

Market situation in the Northern Hemisphere, week 13 – 2011

Apples

The U.S. market showed moderate sales activity and stable prices for Chilean Royal Gala apples, while Chilean supply registered slight price decreases in Mexico. Sales of U.S. apples in Canada affected trading of Chilean supply in that market. In northern Europe, the U.K. and Russia, Southern Hemisphere Royal Gala availability led to slight price adjustments. In Latin America, the Argentine market remained stable without significant changes, while an increase in Argentine Red Delicious sales was recorded in Brazil. High volumes of Chilean Royal Gala apples were traded in both Colombia and Peru. A fair inventory rotation was recorded for imported apples in Hong Kong, Taiwan and the Chinese mainland due to Qingming festival (Ancestors Day) celebrations. However, variable prices were recorded depending on fruit quality, conditions, and suppliers. India's imported apple market was active with a dominance of U.S. Red Delicious, which registered healthy sales rates. In Middle Eastern markets, the supply of Mediterranean apples declined while Southern Hemisphere origin apples gained market share in the region, registering high levels of demand.

Avocados

Avocado supply remained limited in the U.S., although some sizes registered price falls. Peruvian and Kenyan Hass volumes increased slightly in Europe, while the Northern Hemisphere supply maintained stable activity and price levels. Scarce Chilean Hass availability was seen in Argentina with high price levels, while Chilean domestic prices were unchanged for the week.

Blueberries

Moderate sales activity and upward blueberry prices were registered in the U.S., while the Chilean blueberry season supply finished for the Canadian market, which recorded 40% higher volumes than last year. Chilean blueberry supply decreased on the European continent and in the U.K. as the Northern Hemisphere season got underway, recording the first Spanish blueberry volumes. Chilean blueberry availability continued to decrease significantly in Asia as the Southern Hemisphere season neared its close, although air arrivals to Japan persisted in variable condition.

Kiwifruit

Problems were reported for Chilean kiwifruit lots arriving in the U.S. with a fall in price, while Mexico showed good sales activity for U.S. kiwifruit with price adjustments. Availability of Chilean supply remained limited in Canada and was insufficient to establish a market. On the European continent and in the U.K. the supply of Italian kiwifruit was expected to last until early May, registering a dominance of small to medium-sized fruit with stable prices. In Latin America, the Italian Hayward season was nearing its end, while the Chilean season was beginning and registered export arrivals both in Colombia and Brazil. Asia's main destination markets were preparing for the first arrivals of Southern Hemisphere supply in the following week, while Italian Hayward trading continued but with limited availability and low consumption levels. Italian kiwifruit supply was in line with demand in India, while the Mediterranean country remained the only supplier to Saudi Arabia and Dubai, reporting price flexibility in terms of fruit condition.

Pears

Active sales activity was registered for Chilean Bosc pears in the U.S. while the Bartlett variety maintained moderate trading, while lower activity was recorded in the Mexican market for D'Anjou pears, with price falls seen for all suppliers. The Argentine Williams variety recorded price increases in Canada. The Williams season was nearing its end for European markets, with a dominance of Southern Hemisphere Packham's T supply, which registered moderate sales activity.

Peaches/Nectarines

Both peaches and nectarines registered moderate sales activity with no significant price changes in the U.S, but their prices fell in Mexico. The Southern Hemisphere peach and nectarine seasons are finished for the European and U.K. markets, with stable sales activity expected during the last days of trading. In Latin America, Argentina has maintained local volumes with no market changes, while the last Chilean peach and nectarine arrivals were recorded in Brazil and Colombia. In Asia, the Southern Hemisphere nectarine season is nearing its end, with Chilean arrivals expected to peak during the week and shipments forecast to decrease quickly afterwards. Australian peach and nectarine supply remained limited.

Plums

Angeleno plums showed upward price levels and active sales pace in the U.S., while in Mexico this variety registered good market acceptance and lower opening prices compared to last season. Southern Hemisphere plums registered stable trading on the European

continent and in the U.K., for both red and Angeleno varieties. In Latin America, volumes declined in Argentina while prices and availability were stable in Brazil. Colombia reported high Chilean Angeleno supply and lower prices. In Asia, availability of Australian and South African plums was scarce, with Chilean plums dominating the main markets, reporting stable prices and sales activity.

Table Grapes

Red Globe price levels rose in the U.S. with active sales pace, while the opposite was seen in Mexico, with moderate trading and a drop in prices. Stable sales activity for Thompson S grapes was recorded in Canada. White seedless grapes registered slight price increases in Europe due to low availability. In Latin America, slight price rises were seen in Argentina, Chilean Red Globe volumes increased significantly in Brazil and Colombia, while Peru continued to trade only high quality domestic supply. Asian markets showed stable prices and continued sales for imported grapes, although the Thompson S variety did not follow this trend. An active grape market was registered in India, where the Peruvian Red Globe variety remained the most attractive for consumers due to its large size and availability. Indian Thompson S and South African Red Globe grapes registered continued sales and stable prices in Saudi Arabia and Dubai, where they dominated markets.

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