



A REPORT FROM THE CALIFORNIA TREE FRUIT AGREEMENT

# International Market Report

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MARKET NEWS FROM CTFA REPRESENTATIVES AROUND THE WORLD

## July 13, 2009

While most Americans were celebrating Fourth of July with BBQ's and fireworks the California Tree Fruit Industry was harvesting and packing peaches, plums, and nectarines. With temperatures, being in the 100's in previous weeks the industry has been hard at work. Temperatures are expected to decline in coming weeks which should cause some fluctuation in packouts, but ample supplies of California PPN will be available for promotion. Varieties you can expect in the market are July flame® and Elegant Lady for peaches, Summer Sweet and Snow Blaze for Summerwhite® peaches. When it comes to nectarines Grand Bright, Diamond Ray and Summer Bright can be expected. Summerwhite® nectarine varieties are Candy Pearl™ and Grand Pearl™. Owen T and Fortune are the expected Plum varieties to be available in the market.

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

### US dollar creates vulnerability for global reserves

Due to the global financial crisis, leaders from countries who are the largest dollar holders, including Brazil, India, Russia, and China, are lobbying the International Monetary Fund (IMF) to issue Special Drawing Rights (SDR). SDRs are a currency that is a substitute for dollar reserves, and are held at central banks throughout the world. Those countries involved have been pushing for an international monetary unit that is universal, because the world would not be so vulnerable to currency fluctuations.

### Mexican Economy predicted to decrease by 6.3% in 2009

Inflation is beginning to rise in Mexico with predictions of a bad recession. Due to the issues in the US, migrants have not been able to work and send home money to their families. Central banks are claiming in May money being sent home from migrants has dropped over 19%. Money sent home from migrants is the second largest form of currency in the Mexican economy. Ineffective US work plans for migrant workers, the US economy issues and the lack of water to farm in California has put a huge dent in the Mexican economy. This is due to the fact that so many Mexican citizens live in the US to work and send their money home to support their families. A large contributor to the Mexican economy is the wide variety of goods exported to the US, with the American consumers spending less on goods and services because of the US economic situation; has also added to the decrease in Mexico's economy.

## Market Reports

### Mexico

California currently has 55% market share for peaches in the Mexico market, with nectarines at 100% and plum representing 50% of the market. Movement for peaches and plums is above average, while the movement of nectarines is only average. California Summerwhite® nectarines are also available in the market. The direct competition for California PPN is local peaches, plums, and nectarines. Indirect competition present in the market is apples from Washington and Chile, US pears, Chilean and Mexican grapes, California and Mexican strawberries, along with kiwifruit from Chile.

### Hong Kong

Volumes are increasing in the wholesale markets. Summerwhite® peaches and nectarines along with yellow flesh peaches and nectarines, red and black plums and organic interpericifics can all be found. Italian and French tree fruit were found in the market with low volumes at boutique retail markets. Chinese tree fruit were also spotted. Other direct competition to California PPN is Chinese and Japanese peaches and plums. Total PPN movement is currently average but should increase as the season progresses.

### Taiwan

Temperatures in Taiwan have been rising into the high 90°s, which has caused some shrinkage with all fresh produce for retailers without cold storage. The heat has not been an issue for retailers with refrigeration capabilities. Summerwhite® peaches and nectarines as well as traditional yellow fresh varieties have had only average movement due to weather conditions. Shipments have been arriving in the market via air and ocean. Competing peaches such as Lala Mountain and Pear Mountain are available, but are of poor quality. Japanese peaches can be found in limited volumes at premium supermarkets. Also in the market are local pears, mangos, pineapples, melons and watermelons, which have large volumes. This has affected the movement of imported fruits. New Zealand kiwifruits citrus, Washington cherries, and apples are also present in the market.

### China

California plums have not yet arrived in the market. Currently the Shanghai, Dalian, Beijing, Guangzhou, and Shenzhen markets are dominated with local fruits. There is currently no competition in the market for the Chinese stone fruit. San Hua plums, white flesh nectarines, and peaches were favorites among consumers.

### Singapore

Air shipments of California PPN are increasing. Summerwhite® peaches and nectarines, plums, prunes, donut peaches and yellow flesh peaches and nectarines have all been spotted in the market. Movement of California PPN is quite strong in all market channels. Also in the market are Chinese plums, cherries, apples, and pears. There are still Chilean plums available in low volumes.

## Malaysia

Hyper markets and supermarkets have become very aggressive with promotions because of the current economic situation. Consumers are currently showing their buying power by buying items on promotion. California peaches and nectarines are still very popular with the higher end consumers despite the low volumes. Summerwhites® can be found at all market levels. Currently there is no direct competition for California PPN. Ocean shipments are expected to arrive in the next few weeks.

## United Kingdom

Israeli plums, Spanish peaches and Portuguese plums have a steady movement though all market levels in the UK. Spanish peaches are selling at 30% less than 2008 do to larger volumes and the Euro strengthening against the sterling. The EU has a strong focus on fresh fruit and vegetables that are fresh and cheap. Currently there are Greek Cherries, British Blackberries and US apricots in the market as well.

## New Zealand

Average volumes of California peaches and nectarines have arrived by sea. Summerwhites® were also present but in low volumes. Still in the market are small volumes of Chilean plums in poor quality. Australian and Chilean grapes have slow movement in the market as well. Also found in the market are California oranges, Australian melons and strawberries, and pineapples from the Philippines.

## Central America Region

Movement is above average in both the traditional and supermarket sectors. Demand is high and display space will increase as the volumes of California PPN increase. Direct competition from Guatemalan peaches and plums is present but in low volumes and poor quality. Plums volumes from Costa Rica are decreasing but the quality was perceived as above average. Grapes and apples are available in all sectors of the market with heavy volumes. Chilean kiwifruit and citrus from Peru and Chile were also spotted.

## South America

California PPN is found with great quality and low volumes in Colombia. The economic situation in Ecuador is strengthening which increases movement since more consumers will be spending. Also in the market are Chilean plums, Peruvian peaches, Chilean grapes, US oranges, pears, and apples. Local commodities in the market are oranges, melons, mangoes, pineapples, papayas and some exotic fruits. Great quality California PPN is present in the Panama market. Summerwhites® and yellow flesh plums are also available in Panama. There is currently no direct competition for California PPN. Importer permits are still suspended in Venezuela except for one importer whose permit is valid through November 2009. There is currently no California PPN in the Venezuela market.

# 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](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

## Singapore

Since the start of the California PPN arrivals in Singapore three retail sampling promotions have begun. Currently two of three promotions are completed with overall sales increasing 90-100%. The promotions involved over 120 stores within three different retail chains.

## New Zealand

Radio advertising promotions praising the benefits of Vitamin C in California PPN is being broadcasted in over 150 stores nationwide. The radio advertising also discussed handling practices at home for California PPN. This week 26 more stores nationwide will begin in store promotions.

Country	Fruit	Grade/ Origin	Size/Count	Wholesale Price US\$	Retail Price US\$
Mexico	Peaches	CA	50 to 72 VF	\$ 22.34	\$ 1.31
	Nectarines	CA	45, 72	\$ 25.86	\$ 1.45
	Plums	CA	80	\$ 22.10	\$ 1.43
	Peaches	MX	22 lb	\$ 16.71	\$ 0.95
	Plums	CUG. MX	80; 18kg	\$10.90 - 14.44	\$0.90 - 1.15
	Apple	WA	56,88-100-125-135	\$ 24.66	\$ 0.90
	Apricots	CA	8, 12-60	\$ 26.91	\$ 3.29
	Kiwifruit	CH	22lb	\$ 15.13	\$ 1.09
	Mangoes	MX	25kg	\$ 10.44	\$ 0.36
	Pears	Arg, WA	36-44lb; 70-100	27.63 - 29.75	0.85 - 0.95
	Strawberries	CA, MX	12 - 19.2 lb	6.54 - 13.00	0.42 - 2.31
	Grapes	CH, CA, MX	18 - 21 lb	11.63 - 13.90	0.92 - 1.15
Hong Kong	Yellow Peach	CA	/	/	3.6/2pcs
	SW Peach	CA	/	/	4.2/2pcs
	SW Peach	CA	13pcs/ 18pcs	16.88/36.4	1.27/100g
	Yellow Nectarine	CA	/	/	1.14/100g
	SW Nectarine	CA	/	/	3.1/2pcs
	Plum	CA	/	/	0.84/100g
	Plum	CA	24pcs/ 32pcs	23.4/ 20.8	1.43/1pcs; 4.2/1lb
	Peach	China, JP, France	70pcs	22.7	1.3/3pcs; 11.03/2pcs; 2.32/100g
	Nectarines	Italy, China	60mm	6.2	2.6/8pcs; 2.06/100g
	Plum	JP			7.76 - 15.3/8pcs
	Pluots	Chile	40pcs	13	1.94/lb
	Apricot	CA	/	/	1.27/100g
	Organic Apricot	CA, Italy	/	/	1.68-2.44/100g
	Taiwan	SW Peach	CA	#13-16	22.89-39.67
SW Peach		CA	#15-22	24.41-38.14	1.52-4.56/pc
SW Peach		CA	#20-24	42.72-54.93	2.58-4.12/pc
SW Peach		CA	#48-72	18.30 - 21.36	0.40 - 0.82/pc
SW Nectarine		CA	#64-84	21.36-24.41	0.31-0.5/pc
Peach		JP	#4-6 / 2Kg	33.47-39.55	9.87- 20/pc
Peach		TW	#6-12/1.5-1.68Kg	4.58-9.15	0.61-4.58/pc
Plum		TW		0.46-1.22/ 1.32lb	0.60-1.79/ 1.32lb
China-Shanghai	Nectarine	China	Medium/5KG	4.79/Box	0.77/500G
	Red Plum	China	Medium/5KG	4.42 - 6.63/Box	0.71 - 1.06/500G
	Peach	China	Big/10KG	5.89/Box	0.44/500G
	Peach	China	Medium/5KG	8.83/Box	1.32/500G
China-Guangzhou	Nectarines	China	Medium/13KG	11.75/16.18	1.17-1.77
	Nectarines	China	Medium/20KG	3.68/5.15	0.37-0.56
	Peach	China	Medium, Bulk pack	0.37-0.59/500g	1.00?1.76
	Plum	China	Medium	0.26-0.29/500g	0.41-0.44
	Black Plum	China	Medium	0.44-0.59/500g	1.17-1.39
	Green Plum	China	Medium	0.22/500g	0.44
Malaysia	Peaches	CA	56-64 vf	56.0-60.0/carton	1.20-1.60/pc
	Nectarines	CA	56-64 vf	56.0-60.0/carton	1.20-1.60/pc
	SW Peach	CA	56-64 vf	58.0-62.0/carton	1.60-1.90/pc
	SW Nectarines	CA	56-64 vf	58.0-62.0/carton	1.60-1.90/pc
	Strawberries	CA	4.5kg	40.0-50.0	5.00-6.00/pkt
	Grapes	AUS, Chile, SA	4.5-10kg	8.10 - 28,5	2.20 - 3.5/kg
	Plum	Chile	48-78	13.00-15.00	0.22-0.35/pc
	Orange	CA, AUS	125-180	23.20-28.32	0.16-0.30/pc
	Pear	SA, CN	38-72	6.00-12.50	0.10-0.39/pc
	Apples	NZ, SA, WA, CN	36 - 180	10.00 - 22.00	0.15 - 0.45/pc

Country	Fruit	Grade/ Origin	Size/Count	Wholesale Price US\$	Retail Price US\$
Singapore	SW Peach	CWM (air)	56 2Lyr	53.50	0.64 s/o - 1.14
	Yellow Peach	CWM (air)	64 2Lyr	49.68	1.29
	Saturn Peach	CWM (air)	48 2Lyr	42.75	1.38
	Plums	CWM (air)	55	48.57	7.07 454g box
	Prunes	CWM (air)	60	83.57	10.71kg
	SW Nectarine	CWM (air)	64 Vf	53.50	0.86
	Appricot	US	10 kg	59.31	5.17 500g
	Cherry	CA	10	59.03	11.03 kg
	Strawberry	US	454g x8	26.21	4.76
	Red/green Grapes	US	8.6 kg	51.97	7.07
	Red Grapes	AUS	10kg	29.62	4.37
	Black Plum	Chile	50/55	22.06	2.36 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
United Kingdom	Plum	US	1kg (50-55mm)	N/A	\$6.55
	Nectarines	SP, Italy	4-6pck (56-73mm);	1.44/kg	0.89
	SW Nectarines	SP, Italy	4 Pack (61-67mm)		\$3.26-3.28
	Peaches	SP, Italy	4-5pack/ Loose	1.85-2.06/kg	1.65-2.77/pk; 0.33-0.89
	SW Peach	France, SP	4-5 pack (61-67mm)	\$2.63/kg	3.28 - 4.92
	Plum	Israel, Aus, SP, Portugal	4-6pack/ Loose	2.88/kg	1.65-3.28/pk; 0.33-7.56/kg
	Apricots	Sp	5 pack	Approx \$2.47 / kg	3.28
	Apricots (Black,	US	6 pack	N/A	4.92
	Blackberries	UK	150g	N/A	1.65
	Blueberries	Sp	200g	N/A	3.28
	Cherries	Turkey	425g	Approx \$5.60 / kg	4.92
	Galia Melon	Sp	Loose	Approx \$1.15 / kg	1.63
	Raspberries	UK	225g	N/A	3.28
	Strawberries	UK	454g	N/A	3.28
New Zealand	Peach	CA	56	NA	\$ 2.52
	SW Peach	CA	56	NA	\$ 2.52
	Nectarine	CA	64	\$ 1.47	\$ 2.24
	SW Nectarine	CA	64	\$ 1.52	\$ 2.52
	Plums	Chilean	64		\$ 1.94
	Cherries	CA	10 Row		\$ 5.62
	Grapes		sml/med/lg	1.12 - 4.30	\$ 2.47
	Kiwifruit	tag 1	Med		\$ 1.12
	Apples	tag 1	med/large		\$0.54 - \$1.12
	Mandarins	tag 1	med	on promotion	\$ 1.22
	Pears	tag 1	med		\$0.54 - \$1.12
Central America	Peach	CA	70-74	\$ 26.10	\$ 1.57
	Nectarine	CA	70-72	\$ 27.33	\$ 1.98
	Plum - Black	CA	64-70	\$ 30.70	\$ 1.74
	Plum - Red	CA	50-70	\$ 27.79	\$ 1.77
	Plum - Red	CH	20 lbs		\$ 1.67
	Peach	GT	small	\$ 14.96	\$ 0.91
	Plum	GT, CR	small		\$ 1.59
	Apple	CH,USA	80-198	\$ 28.80	\$ 1.08
	Grape	CH	18 lbs	\$ 29.42	\$ 1.62
	Pear	CH,USA, Arg	64-135	\$ 30.36	\$ 1.39
	Kiwifruit	CH	30-33	\$ 24.50	\$ 1.99
	Orange	USA, Pe	44-72	\$ 26.20	\$ 0.60
	Strawberry	CR, HO, GT			\$ 1.41
	Mandarine	CH, Pe	80	\$ 27.44	\$ 2.49
	Apricot	US-1	10 M	\$ 34.19	\$ 2.24
	Cherry	Premium	15 lbs	\$ 73.00	\$ 7.48

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	Colombia	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
Canada	SW Peaches	CA	per pound		0.75 - 1.71
	Peaches	CA	per pound/2# bag	\$0.85; \$2.58/2#	\$ 1.71
	Peaches - Saturn	CA	per pound		\$ 2.58
	SW Nectarines	CA	per pound		0.75 - 1.71
	Nectarines	CA	per pound/2# bag	\$0.85; \$2.58/2#	\$ 1.71
	Plums	CA	per pound; 2# Bag	\$0.85; \$2.58	1.28 - 1.71
	Pluots/Plumcots	CA	per pound		\$ 2.57
	Apples	ON, NS	bag	2.15/ 3#	
	Apricots	CA	per pound		\$ 1.71
	Avocadoes	MX	each	\$ 0.86	\$ 1.14
	Blueberries	U.S.	pint	\$ 1.44	1.44 - 2.15
	Cantaloupe	U.S.	each		\$ 1.27
	Cherries	WA	per pound	\$ 1.52	1.71 - 3.44
	Grapes, Gr S'dless	CAMX	per pound		1.11 - 2.57
	Grapefruit	S Af	each	\$ 0.57	
	Honeydew	U.S.	each	\$ 2.15	
	Kiwifruit	CH/NZ	each; 2# punnet	0.34 ea	\$ 2.57
	Mangoes	MX	each	\$ 0.59	0.67 - 1.43
	Oranges - Navel	Imported	per pound		\$ 1.28
	Pears	S Af/CH, Arg	per pound	\$ 0.85	\$ 1.54
	Pineapple	CR	each		2.15 - 3.01
	Raspberries	MX	1/2 pint	\$ 1.44	1.08 - 1.89
	Strawberries	CA	2# clam		\$ 2.57
	Strawberries	Local	1-1/2 L basket		2.57 - 3.36
	Watermelon, S'dlss	U.S.	per pound		0.34 - 0.42
	W'melon mini slss	U.S.	each	\$ 3.44	\$ 2.57
	India	Plum (Angeleno)	CH, AUS	50-60	\$13.20/10 Kg box
Plum		India	70-80	\$2.82/5 Kg box	\$0.66/lb - \$0.84/lb
Peaches		India	70-80	\$3.77/8 Kg box	\$0.56/lb - \$0.75/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