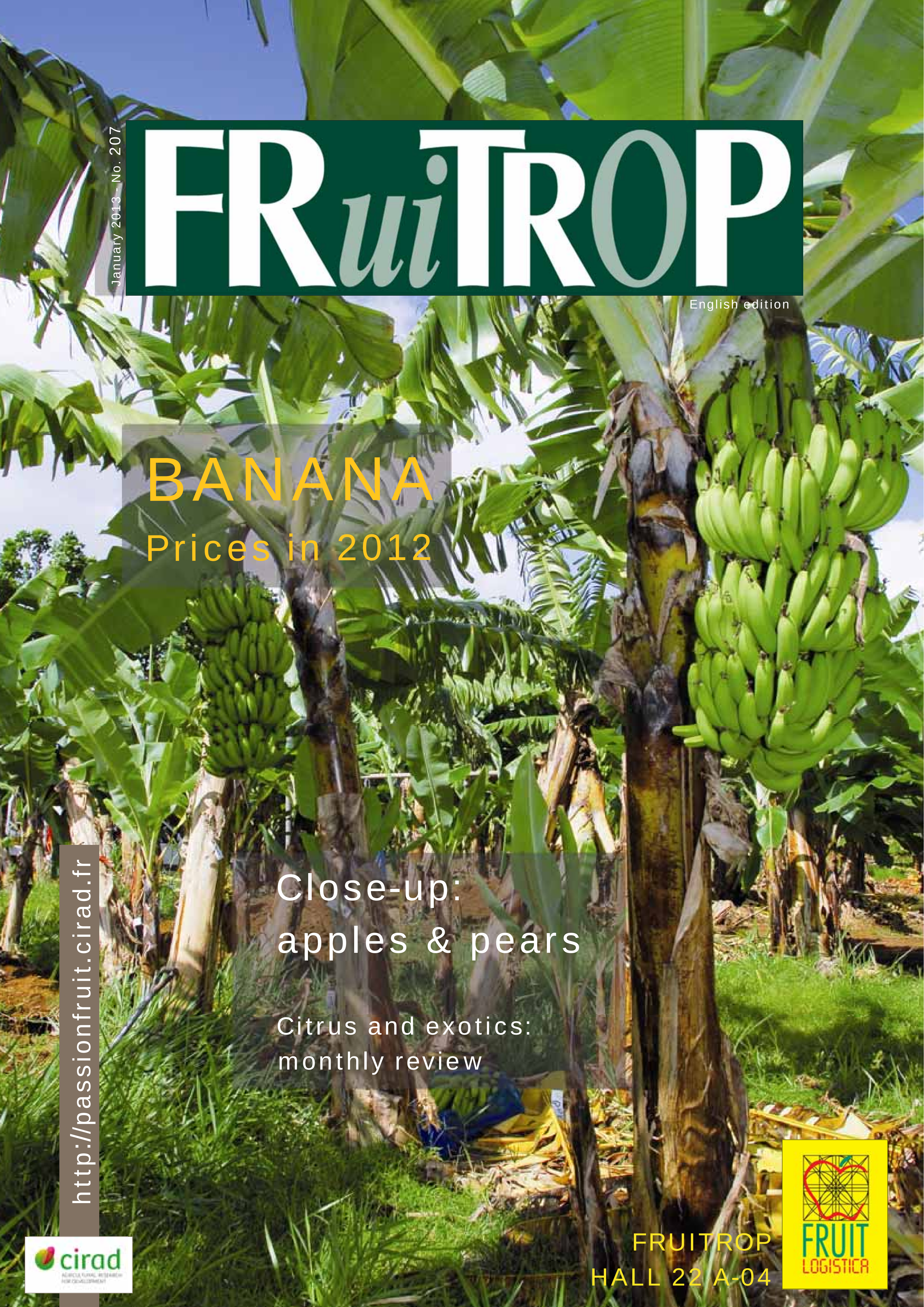
January 2013 - No. 207

# FRuiTROP

English edition



## BANANA
Prices in 2012

Close-up:
apples & pears

Citrus and exotics:
monthly review



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The New Year greetings tradition in Europe is sometimes exhaustingly conformist and sometimes approaches the hypocritical. *So everything that enables us to escape this problem can be grasped at. Here, comparative reading of the international press is a never-ending source of astonishment for an average European like me. As even if those who govern often spout wishes that we consider to be inordinately optimistic, my fellow citizens see only blood and tears for 2013. Spain and Greece are top of the class in this little game. So the economic slump will not end. Economists even say that Germany will not do too well, even though all is fine in every respect. Malaise now seems to be part of our mood. The glass can be only half empty or even totally empty. But what is printed in the foreign press is the exact opposite in many countries in the South. Spirits are high even though difficulties remain to be resolved. There, people are still fighting for fundamental liberties and rights such as education and health. Nonetheless, optimism and passion are evident. There, a better world is possible and in the short term too. So my one and only wish for 2013 is that Europeans recover their happiness about living in Europe.*

*Denis Loeillet*


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**Publisher**
Cirad
TA B-26/PS4
34398 Montpellier cedex 5, France
Tel: 33 (0) 4 67 61 71 41
Fax: 33 (0) 4 67 61 59 28
Email: odm@cirad.fr
http://passionfruit.cirad.fr

**Publishing Director**
Hubert de Bon

**Editors-in-chief**
Denis Loeillet and Eric Imbert

**Editor**
Catherine Sanchez

**Computer graphics**
Martine Duportal

**Iconography**
Régis Domergue

**Website**
Unité multimédia (Cirad)

**Advertising Manager**
Eric Imbert

**Subscriptions**
odm@cirad.fr

**Translator**
Simon Barnard

**Printed by**
Impact Imprimerie
n°483 ZAC des Vautes
34980 Saint Gély du Fesc, France

**Separate French and English editions**

**ISSN**
French: 1256-544X / English: 1256-5458





**Subscription rate**
**EUR 220 / 11 issues per year**





FRuiTROP


# Contents



Cover photograph: Regis Domergue

# Banana

December 2012

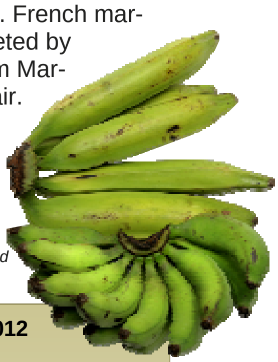
The market conserved its good dynamics in December in spite of the seasonal slowing of demand. This is the result of Christmas period festive dates (St Nicholas, Christmas and New Year's Eve) and competition from the exotic fruits sold during this period first on the markets in the East and then throughout the continent. However, market balance was maintained by reduced supply of dollar bananas resulting from a shortfall in producer countries and the volume reduction schedules applied by importers in Northern Europe. Falling since October, supply from Colombia reached a low point with 16% less volume than in other years. Quantities from Ecuador were 28% short and those from Costa Rica were also smaller than the usual level for the season. Supply from the French West Indies had also decreased since October but remained close to average (- 5%). Arrivals from Africa were also down but still above average, with an increase in shipments from Cameroon and a decrease from Ghana and Côte d'Ivoire. Thus in spite of the continuing high level of retail prices (16 to 18% higher than average), demand matched supply and green prices held at higher levels than those of other years on all the European markets.

■ **Bananas in India: great export ambitions... that are viewed with scepticism.** India is the world's leading banana producing country with an annual harvest of close to 30 million tonnes. According to a recent BBC report, it aims at increasing exports. The country is currently practically invisible on the international market, with shipments hardly exceeding 20 000 t in 2011-12. The plan designed by the Confederation of Indian Industry (CII) is aimed at setting up fruit storage infrastructure to limit postharvest losses, reported to be 30% of production in Tamil Nadu, the main banana production region. The volumes gained in this way could be sold on the international market. It is an ambitious plan but most analysts do not think that it is credible. In spite of its scale, Indian production does not cover domestic demand. Furthermore, the CII seems to have lost part of its credibility with fruit producers after the poor results given by a previous project to support mango exports.

*Sources: Reefer Trends, BBC*

■ **Plantain market.** Most of supply for the European and French markets is from the two Latin American sources Colombia and Ecuador. Supply is steady throughout the year, as for dessert bananas. In 2012, prices of plantains increased slightly from June and July onwards as shipments were a little smaller. Firm prices held until the end of the year. Colombian produce has a better image (with even quality) and so sells for slightly higher prices. Plantains are sold mainly in the ethnic segment and the market is much the same throughout the year. Prices are affected only by larger or smaller supply flows. Plantains are shipped to Northern European ports and then forwarded to the various EU markets. French market supply is completed by small quantities from Martinique shipped by air. The price generally oscillates between EUR 2.00 and 2.30 per kg.

*Source: Pierre Gerbaud*



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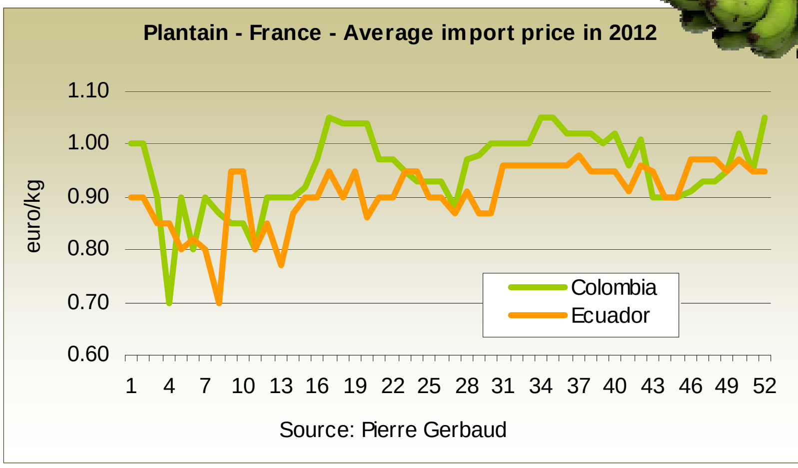
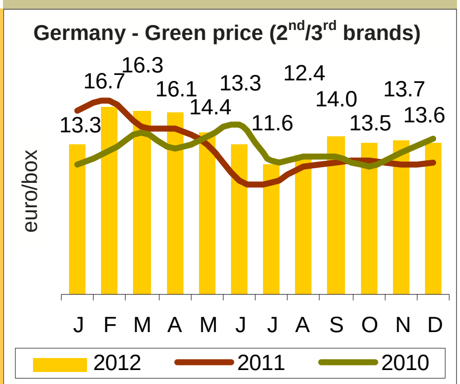



| NORTHERN EUROPE — IMPORT PRICE | | |
|---|---|---|
| December 2012 euro/box | Comparison | |
| | previous month | average for last 2 years |
| 13.60 | - 1% | + 6% |

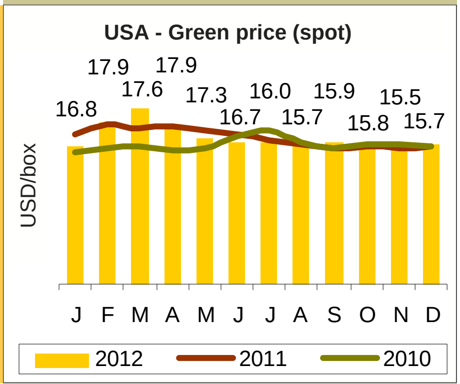
EUROPE




| EUROPE — RETAIL PRICE | | | | |
|---|---|---|---|---|
| Country | December 2012 | | Comparison | |
| | type | euro/kg | November 2012 | average for last 3 years |
| France | normal | 1.58 | + 1% | + 16% |
| | special offer | 1.38 | 0% | + 16% |
| Germany | normal | 1.29 | + 2% | + 12% |
| | discount | 1.14 | 0% | + 18% |
| UK (£/kg) | packed | 1.17 | - 1% | - 2% |
| | loose | 0.76 | + 6% | - 6% |
| Spain | plátano | 1.95 | - 2% | + 7% |
| | banano | 1.29 | - 1% | - 3% |

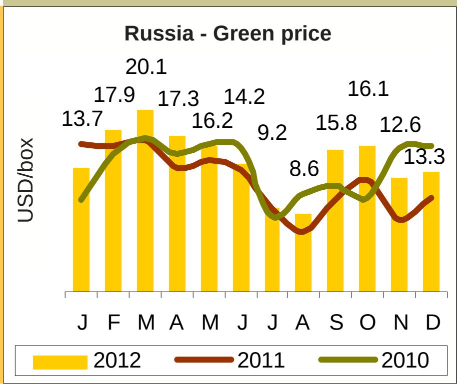
# Banana

UNITED STATES



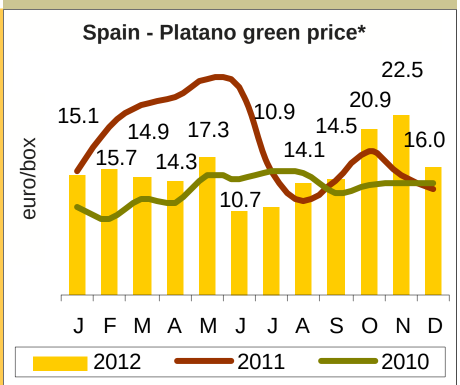

| USA — IMPORT PRICE | | |
|---|---|---|
| December 2012 USD/box | Comparison | |
| | previous month | average for last 2 years |
| 15.70 | + 1% | + 1% |

RUSSIA




| RUSSIA — IMPORT PRICE | | |
|---|---|---|
| December 2012 USD/box | Comparison | |
| | previous month | average for last 2 years |
| 13.30 | + 5% | 0% |

CANARIES




| CANARIES — IMPORT PRICE* | | |
|---|---|---|
| December 2012 euro/box | Comparison | |
| | previous month | average for last 2 years |
| 16.00 | - 29% | + 17% |

* 18.5 kg box equivalent

■ October 2012: European banana imports still slow. European banana imports decreased in October 2012 for the ninth month running. The fall was much smaller (- 2%) than in September (- 8%). Total supply (imports + European production) was down by 1%. The market during the first ten months of the year was down by 1.4% in comparison with 2011 and by only 0.5% against 2010. In October, decreases in shipments to the EU market were observed from the dollar sources and African ACP countries; delivery from European sources was also down. Unusually, the best performance by an ACP source was not the Dominican Republic but Belize (+ 36% over the ten-month period), followed by Surinam (+ 32%). It should be noted that, after returning to production, St Lucia performed very well from the beginning of the year onwards before a decrease in October. Côte d'Ivoire, which had been heading downwards since April, did very well in October with a 6000-tonne increase while Cameroon displayed the same negative scores as in previous months. Ghana continued to gain momentum. October in the dollar zone saw a second month of decrease for Ecuador. Colombia, Costa Rica and Panama displayed negative results for the whole ten-month period. Mexico won a fine foothold in the EU with a total of 14 000 tonnes in the first ten months of 2012, an increase of 5 500 tonnes. Finally, Brazilian deliveries were stable in October but this does not call into question the strong and recurrent shrinking of its position in Europe.

*Source: CIRAD*

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| Banana - January to October 2012 (provisional) | | | | |
|---|---|---|---|---|
| tonnes | 2010 | 2011 | 2012 | Difference 2012/2011 |
| **EU-27 — Total supply** | **4 303 233** | **4 342 764** | **4 283 286** | **- 1 %** |
| **Total import, of which** | 3 795 919 | 3 863 009 | 3 766 133 | - 3 % |
| MFN | 2 940 748 | 3 038 409 | 2 954 919 | - 3 % |
| ACP Africa | 450 849 | 419 927 | 391 968 | - 7 % |
| ACP others | 404 322 | 404 674 | 419 245 | + 4 % |
| **Total EU, of which** | 507 314 | 479 755 | 517 154 | + 8 % |
| Martinique | 167 277 | 151 229 | 157 472 | + 4 % |
| Guadeloupe | 31 744 | 48 726 | 52 849 | + 8 % |
| Canaries | 293 118 | 262 261 | 289 294 | + 10 % |
| **USA — Imports** | **3 439 467** | **3 501 745** | **3 649 757** | **+ 4 %** |
| Re-exports | 422 331 | 434 429 | 420 139 | - 3 % |
| Net supply | 3 017 136 | 3 067 316 | 3 229 618 | + 5 % |

*EU sources: CIRAD, EUROSTAT (excl. EU domestic production) / USA source: USA customs*

| EUROPE — IMPORTED VOLUMES — DECEMBER 2012 | | | |
|---|---|---|---|
| Origin | Comparison | | |
| | November 2012 | December 2011 | cumulated total 2012 compared to 2011 |
| French West Indies | ↘ | + 3% | + 6% |
| Cameroon/Ghana | ↘ | + 12% | + 27% |
| Surinam | ↘ | + 15% | + 31% |
| Canaries | ↘ | - 7% | + 7% |
| Dollar : | | | |
| Ecuador | = | - 28% | - 11% |
| Colombia* | ↘ | - 9% | - 3% |
| Costa Rica | ↘ | - 35% | + 1% |

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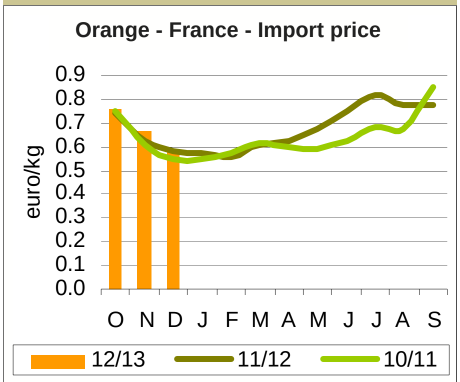
# Orange

December 2012

The market worsened distinctly for the produce forming the heart of the range. The quality of a significant proportion of supply of 'Naveline' from Spain was fragile after heavy rain and high temperatures at the beginning of the winter. The prices of standard brabds were very low and those of fine fruits were fairly firm but this required a large proportion of sorting rejects at packing stations. Supply of 'Salustiana' increased fairly rapidly in this difficult context for 'Naveline'. The prices fetched by 'Salustiana' were also disappointing.




PRICE

| Type | Average monthly price euro/box 15 kg | Comparison with average for last 2 years |
|---|---|---|
| Dessert oranges | 8.70 | + 5% |
| Juice oranges | 9.50 | - 6% |

VOLUMES

| Type | Comparison | |
|---|---|---|
| | previous month | average for last 2 years |
| Dessert oranges | ↗ | - 3% |
| Juice oranges | ↗ | + 27% |

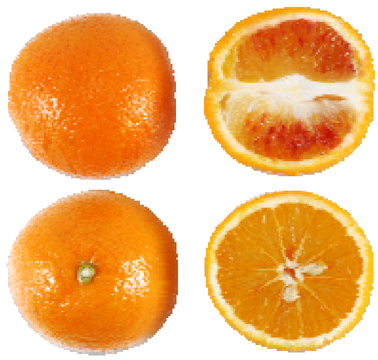
© Régis Domergue

■ Brazilian orange juice: poor 2012 vintage. After brightening in 2010 and 2011, the Brazilian orange juice industry ran into another serious overproduction crisis in 2012. The physical market handled by the three sector majors did not reveal anything as prices remained high at more than USD 2 200 per tonne. However, the price paid by industry for volumes not covered by contracts collapsed, showing the extent of production problems: FoodNews reports that the average USD 3 paid on the spot market in 2012 was less than a third of 2010 and 2011 prices and well below the cost price calculated by Consecitrus. The indicators are red both upstream and downstream. Demand continued to weaken in 2012.The carbendazim crisis and high retail prices aggravated the structural trend for decrease in consumption in the United States. Europe, the other large market, just remained stable while the quantities imported by the other consumer countries continued to increase but they remained modest and not large enough to make up for the decrease in the US. Upstream, the 2012-2013 harvest is well above average in volume and this is not good for a sector weighed down by stocks that occupy the whole of the country's storage capacity. So in spite of the increase in the price of factors of production, the firming of the real and the indecent prices paid to producers, it is more than likely that prices of concentrate will fall. But the downward trend in production in the medium and long term should not be forgotten. The effects of greening on production in Florida are increasingly marked (see below) and the number of infected trees in Brazil increased strongly from 2011 to 2012, from less than 4% to 7%.

*Sources: FoodNews, CIRAD*

■ Orange variety of the month: Maltese. This high-quality well-coloured orange is grown almost only in the Cape Bon region of Tunisia, where conditions bring out its full potential. It is medium-sized and slightly oval. The soft peel is slightly grainy and easy to remove. The tender, juicy flesh is little coloured for a blood orange. The flavour is particularly pleasant with sweetness balanced by a good level of acidity.

*Source: CIRAD*



VOLUMES

| Varieties by source | Comparison | | Observations | Cumulated total / cumulated average for last 2 years |
|---|---|---|---|---|
| | previous month | average for last 2 years | | |
| Navel/Naveline from Spain | ↗ | - 3% | Supply slightly smaller than average. Uneven quality of a significant proportion of supply following rain and warm weather at the beginning of the winter. | - 19% |
| Salustiana from Spain | ↗↗ | + 27% | Early increase in supply. Volumes larger than average. | + 27% |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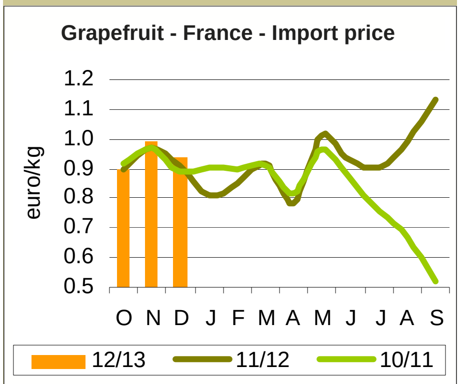
# Grapefruit

December 2012

The December slump was particularly marked. The seasonal slowing of demand seems to have been more marked than in other years, especially for Mediterranean grapefruit. In spite of the very limited arrivals from Israel, Turkey and Spain, prices worsened and hit a new low. The limited supply from Florida made it possible to keep prices stable and higher than average. However, given cost prices performance was disappointing for importers.




PRICE

| Type | Average monthly price euro/box 17 kg box eq. | Comparison with average for last 2 years |
|---|---|---|
| Tropical | 18.00 | + 8% |
| Mediterranean | 10.00-10.50 | - 6% |

VOLUMES

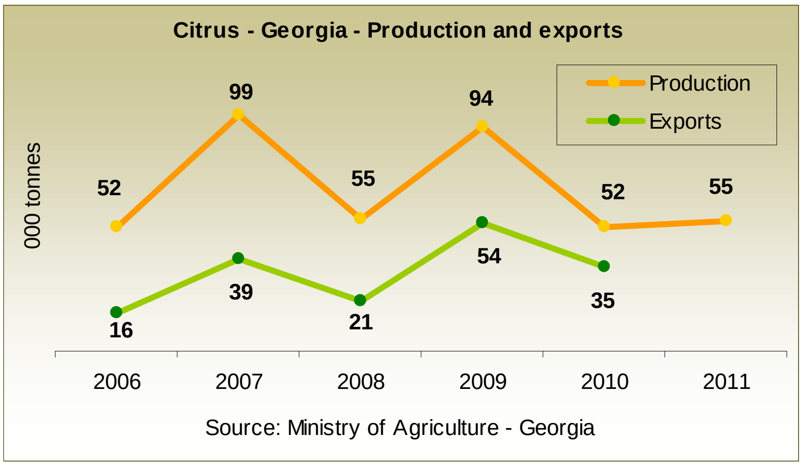
| Type | Comparison | |
|---|---|---|
| | previous month | average for last 2 years |
| Tropical | ↘ | - 7% |
| Mediterranean | ↘ | - 10% |

■ **Serious and disturbing revision of the Florida citrus harvest forecast.** An updated Florida citrus harvest forecast released by the FDOC in December shows a strong decrease in comparison with the initial forecast made in October. The decrease is 5% for oranges with production at 146 million field boxes, a level hardly greater than the 4-year average. The decrease is greater for grapefruit at 8% with a forecast of 18 million boxes, making it 10% smaller than the average. The decrease results mainly from the historically high proportion of fruit drop since the beginning of the season. This is disturbing as the extremely abnormal intensity of the phenomenon results not only from drought but from the weakening of the trees caused by the increase of greening in Florida.

*Sources: FDOC, Reefer Trends*

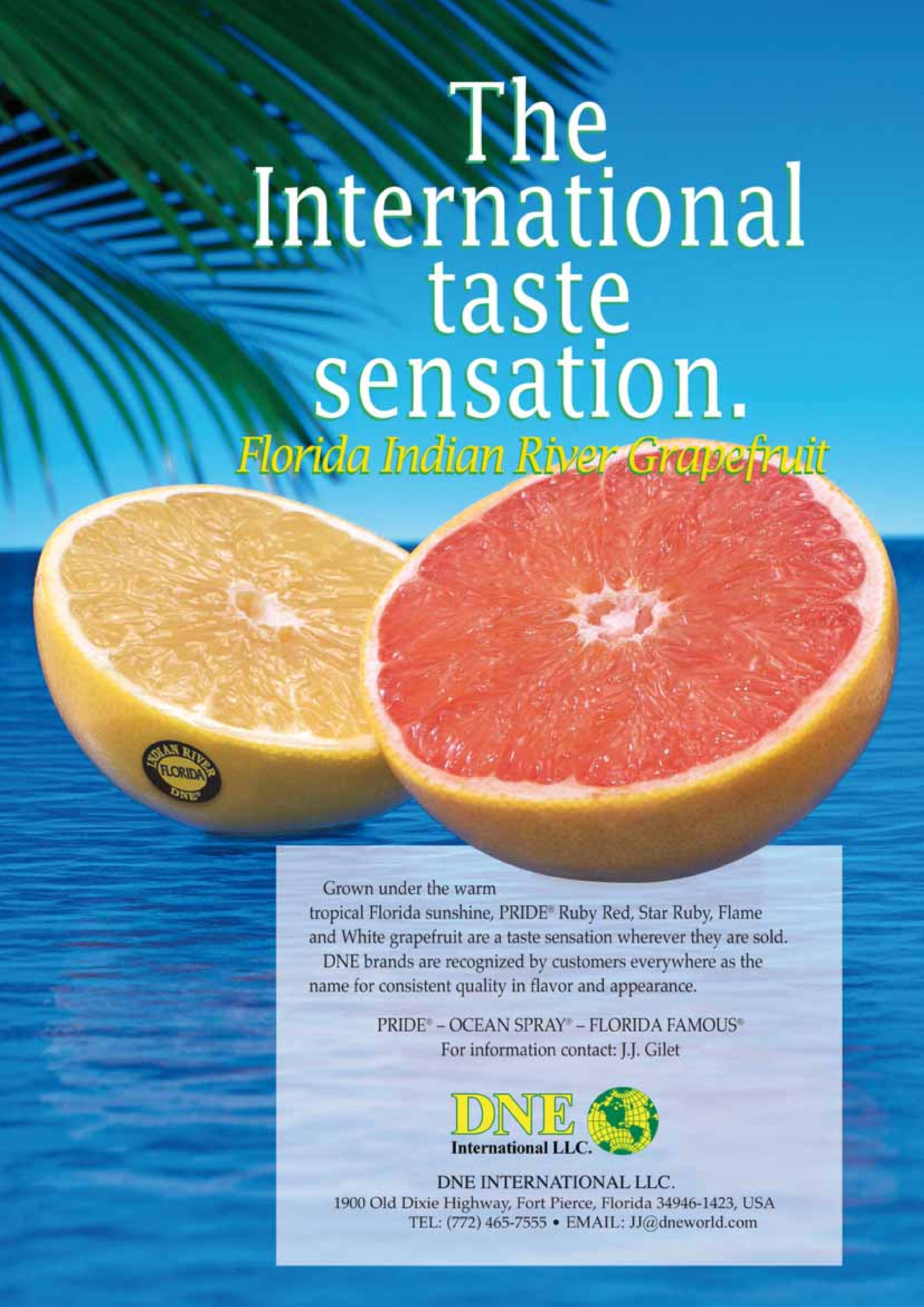

■ **Russia reopens the door to Georgian citrus fruits.** This source that competes with Mediterranean production reappeared on the much sought-after Russian market at the end of December, with the first deliveries in a few lorries. The Kremlin has lifted the embargo in force since 2006. Between 50 000 and 100 000 t of citrus fruits are grown annually in Georgia in an orchard area of about 3 000 ha in the south-west part of the country (the coastal provinces of Guria and, above all, Azara). About 80% of the harvest is exported.

*Source: Reefer Trends*




VOLUMES

| Source | Comparison | | Observations | Cumulated total / cumulated average for last 2 years |
|---|---|---|---|---|
| | previous month | average for last 2 years | | |
| Florida | ↘ | - 7% | The dip in arrivals was slightly more marked than in other years as market conditions were fairly difficult; shipments to Japan were larger and production was finally smaller than forecast (see above). | - 4% |
| Israel | ↘ | - 9% | Arrivals smaller than average because of the market conditions. | + 7% |
| Turkey | ↘ | - 16% | Shipments smaller than average to both the EU and the natural markets in Eastern Europe. | - 3% |
| Mexico | ↘ | - 20% | Shipments distinctly smaller than average. | - 5% |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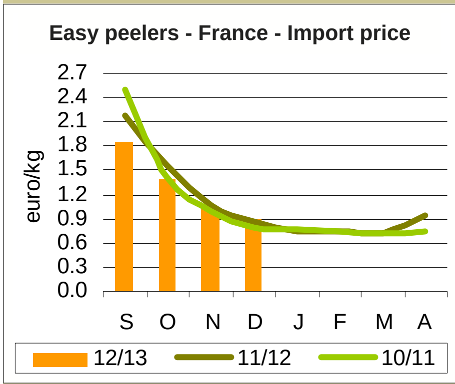
# Easy peelers

December 2012

The market was still difficult but improved for high-quality fruits. Demand accelerated with the Christmas season promotion operations and colder weather that favoured consumption. In addition, Spanish clementine supply was smaller than average as fruit fragility resulted in substantial sorting rejects at packing stations. Prices remained extremely low for standard produce but held up better for good brands. Demand was active for other varieties with assured fruit quality. Sales of Spanish 'Clemenvilla' were strong and prices slightly higher than average. Likewise, December was a record month for Corsican operators in terms of both price and volume. Supply of 'Fine de Berkane' was limited but prices were higher. Supply was completed by a few batches of 'Minneola' from Israel.



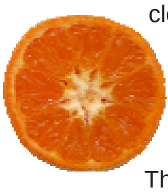

| PRICE Type | Average monthly price euro/kg | Comparison with average for last 2 years |
|---|---|---|
| Clementine | 0.84 | + 9% |
| Hybrids | 0.80 | + 5% |

| VOLUMES Type | Comparison | |
|---|---|---|
| | previous month | average for last 2 years |
| Clementine | =↗ | - 8% |
| Hybrids | ↗ | + 18% |

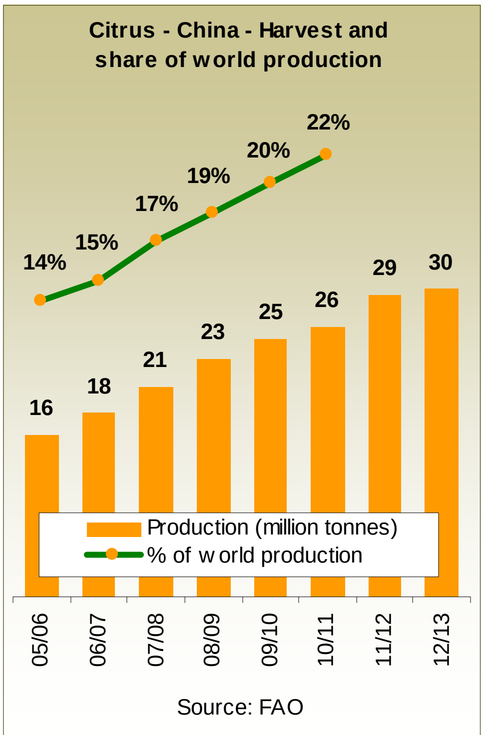
■ Citrus from China: the boom continues. According to a recent USDA report, Chinese citrus production should reach 30 million tonnes in 2012-13. This increase of a million tonnes in comparison with the previous season is further illustration of the extremely rapid growth of Chinese citrus groves. Total planted area, estimated at 2.3 million hectares in 2012, has increased by 250 000 ha since 2008, that is to say the equivalent of the total area under citrus in Spain! And growth is continuing, as shown by the plantations completed in recent years in the Three Gorges Dam, Yunnan and Jiangxi regions. In the Jiangxi region alone, the orange harvest should increase from some 1.3 million tonnes today to 3 million tonnes in 2020! This will change the foundation of the world juice market, which seems to be the destination of part of future production.

*Sources: USDA, FruiTrop*

■ Eaysy peeler variety of the month: Nadorcott. This natural hybrid of 'Murcott' originated in Morocco. The fruits are medium-sized to small and easy to peel, like clementines. The shape is irregular and slightly flat, like 'Murcott'. They ripen late and are seedless. The pulp is soft and melting with a large proportion of juice and acids, giving it a clearly characteristic taste.



*Source: CIRAD*





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| VOLUMES Varieties by source | Comparison | | Observations | Cumulated total / cumulated average for last 2 years |
|---|---|---|---|---|
| | previous month | average for last 2 years | | |
| Clementine from Spain | =↘ | - 15 % | Smaller quantities of 'Nules' as a result of more limited potential, a large proportion of rejects at packing as a result of rain and warm weather at the beginning of the winter. The season tailed off early. | - 3% |
| Clemenvilla from Spain | ↗ | + 18 % | Rapid increase in volumes after problems of keeping quality of a large proportion of clementines. Supply distinctly higher than average. | + 18% |
| Clementine from Corsica | =↗ | + 34 % | Very large volumes as a result of good crop potential; excellent demand. | + 31% |
| Clementine from Morocco | ↗↗ | - 15 % | Limited arrivals in the EU. Export potential was markedly smaller than usual. | - 19% |

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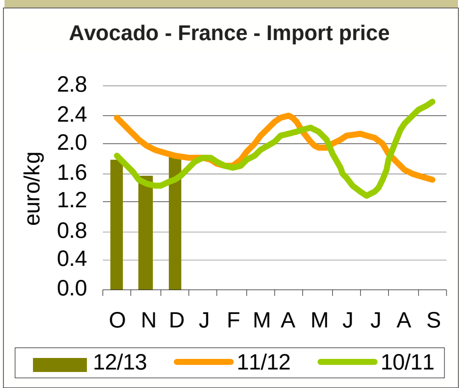
# Avocado

December 2012

The 'Hass' market was satisfactory even though sales were not very fluid in spite of Christmas special offers. Supply was no more than modest. As the United States market is still very competitive, Chilean deliveries held at an above average level. However, the Spanish and Israeli seasons started very gradually. Prices held at a good level, with problems for certain Mexican brands (uneven quality) and for the small fruits that were plentiful in shipments from Spain. The market was fairly disappointing for green varieties, these being sold mainly in Northern Europe. Prices remained lower than average even though supply was fairly light as demand was not very brisk.




**PRICE**

| Varieties | Average price in France euro/box | Comparison with the last 2 years |
|---|---|---|
| Green | 5.00-6.00 | - 7% |
| Hass | 7.50-8.50 | + 11% |

**VOLUMES**

| Varieties | Comparison | |
|---|---|---|
| | previous month | average for last 2 years |
| Green | ↗ | + 1% |
| Hass | =↗ | - 3% |

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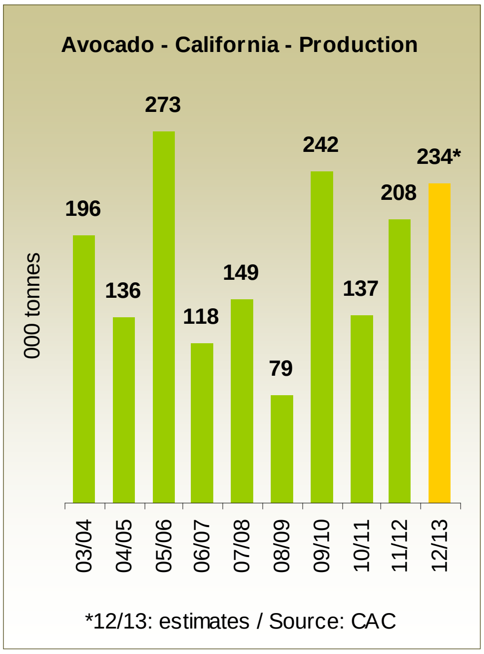
■ Japan, the third largest world market, opening to Peruvian avocado. Peruvian exporters will probably gain a new market in 2013. According to the economic advisor at the Peruvian embassy in Tokyo, 'Hass' from Peru should be allowed into Japan with no postharvest treatment during the coming season. This is excellent news in the lmight of the probably substantial increase in production and a United States market lacking capacity because of the substantial Californian and Mexican harvests. Japan is the world's third largest market for avocado. The some 50 000 t imported in 2011-12 is far from the 225 000 t shipped to the EU and the nearly 470 000 t shipped to the US. However, exports are growing strongly thanks in particular to the promotion operations organised by the Avocado Producers and Exporting Packers Association of Michoacán (APEAM).

*Source: Reefer Trends*

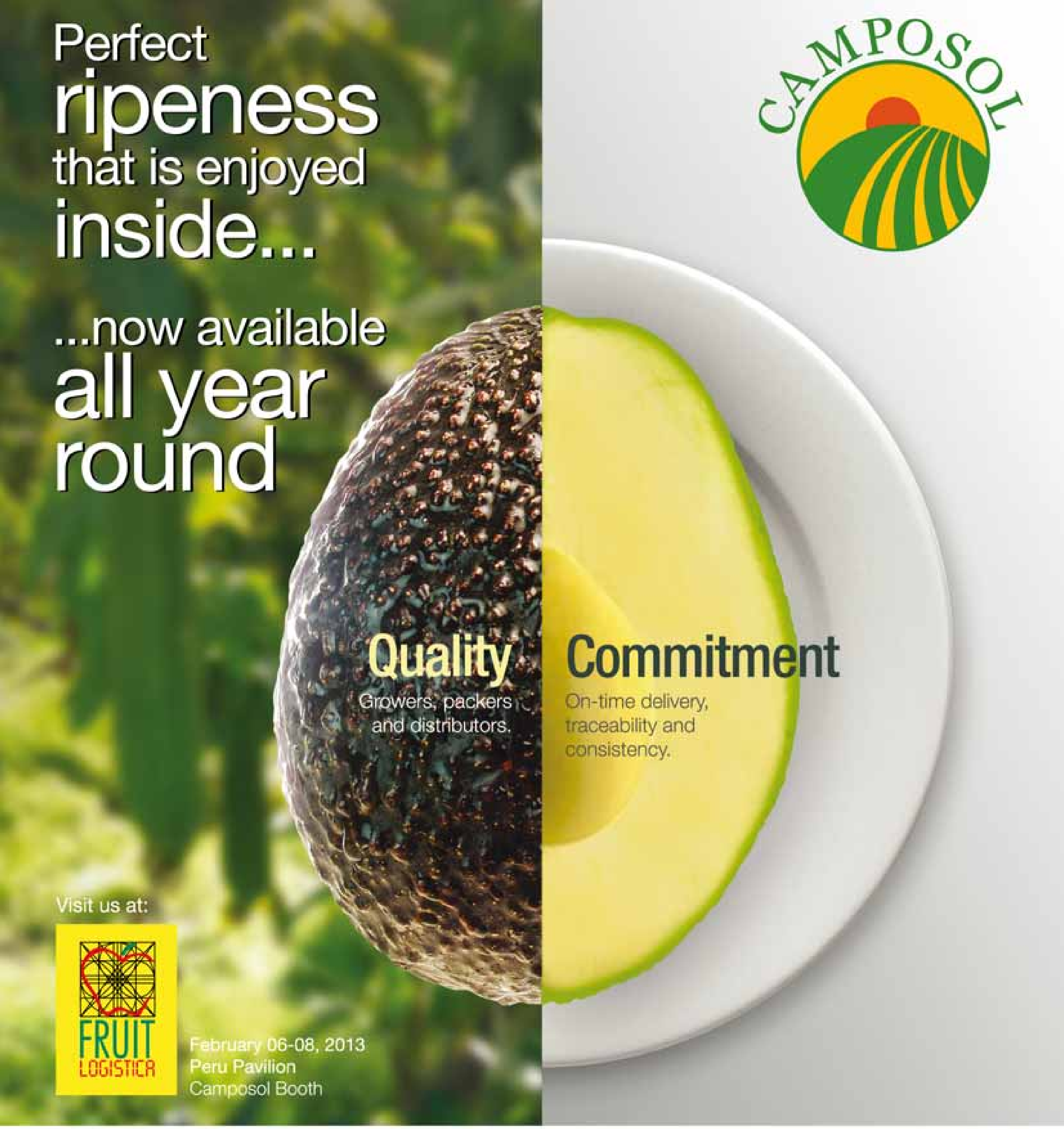
■ Strong pressure to come on the American avocado market in the spring and the summer. There seems to be an almost strict rule in the avocado world that a large harvest is followed by a much smaller one. There are some exceptions to this alternate bearing phenomenon, as can be seen in the harvest forecast for 2012-13 in California. The large harvest of more than 200 000 t in 2011-12 would seem to indicate very small volumes in 2012-13. But this is not true at all. The preliminary forecast of the California Avocado Commission indicates that production may even reach 230 000 t, a level only exceeded twice in the last fifteen years! It is therefore very probable that the United States market will not be very open in the spring and summer, especially as Mexican production will be large.

*Source: CAC*




**VOLUMES**

| Source | Comparison | | Observations | Cumulated total / cumulated average for last 2 years |
|---|---|---|---|---|
| | previous month | average for last 2 years | | |
| Chile | =↘ | + 32% | Volumes shipped to the EU still distinctly larger than average even though export potential was even more limited than predicted. The United States market was still only very slightly open. | + 22% |
| Israel | =↗ | - 12% | Shipments smaller than average. The 'Hass' season got under way very gradually. Large arrivals of green varieties during the first half of the month, then becoming more modest (difficult market conditions). | - 19% |
| Mexico | ↘ | - 15% | Very limited supply and some brands displaying uneven quality. | + 4% |
| Spain | =↗ | + 23% | Supply of green varieties still large. Increasing quantities of 'Hass', slightly larger than average. | + 3% |

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# Pineapple

December 2012

The situation on the pineapple market improved at the end of the first week of December. Operators gradually received confirmation that the supply of 'Sweet' during the Christmas period would be distinctly smaller than forecast. The twin effect of decreased supply and brisker demand resulted in a rapid rise in prices and stabilisation at the beginning of the second week of the month. Good demand in the Eastern countries where large fruits that were not readily available allowed some operators to sell at prices higher than average. Decreased supply was the main reason for prices remaining stable between Christmas and the New Year.

Supply of 'Smooth Cayenne' increased during the first half of the month. The keeping quality of the batches released was good and the produce sold fairly rapidly in the Eastern European countries.

Sales were fairly good as a whole on the air pineapple market. They were quite fluid even if the larger supply in mid-month seemed to weigh on the market. The most surprising feature was the quality of fruits from Benin and Cameroon. Both sources alternated good and less good during a period in which buyers seek high quality fruits. Sales remained fluid but the risk was great. The decrease in supply of 'Sugarloaf' pineapple in the second half of the month resulted in higher prices, with fruits selling at between EUR 1.95 and 2.10 per kg.

'Victoria' pineapple sold well as a whole. This variety is more appreciated during festive periods and sold better in the second half of the month, with fruits from Réunion fetching a higher price.

■ 'Sweet' pineapple from Cameroon. La Compagnie Fruitière is putting an end to its production of 'Sweet' pineapple in Cameroon. The group is to concentrate on the development of its plantations in Côte d'Ivoire and Ghana.

*Source: Thierry Paqui*

■ The market for chayottes and christophines. The market is supplied regularly with chayotte (the greenish type of *Sechium edule*) by Costa Rica throughout the year. Price variations are limited and of small amplitude, occurring during supply disturbances and during the French production season (August to March) that causes livelier competition. The prices of produce from the two origins tend to become matched.

The market for christophine (the whitish type of *Sechium edule*) seems less regular. Here again, Costa Rica is the leading supplier of the French market with a few interruptions in supply, especially during the winter. French production runs from August to December. More fragile than chayotte, christophine generally fetches higher prices. It is popular during the Christmas period, accounting for the increase in price. A few batches of christophine are also shipped from Martinique, but these are sporadic and quantities are limited.

*Source: Pierre Gerbaud*

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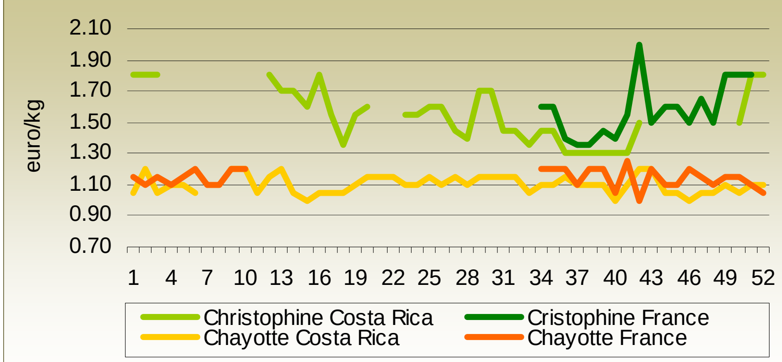
**Chayotte and christophine - France - Average import price in 2013**




Source: Pierre Gerbaud

EUROPE

**PINEAPPLE — IMPORT PRICE**

| Weeks 49 to 52 | Min | Max |
|---|---|---|
| By air (euro/kg) | | |
| Smooth Cayenne | 1.70 | 1.90 |
| Victoria | 3.00 | 4.00 |
| By sea (euro/box) | | |
| Smooth Cayenne | 5.00 | 8.50 |
| Sweet | 6.00 | 9.50 |

**PINEAPPLE — IMPORT PRICE IN FRANCE — MAIN ORIGINS**

| Weeks 2012 | | 49 | 50 | 51 | 52 |
|---|---|---|---|---|---|
| By air (euro/kg) | | | | | |
| **Smooth Cayenne** | Benin | 1.70-1.85 | 1.70-1.85 | 1.70-1.90 | 1.75-1.90 |
| | Cameroon | 1.70-1.85 | 1.70-1.85 | 1.70-1.85 | 1.70-1.90 |
| | Ghana | 1.70-1.85 | 1.70-1.85 | 1.75-1.90 | 1.75-1.85 |
| **Victoria** | Réunion | 3.20-3.50 | 3.20-3.60 | 3.20-3.80 | 3.50-4.00 |
| | Mauritius | 3.00-3.30 | 3.00-3.30 | 3.00-3.40 | 3.00-3.40 |
| By sea (euro/box) | | | | | |
| **Smooth Cayenne** | Côte d'Ivoire | 5.00-7.00 | 6.50-8.50 | 7.00-8.00 | 7.00-8.00 |
| **Sweet** | Côte d'Ivoire | 7.00-8.00 | 7.00-9.00 | 7.50-9.50 | 7.50-9.50 |
| | Cameroon | 7.00-8.00 | 7.00-9.00 | 7.50-9.50 | 7.50-9.50 |
| | Ghana | 7.00-8.00 | 7.00-9.00 | 7.50-9.50 | 7.50-9.50 |
| | Costa Rica | 6.00-6.50 | 6.50-9.00 | 8.00-9.00 | 8.00-9.00 |

# Mango

December 2012

The European mango market remained satisfactory in December, in line with performance in November. Brazil, now the largest supplier of the European market, greatly benefited from the sales conditions during the period. Prices remained high and firm during the first half of the month at levels rarely reached at this time of the year. But prices decreased slightly in mid-month, indicating a change in trend. Cumulated arrivals from Brazil, Peru and to a smaller degree from Ecuador resulted in comparative over-supply although this was first counter-balanced by brisker demand during the approach to the Christmas period. The weakening of prices became more visible during the last week of the month. The fall in prices was distinct for 'Tommy Atkins' from Brazil, while 'Kent' and 'Keitt' from the same source displayed a more moderate but continued decrease. The smaller deliveries of Peruvian mangoes suffered the same market trend but sold at distinctly higher prices.

The air mango market was more contrasted, with large deliveries from Peru in particular. The price of these fruits lost ground steadily and then more rapidly in the second half of the month. Batches from Peru consisted mainly of small fruits, for which there is generally less demand. Arrivals from Brazil decreased in December. The price of 'Kent' from the same source remained fairly stable but lower than that of the competition, with the difference in quality partially accounting for this. In contrast, shipment of larger fruits was an advantage for Brazil when quality was satisfactory. Shipments from supplier countries were diversified in the second half of the month, with a few batches of 'Ataulfo' from Peru and of 'Maya' from Brazil. The latter variety was previously an Israeli speciality.

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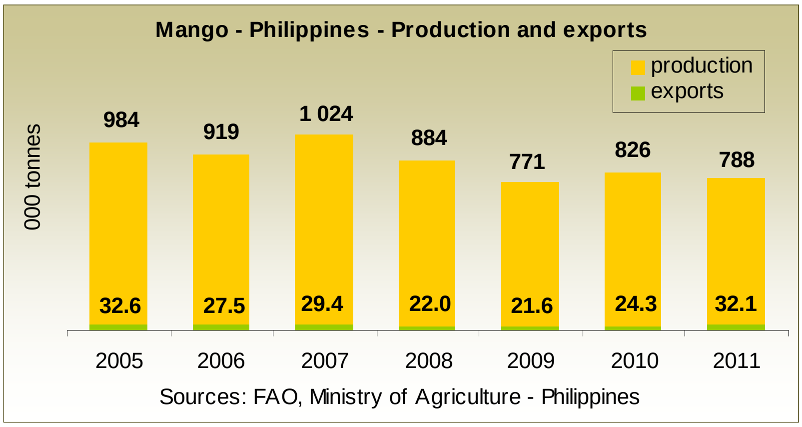
■ **Côte d'Ivoire mango production forecast for 2013.** The first flowering of mangoes in orchards in northern Côte d'Ivoire started around 15-20 December. A second wave of flowering was reported at the beginning of January. Mango production in the coming season promises to be satisfactory if there are no weather problems. New orchards are coming into production and this should also ensure good supplies to packing stations. The harvest may begin between 5 and 10 April, given the lateness of the first flowering. Box manufacturers have also announced the strengthening of packaging to solve the problems of weakness observed during the 2012 season. Finally, containers should be made more available for the Abidjan/ Ferkessédougou/Bobodioulasso/ Ouagadougou railway line and for road transport.

*Source: Alexis Moulin*

■ **Towards the strengthening of the mango export sector in the Philippines.** At the beginning of January, the government of the Philippines decided to set up an official body to support and develop the mango sector. Its missions will cover both the upstream part of the sector (support for production) and the downstream end (the development of exports). Mango is the third most grown fruit in the country after bananas and pineapples, and the annual harvest totals about 1.4 million tonnes. Shipments exceeded 30 000 t in 2011, with the main destinations being China, North America and Japan.

*Source: FoodNews*




EUROPE

MANGO — ARRIVALS (estimates) Tonnes

| Weeks 2012 | 49 | 50 | 51 | 52 |
|---|---|---|---|---|
| By air | | | | |
| Brazil | 60 | 60 | 30 | 30 |
| Peru | 100 | 130 | 60 | 100 |
| By sea | | | | |
| Brazil | 3 410 | 2 700 | 4 660 | 4 660 |
| Ecuador | 150 | 370 | 610 | 510 |
| Peru | 370 | 1 140 | 2 420 | 770 |

MANGO — IMPORT PRICE ON THE FRENCH MARKET — Euro

| Weeks 2012 | | 49 | 50 | 51 | 52 | Average December 2012 | Average December 2011 |
|---|---|---|---|---|---|---|---|
| By air (kg) | | | | | | | |
| Brazil | Kent | 3.50-4.00 | 3.50-3.80 | 3.50-4.00 | 3.50-4.00 | 3.50-3.95 | 4.00-4.45 |
| Peru | Kent | 4.50-4.80 | 4.20-4.80 | 3.80-4.50 | 3.50-4.00 | 4.00-4.50 | 5.00-5.50 |
| By sea (box) | | | | | | | |
| Brazil | T. Atkins | 6.00-6.50 | 6.00-6.50 | 5.50-6.00 | 4.00-5.00 | 5.35-6.00 | 4.25-5.00 |
| Brazil | Kent | 6.00-7.00 | 6.00-7.00 | 5.50-6.50 | 5.00-6.00 | 5.60-6.60 | 5.60-6.35 |
| Brazil | Keitt | 6.00-7.00 | 6.00-7.00 | 5.50-6.50 | 5.00-5.50 | 5.60-6.50 | nd |
| Peru | Kent | - | 7.00-7.50 | 6.50-7.00 | 6.00-7.00 | 6.50-7.15 | nd |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# Litchi

December 2012

Performance in December started in line with that of November with still substantial arrivals in spite of the very strong decrease of shipments from Madagascar. The comparative remoteness of the Christmas period limited demand as retail prices remained high. Week 50 was a transition period between dominant shipping by air and the arrival of the first conventional ship from Madagascar. As every year, the week was delicate for operators who had to complete their sales of fruits imported by air before the arrival of the first fruits transported by sea. As a result, they limited their orders for fruits by air, causing a dip in supply that tended to send prices up. Except for a few batches from South Africa, deliveries of sulphur-treated fruits by air ceased after the release on the market of the first 'sea' litchis. In contrast, shipments of destemmed litchis and litchis on the branch from Mauritius and Réunion continued, with prices rising. This produce was intended mainly for traditional detailers. The broad price ranges recorded for produce from Réunion resulted from the type of fruit presentation. Lower prices applied to destemmed litchis while fruits on the branch fetched distinctly higher prices.

The season for exports by sea started with the arrival of the first ship from Madagascar in the middle of Week 50. The approach of Christmas and the scheduling of promotion operations for litchis by many European retail chains strongly boosted sales of the cargo of the first boat. Almost everything had gone when the second ship from Madagascar arrived. Prices dipped during the three weeks of sales, showing that the European market is more difficult in the current slump. But sales were fairly fluid until the end of the year. Fruit quality was satisfactory and size was larger overall than the previous season. The self-monitoring procedures for residual sulphur set up by professionals re-established or strengthened confidence among retailers who remembered the problems of the 2010-11 season. The first containers from South Africa arrived in Week 51. The small volumes involved were sold rapidly on wholesale markets. The fruits were larger than those from Madagascar, resulting in sales at higher prices.

■ The chilli pepper market. European production amply covered chilli pepper requirements in October and November. Regular supplies of good quality produce resulted in fairly stable prices for the French and Portuguese crops, to which were added a few batches from Spain. Sales of produce not from continental Europe were difficult during this period and shipments from the French West Indies and the Dominican Republic were reduced to avoid head-on competition. However, shipments from these sources gained momentum at the end of the European season. Supply remained moderate in December and resulted in a distinct increase in prices at the approach to the Christmas period, especially for produce from the French West Indies. During the rest of the year, practically all the supply for the French market is from the Dominican Republic, Martinique and more occasionally from Guadeloupe. As chilli peppers are ethnic produce, mainly purchased by African, West Indian and Asian consumers, demand is stable throughout the year. Supply is therefore particularly important in the setting of prices, which can vary considerably according to the flows of produce. Under-supply causes prices to rocket while large supply sends them down. The downward trend is often observed during the European production season when supply is substantial, with lower transport costs. Finally, an external factor—the presence of competing produce—also causes price variations. Thus demand for chilli peppers may decrease during the sales season for 'piment sucette' and 'cow horn' chilli, supplied in abundant quantities, especially by Morocco.


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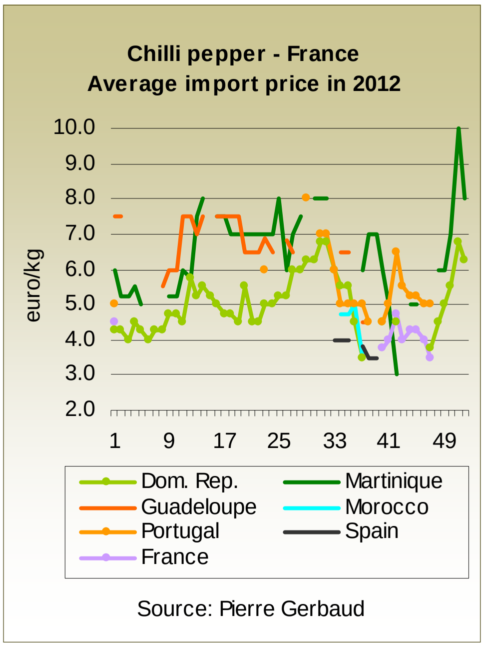
Source: Pierre Gerbaud




EUROPE

LITCHI — ARRIVALS (estimates) Tonnes

| Weeks 2012 | 49 | 50 | 51 | 52 |
|---|---|---|---|---|
| By air | | | | |
| Madagascar | 15 | 10 | 5 | - |
| Mauritius | 30 | 20 | 10 | 5 |
| Réunion | 85 | 80 | 70 | 35 |
| South Africa | 70 | 50 | 30 | 20 |
| By sea | | | | |
| Madagascar | - | 7 000 | 7 000 | - |
| South Africa | - | - | - | 220 |

LITCHI — IMPORT PRICE ON THE FRENCH MARKET — euro/kg

| Weeks 2012 | | 49 | 50 | 51 | 52 | Average December 2012 | Average December 2011 |
|---|---|---|---|---|---|---|---|
| By air | | | | | | | |
| Madagascar | s | 4.50-5.50 | 5.00 | - | - | 4.75-5.25 | 4.90-5.50 |
| Madagascar | br | 4.50 | 5.50 | 6.00-6.50 | - | 5.30-5.50 | 7.60-8.00 |
| Mauritius | br | 4.00-5.50 | 5.00-5.50 | - | 7.00-7.50 | 5.30-6.15 | 8.10-9.50 |
| Mauritius | s | 4.00-5.00 | - | - | - | 4.00-5.00 | - |
| Réunion | br | 4.50-7.00 | 5.00-7.00 | 5.00-10 | 6.00-10 | 5.10-8.50 | 9.00-11.50 |
| South Africa | | 4.00-5.50 | 4.50-5.25 | 5.00-6.00 | - | 4.50-5.60 | 4.60-5.50 |
| By sea | | | | | | | |
| Madagascar | | - | 2.50-2.70 | 2.00-2.35 | 1.80-2.00 | 2.10-2.35 | 2.30-2.45 |
| South Africa | | - | - | - | 3.00-3.50 | 3.00-3.50 | 3.00-3.50 |

br: on the vine or not sulphur treated / s: sulphur treated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# Roots & tubers

4th quarter 2012

## Sweet potato

The European sweet potato season (Spain and Portugal) started at the end of September and continued until the end of November with varieties with white flesh. The comparatively moderate quantities sold steadily at between EUR 1.20 and 1.30 per kg. Larger volumes arrived from Egypt and sold at lower prices: around EUR 0.80 per kg during the period. Packaging has been diversified for Egyptian produce with stronger boxes, better trade presentation and the occasional use of cardboard trays, a change from the traditional telescopic box. Honduras continued to ship regular, moderate quantities; this kept prices at the high end, with EUR 2.00 kg attained at the end of October/beginning of November. In contrast with preceding seasons in which mainly produce with orange flesh was delivered, most of the 2012 shipments consisted of varieties with white flesh. Sweet potatoes with white flesh were delivered from Brazil and China from December onwards when the season for European production was ending. The volumes of produce with orange flesh seem to have been smaller in the last quarter and were shipped mainly from Israel and the United States. Prices of this produce held at EUR 1.10 to 1.20 per kg. This seems to have been distinctly lower than in previous years when prices had always been higher than those of varieties with white flesh.

## Yam

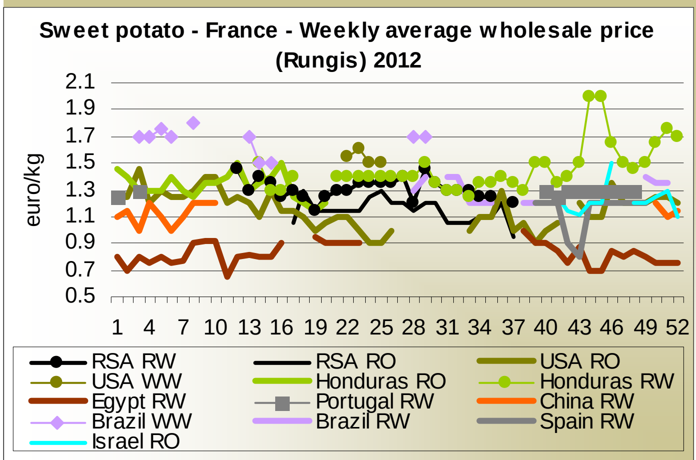
Ghana was still the main yam supplier during the last quarter. Delivery was fairly irregular throughout the period, with white yams dominant but with shipments that were sometimes small and partially compensated by 'Pona' yams. The quantities released on the market were moderate, helping to keep prices up, with a slight increase from mid-November until the end of the year. As shipments from Ghana had been small in October, a few batches from Brazil were also available but at a high price and this blocked sales and resulted in the suspending of shipments. The French yam season started in the second half of November. These sold at higher prices than produce from Ghana but quantities were marginal. A few batches of white yams from Côte d'Ivoire completed supply from time to time but their irregular delivery and uneven quality prevented stable, lasting sales.

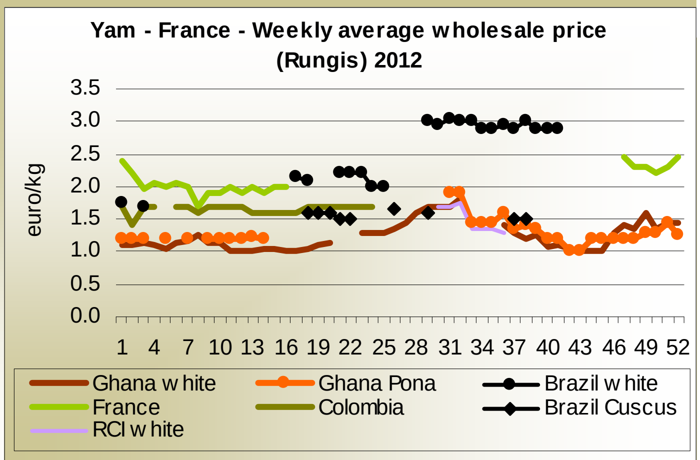
## Cassava

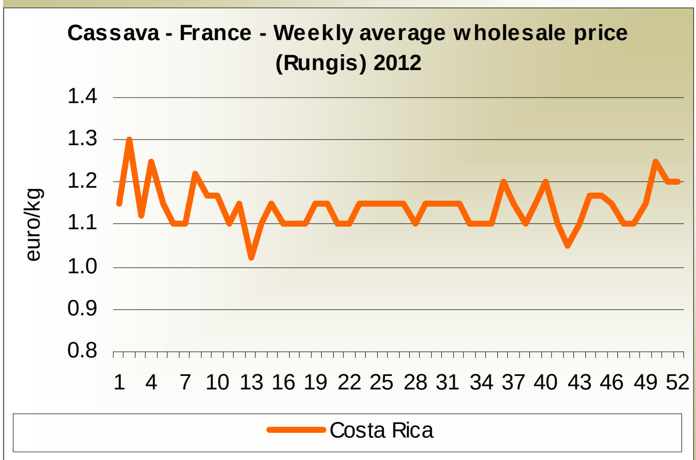
Costa Rica remained the exclusive supplier of the European market in the fourth quarter. Price fluctuations were hardly more than EUR 0.10-0.15 per kg according to variations in supply. Prices rose at the end of October/beginning of November and then in December as a result of limited supply or occasional increases in demand (end-of-year period in the ethnic segment). A few brands gained a reputation for the quality of their produce and succeeded in selling it a little better.

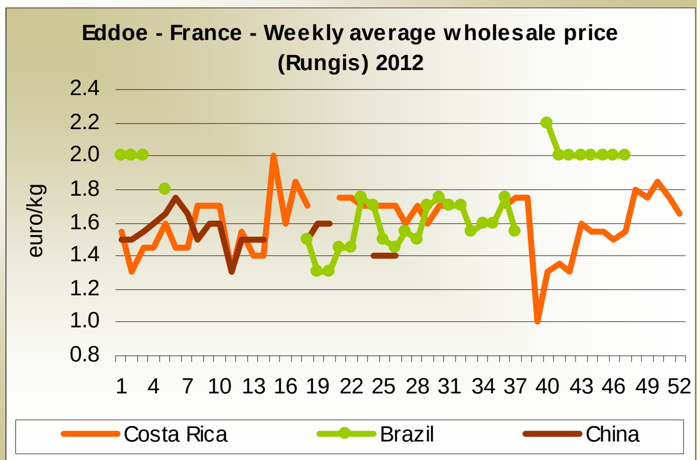
## Eddoe

Shipments from Costa Rica were continuous in the fourth quarter but quantities were irregular. Compensated in October and November by Brazil, Costa Rica was the sole shipper in December. Moderate quantities encourage a rise in prices in December, with sales at EUR 1.50 to 2.00 per kg, strengthened by busier demand for the Christmas period.




Sweet potato: RW: red skin, white flesh / RO: red skin, orange flesh / WW: white skin, white flesh / Source : Pierre Gerbaud


Success tastes better when you work hard to achieve it



# Sea freight

December 2012

Where to start with a review of 2012? By December it was clear that the structure of the reefer business had changed to reflect lower demand for specialized reefer capacity: a record number of ships were demolished, the industry had consolidated further and a number of new alliances had been formed, none more so important than the JV between Seatrade and Baltic Shipping to service the Russian market, which 12 months previously looked as if it was on the path to full containerization of reefer cargo.

Without doubt the specialized reefer business is in a stronger position today to defend its interests than it was last January. This is partly because it has put its own house in order and, equally importantly because the liner competition, led by Maersk, has belatedly come to understand, and even admit, that it needs to make a greater return from reefer to justify continued investment in the segment. Although the lines have been nowhere near successful in the full implementation of the universal USD 1,500 General Rate Increase they declared in October and November, indications are that charterers and cargo interests are paying in some cases significantly more to ship on third party services this season than they did at the same stage last year.

The combination of the switch to containerization and rationalisation of the reefer business into liner trades and COAs has led to a charter market (for large vessels) that is 'made' by no more than three operators and three charterers at any one time. In this structure, reefer brokers have unsurprisingly been marginalized, finding it ever more difficult to add value to either side of the chartering divide - the sector has shrunk as a result.

After such a cathartic 12 months for the specialized reefer industry it is unlikely that the purge of older tonnage will continue on the same scale into 2013. Arguably the greatest concern going forward is how much demand for reefer capacity (both specialised and box) will be affected by the inability of markets and reluctance of retail customers to cover steeply rising supply chain costs.

■ Réunion: after the cyclone...

On 3 January, cyclone Dumile was less than 100 km from the south-west coast of La Réunion island. Winds of nearly 170 kmh, accompanied by torrential rain, caused serious damage to infrastructure (roads, bridges, power lines, etc.) and also to the farming sector. The warning systems set up made it possible to avoid loss of life but the damage was substantial. The event was at the end of the litchi season, which was thus little affected as the last batches were shipped to France before the cyclone hit. At most it precipitated the end of the shipments of a season that had started early and should logically have finished early.

'Victoria' pineapple production zones do not seem to have been hit by Dumile. However, although shipments were resumed, it would seem that the heavy rains had made the fruits more fragile.

Apart from market garden crops, the sector probably hardest hit by the cyclone was mango as a large proportion of the orchards were destroyed. It is true that the height of the trees makes them susceptible to damage by wind. With a degree of cynicism, one could thank the cyclone to have come past after the end of the Christmas and New Year period, thus saving sales of fruits in mainland France, a feature of economic importance for La Réunion. But how long will it take for Réunion to recover its quality fruit export potential, a speciality of the island?

*Source: Pierre Gerbaud*

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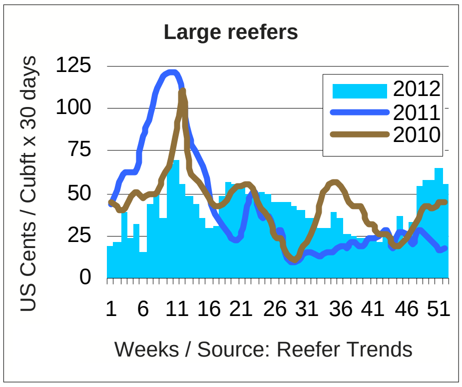
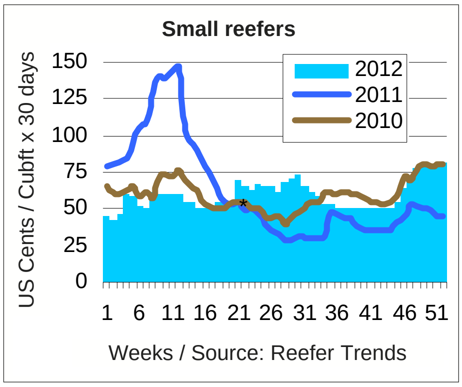
REEFER

MONTHLY SPOT AVERAGE

| USD cents/cubic foot x 30 days | Large reefers | Small reefers |
|---|---|---|
| December 2012 | 59 | 81 |
| December 2011 | 21 | 47 |
| December 2010 | 43 | 81 |



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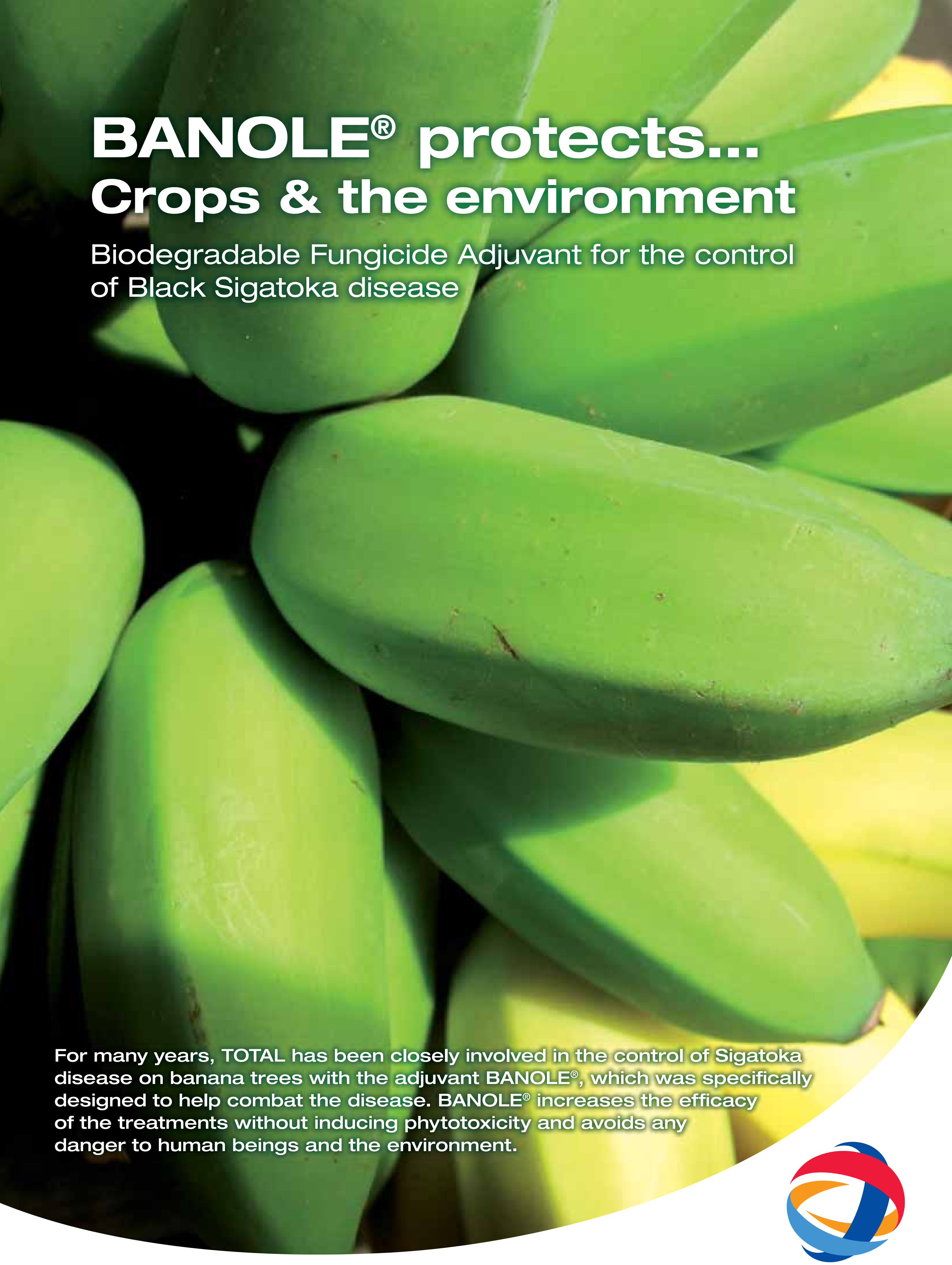

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Close-up by
Denis Loeillet

# Banana
## Prices in 2012

Contents



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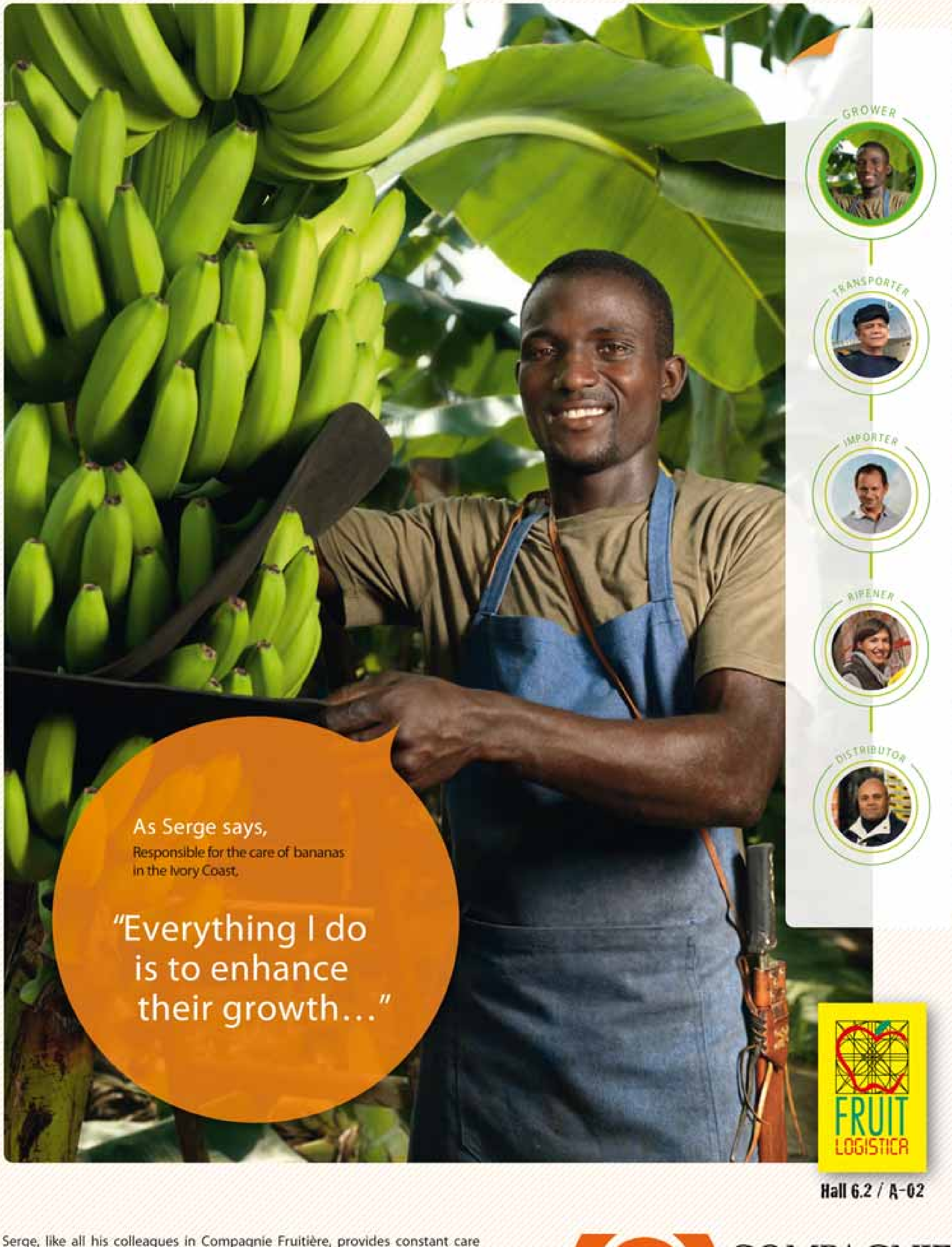
Last year will be remembered as a fine period for bananas. Weather, supply, demand and competition were all just right. We can be pleased about this but also ask questions about the pervading gloom in certain production regions that do not seem to have viewed the improvement with the same enthusiasm.




Hall 6.2 / A-02

Serge, like all his colleagues in Compagnie Fruitière, provides constant care to the fruit he is responsible for during their nine months of growth. Everything he does counts, like here, where Serge gently positions cushions between the banana hands to avoid damage to their fragile skin. It's with this care and attention that we grow 400,000 tonnes of bananas every year in Western Africa.

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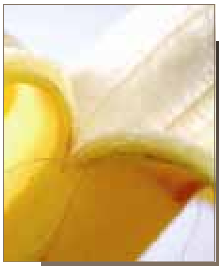

# The European banana market in 2012

## Price performance: 'Luxury, quiet and pleasure'

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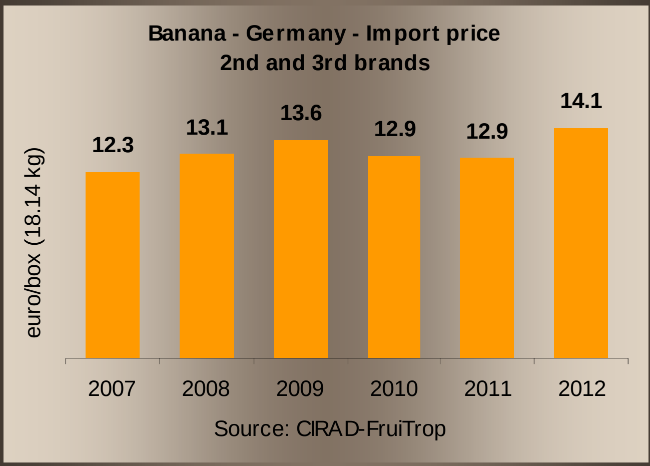
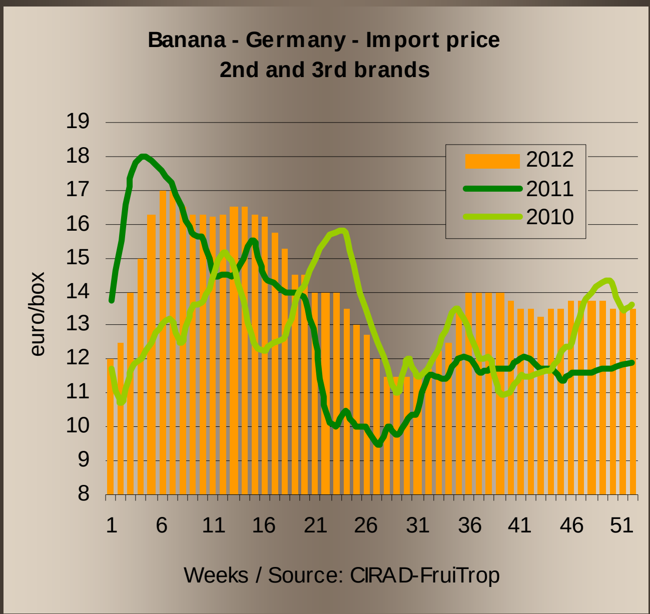
**Green prices up, retail prices almost reasonable and contained intermediate costs. What more could you want? Except for better distribution of surplus value and a market that understands that a little less bananas is much better for everybody.**

The permanent, generalised atypical nature of the market was a feature once again in 2012. This time, it seems to have been for the good of the upstream parts of the chain without the downstream end (retail distribution) or even consumers paying the bill. In spite of the sometimes marked increase in retail prices, bananas are still extremely competitive or even desperately cheap. But I shall first analyse price movements in the upstream part of the sector.

### Confirmed improvement

According to the CIRAD Market News Service and for all the references examined, 2012 green prices increased by an average of a little more than one euro per box and as much as EUR 1.4 for major





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brands. This is an average 10% increase on 2011. Value-added even increased to 18% on traditionally very volatile markets like Poland and Russia. Spain was the only exception, with a serious 17% decrease (Super Extra).

For once, the improvement observed in the annual indicator does not conceal erratic monthly movements. For example, except in Weeks 1 to 6 (January to mid-February), prices in Germany displayed positive performance for 46 weeks. And the 'poor performance' at the beginning of the year should be viewed in relative terms as comparison with 2011 does not show that 2012 was better. Great difficulties at production level in dollar zones, and especially in Colombia, right at the end of 2010 allowed a fine start to 2011. Performance was thus very satisfactory when 2012 is compared to the smoothed average for the last three years (2009-10-11). Only January (- 2%) and June (- 1%) were negative. It has been seen above for January that 2011 pushed the average higher. For June, 2009 and 2010 gave a boost to what is traditionally a dangerous period for bananas. Releases on the market were controlled and supply of competing fruits was short (especially in 2010) and explained the increase in import prices. 2012 was among record years for the other ten months. Prices (in Germany for example) often increased by 10% in comparison with the average and even hit 17% in September. The return to school—a fetish for the French—was for once the occasion for the market to gain momentum again. In September 2012, prices hit a record EUR 14 per box in Germany and EUR 13 in France.

2011 was also a very volatile year with large average annual variation (standard deviation in the series of weekly import prices in France) of more than EUR 2.5 per box. Together with 2009, the year of the hurricanes, deviation was among the largest of the past decade. The situation was calm again in 2012 with volatility falling to a historical low of around EUR 1.5 per box, a level only previously observed in 2010. Alternation has been observed since 2009, with a stable year followed by an unstable one. But the performance that made 2012 a really special year was that this consistency was accompanied by an excellent annual price level. 2013 promises to be just as exceptional and the beginning is very encouraging. It is in fact the best start ever with an import price of more than EUR 13.50 per box in France. But the year will be long!


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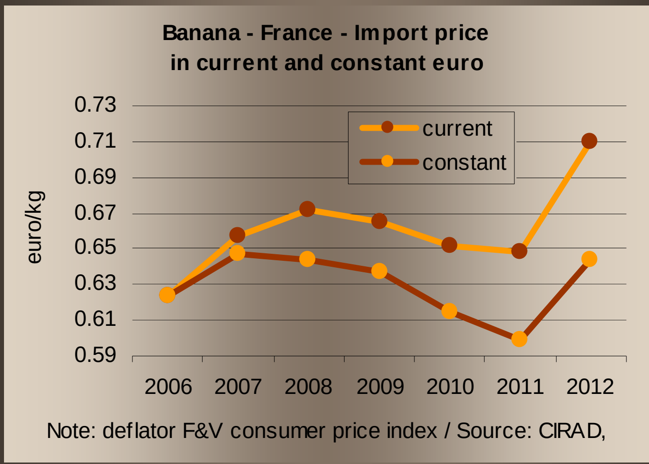


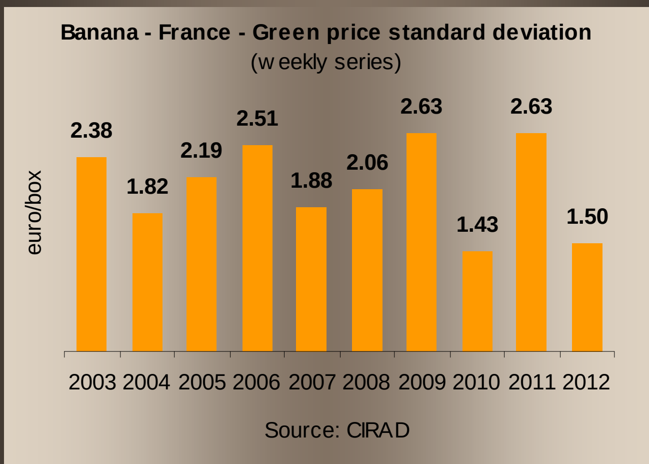


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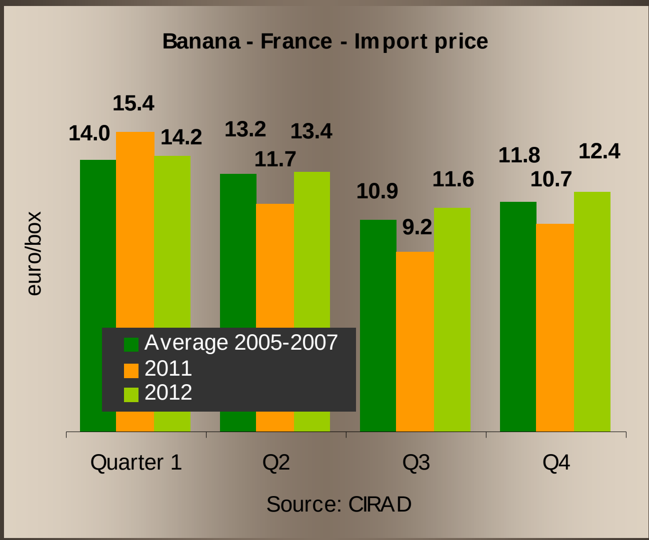
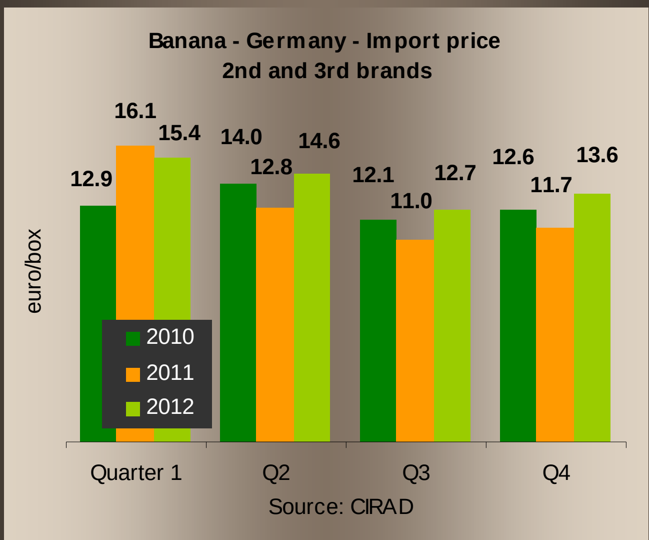
## Small causes, big effects

The effects for 2012 are simple, clear and massive: import prices were good. The causes are more complicated. As always, a set of factors makes or breaks the banana market. It was luck this time. Volumes of competing fruits (red fruits throughout the season and summer fruits at the beginning of the season) remained small and their comparative competitiveness worsened. The 2012 apple and pear harvest was far from affecting bananas, the main competitor. Weather damage during periods crucial for the development of plants or fruits dramatically reduced the harvest volumes all over Europe. Although there was not necessarily a deficit in citrus fruits, it can be said that the 2011-12 and 2012-13 seasons did not disturb the banana market very much. Weather conditions also favoured banana consumption with the poor spring in Northern Europe. Those were the external causes.

The main internal factor was the supply of bananas, with a decrease of supply on the world market and hence on the European market. A more complete analysis will be published in the special issue of FruiTrop in April devoted to the supply of the European and world markets, but it can be observed that small causes have big effects. There should be no talk of a shortage There are no queues for bananas in shops. The figures collected by CIRAD are clear. Ten months of figures are currently available for 2012 (January to October) and, in comparison with 2011 supply has displayed a surplus or has been stable 4 times and a deficit 6 times. The deficit is very relative if all market supply sources are counted: dollar, ACP and EU production. Except in September when supply was 8% less than in 2011, we refer here to a deficit of just a few percent: 1 to 4 depending on the month. In volume terms, this means a reduction of 5 000 to 18 000 tonnes per month, that is to say only a few hours of European monthly consumption. The balance—drawn up for ten months for the moment—also shows the small variation in banana supply: - 1% in comparison with 2011 and stable in comparison with 2010. This should be compared with the increase in import prices examined above—from 9 to 11%. Market elasticity is thus remarkable.

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## A decrease in supply caused mainly by dollar banana sources

Why such a sudden fragility of dollar supplies that were considered to be inexhaustible, uncontrollable and developing strongly? Weather, politics, disease and competitiveness have contradicted this. The decrease in world supply at various times of the year, according to country, is a feature of the market. Explanations of the decrease in world supply include weather damage, less than optimal production conditions in certain cases, an Ecuadorian government that complicates life for the export sector, poorly controlled Black Sigatoka disease, especially in Ecuador, and certain countries like Costa Rica that are seeking to improve their competitiveness without returning to past productivity levels.

Somewhat cynically, one can approve this reduction of supply when thinking about the forced reorganisation of the Russian market throughout 2012. Just imagine large volumes of Ecuadorean bananas on the poorly mastered Russian market and hence in search of a target market and strongly attracted by the EU. Poland would have been the first market to explode. But the Russian market held up and grew in the same proportions as the Polish market. We just hope that this market of structural importance for the European continental market becomes reorganised quickly.

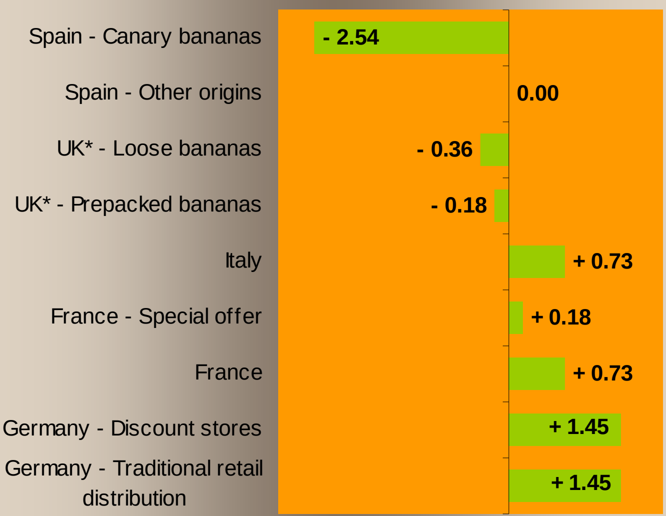
This analysis is too superficial even if it seems to be satisfactory as a preliminary approach. Indeed, parameters other than supply from all sources are involved. First, certain parameters are linked to supply structure. Examination of the detail shows that the dominant supply—dollar bananas—drives the trend in Europe. This is not a new discovery but 2012 confirms it. Dollar supply was short nine months out of ten, the non-random exception being January. It is reminded that for reasons of the other suppliers (ACP and community sources), the market was over-supplied four times and prices increased throughout the year, with one exception.

However, market behaviour also results from the strategies and forecasts of the constituent firms. It is more difficult to find figures for this. What is certain is that everything possible was done to restore margins, with the results varying according to the market or exposure to exchange rate risks. For others, the good market situation coincided to large-scale reorganisation, as in Southern Europe where the end of the Orcero-Del Monte agreement increased competition, especially in Italy. The interim results published by several large

| Banana — Europe — Import and retail prices | | | | |
|---|---|---|---|---|
| **euro/box** | **2011** | **2012** | **difference** | **difference %** |
| United Kingdom **(£/box)** | | | | |
| Retail price Loose bananas | 13.2 | 12.9 | - 0.36 | - 3% |
| Retail price Prepacked bananas | 21.9 | 21.8 | - 0.18 | - 1% |
| Import price | 10.3 | 10.6 | + 0.33 | + 3% |
| Spain | | | | |
| Retail price Canary bananas | 35.0 | 32.5 | - 2.54 | - 7% |
| Retail price Other origins | 24.3 | 24.3 | 0.00 | 0% |
| Import price - Canary bananas - Super Extra | 18.9 | 15.6 | - 3.30 | - 17% |
| Germany | | | | |
| Retail price - Traditional retail distribution | 21.6 | 23.0 | + 1.45 | + 7% |
| Retail price Discount stores | 18.9 | 20.3 | + 1.45 | + 8% |
| Import price | 12.9 | 14.1 | + 1.17 | + 9% |
| France | | | | |
| Retail price | 27.2 | 27.9 | + 0.73 | + 3% |
| Retail price Special offer | 23.8 | 23.9 | + 0.18 | + 1% |
| Import price | 11.8 | 12.9 | + 1.10 | + 9% |
| Italy | | | | |
| Retail price | 32.8 | 33.6 | + 0.73 | + 2% |
| Import price | 12.5 | 13.5 | + 1.00 | + 8% |

Sources: TWMC, SNM, CIRAD

**Banana - Retail price - Difference between 2012 and 2011**
(euro/box)




* UK: in £/box
Sources: TWMC, SNM, CIRAD, national authorities

companies are mixed. It remains to be seen what impact bananas have in their accounts. Those that mention them specifically are positive (Fyffes and Del Monte) or somewhat negative (Dole and Chiquita). Other more modest companies announce 2012 banana sector profits much greater than those of 2011.

In the downstream part of the sector, retailers have displayed various attitudes. First, the changes in German supermarket chains that operate less on a spot basis and more in the medium term (two to three months). This is certainly a pity during an inflationary period but has a stabilising effect in periods of greater tension.

## German retailing going against the trend

As regards retail price policy, we cannot analyse the policy of each company but behaviour categories can be identified in Europe. There is first Germany, Europe's leading consumer market, where chains have increased retail prices. It was easy for the retail sector to follow the inflationist pressure of the import market. Easy and logical it is true, but not necessarily in reasonable terms. Of course bananas are and will remain the cheapest fruits on the shelves, whatever the site of consumption, the season or the year. So a few centimes more per kilogramme will not bother consumers. They are convinced that bananas are cheap food. But it is not necessarily reasonable all the same as the increase observed is substantially greater than that at import stage in absolute value. While the increase in the retail price has been an annual 7 to 8%, in conformity with the increase at the import stage, in absolute value the surplus value per box in Germany was EUR 1.45 both in discount supermarkets and traditional outlets. It is reminded that the price has increased by only EUR 1.17 at import. Questioned about this divergent price movement at a recent meeting of the World Banana Forum (WBF), German retail distribution representatives held that intermediate costs had moved unfavourably in their country with higher energy costs and rising wages. A check showed that this was true but not in proportions that accounted for the increase. The windfall effect of good trends on the world banana market played a strong role here.

Prices have moved very little or even fallen in the other European countries studied. For example, France is in the category in which distributors have increased their retail prices more slowly (+ EUR 0.18 to 0.73 per box depending on whether standard or special offer sales are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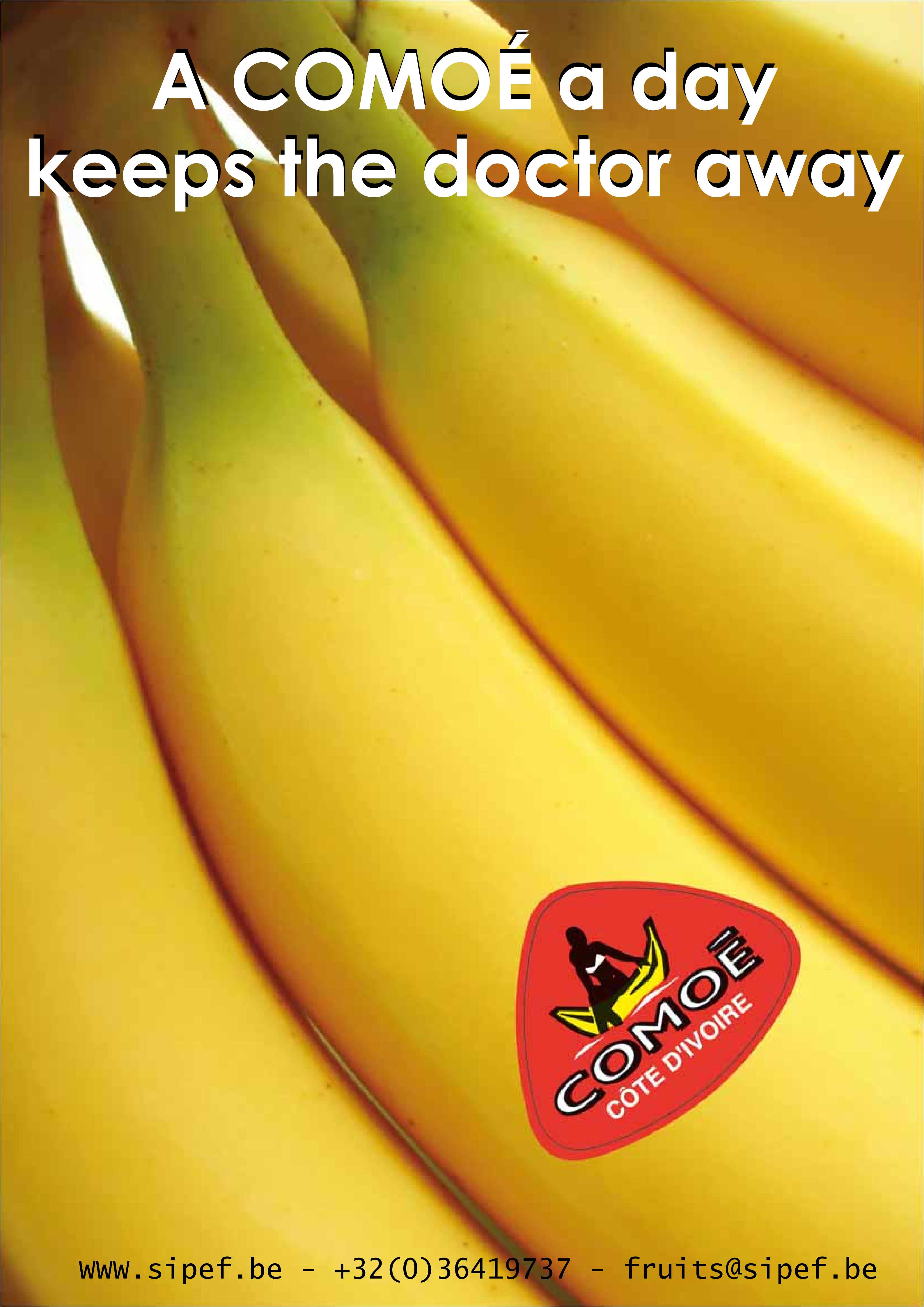
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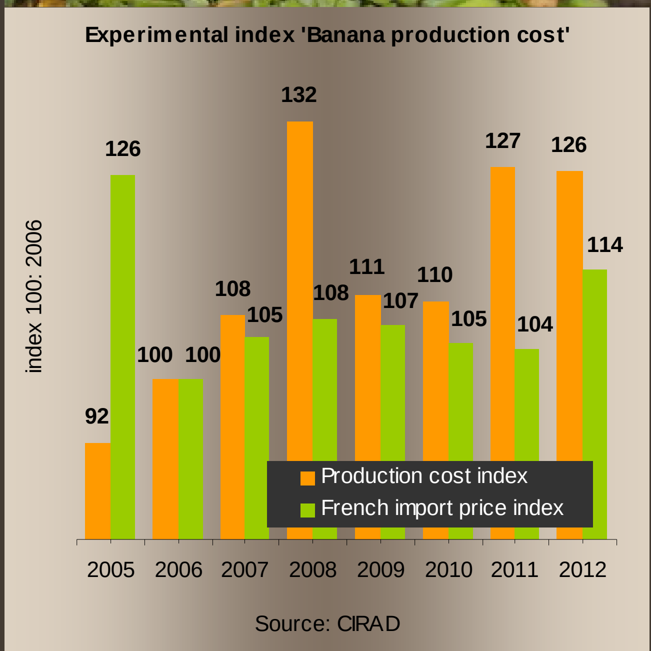
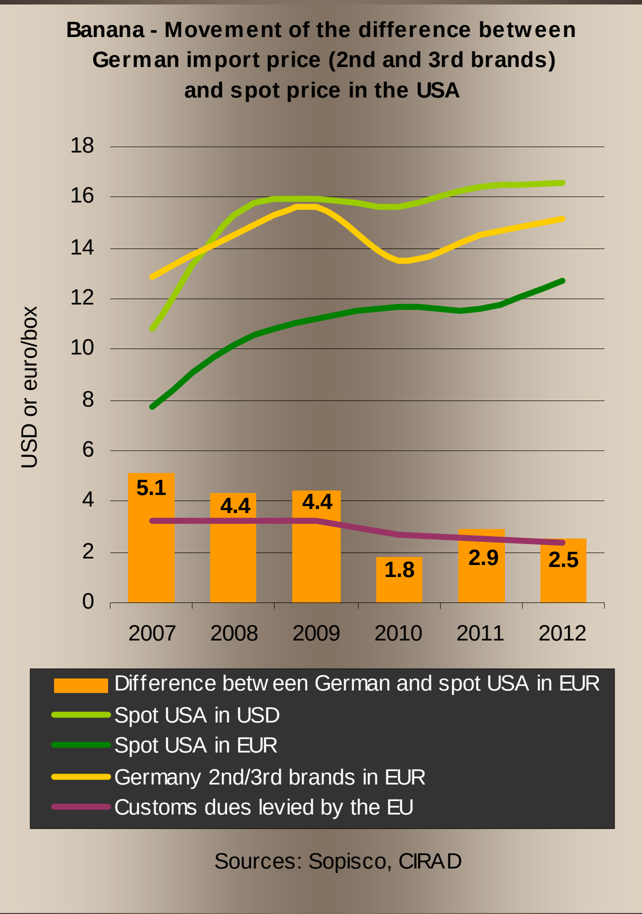



concerned) than the import price (+ EUR 1.10 per box). The situation seems to be the same in Italy. UK distributors have played with scissors, cutting prices. Whereas the green price (spot) increased by 33 pence per box, the retail price for loose fruits was lowered by the same amount. That of packaged bananas stagnated. We know about the retail price war in the UK and this is probably an explanation. In addition, this is the spot import price and this makes the analysis less reliable as the British market is known for its high degree of contract arrangements. There is no bias in the study of the Spanish market as everything went in the same direction and in large proportions. Indeed, the fall in the green price of Canary Island bananas (- EUR 3.3 per box for Super Extra) was accompanied by a fall in retail prices (- EUR 2.54 per box, average price for all categories). The retail price of dollar bananas has remained unchanged.

The banana market is not representative of the overall economy of a country. It would be wrong at the least to think this, but it can be imagined that certain features are echoed. How is it possible not to compare the economic situation in the countries mentioned above and the movement of banana retail prices? The economic slump has made retail distributors very attentive to price positioning. This is no doubt less the case in Germany where the economic situation is worlds away from that of Spain.

## Exchange rates and customs tariffs in the background

Exchange rates form one of the parameters typically suffered by operators and on which they have little hold. It is true that they can partially arbitrate on futures markets to cover part of the risk. We examined the effect of the exchange rate in the last issue of **FruiTrop** devoted to pineapple (No 204). In 2012, the euro was relatively weaker against the dollar than in 2011. The attractiveness of the European market was affected automatically and immediately. In a situation of fairly limited supply, the attractiveness of Europe decreased to the benefit of the United States and other non-euro countries. But the question of exchange rates is a complex one and does not affect just the selling price but also the cost of the various inputs, sometimes in conflict with competitiveness. As regards cost prices, the index published by CIRAD is stable overall for 2012 in comparison with 2011: index 134 (spot dollar fruits, index 100 in 2006). However, it started to fall substantially from the end of the first half of the year.





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One might nearly forget the customs dues paid for the entry of dollar bananas to Europe. It is not one of the banana themes this year, except for discussion of the safeguard clause and the stabilisation mechanism, but it has medium and long term effect (**FruiTrop** 204, October 2012, page 13). It was EUR 132 per tonne (EUR 2.4 per box) in 2012 and in 2013 may decrease by 8 euros for the eight Latin American beneficiaries of the association agreement. It is reminded that this has not yet been signed by Ecuador.

## 'Luxury, quiet and pleasure'... for almost everybody

There is no point in repeating that the situation was very favourable for the banana market … on the import side. This was not the case in dollar banana production, especially for workers and small growers or exporters. The gap is enormous when comparison is made of prices approaching record levels in Europe and the United States and what is felt upstream. We have the impression that the mechanism for the passing on of value has seized up. As a major operator said at the last WBF meeting in Rome in December 2012, you cannot increase wages after just one good year. He was doubtless using for his own purpose the saying that 'one swallow doesn't make a summer'. But if the terms of trade are not improved during good periods for those in the most fragile situation, when will this be done? In short, the world banana situation remains uncertain and so wage moderation is the law.

Seen from Europe, we nonetheless have the impression that the situation is tending to improve at production. In Ecuador, the government has stipulated obligatory regular increases of the minimum wage. This salario basico unificado increased from USD 264 per month in 2011 to USD 292 in 2012 and now to USD 318 USD en 2013. Pressure from the markets (a nebula formed by NGOs, consumers and retail distributors) is also making things move. But not quickly enough it would seem, or perhaps it is just window-dressing. And then although certain behaviour is changing in certain countries, unfortunately the movement is not universal. Market euphoria is therefore somewhat out of step with the demoralisation perceived in some production zones.

## 2013, a year that should not disappoint us

But how long will the 'Banana Spring' last? It is difficult to have an accurate idea, but it can be imagined—without taking much of a risk—that there should not be any great surprises in the first half of

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the year. The quantities available in dollar zones should not suddenly increase. The powerful typhoon that ravaged part of the Philippines at the beginning of December hit the export banana sector hard. Japan, China, Korea and Iran will have to obtain part of their supplies elsewhere. The damage is serious but there are no precise estimates. There is talk of the total destruction of at least 10 000 to 14 000 ha of Cavendish, that means a shortfall in a broad range of from 500 000 to 800 000 tonnes during the next twelve months. Ecuador could be well-placed to replace the Philippines, but many people have doubts about its production potential.

Still on the subject of Ecuador, the government announced an increase in the guaranteed minimum price at production to USD 6 per box, that is to say USD 8 per box FOB. What effects will this have in terms of increase in supply? It is difficult to reply as the guaranteed minimum price is not always respected and although checking seems impossible, the state wishes to reduce the area under banana by 15 000 to 20 000 ha, that is to say 10% of the total officially planted. Eduardo Ledesma, the director of the Banana Exporters Association of Ecuador (AEBE), has his opinion on the subject. In a statement made in early January this year, he affirmed that his country was no longer competitive with regards its competitors (Colombia, Costa Rica, Guatemala and Honduras). He even estimated the difference to be USD 3 per box.

In 2013, Costa Rica is to continue its policy of improving productivity but without increasing the planted area—quite the contrary. As regards ACP sources, it can be considered that after the complete rehabilitation of the plantations in Côte d'Ivoire, the increase in potential in Ghana, the extensions planned in Cameroon and favourable dynamics in Surinam and Belize, this group of producer countries could return to their best levels. Gloom is still the watchword for the Caribbean ACPs. In the same zone, production in Guadeloupe and Martinique in the French West Indies faces a particularly difficult challenge—that of managing Black Sigatoka disease. This spread to the islands recently but the effects have already been felt especially as control is made more difficult by the provisional forbidding of aerial spraying, a measure that could become permanent, and a very small range of authorised fungicides.

As regards weather, it is still too soon to have any idea about hurricane activity in the 2013-14 season. But at least we know that its intensity will depend directly on the development or not of the El Niño phenomenon in the Pacific and that we are still in a risk period. The first forecasts are due in April. In the more short term, the last forecasts (beginning of January 2013) are reassuring as a normal climatic situation is forecast for the next three months in Central and South America. As far as competing fruits are concerned, the landscape will remain clear of European pip fruits until the harvest in the autumn.

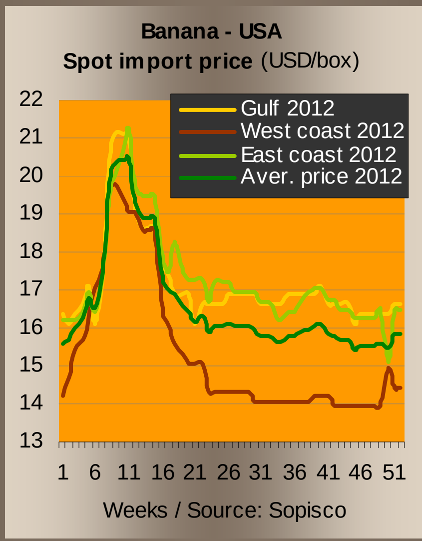
In the current morose atmosphere in Europe, we are going to hold on to this good situation on the banana market and borrow Jacques Coeur's motto: 'Nothing is impossible for a valiant heart'. Let's make the extravagant bet, at the beginning of the year, that the banana market will continue along these lines, not because of smaller world supply but because all operators will have experienced and appreciated the calm and serenity of a balanced market. We also hope that a continued well-oriented market does not give ideas to sector professionals or others who would like to disturb the market with poorly structured spot offers.

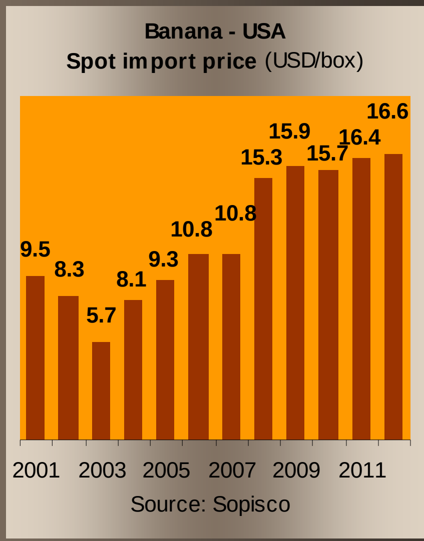
But the question of the distribution of value remains to be settled, with the specific goal of improving the working and living conditions of tens of thousands of agricultural workers and their families. It would seem necessary to find something better than Adam Smith's 'invisible hand' that gives the market the power to contribute naturally to the wealth and well-being of all. It is true that sales of banana were not as common as all that in 1759 ■

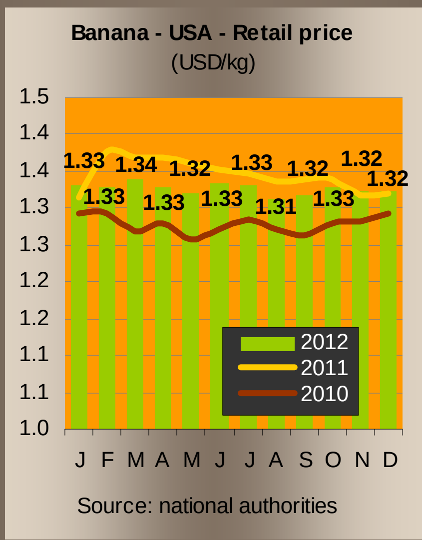
**Denis Loeillet**, CIRAD
denis.loeillet@cirad.fr

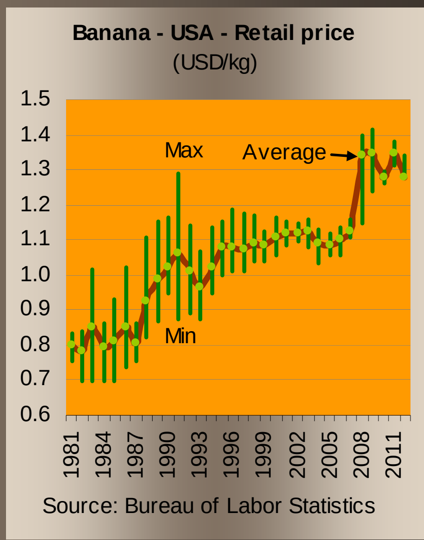
# United States: an almost boring scenario!

For an economic planning specialist, the US banana market has been terribly boring for a number of years. This might seem to be an exaggeration but not as much as all that in fact. Indeed, prices on the US market are unfailingly steady. The US spot import price in 2012 was USD16.6 per box, practically identical to the USD 16.4 observed in 2011. It can just be noted that the prices on the East and West coasts and in the Gulf of Mexico were, as usual, closely grouped until Week 15 while this feature had lasted until Week 23 in 2011. Prices on the West coast then fell suddenly and those on the East coast and in the Gulf of Mexico held at high levels. The retail price was a steady USD 1.33 per kg in 2012 against 1.35 in 2011. It was as if American fruit department managers had lost their erasers and chalks! The greatest difference from one month to the next was just one cent. The contractual basis applied from upstream to downstream is the basic feature of the US market and keeps prices stable. Without nostalgia for markets with yo-yo behaviour, this is also a sign of a patent lack of competition. The attractiveness of the US market in comparison with the EU was just as strong in 2012. The difference between US and EU spot prices was EUR 2.5 per box in 2012 against EUR 2.9 in 2011. This small decrease resulted from the substantial increase in green prices in Europe. But this is still well above the customs tariff to be paid for the entry of dollar bananas to the EU (EUR 132 per tonne, i.e. EUR 2.4 per box). 2012 was also a year in which the major operators used the force majeure clause for the second time since 2008. This time the reason was the shortage of bananas. The clause was activated at the beginning of the year and lifted at the beginning of March.

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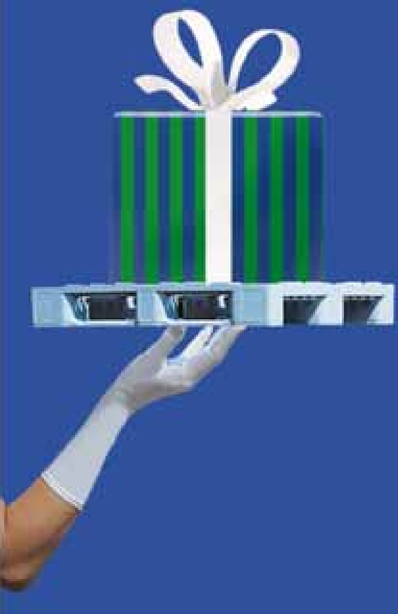

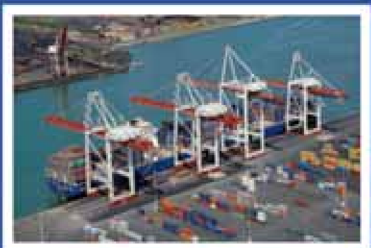

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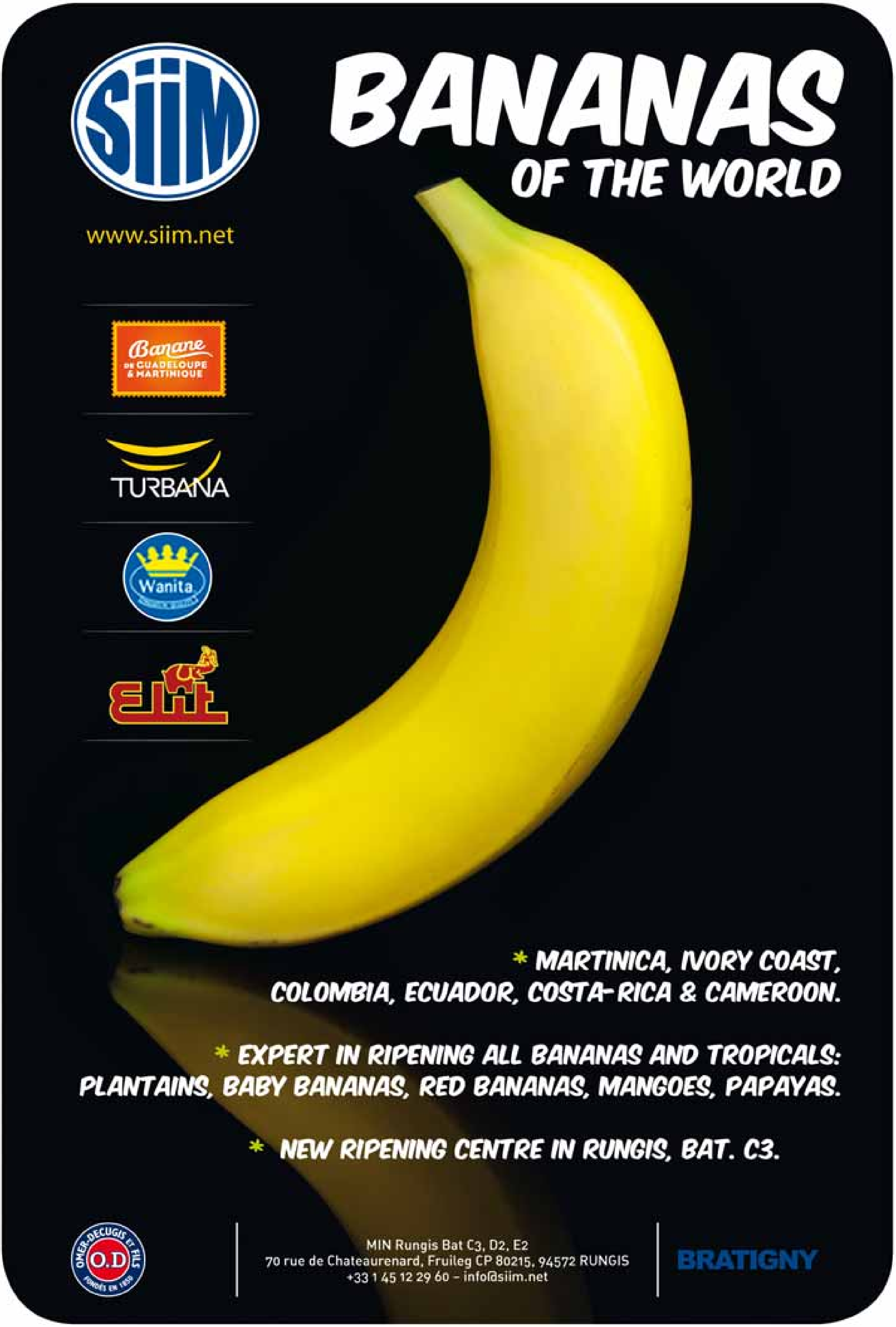
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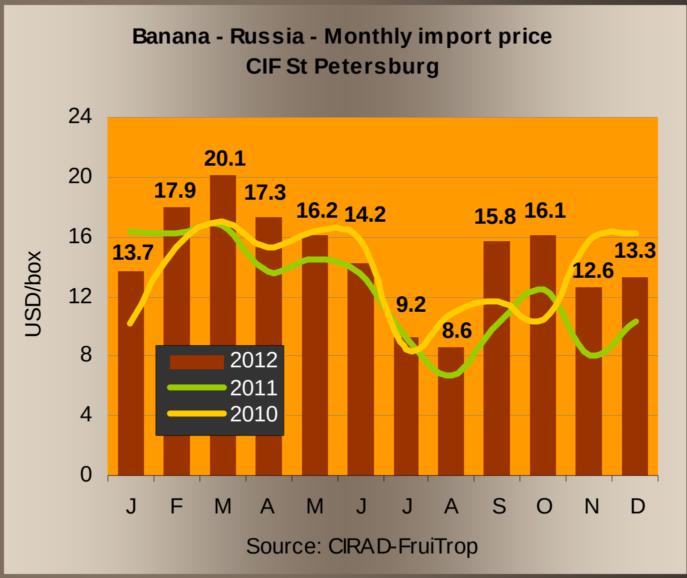
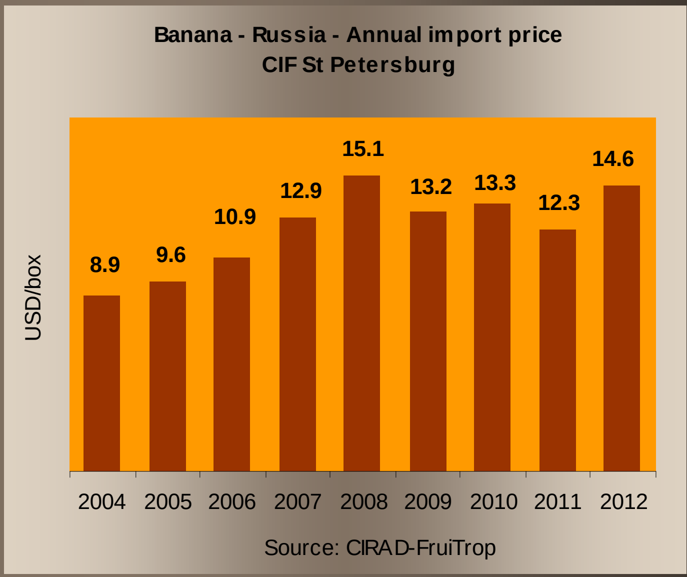
# Russia:
## strong, fine volatility

What is good about very volatile markets is that they overreact when both falling and rising. And this year was not a disappointment. Prices on the Russian market rose twice as fast as on the major EU markets (+ 18% against + 9%). The annual average was USD 14.6 per box (CIF St Petersburg), that is to say an increase of USD 2.3 per box in absolute value. The first half of the year was magnificent with prices that had not been attained since 2008. The USD 20 per box level was exceeded for four weeks (Weeks 9 to 12). But the Russian market would not be the Russian market if it did not break downward records during the summer. Prices fell to USD 6 per box from Week 30 to Week 33. There is no point in calculating volatility indexes as the movement was phenomenal! Whatever the situation it is a fundamental feature of this market. The financial difficulties of certain major operators that could have destabilised the market were counter-balanced by small supply of fruits from Ecuador. It is difficult to obtain figures but the deficit was 6% at the end of August in comparison with 2011. But the fall should be viewed in relative terms as 2011 had been a record year for supply. In spite of the decrease in 2012, the Russian market is still very large at some 1.1 to 1.2 million tonnes.

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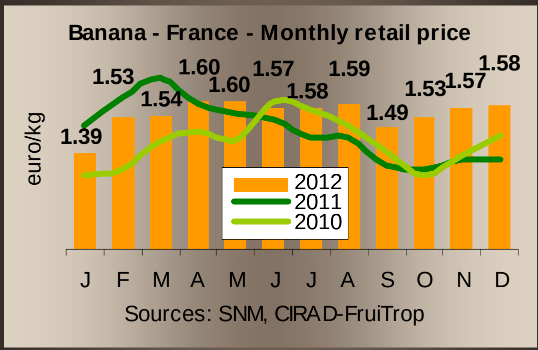
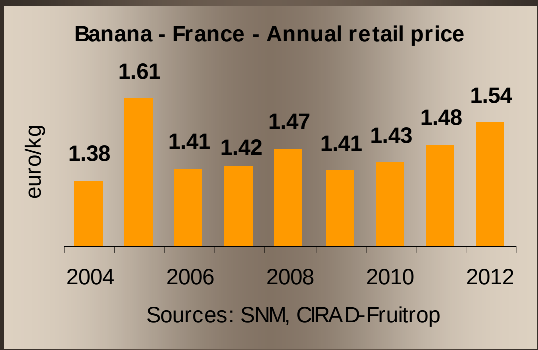
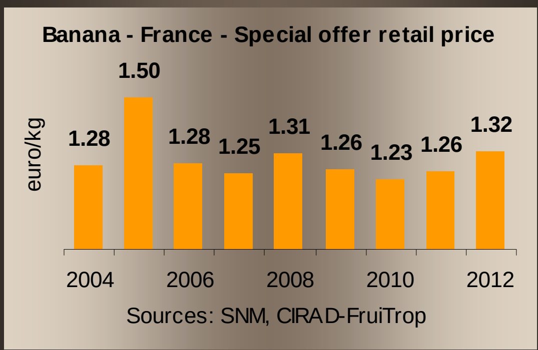
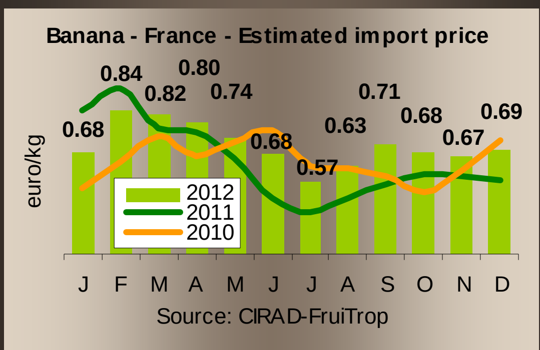
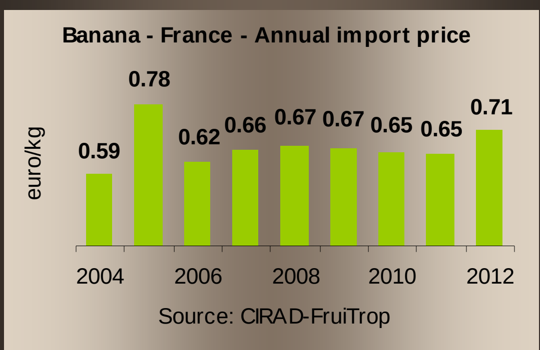
## France



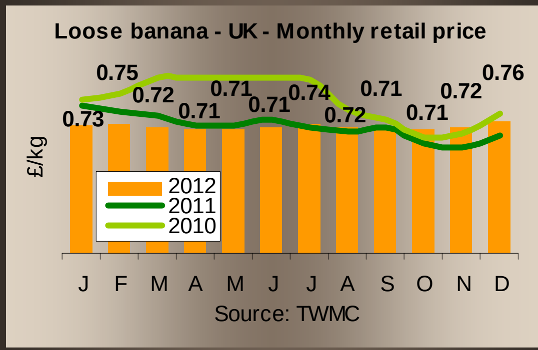



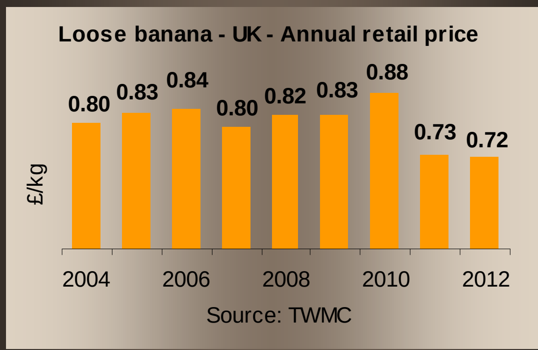



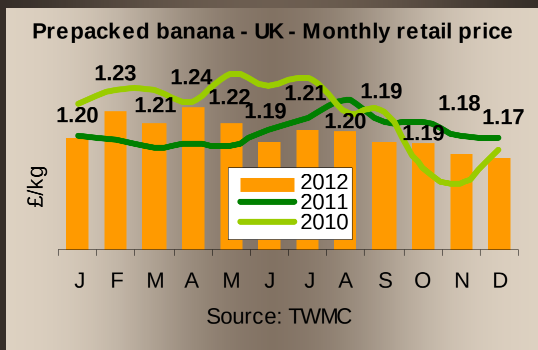



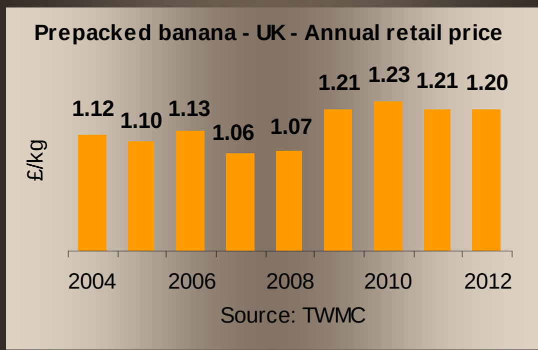




## United Kingdom



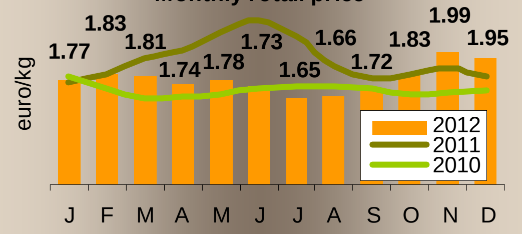



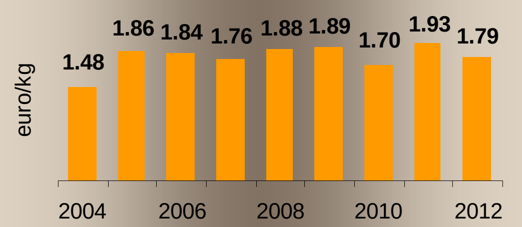

## Spain

**Banana from Canaries - Spain**
**Monthly retail price**



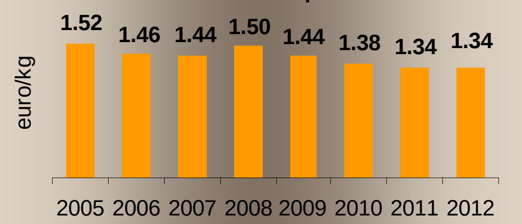

Source: national authorities

**Banana from Canaries - Spain**
**Annual retail price**



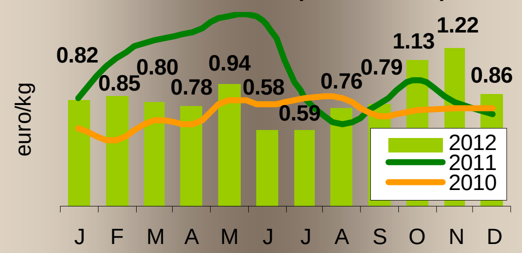

Source: national authorities

**Banana excluding Canaries - Spain**
**Annual retail price**



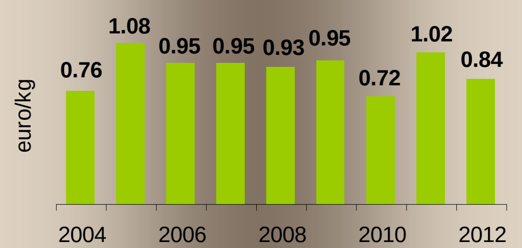

Source: national authorities

**Banana from Canaries - Spain - Green price**




Source: national authorities

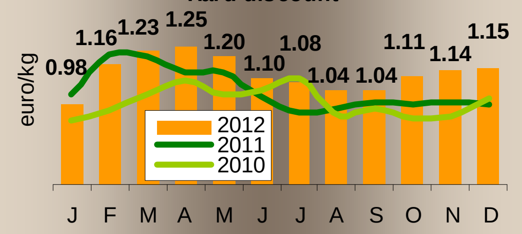
**Banana - Spain - Super extra import price**




Source: national authorities

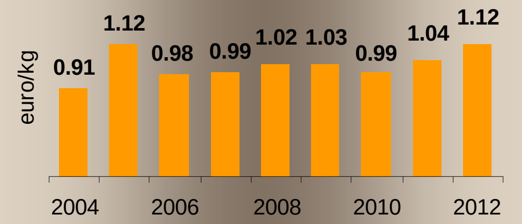
## Germany

**Banana - Germany - Monthly retail price**
**Hard discount**



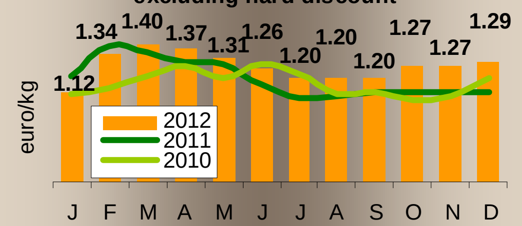

Source: TWMC

**Banana - Germany - Annual retail price**
**Hard discount**



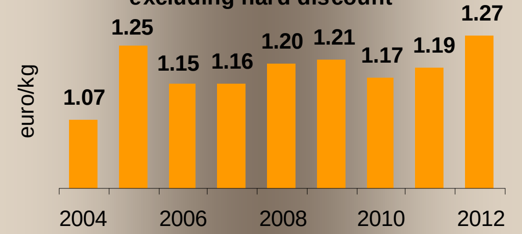

Source: TWMC

**Banana - Germany - Monthly retail price**
**excluding hard discount**



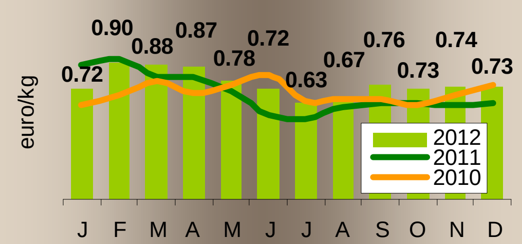

Source: national authorities

**Banana - Germany - Annual retail price**
**excluding hard discount**




Source: TWMC

**Banana - Germany - Green price**




Source: national authorities

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Close-up by
Cécilia Céleyrette

# Apples & Pears

Contents



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Although the market situation for southern hemisphere apples and pears has still not quietened—for reasons of the economic slump—exporters might find things a little more peaceful this year in their endless quest for new markets to make up for the loss of momentum of their traditional markets. Indeed, the marked shortfall of the European apple and pear harvests might provide them with an opportunity to achieve price levels that might cover galloping inflation, even if not all sources are attracted by Europe. Some exporters, especially of apples, will favour structural outlets come what may rather than conjunctural mirages.

# Apples and pears
# The world counter-season market

## When globalisation favours proximity

The economic crisis has hit traditional markets head on, causing a switch in focus of southern hemisphere sources to emerging countries. The trend has been marked in apples since 2008 but is now also seen for pears, even if it seems to affect mainly the EU market. With a falling dollar, the US market has held up better so far. It should also be stressed that after the mirage of globalisation, these sources are now taking up new positions on nearby markets.

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Southern hemisphere apples — Market shares by country and main destination en 2012

| tonnes | EU-27 | USA | Russia | Others |
|---|---|---|---|---|
| Chile | 17% | 16% | 5% | 62% |
| South Africa | 30% | 0% | 1% | 69% |
| Argentina | 18% | 3% | 18% | 61% |
| Brazil | 80% | 1% | 5% | 14% |
| New Zealand | 41% | 12% | 1% | 46% |
| Total | 27% | 10% | 4% | 59% |

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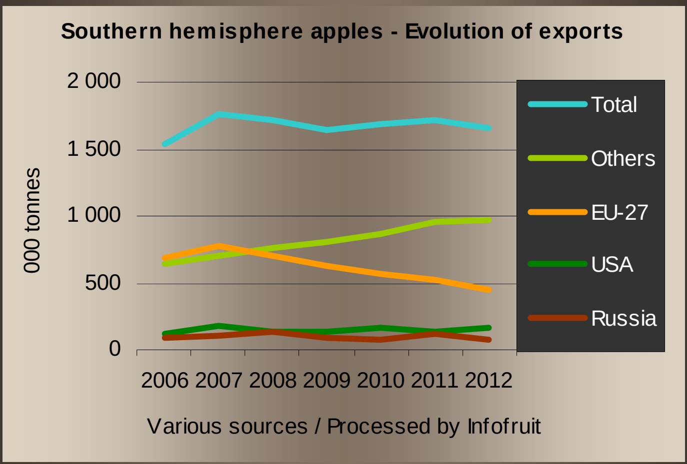
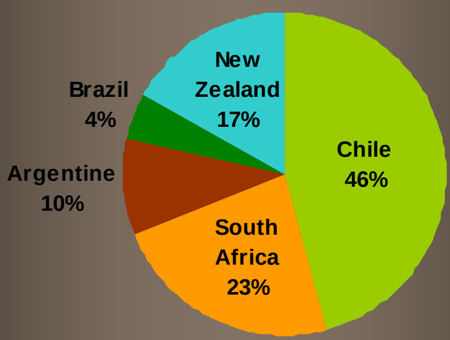



Southern hemisphere apples
Main exporting countries in 2012

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# Apple shipments to Europe down by 40% in 5 years!

The fall in apple exports to Europe was still more marked in 2012 with a 14% drop in comparison with 2011 while total exports decreased by only 3% (1.66 million tonnes) and the decrease had been only 8% during the two previous years. This outlet now seems to account for only 27% of shipments from the southern hemisphere: 17 to 18% for Chile and Argentina, 30% for South Africa, 41% for New Zealand and 80% for Brazil. Exporters' loss of interest in a market that has suffered a slump since 2008, combined with difficulties in Argentina which is strongly focused on Europe, have led to a spectacular 42% decrease in shipments to Europe in five years, from 786 000 t in 2007 to only 450 000 t in 2012. The decrease has been strong for all sources (- 30 to - 44% for Chile, Brazil and New Zealand) but especially for Argentina (- 73%), with shipments from South Africa down by only 27%.

© Denis Loeillet


Although the American market is uneven, it seems to have held up better (161 000 t imported in 2012, that is to say 10% of shipments from the southern hemisphere), and above all displays strong Chilean presence (71% of imports from the southern hemisphere). Likewise, shipments to Russia sometimes oscillate fairly strongly but remain at about 4 to 5% of total fruit exports, even if a fairly marked decrease was observed in 2012 with less produce from Argentina (29 000 t, - 50% in comparison with 2011) which, with Chile (34 600 t), accounts for the greater part of shipments to this destination from the southern hemisphere.

## Preference for nearby markets

The emerging markets have been favoured in parallel by southern hemisphere exporters in recent years. These markets have thus developed in inverse proportions to the

Southern hemisphere pears — Market shares by country and main destination in 2012

| tonnes | EU-27 | USA | Russia | Others |
|---|---|---|---|---|
| Chile | 35% | 15% | 3% | 47% |
| South Africa | 47% | 2% | 9% | 42% |
| Argentina | 21% | 9% | 26% | 44% |
| New Zealand | 16% | 42% | 0% | 42% |
| Total | 31% | 8% | 17% | 44% |

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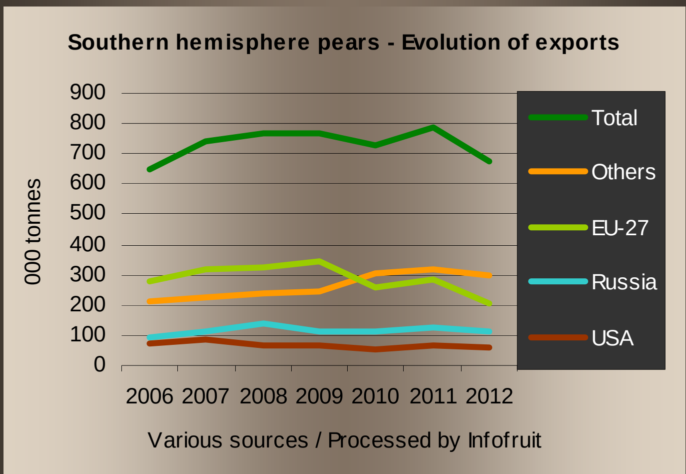
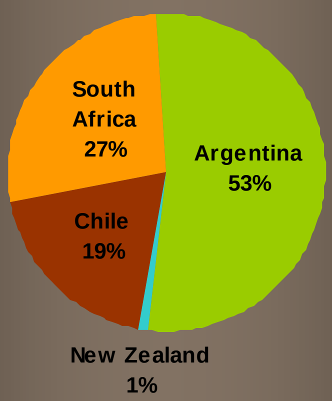



Southern hemisphere pears
Main exporting countries in 2012

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decrease in Europe, with a 38% increase in five years from 700 000 t in 2007 to 974 000 t in 2012. Shipments to these destinations now form 59% of the total exported from the main southern hemisphere countries. However, movements of goods from the southern hemisphere sources to these destinations is not always regular. The switch was strong above all in 2008 with a 19% increase in shipments, especially for South-East Asia, for Chile (33 000 t in 2007 and 99 000 t in 2011) and New Zealand (44 300 t in 2007 and 81 000 t in 2012) and from South Africa to the Middle East. But the trend is still governed by protectionist barriers that are being lifted gradually. The competition that now exists between these sources and also between southern hemisphere and northern hemisphere sources on these markets during the beginning and end of season slots is also a factor. To handle the shortage of outlets, operators have had to favour nearby markets that are less risky, less expensive and less competitive.

Thus Chilean apple exports to other South American markets (more than 220 000 t, particularly to Colombia, Ecuador and Peru) increased by at least 8% in comparison with 2011 and by 28% for shipments to the North


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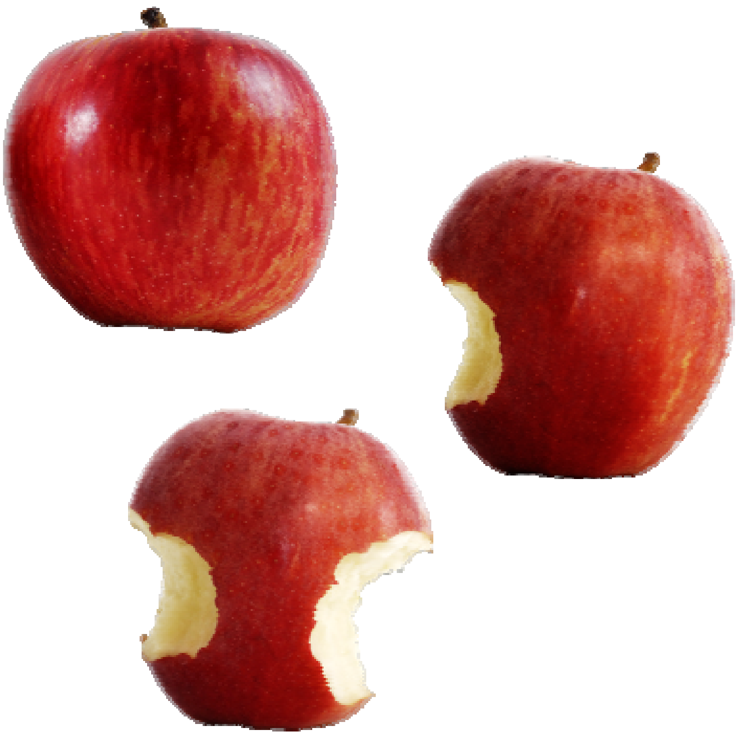

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American markets (138 000 t). Shipments have stagnated or even decreased to all the other destinations, including South-East Asia (- 10%) and the Middle East (- 22%). Likewise, shipments from New Zealand to the other countries in Asia have increased markedly (+ 7% in comparison with those of 2011), thanks in particular to the 'Pacific Rose' varietal range. Because of its difficulties, Argentina has focused more on its domestic market and the processing industry. In contrast, Brazil is still working the European market even though exports are being diversified a little and producers are very interested in the domestic market.

## Dwindling of pear shipments to Europe

This trend for the diversification of clientele portfolios is much less marked for pears. The European share of exports of pears from the southern hemisphere has shrunk less than that of apples and still forms about 31% of shipments from the main source countries (207 000 t) in comparison with 42% in 2006. But EU imports decreased in 2012 (- 26% in comparison with 2011) because of European competition and the prices demanded upstream, whereas total exports decreased by only 14% (678 000 t).

The decrease was marked for Argentina (75 000 t exported to EU-27, - 45% in comparison with 2011) against a background of weather problems and economic difficulties, and also for South Africa (85 000 t, - 12%), which finally took over the lead on the European market. Shipments from Chile held their ground (44 000 to 45 000 t in the last three years) even though the market was particularly difficult for 'Abate' in 2012.

In contrast, exports to the Russian market decreased by only 7% in comparison with 2011, given a moderate decrease in shipments from Argentina, as exporters still favour this destination (94 800 t, - 11%), and South Africa succeeded in winning back a proportion of its market share (16 000 t, + 21%). The American market also slowed somewhat 49 600 t, - 33%) because of the impact of Argentina, as this source normally accounts for as much as 60% of the volumes imported from the southern hemisphere. However, even if South Africa has gained market shares overall, especially in the American continent and Russia, Argentina is still by far the leading southern hemisphere pear exporter (even though it is now more focused on its domestic market and processing) with exports of 360 000 t in 2012, that is to say 53% of the volumes exported by southern hemisphere countries, ahead of South Africa (183 000 t, 27%) and Chile (130 000 t, 19%).

## A gradual switch to nearby markets

But as for apples, the southern hemisphere sources have been turning to other outlets for several years, even if demand is not yet strong. As a result, destinations other than Europe and the United States now account for nearly 44% of the volumes shipped by the main southern hemisphere producer countries. The destinations are generally nearby countries. Argentina has been increasing exports to Brazil since the early 2000s (90 000 t in 2005 and 148 000 t in 2011), although they dipped a little in 2012 (120 000 t) because of the decrease in potential and Brazilian protectionism. Chilean exports to other South American countries have increased each year (37 000 t in 2008 and 47 000 t in 2012). Trade between South Africa and the Middle East is also increasing very gradually (4 000 t in 2008 and 15 400 t in 2012) ■

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# Apples and pears
# The European counter-season market

## A late start


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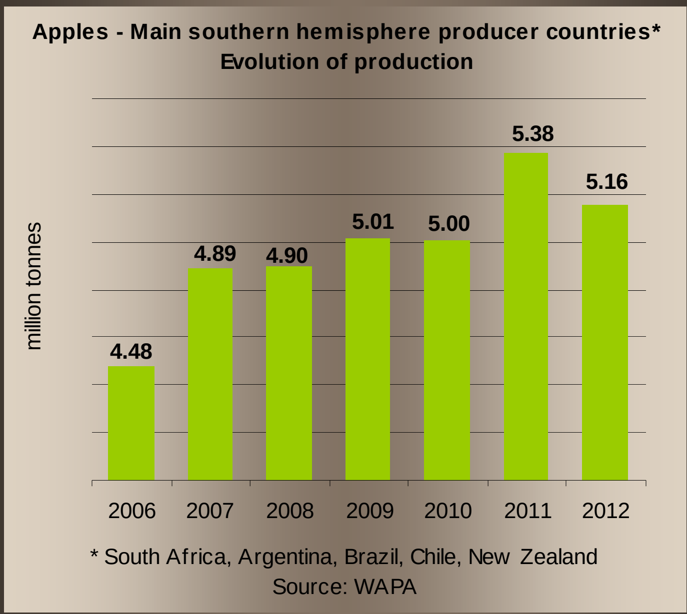
Apple and pear counter-season exports were strongly penalised in 2012 by too late a start resulting from the remaining stocks of domestic production and slow sales. Season dates changed, resulting in a decrease in returns because of competition from the season's fruits and the change in quality of export batches.

### Medium potential and weak opportunities

Unsurprisingly, the 2012 season did not leave just good memories to operators, and especially European operators who had difficulty in obtaining produce and selling it! Production in the southern hemisphere was satisfactory except in Argentina (5.38 million tonnes of apples, that is to say 4% less than the 2011 figure, and 1.27 million tonnes of pears, i.e. -10% according WAPA figures). But the difficulties encountered in the various producer countries (increased production costs) and in the destination countries, especially in Europe (economic slump, large local domestic production of apples) have weighed on trade.

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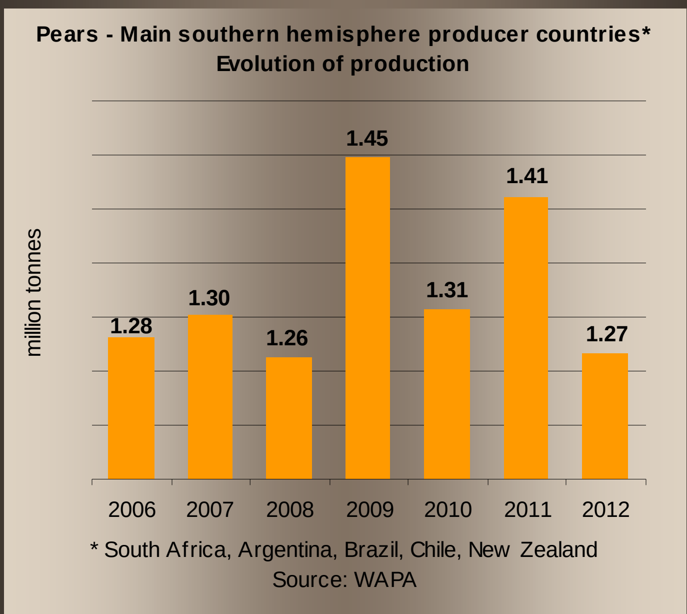


Thus total exports from the main source countries (except for Uruguay) in the southern hemisphere have decreased by 3% for apples in comparison with 2011 (1.66 million de tonnes) and by 14% for pears (676 000 t), with a marked decrease in shipments from Argentina as a result of increased production costs, weather conditions and a series of strikes (160 000 t of apples, i.e. - 31%, and 360 000 t of pears, i.e. -23%). The decrease in Chile was less marked (760 000 t of apples, i.e. - 5%, and 130 000 t of pears, unchanged), as it was in New Zealand, at least for apples (283 000 t, i.e.- 5%). In recent years these sources have tended to refocus on nearby markets: South and North America for Chile and Asia for New Zealand. In contrast, even though the season started late, Brazil finally shipped 72 100 t, with fair volumes for the European market. Likewise, shipments from South Africa reached a fairly good level thanks to the diversification of the customer portfolio (385 000 t of apples, i.e. + 15%, and 183 000 t of pears, i.e. + 1%).

## Apples slow to start but finishing the season in style

The southern hemisphere apple season was very bitty on the European market as the maintaining European domestic stocks tended to encourage operators to favour other destinations such as the United States, South-East Asia and the Middle East at the beginning of the season, depending on the source. The first shipments arrived for the British, Scandinavian and Russian markets at the beginning of March (Week 10) but remained very limited on the continental market until Week 13 as operators were waiting for the beginning of April and the lifting of customs dues before accelerating imports. However, supply remained small and retail distributors remained focused on European bicolour fruits ('Braeburn', 'Jonagold' and 'Fuji'), for which the market improved gradually, especially as the prices of southern hemisphere apples remained firm at about EUR 1.00-1.10 per kg (by 18 kg) in Rotterdam, reaching as much as EUR 1.45-1.55 per kg for fruits from New Zealand. Likewise, supply of 'Granny Smith' from the southern hemisphere remained very small until Weeks 22-23 when supermarkets began to switch lines and when prices were adjusted (from EUR 1.15-1.20 per kg (18 kg) in Rotterdam in

Week 18 to EUR 1.05-1.15 per kg in Week 22). But operators became cautious at the beginning of the summer fruit season and slowed their imports of 'Gala'. The market slowed and then split into two for 'Granny Smith' because of quality problems (bitter pit, colour). However, from Week 23 supply consisted of late varieties such as 'Braeburn' and 'Cripps'/'Pink Lady', which did not attract much interest at first. Tension then increased from Week 25 because of small supply, especially of 'Cripps'/'Pink Lady', as the American market was favoured; this resulted in a sharper increase in prices (from EUR 1.40-1.60 per kg in Week 23 to EUR 1.70-1.80 per kg in Week 27). This made it possible to finish the season early.

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## A good start to the pear season but no recovery

In spite of reduced pear production resulting from the deficit in Argentina, the particularly small sales at the end of 2011 resulted in the slowing of releases of pears in Europe and the United States, affecting 'Comice' and 'Abate' in particular. However, the southern hemisphere season started fairly well in Week 4 for the first 'Williams Bon Chrétien' from South Africa sold at similar prices to those of 2011 (EUR 1.10-1.15 per kg at import stage in Northern Europe) even though some 'Williams' from Italy remained. The market remained well-oriented overall until Week 7, even if prices lost a little ground in Northern Europe from Week 5 (EUR 1.00 per kg). Indeed, volumes were moderate in spite of the large harvest as sales had favoured the processing industry and few market sellers were truly present.

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The situation thus became tougher from Week 8 with a peak in arrivals of 'Williams B.C.' from South Africa, with traders in Northern Europe accelerating the release of the variety before the arrival of the first ship from Argentina in Week 8. The beginning of the Argentinian season was also very laborious as picking was disturbed again in Week 3 ('Giffard' harvest) by a workers' strike for further increases in wages and by hot weather that speeded up the ripening of the fruits. All this led to serious losses added to those resulting from the eruption of the Puyehue volcano in Chile, obliging operators to favour nearby markets—especially Brazil—at the expense of Europe.

The high prices at the beginning of the season that resulted from scarce supply (EUR 1.40 per kg, Open Top, Northern Europe) soon decreased and then stabilised at around EUR 10-11 per box, given the production conditions. But the market did not settle down before Week 11 with the end of the 'Williams B.C.' season in South Africa and the switching by supermarkets to 'Williams' from Argentina. However, as the season had started late it continued until Week 16 and finished late in Week 20 for specialists. But sales were laborious above all for 'Abate' and 'Comice', whatever the source (Chile or South Africa) because of the extremely late end of season for domestic crops (Week 18). The very low prices could not be corrected because of competition from summer fruits and they even fell further as the batches worsened in quality. But 'Packhams' sold steadily in Northern Europe from the beginning of the season as there was a shortage of 'Conference' in Northern Europe ■

**Cécilia Céleyrette**, Consultant
c.celeyrette@infofruit.fr


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BERLIN, 6-8 FEBRUARY 2013
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in cooperation with
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Messedamm 22
14055 Berlin · Germany
Tel +49(0)30-3038-0
Fax +49(0)30-3038-2020
www.fruitlogistica.com
fruitlogistica@messe-berlin.com
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# Northern hemisphere apples and pears Prospects for 2012-2013

## Substantial European deficit and export opportunities


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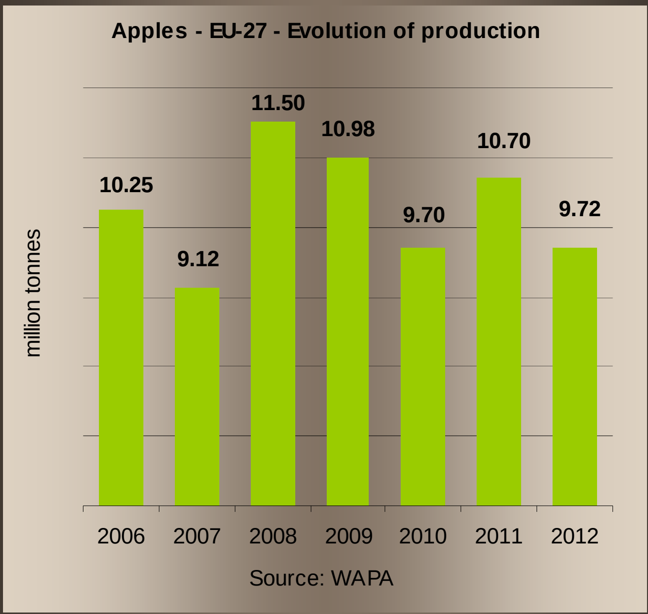
The year 2012 will probably go down in history as production was very seriously penalised by adverse weather conditions. A polar end of winter, a very cold spring and numerous hailstorms in the summer made life a nightmare for many growers. The result was a very small harvest in Western Europe, leading to days of closure of packing stations in the second part of the season.





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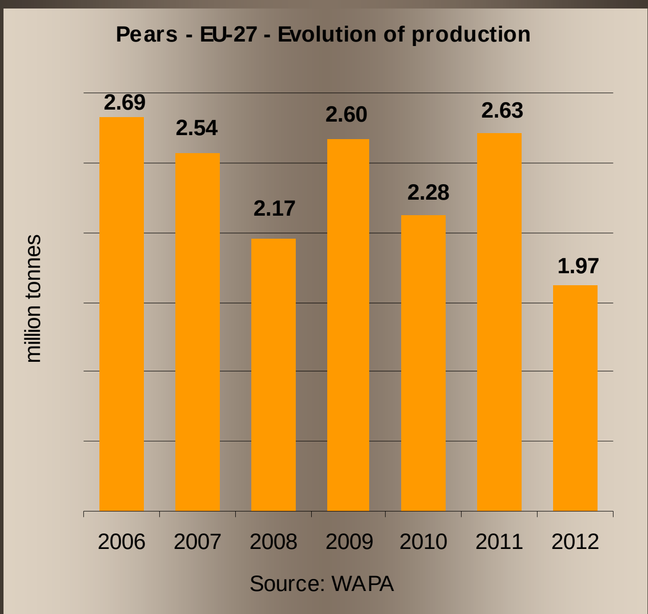


## A historically small apple harvest in Western Europe

Apple production in EU-27 was small in 2012 with potential down by about 9% in comparison with 2011 (less than 10 million tonnes) because of weather conditions at the beginning of the year: very hard frosts in the spring, especially in the northern countries, followed by a number of periods of hail that affected the south. The small harvest will probably be remembered as yields had not been so uneven since 1991. All the Western European countries were affected to varying degrees and only Germany displayed a small decrease of 2%. Thus, among the large producer countries, France suffered most (- 31%), followed by Belgium (- 30%), the United Kingdom (- 28%), Spain (- 26%) and the Netherlands (- 23%).

However, it should also be pointed out that only Western Europe was affected as harvests were at good levels in Eastern Europe. Polish production was very good at 2.8 million tonnes (+ 12% in comparison with 2011), the second largest harvest in ten years (3.2 million tonnes in 2008), after a good harvest in 2011. The harvest was good in Hungary (+ 39%) and the Czech Republic (+ 28%) and production increased again in Russia (1.62 million tonnes, + 8%) and Ukraine (1.096 million tonnes, + 4% on 2011 and + 24% on the 5-year average), where the objective is self-sufficiency. China had a record harvest totalling 33.5 million tonnes (+ 2% on 2011 and + 10% on the 5-year average), while Turkey (2.36 million tonnes, - 3%) and the USA (3.67 million tonnes, - 14%) reported somewhat small harvests.

## A marked decrease in 'Cripps' and 'Granny Smith'

Most varieties were thus strongly affected by the adverse weather conditions with a 15 to 25% decrease in potential in comparison with 2011. The quantities of 'Granny Smith', with production concentrated in Southern Europe, displayed a strong decrease with potential losing at least 100 000 t (309 000 t, - 25% in comparison with 2011) with similar decreases in France, Italy and Spain. Likewise, the harvest volumes of 'Cripps'/'Pink Lady', grown mainly in the south of Europe, were down by 37 000 t (147 000 t, - 20%). Production of 'Elstar' also decreased by 25% because of losses in the Benelux countries (- 16% in Belgium and - 33% in the Netherlands) and also in Poland (- 40%). Volumes of 'Braeburn' were just as limited (264 000 t, - 19%) because of simultaneous decreases in Southern Europe (- 15% in Italy, - 41% in France) and Northern Europe

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(- 26% in the UK). Potential is normal in Germany (+ 4%). Although the decrease in the Benelux countries is substantial, it was less marked for the 'Jonagold'/'Jonagored'/'Jonathan' group of varieties (- 12%) because of the potential in Poland (+ 44%). In contrast, supply of 'Gala' was fairly good overall (1.07 million tonnes, - 6%), although the figure was 13% down in Italy, 16% down in France and 22% down in Spain. This was partially compensated by the increase in potential in Poland (210 000 t, + 19%). Harvest volumes of 'Golden Delicious' were uneven from one country to another, with available quantities down by 45% in France following losses in highland orchards and, to a lesser degree, in orchards in the plain, 26% in Spain and 11% in Italy. In contrast, the harvest is thought to be 11% up in Poland.

## A huge deficit in pears throughout Europe

Also affected by weather conditions, the pear harvest was very small, not even reaching 2 million tonnes, meaning a 22% decrease in volumes in comparison with 2011 throughout the European Union. As for apples, losses were observed throughout Europe and were substantial in Italy (717 000 t, -22%) and Spain (329 000 t, - 29%). The decrease was even 30% in France with losses both in summer pears in the south (rain after flowering and hail) and in autumn-winter pears in the north where the winter weather was polar, as in the Benelux countries. Indeed, the shortfall was very marked in the latter production zone at from 14% in Belgium to 38% in the Netherlands even though the orchard area is still increasing in both countries. Production decreased very strongly in Portugal (115 000 t, - 45%), after the exceptional volumes of 2011.

Serious losses were thus observed in all varieties: - 27% in 'Guyot' (- 29% in France, - 27% in Spain and - 17% in Italy) and - 19% in 'Williams' (- 34% in France, - 18% in Italy and - 26% in Spain). They were substantial in autumn-winter pears with a 26% decrease in 'Abate Fetel' in Italy and a 45% decrease in 'Rocha' in Portugal. Similarly, the 'Conference' harvest was limited in both Southern countries (- 22% in Italy and - 26% in Spain) and Northern countries (- 10% in Belgium and - 33% in the Netherlands). However, the most marked decrease was in 'Doyenne du Comice', which was already losing ground, with a 55% fall in the Netherlands and Belgium and 50% in France as a result of frost and rain and after several difficult seasons.

## No pressure on apple in the first part of the season

However, although the 2012 harvest was laborious in the Southern hemisphere, the decrease in shipments of apples to Europe made it possible to shift local production more rapidly. The 2012-13 European season thus started in a clear landscape, especially as regards bicolour fruits as there was no carry-over of counter-season production in spite of some good quantities of European 'Golden Delicious' that held into October. The small supply pressure soon erased the traditional decrease in prices that occurs when volumes increase. In addition the season started late, in September, in the most northerly production zones; it was sometimes delayed by as much as three weeks to gain a degree of colour. The workforce was often reduced and adjusted to the small supply.

Sellers did not rush to sell their fruits as storage capacity was sufficient and the there was a possibility of lay-offs at packing stations in the second part of the season. Trade relations thus soon became tense in October as operators upstream did not wish to be too involved in the traditional apple fairs that were particularly reduced this year and they maintained firm price levels. Prices at shipping in France thus increased from EUR 1.02 per kg of 'Gala' (trays: 170-220 g, 1 layer,75-80 mm) at the beginning of September (+ 28% in comparison with 2011) to EUR 1.20 per kg at the beginning of December (+ 66%). In contrast, re-

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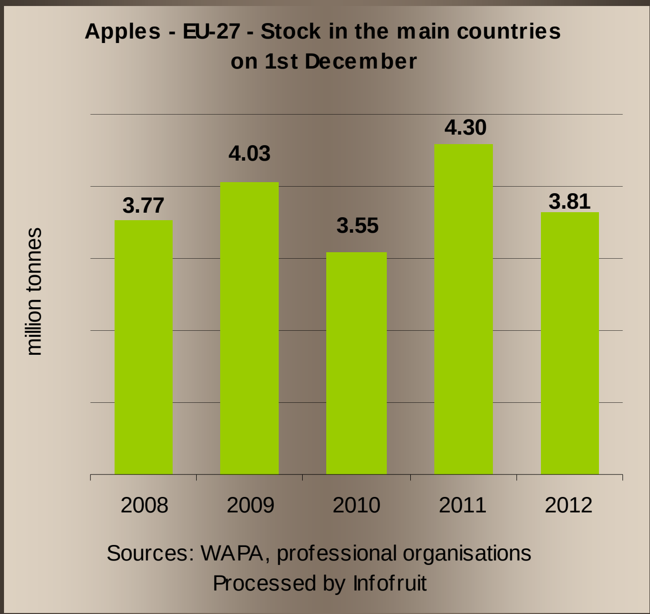




tail prices fell from EUR 2.80 per kg at the beginning of September to EUR 2.33 per kg at the end of November (+ 30% in comparison with 2011). The market slowed nevertheless throughout Europe from Week 43 onwards as a result of these price rises, the generally morose atmosphere and the stepping up of citrus sales.

However, as export sales to destinations outside the EU —in particular to the Middle East—have been busy, stocks on 1 December were down overall by 11% in comparison with the 2011 figure (3.8 million tonnes) and 20% for EU-15 (2.5 million tonnes), that is to say about one month ahead of normal. Shortages were seen above all in Southern Europe (- 37% in France, - 14% in Italy and - 31% in Spain) and in the Netherlands (- 27%) while supply was normal in Belgium (+ 4%) and Germany (- 4%) and at a very good level in Eastern Europe (+ 15% in Poland). In contrast, US stocks were nearly 10% up on 1 December 2012 (2.24 million tonnes); the smaller harvest was caused by the losses sustained in states in the east but volumes exceeded the first estimates for the western states.

## Pears at high prices

The 2012-13 European pear season started on a light basis as a result of the shortage of summer pears. The season for 'Guyot'/'Limonera', that finished at the beginning of September, and that of 'Williams', that finished in mid-September for operators in Southern Europe and the end of October for the latest regions, left only small volumes for specialists, who finished the very last volumes at the end of December, with prices high at about EUR 1.50 per kg at shipping for 65-70 mm fruits. The autumn-winter pear season ('Conference', 'Comice', 'Abate Fetel' and 'Rocha') started well in September at prices up by at least 25 to 30% and even 45 to 50% for certain varieties, especially 'Comice'. The market remained well-oriented throughout September but quietened considerably at the beginning of October once the 'Williams' season was over. Nevertheless, prices remained stable, with producers even considering them lower than the level required to make up for the deficit. Operators thus tended to favour profitable markets such as those in Scandinavia and then the Russian market when it opened in November, and Brazil for Portugal although shipments were disturbed by a dock strike. But the market remained satisfactory in December and there was even a degree of demand for fruits with fine appearance (named origins, 'Passe-Crassane' with waxed stalks, etc.) and club varieties ('Sweet Sensation', 'Angelys').

Stocks thus remained very short in early December (547 000 t excepting Portugal, - 38% in com-

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parison with 2011 and - 21% in comparison with the 5-year average) and hit their lowest level for several years. They were particularly limited in the Southern countries and did not exceed 6 000 t in France on 1 December 2012 (- 42%) and 69 000 t in Spain (- 45%). The figure was only 193 400 t for Italy (- 45% in comparison with 2011), with 113 000 t of 'Abate' (- 46%) and 34 900 t of 'Conference' (- 42%). The overall deficit in Italy was therefore comparable to that of 2010, but with a little more 'Abate' and a little less 'Conference', stocks of which were at their lowest for ten years. Stocks were also very short in the Benelux countries, with only 117 000 t in the Netherlands (- 37%), consisting of 105 000 t of 'Conference' and 6 000 t of 'Comice' (- 54%), and 130 000 t in Belgium (- 24%). The season should also end early for most varieties and especially for 'Comice', the last volumes of which should be sold by the end of January, Benelux included ■

**Cécilia Céleyrette**, Consultant
c.celeyrette@infofruit.fr

# Southern hemisphere apples and pears Prospects for 2013

## A little respite


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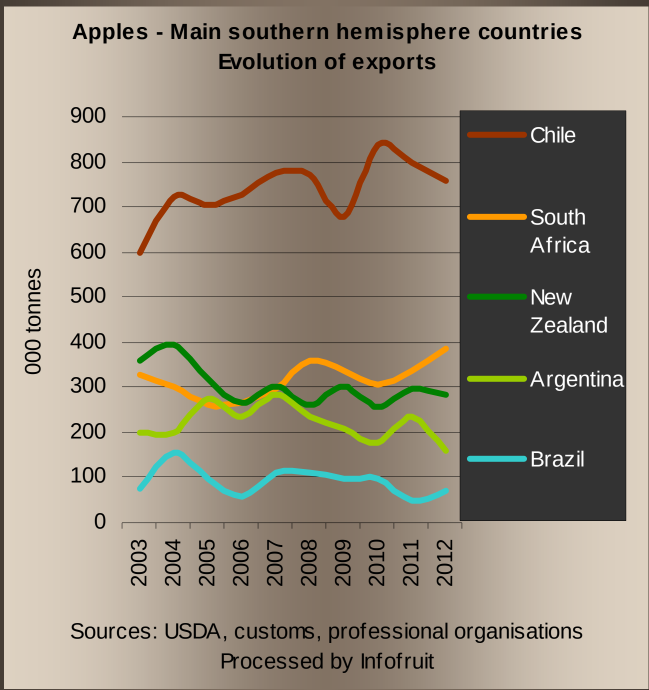
After another very chaotic year in 2012, Southern hemisphere apple and pear exporters may have good market conditions this year, with brighter prospects in Europe at last. However, this should not greatly change their diversification strategies but rather allow producers to obtain returns that match the increase in their production costs and enable European importers to regain a little ground in terms of volume even if it is not possible to conclude true partnerships again.

### Chile is concentrating on the American continent

The quality of its apple production, the marketing support for the sector and above all the very diversified development policy of operators had enabled Chile to maintain a fairly stable level of exports so far. Chilean operators seem to be determined to use this strategy again this year and to favour certain outlets that tend to be structural or even nearby at the expense of traditional marketd, in spite of the opportunities formed this season by some markets, such as Europe. Thus, although exports seem to have held overall at around 760 000 t in 2012 (- 5% in comparison with 2011), ship-

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ments to Europe decreased distinctly once again (133 000 t, - 23%) and, according to preliminary forecasts, may at best hold at this level in 2013, even if there is a marked shortage on the European market. Shipments have also decreased to Russia (34 600 t, - 24%), the Middle East (72 000 t, - 22%) and the South-East Asian markets (89 000 t, - 10%) where there is increasing competition between the end of the season in late European sources and the other southern hemisphere producer countries.

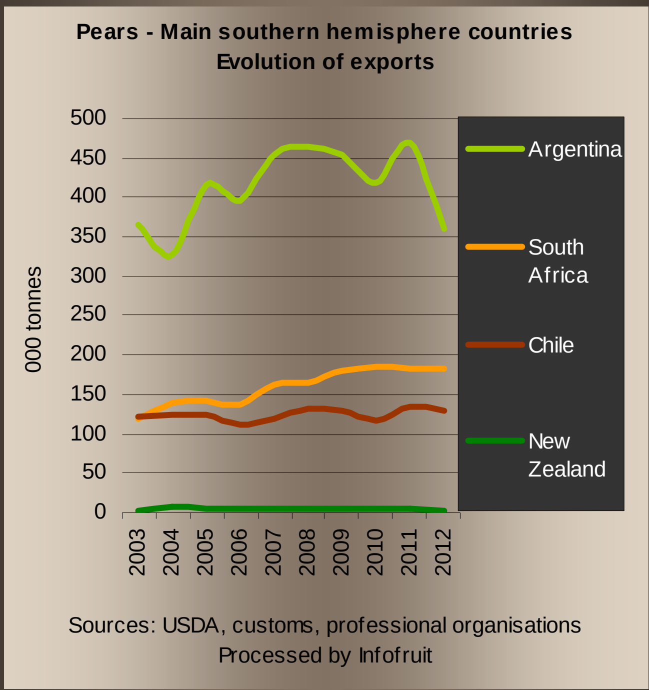
Chilean exporters now therefore tend to favour the American markets. Exports to North America thus exceeded 138 000 t (+ 8% in comparison with 2011) and those to South America exceeded 220 000 t (+ 28%). However, although these destinations still seem attractive, the surplus stocks in North America and the deficit in EU-27 stocks might lead to allocations favourable to the European market during the season.

Chilean pear exports have also been fairly stable in recent years, with 130 000 t in 2012 (- 3% in comparison with 2011) because, in spite of the difficulties encountered in Europe, especially for 'Abate', sales continue for 'Packhams' pears, which still have takers on the Northern European markets (45 200 imported into EU-27 in 2012), the USA (20 000 t) and South America (50 000 t).

Chilean export potential seemed fairly promising at the end of 2012 (enough hours of cold), making it possible to count on production at least similar to last year (1.3 million t of apples and 287 000 t of pears).

## South Africa is consolidating its positions and its plantations

South African exporters will probably continue their development strategy, doubtless at the expense of certain destinations, even if the European market, and especially Northern Europe, should still form the greater part of their outlets. They will probably continue to diversify their customer portfolio or at least consolidate trade with emerging countries, in particular in the Middle East and South-East Asia, to accompany the increase in orchard area. This already totalled 22 300





ha of apples and 12 000 ha of pears in 2012 and should increase by at least 2%. But the rate of planting may slow as the cost of establishing an orchard is increasing, having doubled since 2008. Crop potential should therefore increase this year as the young orchards come into production. Only 10% of the areas are not yet in full production and 30% of the orchards are now more than 25 years old.

Exports forecasts are fairly similar to last year's so far even though European market conditions should be distinctly better. Apple exports reached 385 000 t last year (+ 15% in comparison with 2011); this included 115 000 t shipped to the European market (+ 9%) that had been deserted by the other southern hemisphere sources—especially Chile.

Pear exports were much the same as in the previous year (183 000 t) thanks to a diversification of the client portfolio as exports to the European market decreased by about 12% in comparison with 2011 (86 000 t according to provisional European customs figures at the end of August). Shipments to the Middle East increased again (15 400 t to the UAE, + 56% on 2011) and exports to Russia returned to their previous level (16 100 t, + 21%).

## Argentine grubs up while Brazil makes a comeback

Economic difficulties at home (a further 15% increase in the cost of labour in 2012) and for exports (exchange rates and the economic slump in Europe) have weighed heavily on the Argentinian orchard sector and growers are not replacing their apple orchards any more. This year, grubbing up will probably result in a decrease of about 1 000 ha under apples (28 000 ha in 2013) while the areas devoted to pears are still stable (29 000 ha in 2013, consisting of 50% 'Williams' followed by 'Packhams'). Exports decreased again, scoring 31% less than in 2011 for apples with a harvest down by 19% because of weather and climate (cold weather and the eruption of the Puyehe volcano in Chile) and losses resulting from strikes and hot weather during the harvest period.

But the parameters for the 2013 seem more favourable. Production potential should probably be greater than it was last year, with 1.03 million tonnes of apples, a

20% increase on 2012, and an 8% increase in pears to 820 000 t. In addition, export opportunities seem sunnier because of the deficit of fruits in Europe and hence less competition from European countries at the beginning of the season for exports to Russia and the Middle East, even though exchange rates are still unfavourable. Likewise, Brazilian protectionism may ease a little and permit the resumption of regular shipments from Argentina. However, operators will probably concentrate on the domestic market.

Brazilian operators seem to have conserved their market shares in Europe in spite of the difficult market conditions in 2012. Thus, after weak presence in 2011 because of small production and after a late start in 2012 because of the remaining stocks of European fruits, Brazil finally performed well with total exports of 72 100 t of apples, 57 000 t of which went to the European market (+ 44% in comparison with 2011). Even if the levels attained at the beginning of the 2000s were not matched (102 000 t in 2007 and 2008), Brazilian operators could benefit from the loss of interest by other export sources for the European market thanks to a somewhat early start of shipments (February). But they will probably continue to diversify their client portfolio and continue to make the most of their domestic market.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## New Zealand stabilising production and targeting nearby markets

2012 was a particularly morose year for New Zealand apple producers and sellers as the European market was saturated. Production potential was also down because of somewhat cold weather that affected production and especially fruit size and the further decrease in orchard area (8 324 ha, - 2% in comparison with 2011). Exports were therefore limited (283 000 t, - 5%), and especially those to Europe because of remaining domestic stocks and the economic slump. They fell to 115 000 t (- 22%) on the EU market but shipments to North America held their ground (33 700 t, + 2%). Increased shipments were recorded to nearby markets such as Singapore (+ 20%) and Thailand (+ 41%), while awaiting real development in Australia where the phytosanitary barriers have now been lifted. In comparison with 2011, total exports increased by 7% (81 800 t in 2012) to South-East Asia and also by 64% to the United Arab Emirates (13 200 t).

Operators are thus a little more optimistic for 2013 as the export markets are less encumbered and production potential promises to be good. Orchard areas seem to have stabilised and unless there are weather problems the production potential could return to about 467 000 t of apples (+ 4% in comparison with 2012). For the moment, an increase in exports is forecast and the total could reach 293 000 t (+ 4%) ■


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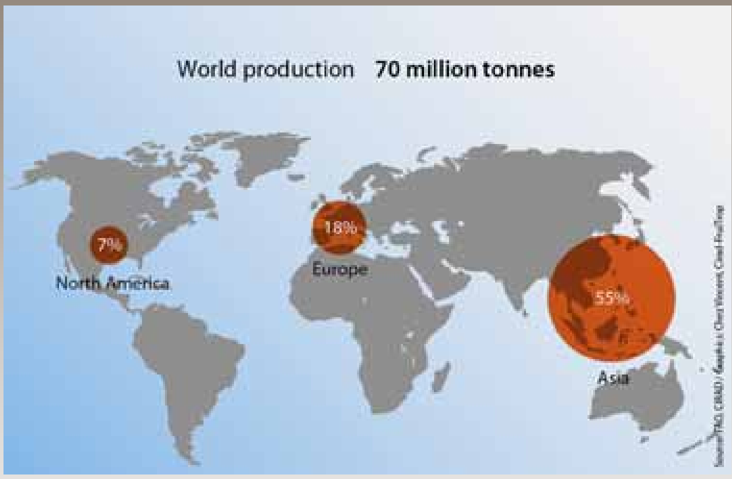
**Cécilia Céleyrette**, Consultant
c.celeyrette@infofruit.fr

# APPLE — Production




| Apple — The 10 leading producer countries | |
|---|---|
| million tonnes | **average 2009-10** |
| China | 32.5 |
| United States | 4.3 |
| Turkey | 2.7 |
| Italy | 2.3 |
| Poland | 2.2 |
| India | 2.0 |
| Iran | 1.8 |
| France | 1.7 |
| Brazil | 1.2 |
| Chile | 1.1 |

Source: FAO

# APPLE — Exports


| Apple — The 6 leading exporting countries | |
|---|---|
| tonnes | **2011** |
| China | 1 012 658 |
| Italy | 975 853 |
| United States | 826 458 |
| Chile | 800 834 |
| France | 729 297 |
| Poland | 533 585 |

Sources: customs, USDA

# APPLE — Imports


| Apple — The 6 leading importing countries | |
|---|---|
| tonnes | **2011** |
| Russia | 1 157 724 |
| Germany | 663 650 |
| United Kingdom | 459 222 |
| Netherlands | 326 229 |
| Spain | 244 800 |
| Indonesia | 212 685 |

Source: national customs

| USA — Imports — Main supplier countries | | | | | | |
|---|---|---|---|---|---|---|
| tonnes | **2006** | **2007** | **2008** | **2009** | **2010** | **2011** |
| Chile | 82 619 | 123 521 | 93 667 | 87 497 | 122 340 | 91 141 |
| New Zealand | 37 417 | 47 210 | 32 801 | 44 518 | 41 572 | 33 238 |
| Canada | 34 893 | 31 062 | 36 035 | 21 098 | 20 923 | 18 547 |
| Argentina | 1 512 | 4 424 | 2 243 | 1 885 | 5 705 | 4 551 |
| China | 172 | 0 | 0 | 0 | 6 | 0 |
| Japan | 61 | 61 | 144 | 249 | 44 | 0 |
| Thailand | 14 | 27 | 4 | 0 | 0 | 0 |
| India | 3 | 2 | 0 | 0 | 0 | 0 |
| **Total** | **156 689** | **206 562** | **165 282** | **155 775** | **191 579** | **147 789** |

Source: US customs

| Canada — Imports — Main supplier countries | | | | | | |
|---|---|---|---|---|---|---|
| tonnes | **2006** | **2007** | **2008** | **2009** | **2010** | **2011** |
| USA | 124 829 | 139 808 | 131 199 | 148 111 | 150 620 | 159 166 |
| Chile | 16 951 | 23 321 | 18 361 | 20 257 | 24 868 | 21 476 |
| New Zealand | 7 187 | 8 273 | 6 953 | 7 685 | 7 759 | 8 070 |
| China | 2 639 | 2 995 | 2 816 | 1 919 | 2 334 | 4 739 |
| South Africa | 4 731 | 4 942 | 6 148 | 3 551 | 3 768 | 2 292 |
| Argentina | 0 | 84 | 377 | 301 | 502 | 1 948 |
| France | 286 | 891 | 251 | 102 | 534 | 376 |
| **Total** | **156 694** | **180 528** | **166 251** | **182 143** | **191 717** | **198 618** |

Source: COMTRADE

| South America — Imports — Main markets | | | | | | |
|---|---|---|---|---|---|---|
| tonnes | **2006** | **2007** | **2008** | **2009** | **2010** | **2011** |
| Mexico | 204 400 | 219 814 | 188 423 | 222 209 | 221 301 | 198 481 |
| Brazil | 77 741 | 68 574 | 55 042 | 61 343 | 76 879 | 96 565 |
| Colombia | 57 635 | 68 097 | 62 521 | 71 929 | 84 838 | 90 208 |
| Ecuador | 41 842 | 42 830 | 44 348 | 41 670 | 50 619 | 51 666 |
| Peru | 28 644 | 25 935 | 28 289 | 39 780 | 47 759 | 39 456 |
| Bolivia | 14 640 | 14 821 | 15 674 | 21 654 | 24 014 | 23 035 |
| Dom. Rep. | 10 248 | 10 263 | 10 741 | 11 351 | 15 405 | 19 504 |
| Costa Rica | 13 630 | 13 897 | 14 207 | 8 336 | 15 116 | 15 943 |
| Guatemala | 58 124 | 13 094 | 11 778 | 11 689 | 13 671 | 14 560 |
| Salvador | 15 020 | 13 427 | 12 610 | 12 262 | 12 160 | 12 822 |
| Honduras | 10 821 | 10 512 | *10 000* | 9 113 | *10 000* | *10 000* |
| Venezuela | 33 969 | 29 006 | 46 204 | 31 703 | 9 187 | 7 517 |
| Paraguay | 3 571 | 4 295 | 5 682 | 5 323 | 5 061 | 5 610 |
| **Total** | **583 868** | **547 344** | **529 833** | **560 979** | **601 757** | **597 538** |

Italics: estimates / Source: COMTRADE

## EU-27 — Imports — Main supplier countries

| tonnes | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|
| **Extra EU** | **784 860** | **969 827** | **813 695** | **704 056** | **628 670** | **604 525** |
| **S. hemis.** | **711 735** | **761 014** | **705 649** | **636 645** | **537 035** | **522 950** |
| Chile | 224 289 | 204 405 | 211 199 | 186 318 | 177 614 | 170 163 |
| N. Zealand | 178 238 | 177 243 | 140 862 | 165 156 | 126 588 | 147 013 |
| South Africa | 151 852 | 158 598 | 171 154 | 144 870 | 112 839 | 110 512 |
| Argentina | 97 378 | 107 918 | 79 726 | 57 629 | 47 106 | 49 742 |
| Brazil | 53 442 | 104 767 | 97 453 | 80 199 | 70 692 | 39 840 |
| Uruguay | 3 596 | 6 789 | 4 653 | 2 190 | 1 826 | 5 407 |
| Australia | 2 940 | 1 294 | 603 | 284 | 370 | 275 |
| **N. hemis.** | **73 125** | **208 813** | **108 047** | **67 411** | **91 635** | **79 797** |
| Others | 1 505 | 40 386 | 1 131 | 2 100 | 12 050 | 32 246 |
| USA | 296 | 15 503 | 3 436 | 4 710 | 14 551 | 11 584 |
| China | 30 600 | 30 996 | 27 313 | 26 427 | 20 060 | 10 235 |
| Canada | 33 513 | 43 535 | 38 172 | 18 448 | 10 979 | 5 644 |
| **Intra EU** | **2 459 219** | **2 567 254** | **2 348 400** | **2 163 446** | **2 219 470** | **2 336 100** |

Source: EUROSTAT

## Other western Europe countries — Imports

| tonnes | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|
| Norway | 49 612 | 55 249 | 52 252 | 51 966 | 52 195 | 51 449 |
| Switzerland | 10 009 | 5 417 | 9 193 | 9 583 | 7 564 | 7 286 |
| Iceland | 3 298 | 3 708 | 3 315 | 3 549 | 3 697 | 3 757 |
| **Total** | **62 918** | **64 374** | **64 761** | **65 098** | **63 456** | **62 492** |

Source: COMTRADE

## Russia — Imports — Main supplier countries

| tonnes | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|
| Poland | 184 537 | 210 272 | 146 188 | 334 572 | 347 968 | 288 832 |
| Moldavia | 724 | 47 419 | 66 932 | 136 503 | 153 251 | 183 523 |
| China | 146 749 | 201 339 | 241 528 | 175 035 | 156 253 | 138 236 |
| Serbia | 25 396 | 31 386 | 30 900 | 30 960 | 88 356 | 93 692 |
| Italy | 56 346 | 55 137 | 46 913 | 45 614 | 60 431 | 71 411 |
| Argentina | 51 933 | 68 113 | 72 395 | 43 219 | 30 540 | 59 393 |
| Chile | 25 969 | 28 120 | 40 442 | 33 253 | 38 861 | 50 602 |
| France | 48 073 | 48 897 | 59 212 | 38 666 | 43 678 | 48 319 |
| Azerbaijan | 63 339 | 71 735 | 121 108 | 84 283 | 40 078 | 41 960 |
| Belgium | 33 440 | 32 143 | 38 588 | 38 580 | 45 337 | 39 312 |
| Ukraine | 38 233 | 30 986 | 27 467 | 56 874 | 96 703 | 35 345 |
| Germany | 20 263 | 27 958 | 24 548 | 17 138 | 27 397 | 23 594 |
| Netherlands | 19 248 | 14 890 | 25 796 | 19 226 | 21 854 | 16 481 |
| **Total** | **812 779** | **931 232** | **1 062 904** | **1 108 205** | **1 204 175** | **1 157 724** |

Source: COMTRADE

## Other eastern Europe countries — Main markets

| tonnes | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|
| Ukraine | 121 411 | 141 022 | 176 871 | 251 394 | 203 061 | 102 479 |
| Belarus | 120 270 | 89 989 | 50 404 | 62 186 | 60 324 | 100 486 |
| Bosnia | 25 439 | 20 434 | 25 503 | 28 308 | 21 469 | 14 816 |
| Albania | 33 723 | 22 516 | 15 641 | 12 928 | 17 702 | 11 399 |
| Croatia | 20 276 | 14 392 | 13 009 | 14 156 | 8 839 | 10 889 |
| Montenegro | 5 288 | 6 535 | 6 655 | 7 877 | 8 057 | 7 137 |
| Moldavia | 9 536 | 984 | 1 434 | 694 | 1 314 | 2 578 |
| **Total** | **335 943** | **295 871** | **289 516** | **377 543** | **320 767** | **249 785** |

Source: COMTRADE

## Mediterranean — Imports — Main markets

| tonnes | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|
| Egypt | 63 955 | 57 168 | 56 568 | 49 138 | 256 235 | 168 459 |
| Algeria | 82 691 | 91 365 | 92 565 | 118 388 | 113 551 | 128 620 |
| Jordan | 17 277 | 20 885 | 20 990 | 23 496 | 27 016 | 28 714 |
| Morocco | 8 014 | 5 953 | 6 490 | 14 188 | 14 025 | 14 000 |
| Israel | 4 678 | 3 830 | 7 732 | 8 894 | 9 668 | 11 266 |
| Turkey | 3 963 | 5 037 | 2 866 | 4 237 | 2 643 | 5 592 |
| Syria | 779 | 997 | 2 699 | 0 | 0 | 0 |
| **Total** | **181 357** | **185 235** | **189 910** | **218 342** | **423 137** | **356 651** |

Source: COMTRADE

## Japan — Imports — Main supplier countries

| tonnes | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|
| N. Zealand | - | - | 20 | - | - | 143 |
| South Korea | - | - | 1 | - | - | 5 |
| Australia | - | - | 16 | 63 | 134 | - |
| **Total** | **-** | **-** | **37** | **63** | **134** | **148** |

Source: Japanese customs

## Other Asia countries — Imports — Main markets

| tonnes | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|
| Indonesia | 122 011 | 145 302 | 139 819 | 153 512 | 197 487 | 212 685 |
| China | 115 211 | 126 636 | 156 882 | 176 672 | 201 005 | 211 166 |
| India | 35 912 | 64 956 | 62 348 | 90 714 | 106 467 | 179 015 |
| Thailand | 87 386 | 93 629 | 105 660 | 121 058 | 128 981 | 123 414 |
| Kazakhstan | 6 072 | 4 847 | 57 071 | 145 714 | *145 000* | *112 399* |
| Malaysia | 85 370 | 92 113 | 89 779 | 97 489 | 102 851 | 97 413 |
| Philippines | 74 464 | 71 427 | 72 939 | 76 248 | 70 237 | 72 319 |
| Bangladesh | 30 204 | 48 543 | *50 000* | *50 000* | *50 000* | *50 000* |
| Nepal | *17 000* | *18 500* | *20 000* | 21 970 | 38 871 | 49 179 |
| Singapore | 44 285 | 45 800 | 47 177 | 45 828 | 47 749 | 44 274 |
| Vietnam | 20 415 | 20 035 | 25 190 | 25 080 | 28 252 | 30 000 |
| Sri Lanka | 16 573 | 18 026 | 17 222 | 20 138 | 22 385 | 21 249 |
| Pakistan | 6 027 | 12 301 | 9 208 | 11 154 | 11 965 | 16 282 |
| Mongolia | 9 249 | 9 607 | *10 000* | *10 000* | *10 000* | *10 000* |
| Kyrgystan | 61 394 | 51 110 | 38 259 | 17 303 | 21 859 | 9 620 |
| Azerbaijan | 4 152 | 11 736 | 2 155 | 9 413 | 20 939 | 5 947 |
| **Total** | **735 724** | **834 569** | **903 710** | **1 072 293** | **1 204 049** | **1 244 962** |

Italics: estimates / Source: COMTRADE

## Persian Gulf — Imports — Main markets

| tonnes | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|
| UAE | *100 000* | 147 566 | 157 799 | *160 000* | *160 000* | *160 000* |
| Saudi Arabia | 149 219 | 147 423 | 60 711 | 50 747 | 176 572 | 100 000 |
| Kuwait | 26 024 | 27 686 | 27 771 | *28 000* | *28 000* | *28 000* |
| Iran | 0 | 0 | 0 | 0 | 8 920 | 27 712 |
| Oman | 22 314 | 25 202 | 34 522 | 24 548 | 25 804 | 22 787 |
| Qatar | 10 521 | 12 983 | 16 384 | 16 384 | 18 060 | 18 000 |
| Bahraïn | 7 268 | 8 481 | 15 756 | 7 743 | 8 469 | 9 334 |
| **Total** | **315 346** | **369 342** | **312 943** | **287 422** | **425 825** | **365 833** |

Italics: estimates / Source: COMTRADE

## Africa — Imports — Main markets

| tonnes | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|
| Benin | 8 302 | *8 000* | *8 000* | *17 662* | *15 654* | *16 000* |
| Zimbabwe | 1 585 | 1 146 | 628 | 6 934 | 10 355 | 14 225 |
| Sudan | 11 176 | 10 864 | 9 606 | 9 833 | *10 000* | *10 000* |
| Senegal | 5 945 | 6 711 | 6 883 | 7 453 | 8 319 | 8 388 |
| Zambia | 3 728 | 3 575 | 5 152 | 6 464 | 6 006 | 7 384 |
| Namibia | 7 221 | 7 314 | 6 130 | *6 500* | *6 500* | *6 989* |
| Ghana | 5 507 | 4 827 | 4 274 | 3 977 | 5 303 | 6 983 |
| Botswana | 6 609 | 7 324 | 7 294 | 8 279 | 7 653 | 6 176 |
| Cameroon | 1 619 | 2 233 | 3 765 | 4 399 | 5 118 | 5 912 |
| Kenya | 3 099 | 4 244 | 5 051 | 5 372 | 5 683 | 5 700 |
| Swaziland | 4 039 | 5 345 | *5 500* | *5 500* | *5 500* | *5 500* |
| Côte d'Ivoire | 4 118 | 4 769 | 4 057 | 4 285 | 4 557 | 3 083 |
| Mauritania | 247 | 568 | 844 | 1 780 | 2 947 | 2 510 |
| Cap Vert | 1 603 | 1 572 | 1 845 | 2 092 | 2 211 | 1 839 |
| Uganda | 784 | 1 073 | 1 041 | 1 618 | 1 565 | 1 762 |
| Gabon | 1 094 | 1 405 | 1 488 | 1 490 | *1 500* | *1 500* |
| Tanzania | 802 | 696 | 651 | 1 124 | 935 | 1 419 |
| **Total** | **67 476** | **71 668** | **72 209** | **94 761** | **99 805** | **105 371** |

Italics: estimates / Source: COMTRADE

# The main varieties of apples

photos © Régis Domergue

After *Le pommier*, CTIFL, 2002

Golden Delicious

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.

Granny Smith

Braeburn

## Apples — The characteristics of some varieties

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

Source: CTIFL

Pink Lady ®

Red Chief ®

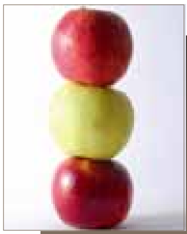
Gala

Russet

| Apples — Classification of the main varieties grown by type | |
|---|---|
| Green | Granny Smith and mutants |
| Yellow | Golden Delicious and mutants — Golden Extrême® Gradigold — Primgold® Deljéni — Tentation® Delblush — Earlygold® Snygold, Ozark Gold — Newgold® Newaphough |
| Bicolour | Akane — Belle de Boskoop and mutants — Braeburn and mutants — Cameo® Caudle — Corail® Pinova — Cox's Orange Pippin and mutants — Delbard Jubilé® Delgollune — Delbarestivale® Delcorf — Elstar and mutants — Fuji and mutants — Gala and mutants — Honey Crunch® Honeycrisp — Idared — Jonagold and mutants — Melrose and mutants — Pink Lady® Cripps Pink |
| Red | Delicious Rouges and mutants — Redwinter® Redaphough |
| Russet | INRA® Belchard® Chantecler — Reinette du Canada and mutants — Reine des Reinettes and mutants — Reinette Clochard — Reinette de Brive |

Source: CTIFL

| Some mutants | Normal cold | | Controlled atmosphere | | | Ultra Low Oxygen (ULO) | | |
|---|---|---|---|---|---|---|---|---|
| | Duration (months) | T (°C) | Duration (months) | % O2 | % CO2 | Duration (months) | % O2 | % CO2 |
| Challenger® Dalivair, Early Smith® Jim Brian | 5 | 0-1 | 6-7 | 2-3 | 1.5-2 | 7-8 | 1.5-1.8 | 1-1.5 |
| Golden X 972, Smoothee® CG10 Yellow Delicious, Golden Reinders®, Lysgolden® Goldenir, Belgolden® Goldensheen, Calgolden® Elbee, Pink Gold® Leratess, Rosagold® Quemoni, Bertanne | 6 | 0-1 | 8 | 2-3 | 3-5 | 9-10 | 1.5-1.8 | 2-3 |
| Hillwell® Hidala, Braesun® Braecest, Jobrun® Aurora, Mariri® Eve, Mahanared® Redfield | 5 | 0-1 | 7 | 2-3 | 1-1.5 | 8-9 | 1.5-1.8 | 0.8-1 |
| | 4-5 | 1-2 | 6 | 2-3 | 2-2.5 | 6-7 | 1.5-1.8 | 1 |
| Royal Gala® Obrogala, Gala Must® Régal Prince, Buckeye Gala | 4 | 0-1 | 5-6 | 2-3 | 2-3 | 6-7 | 1.5-1.8 | 1.5 |
| Standard types: Topred Delicious, Early Red One® Erovan Types spur: Starkrimson, Redchief® Campsur, Stark Spur Ultra Red®, Flatar, Scarlet Spr® Evasni, Super Chief® Sandige | 4-5 | 0-1 | 6 | 2-3 | 3-4 | 7 | 1.5-1.8 | 1.8-2.2 |



# Growing apples

After *Le pommier*, CTIFL, 2002

## Agronomy

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.

## 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).

## Harvesting

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

- 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.

# Wholesale market prices in Europe

## Week 50 — December 2012

| | | | | | EUROPEAN UNION — EURO | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | Germany | Belgium | France | Holland | UK |
| AVOCADO | Air | TROPICAL | DOMINICAN REP. | Box | | | 11.20 | | |
| | Sea | ETTINGER | ISRAEL | Box | 5.50 | | 5.13 | 6.00 | 7.40 |
| | | HASS | CHILE | Box | 8.25 | 6.50 | 7.56 | | |
| | | | ISRAEL | Box | | | 7.20 | | |
| | | | MEXICO | Box | | | 6.42 | | |
| | | PINKERTON | ISRAEL | Box | | | 5.65 | 6.55 | |
| | Truck | BACON | SPAIN | Box | | | | | 5.03 |
| | | HASS | SPAIN | Box | | | 8.31 | | |
| BANANA | Air | RED | ECUADOR | kg | | | | 4.88 | |
| | | SMALL | COLOMBIA | kg | | | 6.70 | 6.52 | |
| | | | ECUADOR | kg | | 5.67 | | 5.17 | |
| | Sea | SMALL | ECUADOR | kg | | | 1.70 | 2.00 | |
| CARAMBOLA | Air | | MALAYSIA | kg | | 4.63 | 4.43 | 5.01 | |
| | Sea | | MALAYSIA | kg | | | | 3.47 | 3.53 |
| CHAYOTE | Sea | | COSTA RICA | kg | | | | 1.43 | |
| COCONUT | Sea | | COTE D'IVOIRE | Bag | | 10.53 | 10.50 | 8.90 | 12.96 |
| | | | DOMINICAN REP. | Bag | | | | 19.00 | |
| | | | SRI LANKA | Bag | | | | 20.10 | 9.25 |
| DATE | Sea | MEDJOOL | ISRAEL | kg | | | | 7.90 | 6.91 |
| | | | MEXICO | kg | | | | | 11.11 |
| | | NOT DETERMINED | TUNISIA | kg | | | | 1.88 | 1.73 |
| DURIAN | Air | | THAILAND | kg | | | | 7.20 | |
| EDDOE | Sea | | COSTA RICA | kg | | | 2.10 | 1.57 | |
| GINGER | Sea | | BRAZIL | kg | | | 1.70 | 1.31 | 1.14 |
| | | | CHINA | kg | | 2.10 | 1.10 | 0.93 | 0.84 |
| | | | SOUTH AFRICA | kg | | | | | 1.23 |
| GUAVA | Air | | BRAZIL | kg | | | 6.50 | 6.17 | |
| | | | THAILAND | kg | | 7.38 | | | |
| KUMQUAT | Air | | ISRAEL | kg | | | | 4.23 | 6.17 |
| | | | SOUTH AFRICA | kg | | | | 4.50 | |
| LIME | Air | | MEXICO | kg | | | 4.50 | | |
| | Sea | | BRAZIL | kg | 1.00 | | 2.30 | | 2.54 |
| | | | MEXICO | kg | 1.00 | | | | 3.02 |
| LITCHI | Air | | MAURITIUS | kg | | | | | 5.86 |
| | | | REUNION | kg | | | 7.50 | | |
| | | | SOUTH AFRICA | kg | | | | 6.00 | |
| | Sea | | MADAGASCAR | kg | | | 3.20 | 3.30 | |
| | | | MAURITIUS | kg | 2.90 | | | | |
| LONGAN | Air | | THAILAND | kg | | | | 8.35 | |
| | Sea | | MADAGASCAR | kg | | | | | 3.39 |
| | | | THAILAND | kg | | | | | 3.70 |
| MANGO | Air | KENT | BRAZIL | kg | | | 4.50 | 4.11 | |
| | | | PERU | kg | | | 5.50 | 4.32 | |
| | | NAM DOK MAI | THAILAND | kg | | | | 7.80 | |
| | Sea | ATKINS | BRAZIL | kg | | | | 2.00 | 2.32 |
| | | KEITT | BRAZIL | kg | 1.50 | 2.38 | | | |
| | | KENT | BRAZIL | kg | 1.50 | 2.38 | | | |
| | | | PERU | kg | | | | 2.13 | |
| | | NOT DETERMINED | BRAZIL | kg | | | 2.00 | | |
| | Truck | KEITT | SPAIN | kg | | | | | 1.85 |

| | | | | | EUROPEAN UNION — EURO | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | Germany | Belgium | France | Holland | UK |
| MANGOSTEEN | Air | | INDONESIA | kg | | | | 7.93 | |
| | | | THAILAND | kg | | | | 7.72 | |
| CASSAVA | Sea | | COSTA RICA | kg | | | 1.20 | 0.96 | |
| MELON | Sea | CANTALOUP | BRAZIL | kg | | | | 2.80 | 1.36 |
| | | GALIA | BRAZIL | kg | | | | 2.00 | 2.23 |
| | | HONEY DEW | BRAZIL | kg | | | | 1.00 | 1.54 |
| | | PIEL DE SAPO | BRAZIL | kg | | | | | 1.36 |
| | | SEEDLESS WATER | BRAZIL | kg | | | | 0.92 | |
| | | WATERMELON | BRAZIL | kg | | | | | 0.96 |
| | | | GUATEMALA | kg | | | | | 0.85 |
| PAPAYA | Air | FORMOSA | BRAZIL | kg | | 3.19 | | 3.17 | |
| | | NOT DETERMINED | BRAZIL | kg | | 4.00 | 3.50 | 3.70 | 3.80 |
| | | | THAILAND | kg | | | | 4.81 | |
| | Sea | | ECUADOR | kg | | | | 1.87 | |
| PASSION FRUIT | Air | NOT DETERMINED | COLOMBIA | kg | | | 6.20 | 5.79 | 4.32 |
| | | PURPLE | BRAZIL | kg | | | | | 3.49 |
| | | | KENYA | kg | | | | 5.00 | 4.79 |
| | | | SOUTH AFRICA | kg | | | 7.20 | | |
| | | | ZIMBABWE | kg | | | | 5.50 | |
| | | YELLOW | COLOMBIA | kg | | 8.38 | | 9.00 | |
| | | | ECUADOR | kg | | 8.38 | | | |
| PERSIMMON | Sea | | ISRAEL | kg | 1.36 | | | 1.92 | |
| PHYSALIS | Air | PREPACKED | COLOMBIA | kg | | | 8.00 | 8.91 | |
| | | | THAILAND | kg | | | | | 7.71 |
| | Sea | | COLOMBIA | kg | 5.42 | | | 6.25 | 8.23 |
| PINEAPPLE | Air | MD-2 | BENIN | kg | | | 2.10 | | |
| | | VICTORIA | MAURITIUS | Box | | 12.50 | | 13.35 | |
| | | | MAURITIUS | kg | | | 3.80 | | |
| | | | REUNION | kg | | | 4.00 | | |
| | | | SOUTH AFRICA | Box | | 12.50 | | 12.25 | |
| | Sea | MD-2 | BRAZIL | Box | | | | | 7.40 |
| | | | COSTA RICA | Box | 7.75 | | | | 8.64 |
| | | | COSTA RICA | kg | | | 0.65 | | |
| | | | COTE D'IVOIRE | kg | | | 0.75 | | |
| PITAHAYA | Air | RED | VIET NAM | kg | | 6.30 | | 6.68 | |
| | | YELLOW | COLOMBIA | kg | | | | 8.98 | |
| | | | ECUADOR | kg | | | | 9.00 | |
| PLANTAIN | Sea | | COLOMBIA | kg | | | 1.10 | 0.98 | 1.31 |
| | | | ECUADOR | kg | | | 1.00 | 0.94 | |
| RAMBUTAN | Air | | INDONESIA | kg | | | | 7.80 | |
| | | | THAILAND | kg | | | | 7.72 | |
| | | | VIET NAM | kg | | 7.50 | | 7.50 | |
| SAPODILLA | Air | | THAILAND | kg | | | | 8.34 | |
| SWEET POTATO | Sea | | BRAZIL | kg | | | | | 1.48 |
| | | | EGYPT | kg | | | 0.80 | | |
| | | | HONDURAS | kg | | | | 1.67 | |
| | | | ISRAEL | kg | | | 1.30 | 1.12 | 1.18 |
| TAMARILLO | Air | | COLOMBIA | kg | | 6.80 | | 7.10 | |
| | | | ECUADOR | kg | | 6.80 | | | |
| YAM | Sea | | BRAZIL | kg | | | | | 1.23 |
| | | | GHANA | kg | | | 1.50 | 1.44 | |

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

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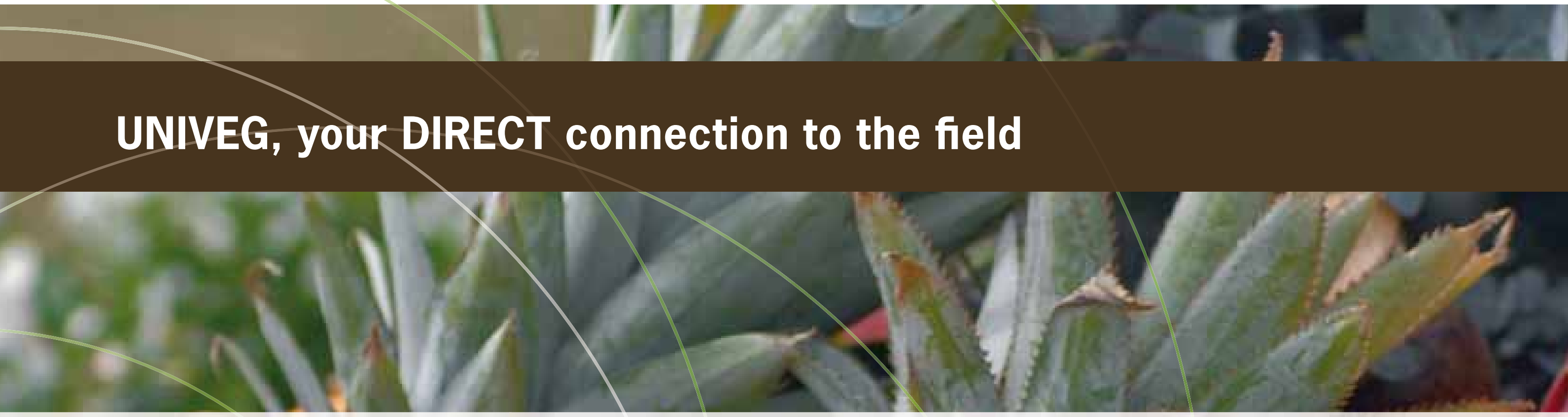
Cycle of Freshness



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