The Chinese market: opportunities and setbacks for Chile

The global industry in numbers

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INTERNATIONAL SPECIAL EDITION

Cherries of the World 2014

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Dear Readers,

With the publication of the Cherry International Special Edition, we wrap up a calendar year that has been just as versatile and lively for our team as the industry we work with.

Over this year, our office has grown from a dedicated, staple crew to a culturally and professionally diverse team that represents almost every continent. With great pride, we have grown to become the only media group of our kind that now offers content in English, Spanish and Mandarin Chinese.

A top priority for us is to do justice to the vibrant fresh produce industry in the many languages it speaks and the many realities that it lives. We seek to capture the experiences and tell the stories of the hard-working people that keep our communities healthy, happy and fed.

At the Yentzen Consulting team, we are not just producing industry news. We are sharing it with you and living it with you as it happens. From the laboratory to the field, from the packing house to the dinner plate, we strive to capture the spirit of the fresh industry along every step of the supply chain.

In this edition, we had the privilege to speak with some of the cherry industry’s leading researchers, importers, exporters, marketers and growers. Although many more stories remain to be told, we sought to represent the wealth of talent and hard work needed to bring top quality cherries from the orchard to the kitchens of the world.

Thank you to the journalists, translators, marketing team and design crew that made this edition possible. And a special thanks to those who took the time out of their day to speak with us and enrich the content of the magazine.

We wish you a happy growing season and a happy year ahead.

- The International Special Edition Team
Chile has enjoyed impressive growth in its cherry sector over recent years, particularly in Asia, but several factors have left the market vulnerable to severe disruptions.

As the champion of the Southern Hemisphere’s cherry industry, Chilean growers have defined themselves by their ability to achieve rapid growth and seize export opportunities in little time. Chile’s fresh sweet cherry exports grew a remarkable 807% between 1995 and 2010, well outpacing the average growth rate of 190% recorded for the top six exporting nations, according to market analysis by Belrose, Inc.

While Chile had traditionally depended on the United States and, to a lesser extent, Europe for sales, the booming Chinese market has wooed many Chilean suppliers for its high premiums and promising potential. Although just 10 years ago China and Hong Kong were minor import partners for Chile, combined, they now represent the top market for Chilean cherries.

In the 2005-06 season, Chile exported just over 1,500 MT to Hong Kong. By the 2010-11 season, cherry exports from Chile to China and Hong Kong reached almost 24,000 MT, Belrose, Inc. reported.

Chilean Cherry Commission director Cristian Tagle explained that Chile can continue to enjoy great success on this market if it can stabilize its supply and ensure top quality product.

“Unavoidably, Tagle’s call for improvements to Chile’s export sector refers to major labor strikes this past year that affected the ability to reach markets. April’s port strike had grape suppliers anguished, waiting to move deteriorating product out to buyers.

This November, cherries bore the brunt of labor conflict. Just as the first, premium cherries were set for aerial departures to Asia, stoppage in customs left fruit detained in the airport.

“This has been a problem that has generated little confidence in arrival markets. Continuity of the export chain is essential for our progress,” Tagle said.

“Chiang has worked importing fruit through Terrafrut since 2006. She said Chilean cherries enjoy a good reputation in China, especially given their ability to satisfy demand for the Chinese New Year. Supply problems, however, have been a headache for Asian buyers, she explained.

Beyond quality concerns, if volume builds up in Santiago, importers may not have the capacity to move the fruit once it arrives.
“With Chile on strike, nobody can ship and it’s kept in cold storage. Then one day it’s opened and everybody starts to ship and come out with big volume. Suddenly they’ll ship a whole week’s volume,” she explained from her office in Taiwan.

“This whole week’s volume arrives to the same market and it’s totally damaging for the price. Too much fruit arrives and the consumer has too much choice. It also arrives with different quality and the price will go down due to the market situation.”

The now days’ or weeks’ old fruit will also face a real possibility of rejection once in Asia where buyers expect high quality to justify high prices.

“In the Guangzhou market, they can sell all kinds of fruit but they have all kinds of prices. For low quality, there is low price. But in Beijing and Shanghai, you cannot sell any quality of fruit. If there is any quality issue, they are not able to sell,” she said.

“This market demands good quality and they are waiting to pay a higher price to get this fruit. If there is any single quality problem, they are not able to sell, the same as in Taiwan. In Taiwan, they set a very high price for these air shipment cherries.

“When the consumer wants to pay a high price that means they are demanding good quality. They don’t want to pay less money for quality problem fruit.”

On the Chilean end, Terrafrut director Alvaro Larrondo expressed frustration that a year of hard work by growers and exporters can so easily go to waste due to unresolved labor conflict.

“The problem is that even without a strike, cherries are already a very delicate product. It requires post-harvest treatment, packaging and a lot of care regarding temperature. If you add the factor of a stoppage in the airport because customs is not working, it becomes complicated,” he said.

“We, as an exporter, have done everything possible to protect the fruit. We have said many times that we need a law to protect the export sector, especially when we’re talking about a perishable product. It should not be legally allowed to do this to a perishable product.”

If Chile can stabilize its supply chain, Larrondo said great possibilities await the nation’s cherry sector.

Despite extensive frosts in September, Chile is expected to maintain exports on par with last year’s 11 million boxes. Thanks to new plantations and new, better varieties, Chile can expect long-term growth.

“The trend is toward doubling volume. We are going to have to have all of the measures necessary on the production level for post-harvest handling, the structure to process that quantity of cherries and a search for mechanisms to manage the commercial side,” Larrondo said.

“I think this will be a major challenge for the Ministry of Agriculture, worker organizations and organizations that represent producers to fight to establish the conditions to permit fruit exports without uncertainty.”

“THIS HAS BEEN A PROBLEM THAT HAS GENERATED LITTLE CONFIDENCE IN ARRIVAL MARKETS. CONTINUITY OF THE EXPORT CHAIN IS ESSENTIAL FOR OUR PROGRESS,” TAGLE SAID.
United States:
Marketing Washington’s sweet cherries in good times and bad

A slow start and quick ending to the 2013 season highlighted the importance of focused marketing in the U.S. Northwest cherry sector this year.

Although the season began about two weeks earlier than the five-year trend, weather complications also prompted an early ending and cut down volume, explained James Michael, Northwest Cherry Growers’ vice president of marketing.

“Mother Nature didn’t cooperate during the first third of the season which makes it difficult when you’re transitioning from different growing regions and trying to build volume for Fourth of July promotions,” Michael said, speaking from the commission’s office in Yakima, Washington.

“It’s a big produce holiday anyway and it’s especially important for summer fruits like cherries. This year it was a challenge to work through nature and get the crop to market.”

Washington state is the top producer of sweet cherries in the United States, growing over half of the nation’s overall volume.

Although the state experienced a record season of 23 million, 20-pound boxes in 2012, heavy frosts and rains slashed volume to 14.3 million boxes in 2013, Michael said.

Earlier varieties such as Bing and Chelan suffered the greatest losses, complicated further by cracking that impeded sales, the United States Department of Agriculture reported.

As the demand for U.S. cherries continues to increase domestically and abroad, the drastic drop in volume in 2013 left retailers and shoppers hoping for more.

“Retailers would have enjoyed more fruit to sell. Cherries are an important item in the category. They are a huge impulse item. Attractive displays of cherries are one of the top runners,” Michael said.

U.S. consumers have come to expect greater availability of cherries due in large part to dedicated advertising. In difficult production years, however, demand can prove difficult to meet for marketers such as Northwest Cherry Growers.
This year, those retailers that really worked and pushed to promote cherries, they still saw more attention to the category. Certainly, this is a season where everybody would have enjoyed a few more cherries.

Since 2006, U.S. sweet cherry consumption has exceeded one pound per capita, the USDA reported. In 2009, consumption peaked at 1.55 pounds per person.

Demand for sweet cherries has come in large part due to far-reaching marketing efforts supported by the commission. Funded through self-imposed fruit assessments, Northwest Cherry Growers has promoted the fruit among consumers by highlighting its availability, health benefits and culinary applications.

“What we’ve found is that in-store displays versus ads or radio all had a significant impact on sales. What that data is pointing to is that cherries are an item where people need to be reminded that they are in season and only in season for a short period of time,” Michael said.

“One of the biggest ways, since they are almost a herald of summer, are those big attractive displays in the time leading up to the Fourth of July and throughout July.”

Michael explained that the Washington industry has worked to even out the fruit’s availability to keep consumers eating cherries all summer. New varieties and growing regions have sought to extend the season and create consistent availability for much longer.

“Five or six years ago, it was a different story for availability in the latter half of July, but our growers put time and effort into finding new varieties and later growing regions to ensure availability during those last few weeks,” Michael said.

“There is this window now that didn’t exist and consumers are not really aware or educated that fresh sweet cherries are still available. Maintaining those promotions through July is key.”

Michael added that although farmers still rely on the tried-and-true varieties like Bing, Chelan and Rainier, new varieties are constantly under testing to encourage better production.

“Growers are always trying and developing new varieties. We’re fortunate in Washington to have a great land-grant university that produces and tests quite a few new varieties each year in their orchards. Our growers make significant investments in the production of our cherries,” he said.

“They are not just betting on the same varieties and expecting things to be the same. They are always looking for slight improvements.”

A major part of Northwest Cherry Growers’ marketing includes promotion of the fruit’s many health benefits. This July, the USDA released research, funded in part by the commission, linking Bing cherries to decreased inflammatory markers in the blood. The finding has implications to reduce the risk of cardiovascular disease, diabetes and cancer.

Below are some of the other health benefits promoted this year by the commission:

- **Protection against Alzheimer’s:** Flavonoids and procyanidin can protect neuronal cells.
- **Reduced risk of cancer:** A combination of vitamin C, carotenoids and anthocyanins serve as an anti-cancer team.
- **Decreased hypertension and stroke:** High potassium in sweet cherries may reduce risk.
- **Lower cardiovascular disease:** Anthocyanins promote heart health by reducing inflammation, plaque and nitric oxide.
- **Tool against diabetes:** Sweet cherries have a low glycemic index. Anthocyanins may also reduce insulin resistance and increase glucose tolerance.
- **Better sleep:** Sweet cherries are rich in melatonin, a natural tool to regulate circadian rhythm and encourage restful sleep.
Located about 150 kilometers outside of Zaragoza, Fruit Diamond’s production area has been described as the perfect microclimate for early-season cherries.

Thanks to warm weather and favorable growing conditions, the cherry harvest in Bajo Cinca typically begins around April 20, providing the earliest open-field cherries in Europe.

Although the first available variety, Rita, cannot withstand export, production director Carlos Llambrich said its early entrance has meant strong prices on the local market.

“We begin with very attractive prices. These varieties cannot serve for export or big trips because they are susceptible to cracking. But the national market really enjoys them,” he said.

Fruit Diamond’s production picks up steam around May when the rest of Spain and other European zones begin to enter the market.

Around this time, the company starts to harvest more exportable varieties including two recently planted options, Frisco and Rocket. These fruit are later followed by Santina, 484, Lapins, and Skeena, among others.

About 30% of the company’s crop stays local, while remaining product supplies Algeria, Italy, the Netherlands, Germany, Belgium and Russia.

Although rains complicated supply quality this past season, Fruit Diamond also reached Hong Kong in 2013.

“Hong Kong is a market that demands very high quality. But this year we did not have rain on our side and suffered cracking. We did not produce the firmness needed to arrive well,” he said.

“This year we hope to arrive a little more prepared and that precipitation will support us.”

Part of Fruit Diamond’s international strategy includes investment in new, more exportable varieties that can withstand long-distance travel.

“We have two or three new varieties that are coming out now. We also have the life-long varieties that we know are good. We have no reason to lose them,” he said.
“People are really throwing themselves at these new varieties but they are also maintaining the already established options. There are many varieties that we already know to work.”

He used his family farm as an example of the region’s blossoming cherry production. The farm has dedicated a notable area to cherries in recent years, including an additional 12 hectares planted last year.

“I think that it is one of the products that people really value now because there is an ample range of options. It is a valued and growing product,” he said.

Overall, Fruit Diamond has 42 planted hectares of cherries.

The company is directed by Llambrich and his business partner, Juan Carlos Mojica. Mojica leads the company commercially by exploring new markets.

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“SELECT EARLY-SEASON VARIETIES FROM FRUIT DIAMOND

BURLAT
HARVEST: APRIL 30 – MAY 10
CHARACTERISTICS: RED SKIN WITH GOLD FLESH, CONSISTENT, MEDIUM-SIZED FRUIT, SOFTER BUT SIMILAR TO BING, RESISTANT TO BACTERIAL CANKER AND CRACKING, MODERATELY VIGOROUS

ROCKET
HARVEST: MAY 10 – MAY 20
CHARACTERISTICS: DARK RED MAHOGANY COLOR, VERY BIG, FIRM FRUIT WITH GOOD CRACKING TOLERANCE, VERY SWEET, GREAT STORAGE CAPACITY, MEDIUM TO GOOD PRODUCTIVITY

FRISCO
HARVEST: MAY 15 – MAY 25
CHARACTERISTICS: RED MAHOGANY, BIG, VERY FIRM FRUIT WITH MEDIUM CRACKING TOLERANCE, GREAT STORAGE CAPACITY, MEDIUM TO GOOD PRODUCTIVITY

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Global fresh cherry production

Chile stood out for its significant focus on the export market, keeping the South American country among the top three nations of global cherry suppliers, according to the following analysis prepared by IQonsulting.

Global fresh cherry exports were at 358,000 MT in 2012. This corresponds to similar volume in 2011. The main exporting countries were the United States, Turkey, Hong Kong and Spain, said Cristóbal González, general manager of IQonsulting.

The overall export volume of the top countries totaled 264,000 MT, corresponding to 73% participation in the total worldwide export volume.

In 2012, the United States was the main supplier of cherries worldwide with 29% of total participation in export volume. During this year the nation registered its greatest growth in exports, reaching 105,000 MT.

As the second largest supplier in the world, Chile had 16% participation with 58,000 MT. The level represented 14% less than in 2011 due to poor climatic conditions, cold and rain during the harvest. This compromised the quality and condition of the fruit.

Very close behind Chile followed Turkey with 55,000 MT. This volume represented an 18% rise over 2011 but a great drop from the 65,000 MT reported in 2010.

Next follows Hong Kong and Spain with 23,000 MT and 22,000 MT, respectively. It is worth a mention that Hong Kong is not a cherry producer. This number, rather, represents repeat exportations that go toward other Asian nations such as China, Macau and Singapore, among others.

With regard to arrivals, the main destination market for the United States in 2012 was Asia, taking in 54% of exported volume. The appeal of this destination is due to its high demand and high prices paid by consumers. Quality, however, is vital.

Worldwide plantings of cherries were estimated at 390,000 hectares in 2012, of which 38% belonged to these suppliers. Turkey registered the greatest planted area with 46,000 hectares. The main production zones were Izmir, Konya, Manisa, Afyon and Bursa. In the last seven years, Turkey has increased its surface area for cherries by 76%.

The next country with greatest surface area was the United States with 34,000 MT. This represents only a 10% increase since 2005. The main states are Washington with 13,600 hectares, followed by California with 12,400 hectares and Oregon with 5,000 hectares.

Italy, the third largest in terms of planted area, registered 30,000 hectares in 2012. The south had 78% of plantings, most of which were found in Apulia and Campania. The north had 18% of planting and the central region only 4%.

Spain reported 25,000 hectares in 2012, up 17% from 2012 and down 6% from 2005.
In Chile's case, there were 15,000 hectares planted, 78% of which was found in regions VI and VII, the second being of greater importance. These regions are followed by Region VIII and the Metropolitan Region, with 9% and 8%, respectively.

It is worth mentioning that southern regions, from Region VIII to Region X, are the ones that show the most growth in recent years due to comparative advantages. These regions are able to enter the market when volume in the rest of Chile is descending.

Worldwide production in 2012 reached 2.2 million MT. The United States produced 424,000 MT, corresponding to a 26% increase over 2011. In Turkey, production reached 459,000 MT, making it the largest cherry producer in the world.

In Chile’s case, the nation produced around 80,000 MT, of which 22,000 MT went to the internal market. Spain produced 150,000 MT in 2012, up from 101,000 MT in 2011.

After having revised production of each major producer, we can conclude that the Chilean cherry industry ships most of its product for exports, making it one of the few with this characteristic.

### Cherries, World: Total Area in Hectares

<table>
<thead>
<tr>
<th>Supplier</th>
<th>2005</th>
<th>2010</th>
<th>2012</th>
<th>% Var. 12</th>
<th>% Part.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turkey</td>
<td>26,230</td>
<td>43,120</td>
<td>46,090</td>
<td>7%</td>
<td>31%</td>
</tr>
<tr>
<td>U.S.A.</td>
<td>31,500</td>
<td>34,012</td>
<td>34,716</td>
<td>2%</td>
<td>23%</td>
</tr>
<tr>
<td>Italy</td>
<td>28,000</td>
<td>29,700</td>
<td>30,000</td>
<td>1%</td>
<td>20%</td>
</tr>
<tr>
<td>Spain</td>
<td>26,600</td>
<td>24,600</td>
<td>25,000</td>
<td>2%</td>
<td>17%</td>
</tr>
<tr>
<td>Chile</td>
<td>7,125</td>
<td>13,143</td>
<td>15,198</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Total World</td>
<td>119,455</td>
<td>144,575</td>
<td>151,004</td>
<td>4%</td>
<td></td>
</tr>
</tbody>
</table>

Fuente: ODEPA / FAO / USDA / SCGT / iQonsulting.

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# Cherries: Annual Exports in Tons by Market

## Chile

<table>
<thead>
<tr>
<th>MARKET</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>% VAR 13VS12</th>
<th>% PART. 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>NORTH AMERICA</td>
<td>35,195</td>
<td>30,579</td>
<td>37,300</td>
<td>37,922</td>
<td>2%</td>
<td>36%</td>
</tr>
<tr>
<td>EUROPE</td>
<td>5,102</td>
<td>4,157</td>
<td>4,682</td>
<td>5,471</td>
<td>17%</td>
<td>5%</td>
</tr>
<tr>
<td>ASIA</td>
<td>22,860</td>
<td>25,601</td>
<td>28,653</td>
<td>56,972</td>
<td>99%</td>
<td>54%</td>
</tr>
<tr>
<td>LATIN AMERICA</td>
<td>2,544</td>
<td>4,252</td>
<td>5,092</td>
<td>4,426</td>
<td>-13%</td>
<td>8%</td>
</tr>
<tr>
<td>CANADA</td>
<td>352</td>
<td>825</td>
<td>395</td>
<td>306</td>
<td>-22%</td>
<td>1%</td>
</tr>
<tr>
<td>MIDDLE EAST</td>
<td>30</td>
<td>164</td>
<td>193</td>
<td>135</td>
<td>-30%</td>
<td>0%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>69,754</td>
<td>64,305</td>
<td>78,298</td>
<td>105,572</td>
<td>35%</td>
<td></td>
</tr>
</tbody>
</table>

Source: TRADEMAP / USDA / IQonsulting

## U.S.A.

<table>
<thead>
<tr>
<th>MARKET</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>% VAR 13VS12</th>
<th>% PART. 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>NORTH AMERICA</td>
<td>33,170</td>
<td>42,256</td>
<td>29,523</td>
<td>33,494</td>
<td>13%</td>
<td>61%</td>
</tr>
<tr>
<td>EUROPE</td>
<td>5,102</td>
<td>4,157</td>
<td>4,682</td>
<td>5,471</td>
<td>17%</td>
<td>5%</td>
</tr>
<tr>
<td>ASIA</td>
<td>12,587</td>
<td>16,187</td>
<td>12,295</td>
<td>12,528</td>
<td>2%</td>
<td>23%</td>
</tr>
<tr>
<td>LATIN AMERICA</td>
<td>218</td>
<td>318</td>
<td>384</td>
<td>356</td>
<td>-7%</td>
<td>0%</td>
</tr>
<tr>
<td>MIDDLE EAST</td>
<td>38</td>
<td>48</td>
<td>89</td>
<td>61</td>
<td>-31%</td>
<td>0%</td>
</tr>
<tr>
<td>OTHERS</td>
<td>6,341</td>
<td>3,602</td>
<td>7,190</td>
<td>4,790</td>
<td>-33%</td>
<td>5%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>51,089</td>
<td>65,294</td>
<td>46,613</td>
<td>55,039</td>
<td>18%</td>
<td></td>
</tr>
</tbody>
</table>

Source: TRADEMAP / USDA / IQonsulting

## Turkey

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<thead>
<tr>
<th>MARKET</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>% VAR 13VS12</th>
<th>% PART. 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNITED KINGDOM</td>
<td>3,125</td>
<td>2,374</td>
<td>2,070</td>
<td>1,895</td>
<td>-8%</td>
<td>3%</td>
</tr>
<tr>
<td>RUSSIA</td>
<td>12,587</td>
<td>16,187</td>
<td>12,295</td>
<td>12,528</td>
<td>2%</td>
<td>23%</td>
</tr>
<tr>
<td>ASIA</td>
<td>56</td>
<td>37</td>
<td>38</td>
<td>0</td>
<td>-100%</td>
<td>0%</td>
</tr>
<tr>
<td>MIDDLE EAST</td>
<td>1,030</td>
<td>2,670</td>
<td>814</td>
<td>0</td>
<td>-100%</td>
<td>0%</td>
</tr>
<tr>
<td>OTHERS</td>
<td>1,121</td>
<td>1,770</td>
<td>1,873</td>
<td>7,122</td>
<td>280%</td>
<td>13%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>51,089</td>
<td>65,294</td>
<td>46,613</td>
<td>55,039</td>
<td>18%</td>
<td></td>
</tr>
</tbody>
</table>

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## Spain

<table>
<thead>
<tr>
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Source: TRADEMAP / USDA / IQonsulting
Turkey: Maintaining momentum as the leader in global cherry production

In the sweet cherry sector, no other nation rivals Turkey in terms of overall volume. Implementation of new technologies and plantations of new orchards have kept the Eastern European nation ahead of competitors for total volume since the 1990s.

Between 1995 and 2010, Turkey more than doubled its sweet cherry production, rising from 200,000 MT in total volume to over 400,000 MT, according to Belrose Inc. analysis.

If production forecasts remain on track, Turkey will remain in its top position for years to come and should reach 520,000 MT in sweet cherry production by 2020.

As an exporter, Turkey has also consistently shared the top three spots in world rankings alongside the United States and Chile. In 2010, Turkey held the world record for sweet cherry exports with over 65,000 MT.

To maximize its potential, Turkey will need to place greater focus on research and development, much of which currently lacks in the Turkish industry. Below, horticulture professor Hüsnü Demirsoy of Ondokuz Mayıs University shares some of the most recent trends observed from this sweet cherry giant and the efforts being undertaken to improve production.

**IMPROVEMENTS TO 0900 ZIRAAT**

Known in many areas as Napoleon, the 0900 Ziraat variety represents 70% of Turkish sweet cherry production and 95% of sweet cherry exports.

Despite the variety’s importance, it has lacked significant focus by researchers.

Adaptation studies with different cultivars began in 1999 in Turkey. One project has included hybridization of 0900 Ziraat with varieties such as Stella and Sweetheart.

Genotypes and local cherry cultivars have been undergoing characterization analysis, although there has been no comprehensive sweet cherry breeding program.

**EXTENDED HARVEST SEASON**

Turkey’s harvest is currently concentrated in June and July when most of the cherries are eaten fresh. Plantations of more early and late cultivars could extend this period.

With orchards planted at around 1,250 meters of elevation, Demirsoy said harvest can be delayed by around one month.

**SHORTER TREES IN HIGHER DENSITY ORCHARDS**

Most sweet cherry trees in Turkey are between eight and 10 meters tall, contributing to higher labor costs. New plantations have sought out shorter trees with higher density plantings.

**BETTER ORCHARD MANAGEMENT**

Pruning has not been traditionally practiced in Turkish orchards, in part due to fears that it could lead to disease susceptibility. Dead branches are removed once every two to three years.

Regular pruning in new orchards has led to larger fruit, Demirsoy said. Recent studies have focused on bud management such as removal and selection.

In many orchards, irrigation has also been avoided to prevent cracking. Basin irrigation has been the main method until now but drip irrigation has been increasing.

**ROOTSTOCK SELECTION**

The most common rootstocks in Turkey are mazzard seedlings followed by Mahaleb.

Despite the variety’s importance, it has lacked significant focus by researchers.

Adaptation studies with different cultivars began in 1999 in Turkey. One project has included hybridization of 0900 Ziraat with varieties such as Stella and Sweetheart.

Genotypes and local cherry cultivars have been undergoing characterization analysis, although there has been no comprehensive sweet cherry breeding program.

**THE KEY TO SUCCESS**

Demirsoy concluded that the most important factors toward success will be adaptation of modern production techniques focused on quality, food safety and marketing.

Development in coming years will focus on new training systems and breeding new cultivars.
Innovation and leadership in agricultural service

Copper and sulfur-based fungicides stand out among the range of products used to prevent diseases in fruit trees and vines.

With more than 60 years of experience developing chemical products, the Chilean company Quimetal has developed a complete range of products adaptable to the most diverse requirements both nationally and internationally.

Among its line of agricultural products are copper-based and sulfur-based fungicides used as preventive control methods for fruit tree and vine diseases. Quimetal offers other chemical products used in the pulp and paper industry, gold mining and water treatment. In recent years, the company has added a complete line of fertilizers, for agricultural use as well.

“The benefit of the copper and sulfur products is that we have both molecules certified for organic use. There is a competitive advantage in relation to other products, especially considering the growing importance of phytosanitary safety,” says Leandra Bruzzone, Quimetal’s marketing director.

The quality of Quimetal’s products is recognized both nationally and internationally. Through strategic alliances with leading companies worldwide, Quimetal provides copper and sulfur-based products to countries in all of the continents.

“Quimetal has contracts with multinational companies to manufacture copper products throughout the world. Our quality and production standards are within those strict parameters,” says Hugo Perez, Quimetal’s national sales director.

“We sell our sulfur in the U.S., Australia, New Zealand, Italy, Turkey and Bulgaria, among other places. Our copper-based fungicides are available in 25 countries throughout Europe. If you consider that there’s a transit time of 45 days for the majority of these destinations, our clients are still willing to wait for our products because we are talking about a high quality standard,” Bruzzone says.

Perez states that copper products, for example, are manufactured with a copper base that has a high purity standard. The amount of heavy metals is extremely low.
MARKET CHANGES

In recent years, the market has evolved toward the use of products with WG formulation or water dispersible granules. For over 10 years, a majority of Quimetal’s products have had this type of formulation.

“In copper, all of the products which we sell in Chile are WG formulations,” Perez says.

This benefits the operators of these products. In the past, products were formulated as a powder, which was too easy to inhale by field operators. WG granules, instead, offer lower risk.

In the copper product line, Quimetal offers cuprous oxide which is sold under the Cuprodul brand name. This product has both WG and flowable formation options. Quimetal offers copper hydroxide (Hidro-Cup WG), Bordeaux mixture (Caldo Bordalés 25 WG) and copper oxychloride (Oxi-Cup WG) as well.

“Today the copper product market in Chile is worth approximately US$17 million. The tendency since 2010 has shown an enormous growth for hydroxide,” Perez says, who emphasizes the 20% growth experienced by this category in the last four years.

Another product that has grown by US$1 million in the copper market is the Bordeaux mixture. This product tends to be used in two applications a year because it is believed to be the most resistant to rain.

Currently, Quimetal has around one third of the copper product market in Chile, which includes six major companies. In recent years, there has been an exponential growth for liquid and flowable copper formulation due to their benefits during field application.

“I think we have been pioneers in manufacturing liquid copper and we are confident that in the future we will have copper molecules in a flowable form. This demonstrates our capacity for innovation, as we are always carrying out trials and working on innovations to give a better service to the agricultural sector,” Perez says.

Quimetal is leader also in the sulfur market in Chile with around a 60% market share.

“Quimetal is a company which has invested great sums of money in maintaining cutting-edge technology, product lines in optimal condition and in providing great quality products. We want to be the best,” Bruzzone says.

To learn more about Quimetal’s range of products, visit www.quimetal.cl.

PRODUCTS FOR CHERRIES

“While our copper-based fungicides are used for various fruit crops; for cherries, for example, our main product is Hidro-Cup WG with copper hydroxide or our characteristic Oxi-Cup WG with copper oxychloride for preventive control of bacterial canker,” Perez adds.

Hidro-Cup WG is a product that has been developed using the best formulation technology available, yielding a high quality product.

Quimetal is an innovative company that is constantly developing new businesses and products with the objective of gaining new markets and satisfying strict quality requirements by our clients.

To learn more about Quimetal’s range of products, visit www.quimetal.cl.
In British Columbia’s Okanagan Valley, Majinder Khela grows sweet cherries on around 90 acres of land. He is one of many cherry producers in British Columbia preparing his fruit for the newly opened Chinese market.

Although Khela has not yet been approved by Chinese inspectors, he has invested in a brand new facility with an eight-lane Unitec Optical sizer and defect sorter. The facility rivals some of the most advanced packing houses in the world and should be approved soon for Chinese exports.

In a province that produces a vast majority of Canadian cherries, Global Fruit’s André Bailey says Khela is one of the nation’s best growers. His company has already helped Khela export fruit to the U.S., Europe, Hong Kong and Southeast Asia.

“The bulk of Manjinder’s fruit we export. He’s one of the best growers in Canada. It’s to a standard where 95% of his fruit can be exported. Historically all of the best fruit is exported, very similar to Chile or the U.S. The smaller sizes, which are still good fruit but not as strong, stay domestically,” Bailey says, accompanied by Khela on a production visit to Chile.

“The idea is to have something that has as long of a shelf life as possible by growing the firmest, strongest fruit with the highest brix. That’s going to give us a shelf life to send it as far as Asia by air. Even for longer distances, Manjinder has sent fruit by ocean that was just fantastic.”

This past year, Bailey represented the BC Cherry Association in Beijing during a week-long trade mission that established provisional cherry exports to mainland China. Once approved by inspectors, Khela will be ready to participate in this program.

“The China trial program was definitely the biggest item on our agenda this year,” Bailey says.

“We’re hoping everything went well and hoping they were satisfied with all of our procedures. There are ongoing meetings now between the Canadian government and the Chinese government.”

At the time of interview, Canada was still awaiting feedback from China to confirm if the trial program would move forward as a permanent trade agreement.

The first year of the program resulted in 450 MT of direct shipments from Canada to China.

“China definitely has exciting potential for growth as you expand out of the main three...
markets of Beijing, Shanghai and Guangzhou into tertiary markets in smaller cities. It’s a market that is going to grow for the next few foreseeable years,” Bailey says.

THE BEST FRUIT BY AIR OR SEA

Beyond trade agreements, Bailey explains that successfully marketed fruit must first come with the support of superior handling procedures.

Under ideal circumstances, fresh cherries arrive within 72 hours of picking to any market in the world. Restrictive production costs, however, mean that shippers often must sacrifice time for money and send fruit by ocean freight.

Bailey says this reality has forced Canada to rapidly perfect its post-harvest procedures.

“I think it has made us more aggressive at pursuing alternative means of transportation. It has really pushed the Canadian industry to do more in ocean. In the past we’ve always just done air,” he says.

“We used to say we wanted our cherries consumed within 72 hours of picking. But it has forced us to become better growers and also better post-harvest handlers of the cherries. You want to have the same eating experience at 35 days as we were providing in 72 hours by air.”

To promote quality transport procedures, Bailey has traveled the world to observe the best methods used internationally.

“In a short period of time, we’ve managed to accomplish a lot and a lot of that we learned in Chile. In my opinion, Chileans are some of the best in the world at long-distance transport solutions for cherries,” he says.

PRE-PRODUCTION PLANNING

On the farm level, Bailey says British Columbia has moved toward later season, locally developed varieties to improve competitiveness. The new plantations avoid overlap with Washington’s season and improve transport durability.

“Most of the varieties grown in BC, they were all bred in Summerland at the Summerland Research Centre. They are varieties that were developed to be grown in our climate,” he says.

“We have the absolute perfect climate in Okanagan. It’s fairly dry. We get very warm days and cooler nights. It slows the cellular development of the cherry. It’s a denser cherry with far higher sugar. It is one of the latest harvesting regions in the world.”

With the added benefit a smaller orchards, Bailey says British Columbia’s cherries come with the added benefit of specialized care.

“The growers know every orchard and every tree. They can give it a greater level of attention and prune harder. They can take a block and prune it for a specific market to get the very best fruit possible for that market,” he says.

“THE CHINA TRIAL PROGRAM WAS DEFINITELY THE BIGGEST ITEM ON OUR AGENDA THIS YEAR,” BAILEY SAYS.
From behind the Iron Curtain: Tart cherries from Hungary to Michigan

When Michigan State University’s Amy Iezzoni began working on tart cherry development in the early 1980s, the state had access to only one variety of the fruit, Montmorency.

The light-red cultivar has served as a reliable commercial variety in the United States and continues to dominate the tart cherry category.

With just one variety to work with, however, Iezzoni found the local industry quite limited in its capacity to improve and diversify production. Through good seasons and bad, Michigan cherry farmers had all of their chips in for Montmorency.

In Eastern Europe, where the fruit finds its genetic roots, tart cherry development looked vastly different. Tucked away behind the Iron Curtain, there was a wealth of genetic material that remained largely inaccessible to the outside world.

“...When I first decided I needed to go and meet the breeders and collect germplasm, I had to go behind the Iron Curtain with federal grants where there was approval from both governments on both sides. That’s how it got started,” she said.

“In Hungary, they had a special emphasis on fruit quality. Bringing them back I really had the consumer in mind, which is a little tough if it’s a processed product because the consumer isn’t going to see the difference I see.

“But I was really interested in at least getting them over here so that U.S. consumers could have them as one of the options.”

Her work with breeders in Hungary exposed the Michigan program to a variety of tart cherry possibilities that have guided the program to become much of what it is today.

“The goal here is that if you have different types of fruit, you can have more diversity of uses for that fruit. The Hungarian varieties were introduced so that new types of products could be developed from tart cherries and that has been the case,” she said.

The most promising variety initially uncovered by Iezzoni was a deep mahogany fruit known locally as Újfehértói Fúrtös from the Újfehértó Fruit Station.

The variety offers much of what Montmorency cannot. It does not achieve the same yield as Montmorency but its firmness lends itself to the fresh market. Its deep red color throughout the fruit’s flesh also makes for an attractive, processed product.

With a name like Újfehértói Fúrtös, however, the variety needed some remarketing to enjoy success in the United States.

“When I introduced it to the U.S., the goal was to have a name that was pronounceable. Balaton is a lake in Hungary and the largest fresh water lake in Europe. It’s a name that honors its Hungarian heritage,” she said.

Balaton Lake lies far from Újfehértó, the city of origin and namesake of the variety. It is one of the only places on the Hungarian map, however, with a name comprehensible to the average American.

Through a trademark agreement between Michigan State and the Institute of Hungary, Balaton cherries were made available to the U.S. market in the 1990s. For every Balaton tree sold in the U.S., a royalty goes back to Hungary to support the breeding programs at the Enterprise for Fruit Growing at Érd and the Fruit Station at Újfehértó.

Thanks to Balaton’s special characteristics, Iezzoni said Michigan farmers have been able to expand their product options and push the tart category into new markets.

“With the Hungarian varieties being firmer, they hold up better for a fresh market. The second use is for cherry wine. I think almost all the cherry wines in Michigan now have a blend of Montmorency and Balaton because the Hungarian varieties bring more color and a complex flavor,” she said.

“The third product is a glass pack and American Spoon Foods makes that. If you have a cherry that has that internal color and is firmer, it’s not going to show any bruises in that glass pack, because you can see the fruit.”

Currently, Iezzoni is working on improving the tart cherry for disease resistance.

“We’re moving forward with materials that are very resistant to cherry leaf spot which is the number one disease facing growers in Michigan. If we’re successful with this, it will really impact the amount of sprays we have to use,” she said.

“We’ve got some really good sources of disease resistance and some good knowledge of how it’s inherited, so hopefully we can speed up the breeding. It’s a really long process but someone has got to do it.”
Australia: Modest volume to achieve high-quality fruit

Australian cherry growers may never rival the volume of top international producers, but when it comes to quality, the southern nation strives to give its competitors a run for their money.

On often stringent Asian markets, Australia’s counter-seasonal product has created demand due to its high export standards, explained Simon Boughey, CEO of Cherry Growers Australia.

“We want to maintain a high quality of fruit to get the best prices and to do that we need to keep our standards very high. Whatever you sell for export needs to be of higher quality as the domestic level,” he said.

“It’s providing a much more consistent approach to the sizing and quality of cherries. You know that if you get a 2- or 5-kilogram box of 30- to 32 millimeter cherries that it’s the highest quality export available.”

With a strong international focus, Tasmania has come to lead Australian exports and it accounts for over half of national exports.

The island has led the way into new territories, including entrance to the Chinese market this past season. As a region officially free of fruit fly, the state has also reached markets such as Japan, South Korea and Taiwan.

“Last year we sent 66 tons [to China] and this year we’re looking to certainly ramp that up leading up to Chinese New Year. Then we’re also looking at expanding markets into the Middle East and places like Russia,” Boughey said.

About 20% of Australia’s 12,000 to 14,000 MT of production goes to exports, mostly destined for Asian markets. The 2012-13 season brought the largest exports on record for Australia, up 139% to 2,890 MT.

Over 70% of these exports arrived to Hong Kong, Singapore and Taiwan, all non-protocol markets.

By 2017, Boughey said the nation hopes to send around 50% of its volume to exports, with a mixed focused on protocol and non-protocol markets. He added, however, that with a maximum production forecast of 20,000 MT, Australia will not be flooding markets with excess volume.

What Australia does offer are quick arrivals of fresh, carefully handled fruit.

“You can certainly get your fruit picked, packed and sent out to most destinations within 48- to 72 hours around the world. Our competitive advantage, particularly in Asia, is the airfreight into non-protocol countries,” he said.

Australia also hopes to achieve full airfreight access for all Asian protocol countries like China, Thailand, Korea and Taiwan.

Nationally, Cherry Growers Australia has launched a campaign to encourage consumption throughout the production season. Currently, domestic sales fall in the weeks before and after Christmas.

“Our domestic consumption is probably 10,000 tons in a season. The fruit in Australia is very much oriented toward summer, particularly leading up to the festive season,” he said.

“Cherries are seen as one of the quintessential fruits for Christmas. We’re trying to encourage people to eat cherries during that whole summer season.”

The online marketing campaign focuses on “100 days of fun,” representing the 100 days of peak Australian production from December to February.
When Bob Bors arrived to the university program years ago, he said his colleagues had yet to recognize they were on to an exceptional line of cold-hearty cherries, capable of turning Saskatchewan’s grain farmers into budding horticulturalists.

“We’re the coldest location in North America where fruit is being bred. We inherited the cherry program from someone else but it got started around 1940,” said Bors, head of the fruit breeding program.

“It was to develop cold-hardy cherries using Mongolian varieties. What we got were dwarf cherries on their own roots after five or six generations.”

The result was the Romance series featuring six, sour cherry varieties: Juliet, Carmine Jewel, Valentine, Cupid, Romeo and Crimson Passion.

The fruits have been able to withstand the region’s frigid climate in large part due to their small stature. In fact, Bors said the varieties are the smallest statured sour cherries available.

“We normally get -40°C here every winter but one year we got -52°C. It killed a lot of the older branches on the cherries but the cherries were a bush, so we didn’t actually lose any trees but we lost the older branches on many of them,” Bors said.

“Because they were grown as a bush, they were OK. But if they were a tree with a single trunk, it probably would have just killed the whole tree. It was the older ones that died and the younger ones that were only producing for a few years were healthy.”

“We’re THE COLDEST LOCATION IN NORTH AMERICA WHERE FRUIT IS BEING BRED”
The Romance series also stands out due to its dark-colored fruit with above average sugar levels. “Because they were dark, people were picking them way too early, about three weeks before they were ready. They turn red but they are supposed to turn black or burgundy,” Bors said.

“Our sour cherries are also unusually sweet compared to other sour cherries. They are in August for us but in other locations they probably come in two weeks before other sour cherries.”

The low Saskatchewan temperatures have provided a natural disease barrier for the fruits. Bors added, however, that growers in warmer regions should not get their hopes up that the Romance series is independently disease free.

“One of the things about our location is that we don’t get the diseases of cherries. But growing our varieties in other locations, they will get the leaf spot,” he said.

“Some people have been hopeful that they don’t have diseases but I think it’s our climate. The season is so short, I don’t think the disease can cycle through. In other places they see it like in any other variety. So it’s not immune; it’s our season.”

Currently, the program is working on adapting its cherries to better fit the newest harvest technology and decrease fruit loss.

“What I’ve been emphasizing is trying to choose cherries that fit the machinery for harvesting and this is the low cost harvesting, the same machines that do black currants or other bush fruits,” he said.

The program recently purchased the Joanna harvester from Poland. The machine can harvest a variety of fruit bushes and according to Bors, it has a lower cost than many other alternatives.

“The new harvester’s portal pushes the branches at a 45 degree angle and then there’s a ramp that’s a conveyor belt,” he said.

“When it shakes the fruit, it only falls a few inches, where the old type was an upright thing and the fruit on top of the bush would fall six feet and a lot fruit would be lost from the middle of the tree.”

Bors is now working on cherry varieties to best fit this machine. He will seek out plants with thinner, more flexible branches to withstand the bending required of the technology.
In recent years, exports of cherries have grown both to Asia and other emerging markets. This has become possible as a result of on-going studies and research carried out by each of the participants in the production chain. The areas addressed include trade, production, services, universities and institutions, either through the study of factors relating to production, varieties, packaging, as well as harvest and post-harvest techniques.

Because of this and in view of the fact that there is a requirement today to reach distant destinations, it never hurts to do a review of the different varieties that are available, grouped according to their different characteristics and their post-harvest or storage potential.

• Short term post-harvest potential: the varieties that are grouped under this category normally are susceptible to splitting, pitting and staining. Some of the varieties are highly susceptible to stalk detachment. In general these varieties should be sent only by air, so that cherries arrive in the shortest possible time to their final destination. E.g. Glenn Red, Newstar, Sonata, Summit and Royal Down.

• Regular or average post-harvest potential. These generally tend to be varieties such as E. Burlat and Celeste, which can be sent to their final destination either by air or sea, but the shipping method chosen still depends on the quality and condition of the cherries at the moment of harvest. These varieties sometimes show low or moderate resistance to splitting, as well as a medium firmness (Between 50 and 70 Sh., as appropriate). Complying with the above mentioned standards these varieties cannot reach markets located more than 30 days away.

• Long postharvest potential: these are varieties that regardless of their condition and quality can survive long trips, rising to a maximum of 50 days duration. Some of the varieties grouped in this category include Lapins, Bing, Regina, Kordia, Sweetheart, Stella, Van and Santina. The majority of these varieties, due to
their extensive storage potential are shipped by sea. Although for this to occur, certain conditions must be considered such as the need to adjust color uniformity at harvest and to separate by soluble solids over 17 and firmness above 75 Sh.

Additionally, packing processes must also be adjusted, according to certain features such as sensitivity to cracking and stains, which can be adjusted from highly susceptible to highly resistant and incorporating mild or moderate resistance.

All the above, plus the management of post-harvest technologies such as the use of modified atmosphere packaging (MAP - Modified Atmosphere Packaging) have enabled cherries to reach their end destination with good results. But for this, it is important to comply with the following:

1. Seal the package tightly, avoiding any leak or opening of the seal, so that the gas concentration will be carried out according to the specific characteristics of each package.

2. Managing the cold chain of cherries, from the moment they enter the packhouse and especially the pulp temperature at the moment of sealing. This should not be higher than 6 °C, in order to avoid condensation. Loading containers with temperatures below 1 °C and not less than -0.5 °C. Recalling that the containers do not have the ability to lower temperatures, but only to maintain them.

San Jorge Packaging is a leader in Chile in the modified atmosphere industry. With over 15 years of experience it is able to offer its customers a full range of modified atmosphere packaging for cherries. These packages are designed to meet different objectives, depending on the end destinations and client preferences. We have some packaging to suit all needs, from opaque, high-strength, thin and thick, with special additives to increase the sealability and reduce condensation to the lowest levels. Additionally we offer gas measurement services to ensure that the packaging has been properly sealed so they contain the expected atmosphere before being loaded for shipment.

To ensure the quality of its products the company has implemented a comprehensive system of quality management systems and ISO 9001, 14001 and 18001 certifications.

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Technology and innovation in packaging to preserve Fresh Fruit Exports.
Finding a place for South African cherries

South Africa expects to almost double its cherry volume in five years, but will there be a market to take the fruit?

In South Africa, cherry production can be quite complicated. Between insufficient chilling in the north and the threat of hail in the south, this delicate crop is vulnerable to extensive damage.

As a complement to the nation’s primary fruit crops, however, cherries can prove lucrative for Western Cape farmers, explained Koos Pretorius, chairperson of the South African Cherry Growers’ Association.

“It’s a crop that extends the harvest season. They are harvesting it in December, so they can utilize their packing houses more efficiently. They are getting reasonably good money for it locally and for what they export,” Pretorius said.

“South Africa has a lot of apples, pears and table grapes. So they are not producing something that there is already too much of. They are making good margins on it. “I think for the big operators, they can easily fit it in with the rest of their operations. It’s quite a lucrative thing to go into. But for a small guy that just starts, cherries are a difficult thing to grow.”

Currently, Pretorius said South Africa produces around 600 to 700 MT of cherries a year, mostly in the Western Cape where growing conditions are more favorable.

Over the next five years, the nation expects to add an additional 500 MT of production. In 10 years, growth should rise to an additional 1,000 MT in production.

Many of these new plantations include Zaiger cherry varieties bred in California, while other common varieties include Lapins and Bing. Although the upward projections indicate industry growth, Pretorius said a major challenge will be finding markets to take the South African supply.

“If we start to produce another 1,000 tons of cherries, what are we going to do with them? We can’t sell them locally. We just don’t have the market for it. In Africa, people are not used to eating cherries. So we’re opening access to other markets, like Canada, the U.S., Malaysia and Indonesia,” he said.

“Once we go into those markets, the Cape will be in competition with Australia.”

Currently, most early season cherries from South Africa are shipped to the U.K. When Chile comes into production, exports are redirected to the Middle East and other parts of Africa.
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