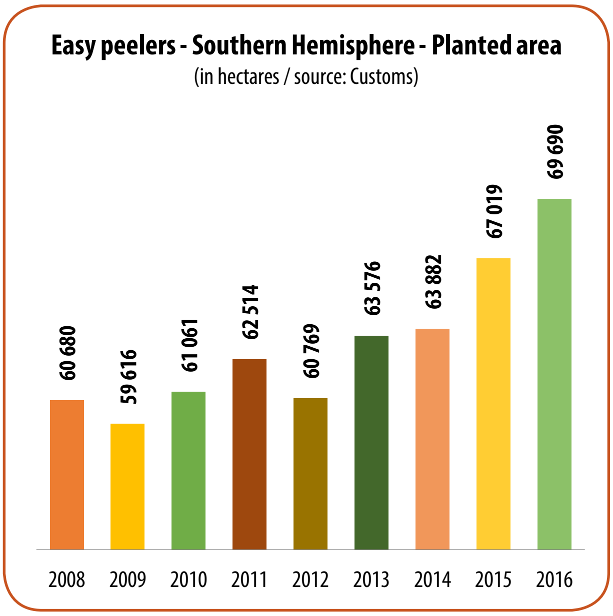
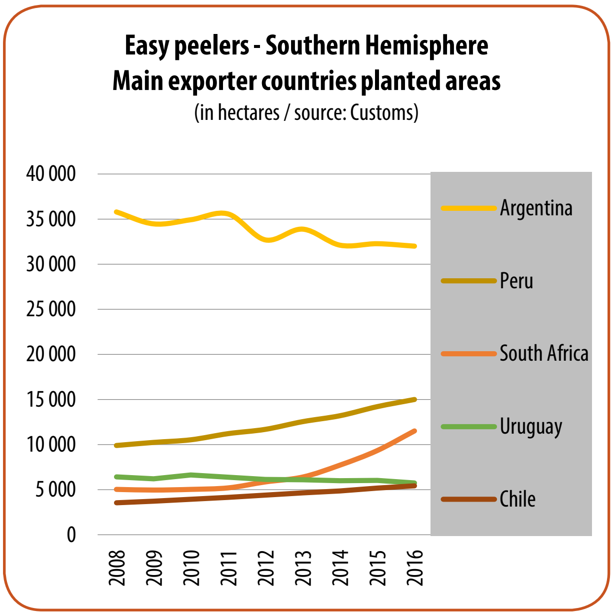




Easy peelers late hybrids – Mediterranean Basin – Exports

000 tonnes	Varieties	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17 forecast	2016-17 / 2015-16
Morocco	Nadorcott	42	67	65	99	106	135	+ 27 %
Spain	Nadorcott	122	135	132	150	157	160	+ 2 %
	Or	-	-	-	-	26	33	+ 27 %
Israel	Or	49	49	53	65	68	90	+ 33 %
Total		**213**	**251**	**250**	**314**	**357**	**418**	**+ 17 %**

Professional sources

Late easy peelers – Mediterranean Basin – New varieties in production now or in the medium term

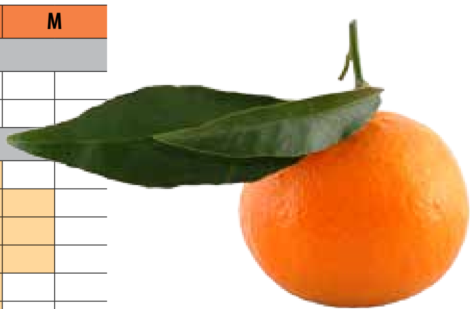
Sources	Varieties	Planted areas	Indicative export potential	Comments
Morocco	Nadorcott	5 200 ha (2016)	210 000 t	6 production centres in the country: Gharb, Beni Mellal, Safi, Chichaoua, Souss, Marrakech
Israel	Or	5 500 ha (2016)	150 000 t	
Spain	Nadorcott	4 520 ha (2015)	180 000 t	40 % Valencian Com. (Valencia/Alicante), 18 % Murcia, 41 % Andal (Huelva/Sevilla)
	Or	2 200 ha* (2015)	80 000 t	40 % Andalusia (Huelva 29 %), 14 % Murcia, 46 % Valencian Com. (Valencia 27 %)
Sub-total		**17 450 ha**	**620 000 t**	
Spain	Tango	3 000 ha ? (2016)	120 000 t ?	No official figures on planted areas. Production conditions?
	Others (Mor, GN, Tahoe, etc.)	low?		

*Areas under licence / Professional sources, ORC, CVVP

Easy peelers 2nd half of the season – Mediterranean Basin – Marketing calendar

Varieties	Sources	D	J	F	M	A	M
Clementines							
Nour	Morocco						
Hernandine	Spain						
Hybrids							
Nadorcott	Morocco						
Nadorcott	Spain						
Or	Spain						
Ortanique	Spain						
Tango	Spain						
Or	Israel						

Professional sources



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