



A REPORT FROM THE CALIFORNIA TREE FRUIT AGREEMENT

# International Market Report

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MARKET NEWS FROM CTFA REPRESENTATIVES AROUND THE WORLD

## June 22, 2009

Summer time has arrived and is in full swing, and there is no better way to celebrate then with summer fruits from California. California's peach, plum, and nectarine production is well under way, as packouts have increased over the past week. Temperatures in the Central Valley are expected to reach into the triple digits in weeks ahead and packouts will continue to rise based on weather conditions. Currently dominating varieties are Rich Lady and Galaxy for peaches, Spring Bright and Kay Pearl™ for nectarines and for plums Black amber and Black Beaut.

Thank you for your interest in California peaches, plums, and nectarines and their journey around the world. If you have any suggestions to improve this report or questions about California PPN exports, please do not hesitate to contact Denise Junqueiro at [djunqueiro@caltreefruit.com](mailto:djunqueiro@caltreefruit.com).

## Current News

### Equivalency Agreement finalized by US and Canada

On June 17, the Equivalency Agreement was finalized by the US and Canada at the Organic Trade Association's "All Things Organic Conference and Trade Show in Chicago." The agreement will take effect on June 30 to help streamline the movement of organic products over the US and Canada border. Organic products can move across the border freely when they are labeled with either the new Canada Organic Biologique label or the USDA Organic seal. Now growers who are certified under the National Organics Program in the US will not have to re-certify according the Canadian labeling. This is due to the fact that the USDA organic label is now a certifiable label in Canada.

### \$1 billion expansion push by Aldi

Aldi, a German supermarket giant, is spending \$1 billion on expanding its operations by adding 25 additional supermarkets. Aldi is striving to build strong relationships with suppliers that can meet the additional volumes with excellent quality products. A product development and quality assurance center opened in Sydney, Australia, with plans of two additional distribution centers in South Wales and Victoria. To read the full article go to [www.smartcompany.com.au](http://www.smartcompany.com.au).

## Market Reports

### Mexico

Volumes of California PPN are gradually increasing, while sales have remained steady. California PPN can be found in both the retail and wholesale market levels. Sizing and quality of California PPN is good, while shipments are moving moderately. Local peaches from Chihuahua and Sonora states are the main competition for California peaches. Local plums from Puebla State are available in the market with low volumes. There is no direct competition when it comes to nectarines, but local apples, strawberries and grapes can be found. Also available in the market is Washington apples, Chilean kiwifruit, California cherries, and pears from Oregon and Washington.

### Hong Kong

Air shipments of California peaches and plums arrived in the Hong Kong market. Feedback from the trade indicates the early season fruit is of excellent quality. Chinese peaches from Hebei and Sichuan also arrived via air and are priced competitively. Japanese peaches were found in the wholesale and retail markets. The 'Hua Nan' plum from China in limited volumes can be found in the market.

### Taiwan

Movement is average and volumes are low for California peaches and nectarines in the Taiwan market. Direct competition in the market is Taiwan Lala Mountain peaches and Japanese peaches. Japanese peaches are only available in premium supermarkets and non-store front markets such as mail order and internet shopping. Also spotted in the market are local Litchis, mangos, pineapples, watermelons and pears. New Zealand kiwifruits, US citrus, and California cherries are other featured fruits.

### China

California plums are still not in the market, but with the timing of the season, this does not come as a shock, since early season is usually dominated by local product. The last of Chilean plums can still be found but as expected are phasing out of the market. Movement in the Guangzhou market is slow due to rainy weather with limited imported fruits. The imports in the Guangzhou market are Chilean stone fruit of inferior quality and small volumes. Steady volumes of local stone fruit are available even though movement has been slowed down by weather conditions.

### Singapore

Air shipments of Summerwhite® peaches, nectarines, and donut peaches are increasing. The increase in volumes is a direct reflection of the increase in the number of importers carrying California PPN. California Summerwhite® peaches, donut peaches, and nectarines are perceived to be of good quality. When referring to plums the only available in the market are from Chile. Importers expect California plums to enter the market by the end of June. Other fruits in the market are US cherries, apricots, and strawberries with persimmons from South Africa.

## Malaysia

Currently small volumes of California peaches, nectarines, Summerwhite® peaches, and nectarines can be found in the Malaysia market. California plums are expected to arrive by sea in early July. Movement of California peaches and nectarines are improving through hyper markets and Supermarkets. Chilean plums are still widely spread throughout the market. Along with California plums expecting to arrive in July, so are plums from China. Also available in the market are the King of fruits, watermelons, mangos and papayas.

## United Kingdom

UK market has only Spanish stone fruit, currently. Compared to last season higher volumes of Spanish organic peaches and nectarines can be found in the market. The current fruit in the market is of smaller size and has low brix levels. Also available in the market are British strawberries, blackberries, and raspberries, in addition to Spanish blueberries and cherries.

## New Zealand

The first California peaches and nectarines arrived by sea. As packouts increase in California, so will volumes of California PPN in the New Zealand market place. Chilean plums still remain in low volumes along with Chilean and Australian grapes. California navel and valencia oranges still remain in the market in addition to local apples, pears, kiwifruit, oranges, mandarins, fejoas, and persimmons.

## Central America Region

Stone fruit is not only available from California but also from Guatemala and Costa Rica. California has the largest presence at the retail level. The quality of California PPN is good with great color, firmness, and flavor. Grapes and kiwifruit from Chile, along with citrus from California and South America have also been spotted in the market.

## South America

High quality California peaches and nectarines are moving slowly into the Colombian market with direct competition from local peaches. Ecuador has received small volumes of California PPN, also spotted in the Ecuadorian market are pears, apples, Chilean plums and grapes, Peruvian peaches, and US citrus. Local fruits found in the market are oranges, melons, mangos, pineapples, and papayas. Panama currently has excellent California peaches and nectarines with small volumes. Venezuela importers are still having issues with obtaining import permits from the Venezuelan government. Importers have started forming an association to have a united front against the regulations and to resolve the problem of permits to import not being issued.

# Promotional Highlights

## General

This section of the report highlights various promotional programs and/or events that are traditionally important for our fruits. Listed below are several brief descriptions of in-country activities. Promotional programs have started and will continue to increase over the next month as more fruit enters the international markets.

\*Be sure to visit the International section on the PPN Network Download Center at [www.eatcaliforniafruit.com](http://www.eatcaliforniafruit.com). On the download center you will find downloadable POS material from many different countries. Additional file formats may also be available upon request. Contact Denise Junqueiro for assistance [DJunqueiro@caltreefruit.com](mailto:DJunqueiro@caltreefruit.com) or (559) 638-8260

## Mexico

In-store promotions have started with over 82 markets in 18 different cities featuring in-store sampling. Print media materials have been picked up by the Mexican media, reaching 1,160,500 readers with ad space value equivalent of \$91,219.20 and media costs equivalent to \$319,267.20.

## Taiwan

An incentive program called "Bid the Best" targets importers and "Lucky Draw" program targets wholesalers to encourage handling of higher volumes of California Tao Lee. Filming of a segment with a nutritionist and a doctor will be featured on the CTFA Chinese website and various TV programs. Joint promotions with super and hyper market chains will begin in July, along with the consumer promotions.

## New Zealand

The 2009 campaign is a promotion program working with 40 schools to encourage consumption of California peaches, plums, and nectarines, while supporting and working with the community. Various retailers will be partnering with CTFA on school promotion during July 6. Store sampling and promotion campaigns will increase as volumes into the market increase.

Country	Fruit	Grade/ Origin	Size/Count	Wholesale Price US\$	Retail Price US\$	
Mexico	Peaches	CA	50 to 72 VF	\$ 25.56	\$ 0.81	
	Plums	CA	80	\$ 27.60	\$ 1.27	
	Nectarines	CA	45, 72	\$ 25.86	\$ 1.27	
	Plums	CUG, CH, MX	65-80, 18kg	\$11.52 - 14.445	\$ 0.92	
	Peaches	MX	22lb	\$ 16.71	\$ 0.95	
	Apple	WA	56,88-100-125-135	\$ 25.35	\$ 0.96	
	Apricots	CA	8,12-60	\$ 14.87	\$ 0.84	
	Kiwifruit	CH	22lb	\$ 16.60	\$ 1.11	
	Mangoes	MX	25kg	\$ 10.47	\$ 0.49	
	Pears	Arg, WA	36-44lb; 70-100	26.95 - 29.92	1.09 - 1.16	
	Strawberries	CA, WA	12 - 19.2 lb	7.50 - 11.38	1.30 - 1.64	
	Grapes	CH, CA	18 - 21 lb	\$ 14.49	\$ 1.37	
	Hong Kong	Peach	CA	12-22pcs	58.4	3.25/1pcs
Nectarines		CA			3.49/2pcs	
Peach		China, JP	8-40pcs	21.4 - 33.8	1.55-1.94/4pc; 1.8/1lb	
Pluots		CH	44-56pcs	11.04 - 14.29	1.56 - 1.95/4pc	
Chinese Variety of Plum		China	33LB	12.99	1.04-1.66/1lb	
Apricot		China			1.94/500g	
Apricot		AUS			1.17/100g	
Taiwan	SW Peach	CA	#14-24; #56-72	25.86 - 47.16	0.45 - 4.56/pc	
	Peach	CA	#16-18; #24	25.86 - 39.55	1.27-3.34/pc	
	SW Nectarine	CA	#14-24; #64-80	15.21 - 45.63	0.43 - 4.56/pc	
	Nectarine	CA	#24	30.42	1.7-1.83/pc	
	Peach	JP, TW	#4-6 / 2Kg	33.47-39.55	9.87- 20/pc	
	Plum	TW		0.46-1.22/ 1.32lb	0.60-1.79/ 1.32lb	
China-Shanghai	Nectarine	China	Medium/5KG	5.15/BOX	0.71/500G	
	Black Plum	China	Medium/5KG	8.84/BOX	1.15/500G	
	Red Plum	China	Medium/5KG	11.05/BOX	1.55/500G	
	Peach	China	Big/10KG	5.89/BOX	0.27/500G	
	Chinese Variety of Plum	China	Small/10KG	5.89/BOX	0.38/500G	
	Peach	China	Medium/5KG	8.83/BOX	1.32/500G	
China-Guangzhou	Nectarine	China	Medium/13-20KG	3.68-5.15; 11.75/16.18	0.37-0.56; 1.17-1.77	
	Peach	China	Medium/Bulk	0.37-0.59/500g	1.00?1.76	
	Chinese Variety of Plum	China	Med/Bulk Pack	0.26-0.29/500g	0.41-0.44	
	Prune	China	Med/Bulk Pack	10.29/10KG	1.18	
	Black Plum	CH	36-48	17.64 - 29.41	1.88?2.35/500G	
Singapore	SW Peach	CA	56 2Lyr	51.65	1.38	
	Peach Donut	CA	48 2Lyr	42.75	1.38	
	SW Nectarine	CA	72 Vf	56.08	1.03	
	Apricot	US	10 kg	\$ 59.31	5.17 500g	
	Cherry	CA	10	59.03	11.03 kg	
	Strawberry	US	454g x8	26.21	4.76	
	Grapes	AUS	10kg	29.62 - 35.86	4.37 - 5.85	
	Black Plum	Chile	50/55	22.06	2.69 kg	
	Kiwi (green)	NZ	10 kg	33.10	2.07 (4pcs)	
	Apple	NZ	80	33.79	0.62	
	Persimmon	NZ	16	16.24	1.72	
	Malaysia	SW Peach	CA	56-64 vf	58.0-62.0/carton	1.60-1.90/pc
		Peach	CA	56-64 vf	56.0-60.0/carton	1.20-1.60/pc
SW Nectarines		CA	56-64 vf	58.0-62.0/carton	1.60-1.90/pc	
Nectarines		CA	56-64 vf	56.0-60.0/carton	1.20-1.60/pc	
Cherries		CA	8.2kg	78-80/lug	2.00/100g	
Grapes		Aus, Chile, SA	4.5 - 10 kg	8.10 - 28.50	2.20 - 3.50/kg	
Plum		Chile	48 - 78	13.0 - 15.0	0.22 - 0.35/pc	
Orange		CA, Aus	48 - 180	13.00 - 28.32	0.16 - 0.30/pc	
Pear		SA, CN	36 - 72	6 - 12.50	0.10 - 0.39/pc	
Apples		NZ, SA, WA, CN	36 - 180	10.00 - 25.00	0.15 - 0.60/pc	

Country	Fruit	Grade/ Origin	Size/Count	Wholesale Price US\$	Retail Price US\$
United Kingdom	SW Peach	CA	4 fruits (61/67mm)	N/A	\$4.91 (Special)
	SW Nectarines	CA	4 fruits (61/67mm)	N/A	\$4.91 (Special)
	Plum	CA	6 fruits (50/55mm)	N/A	\$4.91 (or 2 for \$8.22)
	Peach	SP	4 - 5 fruits (56/67mm)	1.48/kg	1.64 - 7.21
	Nectarine	SP/Isreal	4 - 6 fruits; Loose	2.26/kg	0.81 - 3.07
	Nectarine (white)	SP	4 pack (61-67mm); Loose (61-73mm)	2.26	0.81 - 2.45
	Plum	SP, CH, Isreal	4-6 pack (40-55mm);	1.97 - 2.17	1.64 - 4.91
	Apricots	Sp (Tomcot)	350g (40/45)	N/A	\$3.27 (Half Price)
	Blackberries	British	220g	N/A	\$4.09 (Half Price)
	Blueberries	Sp, France	200 - 250 kg	N/A	3.27 - 4.50
	Cherries	Sp (Ruby)	1 kg	N/A	\$9.84 (Half Price)
	Cherries	nata, New Star, Sor	300g	N/A	\$3.27 (Half Price)
	Raspberries	British	220g	N/A	\$3.27 (Half Price)
Strawberries	British (Elsanta)	454g	N/A	\$3.27 (Half Price)	
New Zealand	Nectarines	CA	64		2.24
	Plums	CH	64		1.94
	Cherries	CA	10 Row		5.05
	Grapes		smll/med		1.95
	Grapes		Med/large		1.95
	Kiwifruit		Med		1.12
	Apples		med/large		0.54 - 1.12
	Mandarins		med		1.40
	Pears		med		0.54 - 1.12
Central America	Peach	CWM	70	\$ 27.32	\$ 1.84
	Nectarine	CWM	65	\$ 29.82	\$ 1.97
	Plum - Black	CWM	70	\$ 38.00	\$ 1.99
	Plum - Red	CWM	70	\$ 30.58	\$ 2.01
	Peach	GT	small	\$ 14.96	\$ 1.45
	Plum - Black	CH, GT, CR	20 lbs/small	\$ 24.17	1.36 - 1.47
	Apple	CH,USA	80-163	\$ 28.36	\$ 1.09
	Grape	CH	18 lbs	\$ 28.32	\$ 1.92
	Pear	CH,USA	44-120	\$ 31.69	\$ 1.21
	Kiwifruit	CH	33-36	\$ 25.55	\$ 1.80
	Orange	USA	72-88	\$ 29.25	\$ 1.15
	Strawberry	CR, Ho, GT			\$ 2.06
	Mandarine	USA, Pe	80	\$ 27.44	\$ 1.47
India	Plum (Angeleno)	CH	50-60	\$11.22/10 Kg box	\$1.12/lb - \$1.40lb
	Plum	India (Shimla and Nainital)	70-80	\$2.33/5 Kg box	\$0.56/lb - \$0.74/lb
	Peaches	India (Shimla and Nainital)	70-80	\$3.74/8 Kg box	\$0.56/lb - \$0.74/lb

Country	Fruit	Grade/ Origin	Size/Count	Wholesale Price US\$	Retail Price US\$
Colombia	Peach	USA	Box 11k	US 40.65	US 1.84 LB
	Nectarines	USA	Box 11	US 43.04	US 1.95 LB
	Plums	Chile	Box 9kl Granel 64	US 23.25	US 1.29 LB
	Guava	Colombia	Box 12 kl	US 6.21	US 0.25 LB
	Orange	Colombia	Box 25 kl	US 23.91	US 0.47 LB
	Papaya	Columbia	Box 18 kl	US 14.34	US 0.39 LB
	Pineapples	ECU		\$12.00-15.00	\$0.60-0.70
	Orange	ECU		100 u/\$5.00	\$0.07-0.09 u
	Papaya	ECU		\$10.00-12.00	\$1.06-1.31
	Melon	ECU		\$15.00-18.00	\$1.50-1.60
	Orange	USA		\$18.00-20.00	\$2.80-2.95
	Mango	ECU		\$18.00-20.00	\$1.88-2.10
	Grapefruit	ECU			\$0.35-0.43
	Watermelon	ECU		\$13.00-15.00	\$0.83-0.95
	Mandarin	ECU/Peru		100u/\$5.00 - \$7.00	\$0.06-0.10u
	Plum	CHILE		\$28.00-30.00	\$3.85-4.20
Panama	Plums	USA	48U		0.25 per unit
	Peaches	USA			0.40-0.60 per unit; 1.59/lb
	Nectarines	USA			0.45-0.60 per unit; 1.85/lb
	Plums	Chile	48U		0.25 per unit
Venezuela	Plum	Chile, VZ	40 - 50	46.51 - 60.46	4.88 - 12.32
	Peach	VZ			4.79 - 8.37
	Mango	VZ	N/A	N/A	2.95-4.41
	Watermelon	VZ	N/A	N/A	1.13-1.90
	Melon	VZ	N/A	N/A	2.46-3.02
	Pineapple	VZ	N/A	N/A	2.93-3.55
	Strawberry	VZ	N/A	N/A	7.80-11.62
	Papaya	VZ	N/A	N/A	2.27-2.90
Canada	SW Peach	CA	per pound		1.76
	Peach	CA	per pound; 2# bag		0.87 - 1.76; 2.65
	SW Nectarine	CA	per pound		1.76
	Nectarine	CA	per pound; 2# bag		0.87 - 1.76; 2.65
	Plums	CA	per pound; 2# bag		1.14 - 1.76; 2.65
	Apple	NZ/CH, WA, ON, BC	per pound; 4# Bag		0.88 - 1.32; 2.21
	Apricots	CA	per pound	0.88 - 1.14	1.76
	Avocadoes	MX	each	0.88	1.18
	Blueberries	U.S.	1/2 pint; pint		1.48; 2.65 - 3.53
	Cantaloupe	U.S.	each; per pound	\$ 1.33	1.76; 0.51
	Cherries	CA	per pound	\$ 2.21	2.45 - 2.65
	Grapes	CA/MX	per pound	\$ 0.88	1.14 - 1.49
	Kiwifruit	CH	2# punnet	\$ 1.76	
	Mangoes	MX	each	\$ 0.61	0.70 - 1.33
	Pears	S Af, Arg, US, CR	per pound	\$ 0.09	1.14 - 1.67
	Pineapple	CR	each		3.45
	Raspberries	MX	1/2 pint		1.48 - 1.76
Strawberries	CA	1# clam		1.48 - 2.21	
Watermelon	US	per pound; each		0.43 - 0.88; 3.53	
Legend	Arq	Argentina		Mal	Malaysia
	Aus	Australia		MX	Mexico
	CH	Chile		NZ	New Zealand
	CN	China		NZ	New Zealand
	CO	Colombia		SA	South Africa
	CR	Costa Rica		Sp	Spain
	CA	California		SW	Summerwhite®
	CUG	California Utility Grade		Thai	Thailand
	CWM	Ca Well Mature®		TW	Taiwan
	EC	Ecuador		USM	US Mature
	GT	Guatemala		Vf	Volume fill
	JP	Japan		VZ	Venezuela
	Lyr	Layer		WA	Washington