

Close-up

COCONUT



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Winter tomato: an early 2011-2012 season

The world banana market:
a crisis more structural than conjunctural

Litchi from Madagascar: progress!

The European papaya market:
unfulfilled promise

The European papaya market

Unfulfilled promise

A promising boom
in the early 2000s

Spectacular! The word is not a cliché here and clearly describes the beginnings of the papaya market at the beginning of the 2000s. Imports peaked at about 15 000 t at

the end of the 1990s and then nearly tripled in five years, exceeding 40 000 t in 2005. Driven by ethnic markets and the virtues of the fruits for health — taking it from the very serious Entretien de Bichat to the plate of Pope John Paul II — papaya was considered by some professionals to be 'tomorrow's mango'. In short, the fruit was going to leave the narrow world of small exotics and venture into the world of consumer products.

In the early 2000s papaya appeared as one of the most promising fruits in the exotics range. However, after a brief period of glory its venturing out of the 'small exotics' world became a failure. Importers specialised in this range of very special fruits have taken the market in hand and may perhaps be able to give it a new future by emphasising quality.

Development
stimulated by
a source and
a variety

A change in logistics initiated by the main Brazilian producers and exporters led to the democratisation of this fruit in Europe. The solidity of the variety 'Golden' enabled them to use sea transport instead of costly air freight and make the fruit affordable. Papaya could then be sold in supermarkets, especially in the United Kingdom and Germany, where even discount stores referenced it. Sales



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Packaging and sizing

Papayas for export to Europe are generally packed in 3.5 kg cardboard trays. 'Formosa' papayas are usually packed in 4.5 kg cardboard trays with the fruits protected by an expanded polystyrene sleeve.

Papayas are sized according to the number of fruits per box. Six to 10 fruits are generally packed in a 3.5 kg box. The number varies from 8 to 14 in telescopic boxes. Three to four large 'Formosa' variety fruits are packed in each 4.5 kg box.



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Solo Sunrise
Papaya from
Ecuador

Coconuts from
Ivory Coast

Plantains from
Colombia

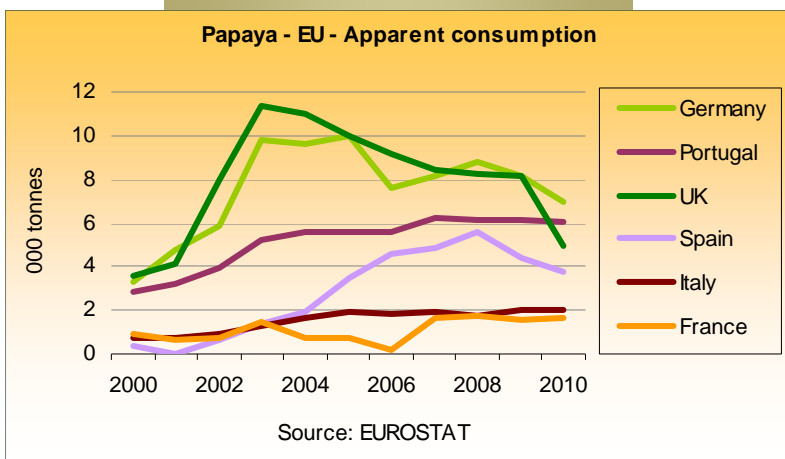
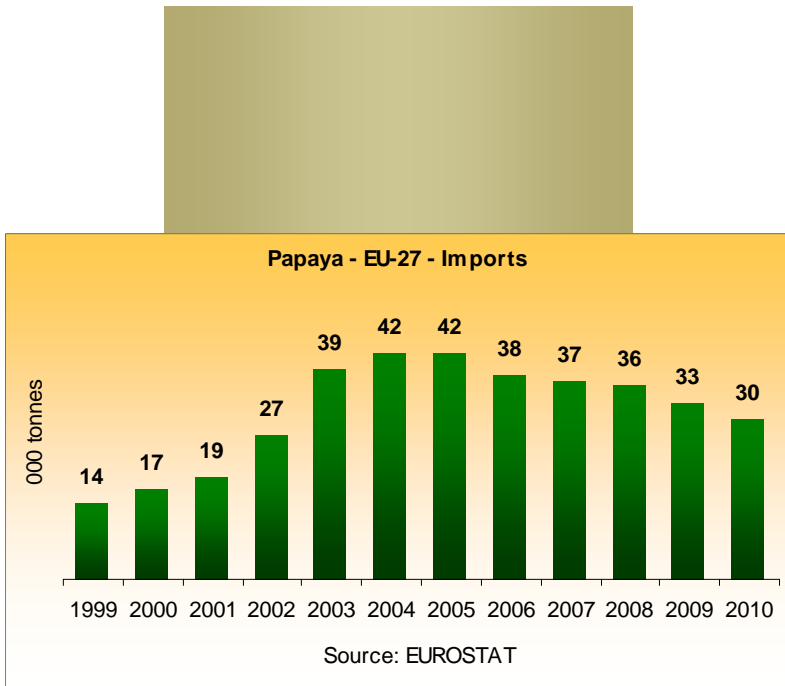
...and all exotic
and ethnic fruit,
roots and vegetables.



Fruit of the world
dibra



GLOBALG.A.P.



then increased exponentially in these two countries that soon became the leading markets in the EU, taking nearly half of the volumes imported to the community.

A change in trend in the mid-2000s

But this golden age of 'Golden' shipped by sea was just a flash in the pan. In spite of the use of controlled atmosphere and the efforts made to reduce shipping times and from 15-16 to about 12 days, the quality of the produce started to deteriorate. Sorting rejects increased on arrival and the organoleptic quality—difficult to guarantee and essential for a fruit with such a special aromatic profile—also deteriorated (taste quality and peel colour). And the final piece of bad news was the strong increase in sea freight costs and rumblings by Greenpeace about Brazilian papaya and pesticides. This soon had results. Consumption decreased strongly in the UK and Germany, the two major markets, putting a stop to the change of scale of the papaya market in Europe.

Most of the major European markets still in recession

In recent years, the effects of the economic downturn on a fruit with a high retail price added to the problems already mentioned

tonnes	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total Extra EU	14 021	16 802	18 848	26 724	38 910	41 939	41 856	37 916	36 520	35 972	32 554	29 775
Brazil	10 322	13 505	15 304	20 332	29 111	29 344	31 855	26 942	24 660	23 288	20 527	21 626
Ecuador	2	88	25	14	1 272	4 367	3 387	4 078	4 740	3 661	5 230	5 070
Thailand	230	244	362	645	789	495	671	700	949	1 007	998	889
Ghana	1 790	1 859	1 937	1 414	1 649	1 860	1 334	1 223	1 042	1 061	797	841
Costa Rica	0	23	0	0	4	0	3	20	22	71	78	264
Jamaica	318	259	226	235	181	52	32	30	136	100	149	250
Pakistan	2	0	1	1 301	2 007	1 676	1 152	785	885	669	1 550	154
South Africa	292	67	79	95	41	31	1	21	45	33	81	145
Côte d'Ivoire	382	317	236	340	232	1 164	1 398	1 857	1 806	3 574	1 061	-
India	4	13	23	1 288	2 004	1 722	1 067	519	622	992	857	64
Others	680	426	655	1 060	1 622	1 229	956	1 741	1 614	1 517	1 224	472

Source: EUROSTAT

Post-harvest

Papaya is a climacteric fruit. It is fragile and requires much care during picking and transport. It is sensitive to temperatures lower than 7°C, that cause the formation of small depressed dark green spots that are readily colonised by moulds.

Papayas are picked when green-ripe and can be stored for 3 to 4 weeks at 8 to 12°C. When ripe, they can only be stored for 2 weeks at 8°C. The fruits ripen in two or three days when stored at 12 to 18°C. Shelf-life is 3 to 5 days.



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and amplified the decrease in sales. Analysis of apparent consumption shows that three of the four main EU markets are in recession: Germany, the UK and Spain. Only Portugal is holding out, in particular thanks to its strong ethnic consumption base. Volumes are also stable in France and Italy, but are still limited at about 2 000 t per year. A little more than a quarter of European market sales has thus been lost in the last five years, with imports running at less than 30 000 t again since 2009.

Will the return to a quality policy mean hope?

But although the trade reports that the market is difficult, changes upstream and downstream lead to considering that it might be regaining a better base. The watchword for most operators is now quality once again and not quantity. The market is still very concentrated upstream. Brazil is still the main source country, accounting for two-thirds of supply. However, air freight has become the rule again for 'Golden'. In addition, 'Formosa', a variety reputed for its taste qualities, is tending to form a larger proportion of shipments. These large fruits that attract the catering industry and ethnic markets in particular, are also shipped by air. Ecuador, the only other large supplier of the EU with a market share of some 15 to 20% still ships fruits by sea. But the variety supplied (bred from 'Solo') has satisfactory taste features even if the peel colour is an obstacle for

PAPAYA Nutritional value (pulp/100 g)

Energy	47 Kcal
Carbohydrate	11.6 g
Vitamin C	60 mg

Nutrition

Papaya is low in calories and in sodium but rich in potassium and vitamins C and A.

Papaya — United States — Imports

tonnes	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Mexico	55 124	68 891	66 965	74 613	94 213	80 182	91 158	92 628	84 901	124 742	115 214
Belize	5 565	5 837	11 021	15 723	24 217	27 716	33 889	33 489	28 170	23 747	28 569
Guatemala	-	148	328	349	415	1 243	1 020	1 540	3 721	2 112	3 882
Brazil	4 672	5 089	5 815	7 178	4 854	4 597	3 662	4 165	3 793	2 923	2 984
Dominican Rep.	2 531	2 877	2 414	2 481	1 201	1 089	987	5 138	2 142	1 791	2 228
Jamaica	1 547	1 579	1 900	1 494	996	1 033	1 319	992	1 096	785	755
Panama	-	-	-	7	-	22	-	99	507	265	205
Costa Rica	324	-	-	-	-	-	-	51	-	-	17
Others	124	20	83	31	114	187	137	6	24	30	39

Source: US customs

Papaya description

Papaya is a semi-lignous tree 5 to 7 metres high, topped by a crown of large leaves similar to those of fig. It grows in the hot, humid tropics. It is short-lived (3 to 5 years) but fruits continuously from the year of planting onwards. It is a sexual plant, making it difficult to produce homogeneous fruits. To overcome the disadvantage, fruit production for international trade is generally performed using self-fertilising hermaphroditic plants. The 'female' fruits are generally more rounded and little sold for export. Papaya fruits grow in bunches attached to the trunk beneath the crown of the tree.

Papaya is an ovoid berry, oblong to globular, measuring from 10 to 30 cm in length according to the variety. The fruit is green, turning yellow as it ripens. The smooth, fragile epidermis is a few millimetres thick. The cross-section reveals orangey to red flesh around a central cavity filled with spherical, non-edible grey or black seeds.



Many varieties exist but those most frequently seen on the European market are 'Solo 8', 'Sunrise' and 'Golden' among the varieties with small fruits (300 to 700 g) and 'Formosa' among those with large fruits (more than 1 kg).

The fruit is generally eaten fresh but can be used in the production of juice, jam, dried fruits, ice cream, etc. Both tree and fruit contain papain, a proteolytic enzyme with digestive properties, also used in pharmacy and certain industries (tanning).



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certain markets. Positive points are also emerging downstream. The papaya trade is tending to become re-concentrated in the hands of exotic fruit professionals. Some of them are developing strategies aimed at fostering quality.

One of the lines of work is ripeness: fruits guaranteed to be well coloured or even 'ready to eat' packaged in trays. The other approach is that of giving a larger role to African 'Solo', reputed for its organoleptic qualities but fragile. However, it became more marginal after the halting of exports from Côte d'Ivoire in 2009. Demonstrating the determination of a retail chain to improve its range, Aldi in Germany is making an isolated initiative to sell papaya again, but the fruits are imported by air this time.

The example of the US market

Without betting on a large-scale recovery of European consumption, it can be considered that these changes are heading the right direction. The development of the US market has been based on quality, with a spectacular doubling of imports in 10 years, with quantities exceeding 150 000 t in 2009 and 2010. It is true that this market has advantages not found in Europe. the presence of a large Hispanic population fringe that is familiar with the fruit and a nearby source country, Mexico, that can guarantee quality similar to that of fruits shipped by air for the price of road transport. However, the main stimulus for increased consumption has been initiatives aimed at making the most of these comparative advantages, such as segmentation by ripeness. This is an example to be thought about! ■

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Regulations

Papaya is covered by Codex Alimentarius Standard 183/1992 amended in 2001.