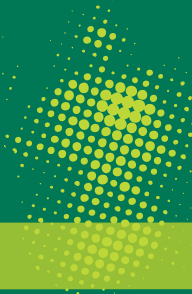




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Horticultural Crops Development Authority

Serving the Horticulture Industry



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Dr. Wilson Songa Agriculture Secretary (MOA) and other guests at the passion fair

VISION:

A globally competitive horticulture sector in Kenya.

MISSION:

To develop, promote, facilitate and co-ordinate growth of a commercially oriented horticulture industry through appropriate policies and technologies to enhance and sustain socio-economic development.

CHIEF EDITOR:

EDWARD MAINA

EDITORS:

ANNE GIKONYO

AGNES WAINAINA

Design/layout & Print:
Diverse Links Enterprises
diverslinks@gmail.com

Passion Fruit Branded Show-Iten

Theme: "Opportunities in the passion fruit Industry"

INTRODUCTION

Horticultural Crops Development Authority's Mandate is to develop, promote, facilitate and co-ordinate growth of a commercially oriented Horticulture Industry through appropriate policies and technologies to enhance and sustain socio-economic development. In line to its vision of being a globally competitive horticulture sector in Kenya, HCDA aspires to be always at the forefront in advocating modern and appropriate technologies to enhance and sustain socio-economic development to the livelihoods hinged in horticulture.

In this concept, various approaches have been developed by the institution to demonstrate and to showcase its developments. Furthermore, one of the key functions of the Authority include holding consultation forums with other industry stakeholders to share achievements, challenges and exchange views in order to identify gaps and offer solutions to furthermore uplift the horticulture in its upward positive trend and in line with the government policies. It is worthy to note that, the current plan by the government to transform Kenya into a newly industrializing "Middle income country providing high quality life to its citizens by the year 2030" under the flagship of vision 2030; one identified gateways of achieving this is through embracing Horticulture. With

this, HCDA, as an institution is on the way making it a reality.

It is in this concept that the Authority organized Passion fruits branded fair in Iten to showcase the crop, promote production, confront challenges and share information with all stakeholders. Founded on the concepts of Value addition, the many trends exhibited all over the world have been attributed to the various stages of crop production. Through this measure, any sudden market constraints are reduced. It is worth nothing that value chain integration is on the use globally due to the fact that it is a tool that enhances costs reduction through effective and efficient logistics implementation in the supply chain management.

Moreover, the sequence of related business activities (functions) from the provision of specific inputs for a particular product to primary production, transformation and marketing and up to final consumption comprises value chain. Generally, the chain encompasses product development, customer relations and supply networks. Value chain analysis being a concept of business manage-

ment is the way to go if the horticulture industry is to realize the millennium goals and national vision 2030 objectives

Other than the exhibition, there was a demonstration and training seminars centered on passion production. The value chain concept was adopted with key topics handled by expert. The topics included: -

- Source of clean planting materials; Certification of planting materials; Passion fruit orchard production and maintenance; Pest and disease identification and management; Markets and market requirements; Value addition methodologies; opportunities for smallholders in the passion industry; and ; and passion fruit production management and challenges.

The Iten passion fruit Fair was graced by the Agriculture Secretary Dr. Wilson K. Songa. Other notable guests included: Mr. Lucas Chepkitony -Keiyo North MP; Mr. James .O Arim -GM TAS; Mr. Abbass -Keiyo North DC ; Mr. Cheboi - DAO Wareng East; DAO's Keiyo North And South; and PDA Nyanza .

The exhibition was attended by a record of 1,021 farmers and stakeholders who registered at our stand. The exhibitors were drawn along the entire passion value



chain. Exhibitors included both the private and Government institutions dealing with the planting materials, input suppliers, Donor community organizations, University & research institutions, private and Government service providers and Value addition providers.

SUPPORT OF HCDA TO ELGEYO/MARAKWET FARMERS

HCDA Iten covers the larger Keiyo and Marakwet districts namely, Keiyo North, Keiyo South, Marakwet East and West respectively. The region is classified into three ecological zones; the higher highlands (1800m A.S.L and above) the middle highlands or escarpment (1300-1600m A.S.L) and the lowlands (800 m-A.S.L 1100 m A.S. L) various crops does very well in the ecological zones depending on suitability.

By the year 2008, the passion fruit farming was regarded a foreign crop within the entire region. The crop was then being introduced in the neighboring Uasin-Gishu and Nandi Districts and few farmers in those areas had adopted this crop. By that year, only two farmers, one at Flax, Keiyo South and another farmer in Kiptingo; in Keiyo North had barely one acre each of passion orchard in the larger. During the exhibition, success stories were being shared of how passion entered into these districts. By the year ending December 2010, 350 Ha is under passion fruit in Keiyo (Horticultural statistics 2010). Among this 590 landowners have established the crop with more than one acre each.

These landowners have an average of six adult members per family, each with average of 4 members per family, in total; there are about 2360 families under intensive passion fruit farming. Elgeiyo Marakwet passion fruit farmers produce one of the largest volumes of passion fruit consignment in Kenya. In December 2010, an average of 50 Tonnes of passion fruit was sold during the month despite the drought condi-

tions being experienced. On good rainy conditions 60-80 tonners of passion is realized per month.

In regard to the nursery established by HCDA at Kolongei, a total of 123,000 of seedlings have been sold realizing about Ksh.4, 920,000 to the group. The seedlings have helped establish passion orchards in and outside Keiyo. Another major milestone that HCDA has also done is establishment of another passion fruit nursery at Kapchorua, Keiyo South District referred to as Miki Horticultural group to meet the high demand of clean passion fruit seedlings.

According to the latest statistics about passion; Moi University, Chemistry department carried out a test on the juice extraction percentage of Passion fruits in passion production areas in the larger Elgeiyo / Marakwet county, Uasin-Gishu and Nandi counties. The results showed that; Kapchelal area, a region in Keiyo North escarpment produces the highest quality passion with a high juice percentage at 34% extraction component (Moi University Chemistry Department) this has given the area a high impetus with the farmers in full time passion production.

To mention other activities/technologies extended by HCDA include the introduction of passion orchard drip Irrigation system that is gaining prominence.

POTENTIALS OF PASION IN ELGEIYO MARAKWET REGION

- Large fertile tracks of land hence a huge potential of expansion and crop rotations
- Adequate water resources due to pres-

ence of permanent rivers

- Warm to hot and humid climate favorable for passion growth
- Fairly good infrastructure
- Existing airport facilities i.e. Eldoret International Airport hence ease of export
- Growing demand for passion in neighboring countries particularly Uganda and sells to Rwanda
- Embrace of new technologies e.g. drip irrigation hence maintenance of production quantities.

PRODUCTION AND MARKETING CHALLENGES IN THE REGION

- Slow rate of adoption of new technologies / crops hence continuous use of obsolete approaches
- Unorganized production and marketing systems leading to exploitation by brokers
- High costs of inputs-seedling, chemicals and fertilizers
- Poor post harvest handling of passion leading to loss of value and losses
- Poor infrastructure lack of cooling facilities in the region
- High demand of clean planting seedlings leading to inadequate supply
- Insufficient knowledge on production and marketing requirements
- Inadequate timely market information
- Lack of effective strategies on crop deficiencies, pest and disease control
- Over-reliance on rainfall leading to low production during dry spells
- Inadequate access to affordable capital / credit to farmers
- Limited collaboration among stakeholders

OBSERVATIONS

- There is a great interest of passion fruit production in the region. The capacity is so high that adequate clean passion seedlings are not enough. The nurseries established through assistance by HCDA have been over whelmed. There is need to create more nurseries
- There is a general need of farmers on training on production particularly crop nutrition, deficiencies pest and diseases. This is a huge gap that the stakeholders should look into.
- Market information is lacking. Farmers need to have awareness on collective marketing, contract farming and the need to bring more buyers/exporters. The marketing wing of the Authority should address this adequately.
- There is a growing need of farmers' capacity building on value addition technologies. Awareness should be embraced, as farmer groups are willing to start cottage industries.

RECOMMENDATIONS

- Baseline survey should be carried out on

the impacts of passion farming. Concrete developments should be documented as HCDA, as an institution has done a lot.

- More efforts should be put on development of an effective strategy to improve supply of healthy planting materials. HCDA, in its efforts should sustain already established through support and establish new one.
- The passion fruit farmers should be encouraged and empowered on contract farming to instill good business practices between producers and buyers.
- It is encouraging that, HCDA through it's drip kit technology introduced drip irrigation in passion production. However there is need to encourage more small holders to adopt the irrigation technology to reduce over reliance on rainwater and maintain high and quality production.
- Strengthen capacities of passion fruit value chain and the need of forming a strong produce marketing organization by passion fruit producers.
- Laying a solid foundation of horticultures in Elkeiyo Marakwet. Avocadoes, garden peas etc on the highlands and pawpaw,

mangoes etc can do well in the escarpment. This is encouraging diversification.

CONCLUSION

Dubbed one of the largest organized Horticultural Fairs, The Passion fruit Fair was an eye opener for the locals to learn and appreciate their achievements. It was a humbling experience that the locals felt should be an annual event. Elkeiyo Marakwet has a great potential in Horticultural production. The locals see this as a one way of satisfying their daily needs as shown by the interest developed. For the lessons learnt, practical approaches have therefore to be emphasized. More of the trainings that the farmers require, if possible, should be coordinated by the Key stakeholders. Major Gaps still exist in the marketing section of passion. The few exporters and local buyers who participated in the fair was a clear sign of the limitations that should be addressed. It is one of the milestones if keenly satisfied can see more production of this crop and other Horticultural crop.

OBJECTIVES OF THE EXHIBITION

No.	OBJECTIVE	OUTCOME	REMARKS
1	Promotion of production of quality passion fruits that meet global market requirements	-The farmers got information on availability of clean seed, orchard setting. -Crop husbandry, good Agricultural practices to enable them increase production and meet export market standards.	The information was provided by The Ministry of Agriculture, KARI-Kitale, KEPHIS, Kolongei Hort. Group, Setek Kayoi and HCDA
2	To enhance the value chain concept, to provide a platform for horticultural stakeholders to show case, and exhibit their products/services in the passion fruits value chain	Key stakeholders from providers of seeds, nursery operators, capacity builders, crop protectionists agricultural input suppliers, local buyers' exporters, development partners both in public & Private exhibited their products.	Farmers got a chance to know where each service can be sought, what to go for in passion industry and market challenges were addressed accordingly
3	To bring together key stakeholders in the passion fruit value chain, to address issues on production, marketing & draw a way forward	In the seminar session, major impacts affecting passion fruit from production, maintaining & marketing were discussed. Question carried by farmers were addressed accordingly.	Experts in nursery establishment, production aspects, marketing challenges and maintenance was addressed as carried by concerned farmers.
4	To exchange views and ideas on the horticulture industry, challenges, market trends and identify possible solutions to help develop a competitive industry	Stakeholders in Elgeiyo / Marakwet region got a rare chance to exchange views and showcase their expertise they learnt more about market trends and requirements and identified their potentials and limitations	The presence of farmers from Nyanza region who attended uplifted the spirits of local farmers. The presence of development partners gave them strength. They appreciated the day and pleaded to be an annual event at Iten.
5	A platform for HCDA to showcase their activities, programmes and achievements	The showcase by Iten station of Documented local information through PowerPoint was immense. The efforts done by marketing learn to export passion in 2008/2009 from Iten was an achievement that encouraged more production. The registration of nurseries was emphasized.	The HCDA staff showed the importance of fruit tree registration, the need for forming marketing groups and benefits of embracing new technologies.

Importers' and Traders' Notes

The January 2011



Ecuadorian Roses

Valentine's cut-flowers market turned out rather and positive, and much better than last year, but not quite as good as some years ago. Total offered and supplied quantities were generally bigger than last year; still, prices were higher for most of the products, especially for gypsophila, aster, liatris, molucella, astantia, but also for proteas and leucospermum cordifolium. All those products were supplied in reasonably moder-

ate quantities. Roses were imported and supplied in bigger quantities, especially the bigheaded roses. Best prices were realized for the red colored varieties. However, when compared to the past years they could be called reasonable. The general quality level of the imported products and also of roses was rather good. Only very marginal quality problems showed up in some roses shipments. However, this was negligible. No special prices for hypericum, helianthus, leucadendron and soldiago.

The hypericum price have been low in the past 6 weeks already. All through the Valentine's week the supplied and offered quantities were too big for the demand in that week. The longer sizes were still paid well, but the shorter and thinner stems, the so-called 'bouquet fillers', were fetching much lower prices sometimes too low. Solidago was also slightly over supplied, but prices were holding at

a reasonable level. During the post Valentine's week prices for nearly all products gradually slowed down. Throughout the last two weeks of the month the cut-flowers market really improved considerably, with very good demand from countries where International Woman's Day, on the 8th of March, will be celebrated. Excellent demand, sales and prices were for roses, hypericum, proteas, leucospermum cordifolium, asters, solidago and gypsophila.

Remarkable was the strong increase of prices of hypericum, especially for the colors red and orange. Foreign producers and suppliers adjusted the quantities, which immediately had a positive effect on the prices. Roses' prices were also very good, especially of the red and orange colored varieties. Some shortage of was noticed. They were probably routed directly to Russia and other Eastern European countries. The only one product of which prices did slowdown was eryngium.

Worldwide Shortage of Leather Leaf Fern & Other Cut Foliage

The Florida Leather leaf Growers Alliance FLGA has announced update on the status of farm conditions, as well as the worldwide shortage of leather leaf fern and other varieties of cut foliage: December 2010 was the coldest December on record in the state of Florida. Early December freezes in Florida devastated a bumper crop off all leather leaf and other greens that would have been marketable for Valentine's Day shipping and beyond. Added to this, there were poor growing conditions in Central America this past summer. All of this has led to a foliage shortage

worldwide. Consequently, these weather conditions have impacted production costs and as a result, prices for cut foliage are expected to increase shortly after Valentine's Day. However, the alliance promised his loyal customers priority on others in supply of quality foliage.

Source: PerishableNews.com
=> [Florida Leatherleaf Growers Alliance](http://FloridaLeatherleafGrowersAlliance.com)



One Language, Three Markets

"Germany, Austria, and Switzerland" share the same (German) language, and thus a piece of culture. Yet, there are some differences in their flower markets" says Joost Naber, FloraHolland's market specialist. The German flower market saw a nice development during the recent years. At the same time, Switzerland has gone through recession, but had a significant recovery last year. In Austria the downturn went on last year, and this year the recovery is still going slowly. In the consumers level there are no real differences between the three communities; they all share the 'liveliness impact' of flowers and plants. The differences are in the ways and places of purchasing. Ger-



many's market main attribute is its being areal 'discount' market. Discount shops are all over. Unlike in other European countries, the discount retailers dominate the market. Aldi and Lidi chains offer basic bouquets for € 1.99, and the others

try to compete. In Switzerland the leading position is with Migros and Coop, the full-service supermarket chains, representing the medium-high segment in flowers. The Swiss consumers give high priority to social responsibility and environmental aspects, but also for 'local for local' approach. Germany and Austria have 4 main sales channels florists, supermarkets, hardware stores, and garden centers. The two latter channels have smaller share in Switzerland. "The Dutch exporters specialized in providing the appropriate assortment and service for each of those markets", concludes Naber.

Source: [FloraHolland Magazine](http://FloraHollandMagazine.com) #1-2011

The future of the Holland flower auction.



Olaf van Kooten a professor at the Wageningen University of the Netherlands, specialized in Horticultural Supply Chains, some years ago predicted the end of the auction clock for flowers in the Netherlands. His opinion about the clock today is governed by a reflection of some distinct opinions about other subjects in his field of interest, like the flowers sales at supermarkets and the future of flower production in the Netherlands and Africa.

On the question of whether he still believe that one day the auction clock for flowers will disappear, His answer is that if nothing changes, the current trend will lead to the end of the clock system. When the number of companies is too small, the clock system will not function well anymore. You would not then get a price in accordance with the supply and demand.

When asked whether the flower trade need the clock in the future, Olaf van Kooten said that the advantage of the clock is that growers and traders know the real market price. This is what we can learn from the fruit and vegetables sector, where the clocks disappeared. Nobody knows anymore what the market price is.

Also for the sake of costs, the clock will remain important to flower growers. Without a clock they should look for customers by themselves, which will increase their costs. This is especially the case for small growers. And for traders the clock will remain important to buy all products in one or a few places.

Flora Holland should become an international marketplace with hubs all over the world. In this way the auction will be able to attract more buyers and sellers and ensure a good number of buyers and sellers. A buyer in Dubai should be able to buy roses from Kenya and tulips from the Netherlands. Important is that the clock becomes electronic and online, where traders and growers all over the world can sell and buy flowers. An important task of the auction is to warrant the quality. Everything is for sale at the Internet, but only the shops that are reliable and can guarantee the quality are successful.

In terms of maintenance of quality the auction should set the rules, like they do now already. Their control system, the reliability index, works very well and keeps a good control over the quality. In this way good growers are getting rewarded.

Currently supermarket sales of flowers lag behind the expectations. The supermarkets have more attention for other products than flowers. I can understand why consumers prefer to buy flowers at the florist. The quality at supermarkets is not good and the bouquets are not appealing. This can be done better as supermarkets in the UK have proven. Years ago, Sainsbury started to pay attention to the flower category, but in the beginning results were not satisfying. Only after they started to guarantee a 7 days vase life, sales went up.

On whether the Dutch growers will remain the main flower suppliers of Flora Holland auctions, Olaf van Kooten said that about 15 years ago Dutch flowers were superior in quality compared to import. In those days roses from Kenya were infected by botrytis, and after a few days in the vase they were hanging down. But growers in Kenya and other countries around the equator have learned a lot over the past years and now the quality is mostly good and can compete well with the Dutch production. Besides, costs are much lower at the equator and transport is getting easier; therefore this will be the main production area in the future. As a consequence, most production will disappear from the Netherlands, apart from products like tulips and novelty products. Factors like exchange rate of the dollar, political instability and transport costs can influence this process. I believe that sea freight would give another boost to the production in Kenya.

Source: FlowerFocus.Info
08/02/2011

The Netherlands: Flower Auctions

The January cut-flowers figures of the auctions have been published as follows. The final turnover of the cut-flowers, sold in all the Dutch auction together, has increased by 28.4% when compared to the same month of last year (when it was a very cold month), realized with a supply increase of 8.8%, resulting in a total average price for all flowers of 20.6 Eurocents per stem, while it was 7 cents last year. Nearly all products fetched higher prices, but absolutely bestsellers in January were: tulip, chrysanthemum and orchids. Lower prices were only for a few products such as gerbera and amaryllis.

Total supplied quantities during the Valentine's week were 8% higher when compared to last year, mainly caused by

roses and tulips, the two biggest product groups around this period of the year. Prices of tulips were identical to the prices of last year, while roses were slightly more expensive.

However, they could not be called extremely expensive, except for the red colored varieties, such as Grand prix, Red Naomi (with an absolute top price for super quality of € 4.30 per stem) and Passion. Prices throughout the Valentine's week tended to fluctuate slightly. On Thursday the lowest prices were quoted and on Friday the highest. Other products with very high prices were: anthurium, aster, carthamus, chrysanthemum, mini-gerbera, gypsophila, liatris, lilies longiflorum, limonium, veronica, and sur-

prisingly all the so called 'fillers' to be used in mixed bouquets. Products with lower prices this year were: delphinium, helianthus, hypericum and spray roses.

Throughout the post Valentine's week prices did hold during the first few days, but later on they slowed down considerably. During the post Valentine's week the market remained very steady, while prices were good as well. Throughout the last week of the month all improved again, because of very good demand for International Woman's day, when lots of flowers could be used, especially to be exported to Russia, to the former Eastern European countries and to Italy, where this day was celebrated mostly. The top bestsellers were red roses, other red products and chrysanthemums; both the single headed ones as the sprays.

Wrong Flowers Can Mean Negative Emotions

A leading cosmetics and fragrance brand once tried to market flower-scented perfumes in Latin America. Unfortunately, one of these fragrances reportedly failed in Brazil because the flower was reportedly used for funerals in the region. Valentine's Day is the appropriate time to remember that flowers have different meanings in different countries and cultures. Flowers have a wide range of meanings from love to professional courtesies, congratulations and sympathy.

Confusing these messages could be disastrous, not only for a cross-border romance, but also for global business. Before sending flowers internationally, research the various cultural connotations those flowers may carry and be sure the message you send is intentional! In some cases, as with the fragrance in Brazil, the type of flower carries significant meaning. Trademarks, logos and product names referencing or incorporating flowers of ill fortune have all performed poorly

overseas. In other cases, the number of flowers is important.

Did you know that Russians generally give flowers in odd numbers because even numbers of flowers are for funerals and sympathy? By contrast, in other countries, an even number of flowers may send a more positive message. In addition to type and number, intercultural color meanings can influence the message communicated with a bloom. "In Muslim and many Pacific Rim countries, the color white is reserved for funerals," writes former chief Whitehouse florist Nancy Clarke, an expert on international floral protocol.

"In many of the Central and South American countries, the same is true of the color yellow." When United Airlines took over Pan Am's Pacific routes and initiated a new first-class service out of Hong Kong, the company gave white carnations to personnel and passengers. Unfortunately, in that part of the world, white flowers symbolize death and misfortune certainly not the ideas United wished to emphasize on any of its flights. The airline quickly switched to red carnations, which carry much more positive connota-

tions in Hong Kong and the surrounding region. However, sometimes the correct course of reaction is not terribly obvious. Such was the case when U.K. representatives wore poppies on a visit to China in November 2010.

In the United Kingdom, poppies are traditionally worn each November in remembrance of those who have died serving their country. The symbol comes from the poppies that grow in Flanders Fields where many Englishmen died in World War I. When U.K. Prime Minister David Cameron and his aides visited China, Chinese officials requested they remove the red flowers from their lapels because the poppy reminds the Chinese of the Opium Wars fought between the two countries in the 1800s. Considering the strong emotion on each side in that sensitive circumstance, it would be difficult to come up with a resolution to satisfy both parties. Before a company includes flowers on its international logo, website, advertising, product or packaging, a precautionary step would be to obtain an evaluation from international customers.

Source: Desert News 04/02/2011

2011 Valentine's Day flower Sales

The sales' figures during the past years Valentine's periods vary from one year to the and It is always difficult to make the appropriate comparison between various years, because the actual Valentine's Day takes place on a different weekday every year. Last year (2010) it was on a Sunday of which every trader and florist says it is a bad day for the cut flower sales. Traditionally, the two major important and biggest (quantity wise) cut flower groups are the roses and the tulips; and then in particular the red varieties. The survey of total all cut flowers shows that Valentine's sales results can be characterized as having been good and satisfactory, but not very special. Neither it has been bad. A total average price for all flowers together of 27 € cents per stem can be called medium.

Bestsellers were: anthurium, aster, chrysanthemum, gypsophila, liatris, lilies longiflorum, limonium, veronica and the red colored roses like: Grand Prix, Red Naomi and Passion.

The rose surveys show a slightly different picture. Tea hybrid roses' quantities were the biggest of the past eight years, while prices were slightly higher than last year, but compared to most of the previous years they were considerably lower. Remarkable is the change in supply. Compared to 2003 the quantities have doubled, while the prices have become much lower. Most probably the major reason can be found in the fact that the import share has increased strongly to some 60-65%, while it was less than 30% in 2003. Import roses are considerably cheaper in average than the Dutch roses; this explains the lower total average price. Of course, the other reason is the strong increased supply during the past years.

Small roses (small and medium types together) are considerably cheaper nowadays when compared to some 5-10 years ago; also because of the percentage of import roses (some 98%). Compared to 2003 the supplied quantities of this group decreased constantly. Spray rose prices (not mentioned in the survey) were lower in 2011. The tulips' supply in 2011 (not mentioned in the survey) was higher, while the average price of 15 € cents per stem was exactly the same like in the past years. All in all the final 2011 Valentine's prices were slightly higher than in 2010. With the increased quantities it brought some better final results for the growers and the auctions.

Source: VBN Stat

Market Requirements

For the development of regular export flows, good agricultural practices, post-harvest management, the development of the products concept (the product and all the services included in its commercialization), the organization of the supply chain and the development of trade contacts in target markets would be

top priorities for the commercialization in international markets. Production and exports should be developed according to international market standards in order to match the commercialization systems of the most important countries and face competition in evolved markets.

Indispensable market requirements are:

- Certification and traceability that can't be set aside to trade in evolved markets and become a market barrier if not attended by suppliers.
- Consistency, the possibility to supply a market continuously, is also necessary: production volumes must be consistent, uniform in terms of quality and deliverable according to precise schedules.
- An efficient organization of the supply capacities is also must: no breaks can occur along the supply chain from the farm

gate to the export point in order to guarantee importers about products arrival and freshness.

•The product concept (the product and all service related to its commercialization) is also essential as the product preparation must refer not only to the product itself but also to product presentation, packaging, export services and product promotion for providing attractive products to the market.

Farmers grouping, contract farming and producers' organization would espe-

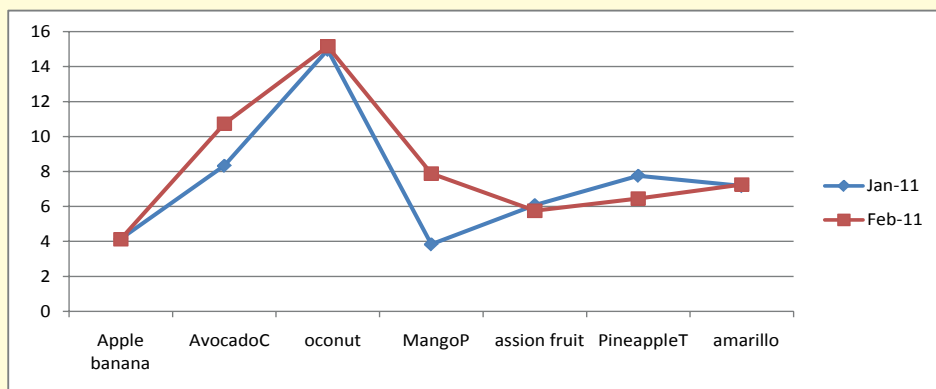
cially contribute to strengthen the trade capacities and provide a bigger production base. Coordination alongside the horticultural sector and with related industries would increase efficiency, generate synergies and economies of scale and allow exploring market opportunities in a longtermerspective set aside to trade in evolved markets and become a market barrier if not attended by suppliers.

Analysis January 2011

Fruits

Price trend for fruits in Europe

	Jan-11	Feb-11
Apple banana	4.142	4.125
Avocado	8.32	10.725
Coconut	14.947	15.15
Mango	3.83	7.875
Passion fruit	6.07	5.75
Pineapple	7.75	6.45
Tamarillo	7.16	7.25



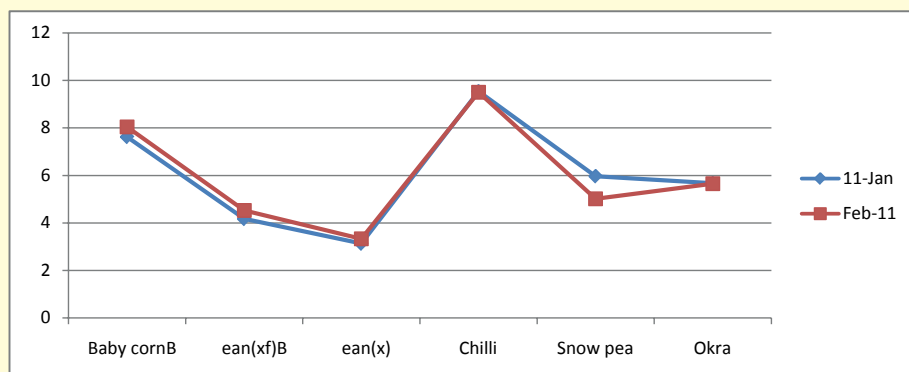
The weight of export of product is packaging of 9*330 for apple banana, 4kg ctn by sea for avocado, 4kg ctn by sea for mango, 2kg ctn passion fruit, 2, 5 kg ctn.

Avocado prices went up by 2.405 Euro i.e. 28.906%, mango prices also saw a high increase by 4.045 Euro i.e. 105.025%.

Vegetables

Price trend for vegetables in Euro

	11-Jan	Feb-11
Baby corn	7.62	8.04
Bean(xf)	4.17	4.52
Bean(x)	3.13	3.3285
Chilli	9.535	9.495
Snow pea	5.965	5.01
Okra	5.67	5.65



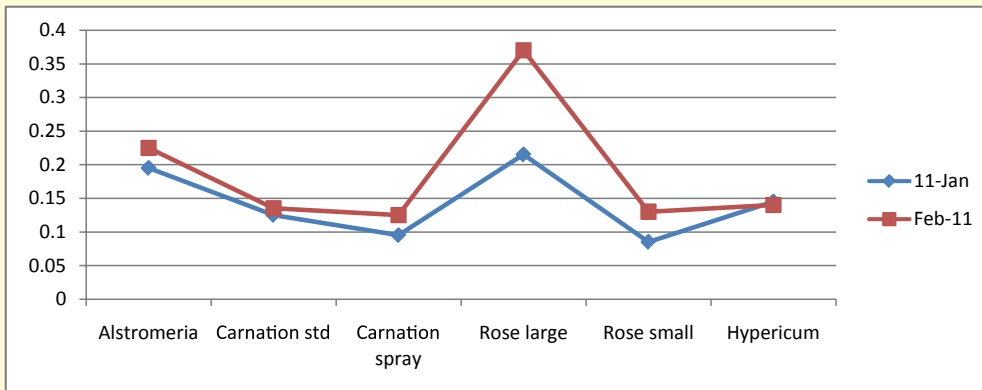
The weight for export are packaging of 12*125 for baby corn, 2.0-2.5kg ctn with prepacks of 12* 250 for beans(xf) and beans(f), for chili packaging is 12*100, snow pea 2kg ctn and okra is 1.8-2kg ctn.

Baby corn saw an increase of prices by 0.42Euro i.e. 5.51186% while chillies saw a decrease by 0.04Euro i.e. -0.41%.

Flowers

Price trend for flowers in Euro

	11-Jan	Feb-11
Alstromeria	0.195	0.225
Carnation std	0.125	0.135
Carnation spray	0.095	0.125
Rose large	0.215	0.37
Rose small	0.085	0.13
Hypericum	0.145	0.14



The price of flowers is in stems. Flower prices were stable.

European Market Trends February 2011

Avocado:



demand is low; supply is stabilized at level above the average. Prices and sales have been stable. The first hass from Kenya are on the market in limited volumes. The market for green varieties improved as the Israeli season continued to decline; the first volumes of Peruvian fuerte are on the market but volumes will become consistent only after mid March.

Mango: volumes of kent and keith are large and price range may reach 2 Euro/ctn. Prices tended to lower at the beginning of week 9 and scarcely reach

4 Euro /ctn. Quotations for atkins are firmer as deliveries will be small until the harvest in the Brazilian North East region.

Pineapples: prices are stable at 8-9 Euro/ctn with prices for top brands well above the prices for standard brands. Difficult market for baby pines in some



countries.

Limes: supply is small; prices decreased but continue relatively high particularly for the Mexican origin fruit. Demand is low.

Lychees: end of season, small quantities on the market and high prices because of lack of volumes and of big sized fruits.

Melons: prices above average for honeydew melons and watermelons. Given the correspondence with the Fruit-Logistica Fair the month has been par-

ticularly busy for the sector operators. The trade has been just regular, favored by cold and sunny weather in Central and Western Europe but slowed by the winter holidays week. Frequently, it has been necessary to decrease prices for some products in order to find customers.



HORTICULTURAL CROPS DEVELOPMENT AUTHORITY

P.O. Box 42601-00100, Nairobi, Kenya

Tel: +254 (20) 2088469, 2131560. Fax: +254 (20) 3532898.

Email: md@hcda.or.ke Website: www.hcda.or.ke