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# FR*ui*TROP

English version

CLOSE-UP:  
GRAPEFRUIT

Mediterranean citrus:  
HLB, a new threat

Sea freight: reefer market  
heads for the rocks

<http://passionfruit.cirad.fr>

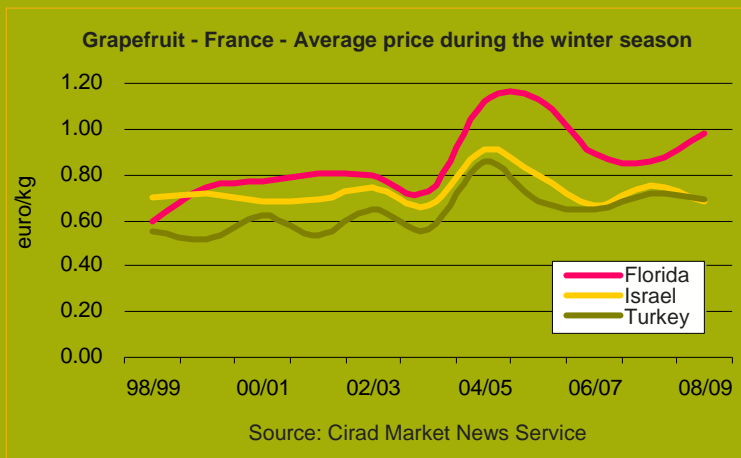
Grapefruit — EU-25 — Estimated marketed volumes by the main suppliers

Tonnes	2008-09	2007-08	%
Florida*	62 000	77 000	- 19
Israel**	65 000	61 000	+ 7
Spain	31 200	31 550	- 1
Turkey	40 000	42 600	- 6
<b>Total grapefruit</b>	<b>198 200</b>	<b>212 150</b>	<b>- 7</b>
China	60 000	49 400	+ 21
<b>Total grapefruit + shaddock</b>	<b>258 200</b>	<b>261 550</b>	<b>- 1</b>

\* Estimate based on 4 million boxes instead of 5 (17kg) / \*\* Estimate : 4.8 million boxes exported world-wide against 4.3 / EU = 85% of world volumes / Sources: professionals, CIRAD, Eurostat

Review of the 2008-09 winter season: disappointing from every point of view

It is still too soon to obtain the final EU import statistics. However, our estimates based on professional sources indicate that the volumes of grapefruit released on the market were down by some 5 to 10% (the cumulated figure for Florida, Israel, Spain and Turkey was some 200 000 t). However, the total is similar to the previous year if imports of shaddock from China are included. The movement of market shares by source is a clear illustration of the major trends described in this article.



The results for Florida are not positive. First, the volumes sold were distinctly smaller than in the two preceding years. However, the return to a normal start of season date (early October) made the sales calendar longer than last year. But production dipped and poor packing yields at the end of the season limited scope for prolonging sales. In addition, a strong increase in cost price and a less favourable euro:dollar exchange rate than in other years made some importers very cautious. Second, even though the very good level of quay prices gives the impression of a season that was positive in economic terms, this was not the case as the cost price had risen strongly.

However, this situation did not benefit most of the other Mediterranean sources and these display fairly poor balances. The twin features of the ground lost by Turkey, concentrated more than ever on the eastern European markets, and the structural decline of Cyprus gave an extra opportunity to Israel and Spain. However, although these two sources performed satisfactorily in terms of volume, price conditions were distinctly less favourable than in 2007-08.

What factors explain this blanket general performance? The first is probably consumption. Although the volumes released were very similar to those released until April last year in France (the data for May are not yet available), consumption seems to have displayed a record decrease in certain countries like Germany (with a dip of more than 10% according to consumer panel sources). The economic downturn does not seem to be the only reason. The market was strongly supplied with competing fruits and probably played a role too. A large European apple crop, large orange and easy peeler crops in the Mediterranean followed by stone fruits slowed grapefruit sales strongly from May onwards. The continued increase in volumes of Chinese shaddock also had an effect. Arrivals reached record-breaking levels, probably exceeding 65 000 t in EU-27.

Another noteworthy factor this season was the decrease in size decided by retail distributors. The 48-fruit box became the standard instead of the 40-fruit box. This is a profitable move as it means that retailers can set more attractive prices while conserving comfortable profit margins!

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