



A REPORT FROM THE CALIFORNIA TREE FRUIT AGREEMENT

International Market Report

975 I Street P.O. Box 968, Reedley, CA 93654-0968
Telephone: 559-638-8260 • Fax: 559-638-8842

www.caltreefruit.com

MARKET NEWS FROM CTFA REPRESENTATIVES AROUND THE WORLD

September 28, 2009

Temperatures here in California continue to be extremely warm for this time of year, although cooler autumn temperatures are expected to arrive this week just as packouts for California peaches, plums, and nectarines slow down considerably. Plums are almost finished, and just last week exceeded their pre-season estimate of 8.9 million packages. Nectarines are effectively finished for the summer, although several late-season peach varieties are still going strong with expectations for the crop to wind down around mid-October. Just as supplies here in California are winding down, export volumes are also declining in several markets as the final shipments are being loaded. However, the key late-season markets, like the United Kingdom, are showing increases in volumes as European supplies finish up.

PMA Fresh Summit in Anaheim, California from October 2-5 is almost here! Please stop by our booth #2002A for the latest information on California peach, plum, and nectarine exports for the 2009 season and beyond. Market representatives from South America, New Zealand, China, and Mexico will be attending. Inquire about the International reception we are co-hosting with the Northwest Pear Bureau, California Pears, USA Apples, and the California Kiwifruit Commission on Sunday evening, October 4.

Our final International Market Report for the 2009 season will be published two weeks from now on October 12. As always, 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.

Current News

Jiagnin Wholesale Market, Guangzhou, grows 20 percent despite global economic downturn

According to business-standard.com, the largest fruit and vegetable wholesale market in China, located in Guangzhou, increased their volume of trade by over 20 percent since 2007. Despite the downturn in the global economy, distribution of fruits from Thailand, Philippines, Malaysia, the United States, Chile and Canada continue to grow. While vegetables have not experienced that level of growth, the importance of the Jiagnin market for imported fruits can not be understated.

Market Reports

Mexico

Since the last reporting period, retail sales have increased for California peaches. Currently California peaches carry 85% of the market and have good volumes, while California Summerwhite® nectarines carry 80% of the market versus yellow-flesh. California plums continue to dominate the market but availability has been inconsistent. Also, in the market are apples from Washington, Virginia and Chile, Southern hemisphere kiwifruit, Washington cherries, along with pears from California and Argentina. Overall quality continues to be above average with very positive feedback from the trade.

Hong Kong

California Tao Lee is currently available at both retail and wet markets in moderate volumes. Currently featured in the market are nectarines, Summerwhite® peaches, and black plums. The trade remains optimistic that shipments will continue to arrive depending on availability of supplies from California and continued good quality. Direct competition for California is Japanese peaches, and Chinese peaches and black plums. Indirect competition is California grapes, Chinese melons and watermelons.

Taiwan

The demand for imported fruit continues to be strong due to Ghost month celebrations and a shortage of local fruits. September 18th was the last day of worship for Ghost month, although the Moon Festival begins on October 3. Peaches from California continue to arrive via air and ocean. Limited volumes of Summerwhite® nectarines have been selling very quickly at the wholesale level. Even yellow-flesh nectarines have been spotted in limited volumes. California plums can be found in the market but in declining volumes. Japanese and Washington peaches currently present the only direct competition for California Tao Lee. Other imported fruits in the market are California table grapes, New Zealand kiwifruits, Japanese and Korean pears, along with apples and citrus from the Southern Hemisphere. Local products featured in the market are pomelos, pears, custard apples, persimmons and bananas.

China

California black and red plums are currently available in Shanghai in limited to moderate volumes, although they have experienced increased sales since the last reporting period. Chinese plums from Lianahg and Shaanxi are also available in large volumes and below average quality. The majority of arrivals to Shanghai are via trans-shipments from the Guangzhou wholesale market. In Shenzhen California red plums were spotted but in declining volumes. The Guangzhou market has limited volumes of California plums at the moment with good quality. California plums were spotted in Dalian at the retail level with limited volumes but good quality. Also available in Dalian are Chinese plums with several examples of these local plums being marketed and labeled as California plums. The market in Beijing has limited volumes of California plums along with an abundance of local fruits in preparation for the Mid-Autumn Festival and National Day events. Local fruits available are pears, bananas, hawthorn, jujube, pomegranates, and plums.

United Kingdom

California peaches and Summerwhite® nectarines are available in the market with good quality. Despite the entrance of quality California PPN, the market is still dominated by European product. Product from France, Italy, Spain, and Turkey are all direct competition for California PPN. Most Summerwhite® nectarines are being sourced from California now. A new Israeli plum variety called Green Red is now in the market as well.

Singapore

Currently in Singapore, there is an ample supply of California Tao Lee. California nectarines have experienced reduced volumes at the wholesale and retail markets over the past two weeks, but sales are still considered steady. Summerwhite® peaches are entering the market via weekly air shipments, and the trade expects plum shipments to increase during the coming weeks. Overall sales of fresh fruits have been above average during the Hungry Ghost Festival. With Moon Festival approaching the trade is confident that the trend will continue. In terms of wet market distribution, California plums are spotted at smaller scale wet market stalls, while California peaches and nectarines can be found in the bigger wet markets. Other fruits featured in the market are Chinese peaches, plums, nectarines, apples and pears, California grapes, and apples from South Africa and New Zealand. Tropical fruits from Malaysia and Thailand such as mangoes, dragon fruit, longans, mangosteens, and watermelons are also available.

Malaysia

The Malaysian market featured lower volumes of California PPN compared to the previous reporting period but quality is perceived to be good. California peaches and nectarines have been arriving via air-shipment. Demand is high for California plums and supplies are sold within hours of delivery. The

demand for imported fruits is expected to stay strong in coming weeks due to the Muslim Hari Raya Puasa festival, and the Mid-Autumn festival. Direct competition in the market is Chinese plums, while indirect competition is dates, papayas, nangka and dragon fruit.

New Zealand

Volumes of California PPN continue to decline gradually in New Zealand as the final shipments of peaches are expected to arrive this week. Weekly shipments of plums and nectarines, both yellow and white-flesh, are still expected through the next few weeks as the California PPN season draws to a close. The trade continues to be pleased in general with sales of stone fruit, despite the challenge of a relatively high rate of loads being fumigated. Warmer weather continues to foster improved sales of fruits in the market. Indirect competition in the market currently are California grapes, local apples and oranges, Packham pears, strawberries and mandarins from Australia, along with Mexican mangoes.

Central America Region

Volumes and sales movement of California PPN in Guatemala are considered average at the moment. In El Salvador, both quality and volumes are exceeding expectations for this time of year. Honduras and Costa Rica have experienced a decrease in volumes over the past two but quality remains very good. Direct competition in the region is Spanish stone fruits. Also found in the market are local apples and grapes, pears from Argentina, kiwifruit from Chile and citrus from Peru and Chile.

South America

There is plenty of competition for California PPN in Colombia at the moment from Spanish, Italian and local stone fruits. In Ecuador, volumes of California PPN are strong with average to above average quality for peaches and nectarines, while quality for plums has been excellent. Indirect competition in Ecuador is local oranges, melons, mangoes, pineapples, papayas, watermelons, mandarins, strawberries, and babacos. In Panama, availability of California PPN has become inconsistent although the trade continues to report good quality. California plums are featured in most supermarkets in black and red varieties. In Venezuela, importers are finally receiving California PPN despite the government restrictions on import permits. Supermarkets currently are carrying small volumes of California PPN and are letting it be known that they are receiving shipments from wholesalers and importers not direct. Local stone fruits including melocotones and duraznos, and plums are also available.

India

With the local stone fruits no longer available, California PPN are the only stone fruits available in India at the moment. Currently there are limited volumes, but those members of the trade handling California report quality to be excellent. California PPN can be found at both the wholesale and retail level in New Delhi and Mumbai. Trade feedback has been very positive on quality, volumes, and sales.

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 a few brief descriptions of in-country activities. Promotional programs have started and will continue over the duration of the season.

*Be sure to visit the International section on the PPN Network Download Center at 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 or (559) 638-8260

India

On September 9th in New Delhi, a press conference was held to launch California PPN's marketing program for the 2009 season in India. There were over 30 media correspondents that attended the event. A presentation on the health benefits and versatility of California PPN was given which was followed by a Q&A period where the media was able to interact with CTFA's Director of Marketing, Gordon Smith. Media personalities and correspondents were presented with samples of various recipes made with California PPN, and a gift of a glass bowl filled with fresh California PPN.

Country	Fruit	Grade/ Origin	Size/Count	Wholesale Price US\$	Retail Price US\$
Mexico	Peaches - Yellow	CA	36 to 70 VF	\$ 23.73	\$ 1.31
	Plums - Red	CA	65 to 90	\$ 25.48	\$ 1.59
	Plums - Black	CA	70 to 90	\$ 25.48	\$ 0.99
	Nectarines	CA	56-64-70	\$ 23.29	\$ 1.59
	SW Nectarines	CA	55 to 80	\$ 25.48	\$ 1.59
	Apricots	CA	88	\$ 19.43	\$ 1.52
	Pears	CA	40-48-50-54-55-100-110-120-135	\$ 17.52	\$ 1.06
	Strawberries	CA	12lb	\$ 13.45	\$ 3.11
	Plums - Red	CUG	80 to 90	\$ 20.92	\$ -
	Peaches	MX	33lb	\$ 24.60	\$ 0.99
	Apple	WA	88 to 135	\$ 26.36	\$ 1.11
	Kiwifruit	CH	22lb	\$ 19.33	\$ 1.51
	Pears	WA	70-80-90-100-110-120	\$ 31.02	\$ 1.43
	Plums	MX	18kg VF	\$ 8.96	\$ 1.31
	Strawberries	MX	19.2b	\$ 11.59	\$ 2.56
Taiwan	Peach (ocean)	CA	#14-17; #34-44	10.80 - 24.69	0.67 - 1.85/pc
	Peach (air)	CA	#13-16	35.49 - 40.12	3.08 - 4.62 /pc
	SW Nectarine	CA	#48-56	37.03 - 40.12	0.62 - 0.93 /pc
	Plum	CA	#40-56	24.69 - 40.12	0.38 - 0.77/pc
	Prune	CA	#110-120	N/A	1.84 -2.07/lb
	Peach (air)	WA	#15-20	27.78 - 37.03	2.22 - 4.62/pc
	Peach (ocean)	WA	#20-21	15.43 - 18.52	1.08 -1.38 /pc
	Peach (air)	ID	#14-18	30.86 - 43.21	2.62 - 4.63/pc
	Peach (air)	JP	#15/ 5Kg	70.98-74.07	6.63 - 7.71 /pc
Singapore	SW Peach	CA	44	51.97	2.07
	SW Peach	CA	14	39.28	3.57
	Plums	CA	50,55	23.57	0.22
	Prunes	CA	60	60.00	6.43 kg
	IS Plums	CA	32,36	34.39	1.79 pc
	SW Nectarine	CA	56vf	31.23	0.57
	SW Nectarine	CA	14	39.28	3.92
	Organic Peach	CA	56 2Lyr	60.71	2.14
	Organic Nectarine	CA	56 2Lyr	60.71	2.14
	Organic Plums	CA	60	57.14	3.21 5pcs
	Red Grapes	CA	8.6 kg	30.00	3.50 kg
	Strawberry	Aus	454g x8	26.21	4.76
	Green Grapes	US	8.6 kg	51.97	7.07
	White Peach	CN	60	35.72	0.43
	White Nectarine	CN	60	39.29	0.57
	Kiwi (green)	NZ	10 kg	33.10	2.07 (4pcs)
Malaysia	Peach sw	CA	56	45.0-50.0	0.80-1.10
	Nectarine sw	CA	56	45.0-50.0	0.80-1.10
	Plums	CA	50-55	35.00	0.50-0.60
	Strawberries	CA	4.5kg	40.0-50.0	5.00-6.00/pkt
	Table Grape	CA	9.5kg	22.20-28.50	2.75-3.50kg
	Plums	CN	Medium	15.0-20.0	0.30
	Table Grape	CH	4.5kg	7.10-10.79	2.00-2.50/kg
	Packham Pear	SA	38-56	11.32-12.50	0.23-0.39/pc
	Apples	NZ	60-163	18.00-22.00	0.15-0.40/pc
	Apples	CN	36-100	10.00-12.00	0.15-0.45/pc

Country	Fruit	Grade/ Origin	Size/Count	Wholesale Price US\$	Retail Price US\$
China-Shanghai	Plum- Black	CN	Medium/5KG	3.54/BOX	0.53/500G
	Plum- Red	CN	Medium/5KG	3.61/BOX	0.58/500G
	Prune	CN	Small/5KG	1.47/BOX	0.39/500G
	Peach	CN	Big/10KG	6.63/BOX	0.44/500G
	Plum-Black	CA	Medium/12.6KG	41.24/BOX	3.09/500G
	Plum- Red	CA	Medium/12.6KG	38.29/BOX	2.65/500G
China-Guangzhou	Nectarine	CN	MEDIUM/13KG	10.30、13.25/10KG	0.96-1.77
	Peach	CN	MEDIUM	0.37-0.66/500g	0.58-1.76
	San Hau Plum	CN	MEDIUM	0.26-0.29/500g	0.41-0.44
	Prune	CN	MEDIUM	8.83/10KG	0.41-0.88
		CN		0.37-	0.43-0.88
	Plum- Black		MEDIUM	0.59/500g,17.67/10KG	
	Plum- Red	CN	70/75(10KG)	13.25	1.18-1.25
	Plum-Red	CA	LARGE,30/35	36.81	2.47-2.92
	Plum-Red	CA	SMALL,90	42.7	4.13
	SW Nectarines	CA	BIG,50/25lb	38.29	2.47-2.65
	Plums- Red	CA	LARGE,45	27.98	2.03-3.24
	Plums- Black	CA	LARGE,35	36.81	2.47-3.24
	Plums- Black	CA	LARGE,45	36.81	2.47-3.24
	Hong Kong	Plum- Black	CA	28lb	\$16.20
Peach SW		CA	18pcs	\$29.90	3.2/1pcs
Peach SW		CA	40pcs	\$16.90	3.6/2pcs
Plouts		CA	56size	\$38.96	3.2/1lb
Plum- Green		CA	96size	\$42.90	3/1lb
Plum- Red		CA	56pcs	\$20.80	1.56/3pcs
Plum		CA	36pcs	\$16.20	2.6/3pcs
Nectarine		CA	/	/	1.3/3pcs
Organic Nectarine		CA	/	/	3.1/2pcs
Nectarine SW		CA	/	/	3.6/2pcs
Peach SW		JP	/	/	12.7/2pcs
Peach SW		France	/	/	3.6/2pcs
Peach SW		Italy	/	/	3.6/2pcs
Organic Pulot		CA	/	/	1.23/100G
Organic Plum-Red		CA	/	/	0.84/100G
Plum- Red		Italy	/	/	0.97/100G
Plum- Black		CN	15lb	\$5.20	1.03/1lb
Plum		CN	15lb	\$5.20	2.6/3b
Peach		CN	70pcs	\$5.20	0.66/1pcs
New Zealand		Grapes	US	Med/large	
	Nectarine	US	54/56	\$ 1.22	1.53 - 2.15
	Nectarines SW	US	60/64	\$ 1.22	\$ 2.15
	Peach SW	US	Tray pack	\$ 1.36	\$ 2.15
	Plums	US	12.7	\$ 1.06	\$ 1.84
	Peach SW	US	56	\$ 0.90	\$ 2.15
	Kiwifruit	NZ	Med		\$ 1.12
	Apples	NZ	large		\$ 0.84
	Mandarins	AUS	med		\$ 0.92
	Oranges	NZ	med/ large		\$ 0.61
	Pears - Packum	AUS			\$ 1.10
	Mango	MX	med		0.55 each
	Bananas	Philippines			\$ 0.92

Country	Fruit	Grade/ Origin	Size/Count	Wholesale Price US\$	Retail Price US\$
United Kingdom	Nectarines	SP	4 pack (67-73mm)	\$1.33 / kg	\$2.76
	Nectarines	SP	4 pack (61-67mm)		\$1.64 (Special)
	Nectarines	SP	Loose (67-73mm)		\$0.80
	Nectarines	SP	5 pack (61-67mm)		\$3.09 (or 2 for \$4.90)
	Nectarines	SP	4 pack (67-73mm)		\$3.25 (Half Price)
	Nectarines	SP	Loose (73-80mm)		\$7.18 /kg (Half price)
	Nectarines	Italy	Loose (67-73mm)	\$1.05 / kg	\$0.90
	Nectarines	Italy	4 pack (B)		\$1.64 (or 5 for \$6.54)
	Nectarines SW	US	4 pack (61-67mm)	N/A	\$4.89
	Nectarines SW	Italy	4 pack (B)	N/A	\$1.64 (or 5 for \$6.54)
	Nectarines SW	Italy	4 pack (B)	N/A	\$1.64 (or 5 for \$6.54)
	Peaches	SP	4 pack (67-73mm)	\$1.33 / kg	\$1.64 (Special)
	Peaches	SP	4 pack (61-67mm)		\$1.64 (Special)
	Peaches	SP	Loose (67-73mm)		\$0.80
	Peaches	SP	4 pack (67-73mm)		\$3.25 (Half price)
	Peaches	SP	Loose (73-80mm)		\$10.78 / kg
	Peaches	Sicily	4 pack (67-73mm)		\$1.33 / kg
	Peaches	Sicily	Loose (67-73mm)	\$0.90	
	Peaches	Italy	4 pack (B)	\$1.43 / kg	\$1.64 (or 5 for \$6.54)
	Peaches	US	4 pack (61-67mm)	N/A	\$4.89
	Peaches SW	Italy	4 pack (A)	N/A	\$1.64 (or 5 for \$6.54)
	Plums	UK	400g (40-45mm)	\$1.25 / kg	\$1.64 (Special)
	Plums	UK	Loose (40-45mm)		\$5.71/kg (half price)
	Plums	SP	400g (50-55mm)	N/A	\$1.64 (Special)
	Plums	SP	400g (45-50mm)	N/A	\$3.25 (or 2 for \$4.90)
	Plums	France	Loose (50-55mm)	\$1.76 / kg	\$8.16 / kg
	Plums	Italy	6 pack (50-55mm)	N/A	\$3.25 (Half Price)
	Greengages	France	320g (35-40mm)	\$1.96 / kg	\$5.71/kg (Half price)
	Blackberries	UK	125g	N/A	\$1.64 (or 5 for \$6.54)
	Blueberries	Poland	125g		\$1.64 (or 5 for \$6.54)
Raspberries	UK	170g	\$3.25 (or 2 for \$4.90)		
Strawberries	UK	454g	\$1.64 (or 5 for \$6.54)		
Central America	Peaches	CA	60-70	\$ 21.82	\$ 1.85
	Nectarines	CA	60-72	\$ 25.35	\$ 1.77
	Peaches - Saturn	CA	30-32	\$ 18.00	\$ 2.31
	Plums - Black	CA	64-70	\$ 22.52	\$ 1.57
	Plums - Red	CA	50-70	\$ 23.33	\$ 1.56
	Nectarines	SP	60-67	\$ 25.69	\$ 1.89
	Peaches	SP	61-67	\$ 24.85	\$ 1.90
	Plums	SP	60-65	\$ 25.63	\$ 1.91
	Peaches	GT	small	\$ -	\$ 1.71
	Plums	GT	small		\$ 1.06
	Apples	CH,USA	80-198	\$ 25.92	\$ 1.08
	Apples	CR	153-198		\$ 1.15
	Grapes	CA, CH	18 lbs	\$ 29.39	\$ 2.17
	Pears	US, ARG, SP	100-135	\$ 24.01	\$ 1.73
	Kiwifruit	CH, NZ	13, 21 lbs	\$ 23.86	\$ 2.18
	Oranges	Pe, USA	44-72	\$ 30.16	\$ 1.49
	Strawberry	CR, HO, GT	20 Lbs	\$ 21.26	\$ 1.63
	Mandarines	CH, PE	22 lbs	\$ 27.58	\$ 2.08
	Cherries	US	15 lbs	\$ 61.05	\$ 7.04
	Apricots	US	10 M	\$ 21.00	\$ 3.09
	Grapefruit	US	150-170		\$ 0.89

Country	Fruit	Grade/ Origin	Size/Count	Wholesale Price US\$	Retail Price US\$
Ecuador	Peach	US	70	\$24.00	\$3.00-3.80
	Nectarines	US	70	\$24.00	\$3.08-3.95
	Plums	US		\$30.00	\$3.93-4.30
	Pineapple	EC		\$15.00-18.00	\$0.80-1.00
	Orange	US		100 u/\$5.00	\$0.07-0.09 u
	Papaya	US		\$15.00-18.00	\$1.30-1.50
	Melon	US		\$15.00-18.00	\$1.50-1.60
	Orange	US		\$24.00-26.00	\$3.60-4.00
	Mango	EC		\$18.00-20.00	\$1.88-2.10
	Grapefruit	EC			\$0.35-0.43
	Watermelon	EC		\$13.00-15.00	\$0.83-0.95
	Tangerines	EC		100u/\$5.00	\$0.06-0.07u
	Tangerines	Peru		100u/\$10.00	\$0.15 u
	Peach	Peru		\$10.00-12.00	\$1.20-1.40
	Claudia	EC		\$20.00	\$2.25-2.50
Venezuela	Plums	CA	N/A		16.2720.93
	Nectarines	CA	N/A		17.67-22.32
	Peaches	VZ	N/A	N/A	3.95-6.97
	Peaches	VZ	N/A	N/A	4.65-7.90
	Mango	VZ	N/A	N/A	1.83-2.41
	Watermelon	VZ	N/A	N/A	1.13-1.46
	Melon	VZ	N/A	N/A	3.20-4.04
	Pineapple	VZ	N/A	N/A	2.86-3.31
	Strawberries	VZ	N/A	N/A	11.62-14.88
	Papaya	VZ	N/A	N/A	2.79-3.10
Colombia	Peaches	CA	Box 11k	US 29,10	US 1,32 LB
	Nectarines	CA	Box 11	US 31,61	US 1,43 LB
	Plums	CA	Box 9kl Grand 64	US 31,43	US 1,76 LB
	Tangerine	CO	Box 22 kl	US 16,27	US 0.36 LB
	Melon	CO	Box 10kl	US 3,72	US 0.186 LB
	Sugar Mango	CO	Box 23 kl	US 12,50	US 0.27 LB
	Plums	Espana	Box 12 kl	US 23,21	US 0,96 LB
Panama	Plums	CA			0.20 – 0.35 per unit
	Plums	CA			1.35 – 1.63 per LB
	Peaches	CA			0.55 per unit
	Peaches	CA			1.65 – 1.93 per LB
	Nectarines	CA			0.57 per unit
	Nectarines	CA			1.55 – 1.65 per LB
India	Black Plums	CA	70-80	\$1.87/lb	\$2.8/lb - \$3.31/lb
	Plum	CA	70-80	\$1.76/lb	\$3.0/lb - \$3.33/lb
	Nectarine	CA	72	\$6.62/lb	\$7.7/lb - \$8.98/lb
	Peaches	CA	72	\$6.62/lb	\$7.7/lb - \$8.98/lb
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