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Inside This Issue

Vision & Mission

A globally competitive horticulture sector in Kenya.

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.

Editorial Board

Fruit Logistica, record attendance at the top fresh produce industry event in Berlin

With a comprehensive market overview, the presence of all key industry decision-makers and a record number of exhibitors and visitors, Fruit Logistica 2010 underscored its role as the world's leading trade fair for the fresh produce industry. From 3-5 February, a total of 53,000 trade visitors from 130 countries attended the most important trade event for the international fresh produce sector.

This represented an increase of 6% on the previous year (2009: 50,000 from 125 countries). Key criteria determining the quality of the three-day trade fair were its international character, the attendance of top decision-makers, and the high level decision-making authority of the industry representatives at the event. Exhibitors and trade visitors alike commended the excellent contacts to wholesalers and retailers, fruit and vegetable growers, and to importers and exporters. Setting a new attendance record, 2,302 exhibitors from 71 countries (2009: 2,283/78) presented the full spectrum of products and logistics services required to ensure a year-round supply of top-quality fresh fruit and vegetables to consumers all over the world. With 89% of exhibitors and 80% of visitors coming from outside Germany, Fruit Logistica 2010 was more international than ever before.

Key objectives for exhibitors at Fruit Logistica 2010 included company presentation/image building, new business development, fostering customer relations and providing information to industry professionals. Nearly all exhibitors reported that they were highly satisfied with their achievement of these objectives. About two thirds of all exhibitors presented an innovation or enhancement of existing products. 88% of exhibitors said that their participation at the trade fair had a positive impact on business. Although business contracts were not among the top priorities, nearly 50% of all exhibitors managed to conclude new orders. Over 86% of exhibitors said they anticipated good post exhibition business.

Around 60% of exhibitors rated the current economic situation in their industry as favourable, and 88% reported a positive overall impression of this year's Fruit Logistica. 92% said they would recommend the trade fair to their business associates and colleagues.

Top-level decision-makers from all over the world - that describes in a nutshell the industry professionals attending Fruit Logistica. 80 % of trade visitors were from countries outside Germany, with the vast majority coming from the EU (65%). The most frequently cited countries of origin were Spain, the Netherlands and Italy. 9% were from European countries outside the EU. 26% of foreign visitors came from America, Asia, and Oceania. Most of the trade visitors to FRUIT LOGISTICA were there to establish contacts or meet new suppliers, find out about new products, and monitor the market and the competition. They were primarily interested in fresh produce as well as packaging and packing machines. The majority of trade visitors identified themselves as fruit and vegetable growers, representatives from import/ export companies or wholesale and retail buyers. The level of decision-making authority.

European papaya market

Although it is widely distributed in the tropics, papaya is little exported to the European Union. Annual supply totals 35 000 to 38 000 tons. Four supply Countries ship nearly 90% of this: Brazil, Ecuador, Cote d'lvoire and Ghana. The first of these accounts for 66% of EU supply.

The recent development of the European market for papaya resulted in the rapid emergence of Ecuador as a supplier from 2003 onwards. It became the second largest supplier of the European market in 2004, a position that it has kept with a volume soon establishing at 4.000 to 5000 tons per year. The calendar of availability of papaya in Europe is very regular, with monthly arrival of 2.000 to 3.000 tons throughout the year, with no period of disturbance. Papaya is an extremely delicate fruit and was long imported by air only. Changes in product logistics were the only way of increasing European imports. The planting of the variety 'Golden' in Brazil, the main supplier, doubtless made it possible to ship papaya by sea in recent years and hence to sell it in supermarket outlets. This variety is more robust during transport and forms the basis of the steady increase in import volumes.

The change in variety accompanied the threefold increase in Europe imports over a period of about ten years. The other exporting countries have replanted with 'Golden', with the exception of Ecuador, which is continuing its exports with a variety bred from 'Solo' and 'Sunrise'. The large fruit variety 'Formosa' has also developed in recent years in response to demand from local authorities and caterers as these prefer this variety used in fruit salads and exotic dishes. Its development is also the result of its success on ethnic markets as its fragrance is more marked than that of 'Golden'. 'Formosa' is shipped mainly by air for reasons of its fragility.
The import flow has been steady for about five years. European consumption has changed little in recent years, with the positions of the major importing countries remaining much the same. The Netherlands are well in the lead, followed by the United Kingdom, Spain, Portugal and France. When intra-European movements are taken into account to better identify consumer countries, Germany joins the first above.

Without any dramatic increase, European market imports are increasing steadily. Development of the papaya market is probably coming up against the fragility of the fruit and its special taste features. It is susceptible to postharvest fungal attacks that shorten its commercial life. The characteristic flavor of papaya also slows consumption.

However, its use in different exotic cuisines contributes to wider sales. These sometimes contradictory characteristics account for the fairly slow progress of European imports.

Source: Fruitrop

Okra

Okra originated in tropical Africa. Its name is derived from 'okuru' in Igbo, a Nigerian language. Already grown in ancient Egypt, the plant was imported to Europe by the Spanish Moors in the twelfth century and then introduced in America during the triangular trade period.

Okra is a herbaceous plant with an erect stem that can grow to 2.5 metres but, grown commercially, does not exceed 1.5 m. This typical annual hibiscus has leaves with 5 to 7 lobes that grow on a petiole some 20 cm long. The solitary flowers grow in the leaf raxils and are generally yellow with a violet centre. The fruit is an erect capsule 5 to 25 cm long. It is conical and may be angular, with a downy skin. It is usually green and sometimes red depending on the variety.

The inside of the pod is divided into a varying number of compartments containing small whitish seeds. Okra lignifies as it ripens. The fruit contains a mucilaginous substance used to thicken sauces and exotic dishes. Okra is eaten raw or cooked. It is used in numerous African dishes such as 'to' and various stews. It is also used in Creole, Japanese and Louisiana cooking. It can be dried or stored in brine. Oil extracted from the seeds is used in the food and cosmetics industries. Okra is widely grown in tropical and Mediterranean zones. According to the FAO, India is the world's leading producer with more than 3.5 million tonnes in 2007 that is to say nearly 60% of total production.

It is followed by the sub-Saharan countries with 30% of production. Okra is eaten mainly in producer countries. However, it is traded internationally in small quantities. It is a typical ethnic product insofar as in Europe it is only eaten by populations for which it is traditionally part of the diet. Purchased in particular by Africans, okra is also appreciated by Asians and people from the Maghreb. There is no true correlation between the main producer countries and suppliers of the European market. Okra is available all the year round and supplies are shipped from several sources whose production calendars complement each other. The main exporting countries are Nicaragua, shipping from November to July, Cyprus, shipping from June-July to October-November, the United States in October-November and Mexico from October to June.

A few small batches arrive from time to time from Mali, Senegal and other African sources. In contrast with the producer countries, 12 Market News Service Tropical and Off-Season Fresh Fruits and Vegetables where comparatively large okra is sought, the European market is focused more on small produce not more than 6 to 8 cm long. They must be fresh with firm, turgescent pods.

Whether ribbed or conical, the angles must be marked. Several varieties are found, with the best-known being 'Clemson Spineless', whose pods are a strong green colour with a pentagonal cross-section and a tapered extremity. 'Emerald'-dark green and cylindrical can also be mentioned. It is noted that numerous hybrids have been added to the range of varieties in the last few years. Demand is stable as it depends to a considerable degree on a well-defined clientele. Thus, the main places in Europe where okra is eaten are still towns and cities with populations who include it in their usual diet.

No precise statistics are available but it is estimated that the French market imports 15 to 20 tonnes per week. Okra is packed in different ways according to the source. Produce from America is generally packed in wooden or plastic crates that usually contain about 7 kg. The pods are packed loose. A few shippers align the pods to improve presentation. Mediterranean and African shippers pack okra in flap closure or telescopic cardboard boxes containing 5 to 5.5 kg of produce.

There is no real sizing of pods, except for European operators' requirement of 6 to 8 cm in length. Only the wishes of shippers give the packed produce more or less homogeneity. Okra is a a good source of potassium and magnesium. It contains folic and vitamins A, B6 and C. The recommended storage temperature is 6º. There is no standard for okra.

Market News Service

Tropical and Off-Season Fresh Fruits and Vegetables among trade visitors remained high, with 74% of them holding management positions in their companies as directors, executive officers or department heads, and 75% being involved in purchasing or procurement decisions.

Nearly all trade visitors gave an extremely positive assessment of their business results at the trade fair (over 97%). 82% managed to establish new business contacts, and 77% were anticipating follow-up negotiations and business transactions as a result of the contacts made at the trade fair.

The range of products and services presented at Fruit Logistica 2010 was rated satisfactory to excellent by 95% of trade visitors, and 97% said they would recommend Fruit Logistica 2010 to their colleagues or business associates.

Source: messe-berlin.de

The January 2010 cut-flowers auction figures were published as follows. The January 2010 turnover has decreased by 13.2% when compared to the same month of last year, which was already a very moderate cut flowers sales month. The total supplied quantities in January 2010 have decreased by 3.8%, which resulted in a total average price for all cut-flowers types of 17.5 Eurocents per stem, which was also lower than last year, when it ended up with 19.4 cents per stem.

Nearly all products were considerably cheaper this year, except for lilies, gerberas, single headed chrysanthemums, cymbidium orchids and freesias. Throughout the first week of February (week number 5), the entire cut-flowers market was improving when compared to all the weeks so far this year (numbers 1–4). However, when compared to last year, prices in 2010 during the comparable pre-Valentine's week were lower, while prices during Valentine's 2009 were not very good, to begin with. Anyway, worse than during many previous years, as can be learned from the special Valentine's statistics over the past fifteen years, further down in the report.

Throughout the second week of the month - the actual Valentine's week - all improved considerably. Prices went up, especially for any product in red colours, but mostly for red coloured tea-roses and – slightly less - also for red small and sweetheart roses.

The situation was relatively better for gerberas and lilies, when compared to many other products, while prices stayed behind for chrysanthemums and tulips. At the end of the first two weeks of the month - the Valentine's Day weeks, it could be concluded that prices were not higher than last year, when prices were already lower than traditionally. Especially top prices were much lower this year, by some 15–20%, according the auction's spokesman. Also throughout the post- Valentine's week the market and the prices were not very good, mainly due to lower demand from buyers. Buyers were reporting that their clients ordered much lower quantities, due to the fact that most of them were not totally sold out with Valentine's stocks. They were trying to sell the older flowers first, before buying new ones; in principle not good for the general quality level, but at the same time proving that buyers won't be forced to buy when there is no real need.

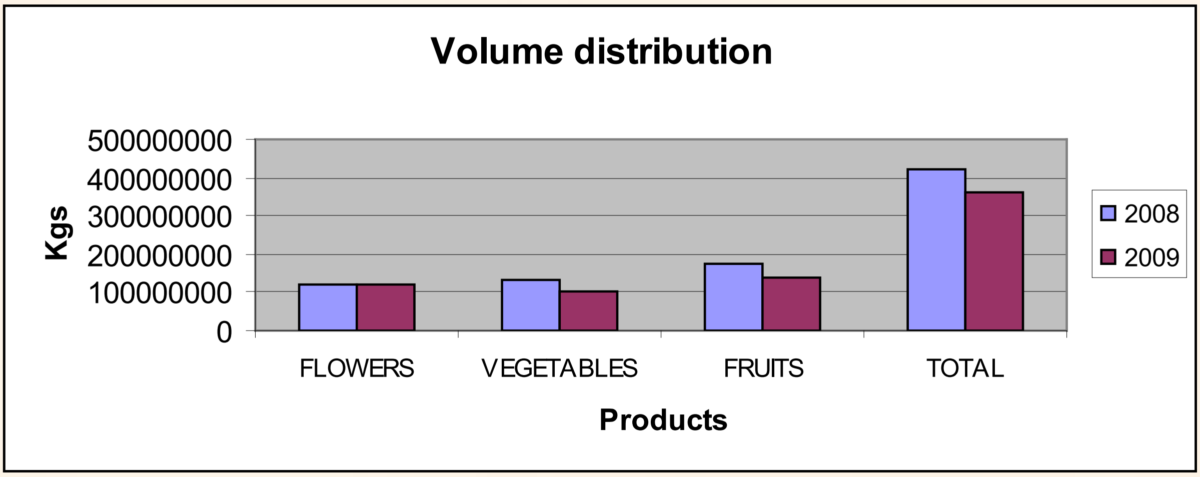
Gradually, the market and the prices improved considerably throughout the last week of the month. Those were the first signs of the demand for the International Woman's Day (the 8th of March).

ANALYSIS 2008-2009

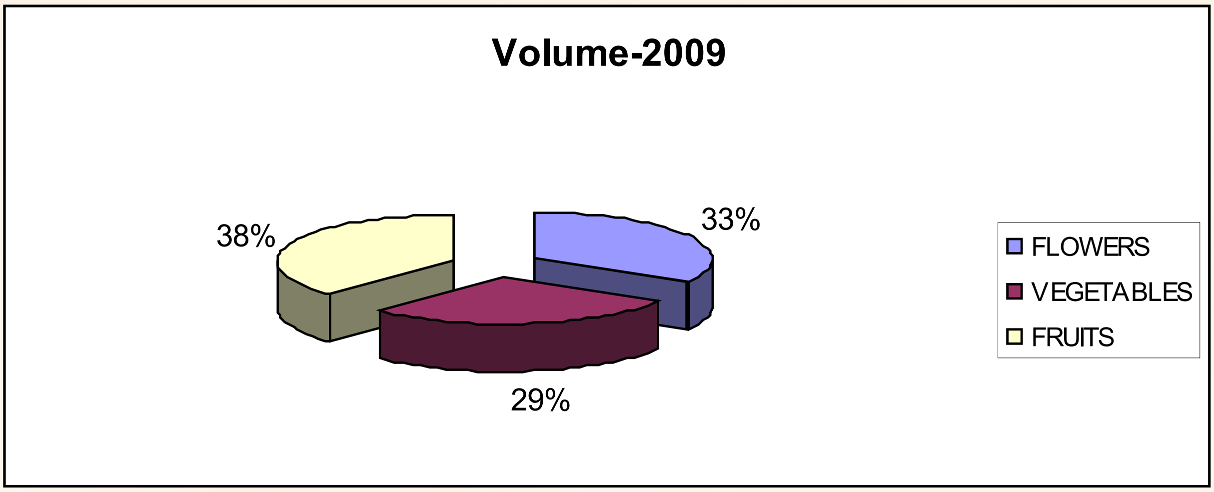
Calendar Year Export Statistics						
Commodity	2008			2009		
	Quantity	Value		Quantity	Value	
	Kgs	Kshs.	US$	Kgs	Kshs.	US$
Cuttings, bulbs and tubers	4,543,036	3,610,890,600	50,527,239	6,177,729	4,395,074,452	54,970,203
Cut flowers	113,569,136	30,691,378,493	429,464,861	114,123,361	32,610,071,609	407,861,639
Fresh foliage	514,472	6,489,079	90,802	93,878	81,123,163	1,014,626
Total Flowers	**118,626,644**	**34,308,758,172**	**480,082,902**	**120,394,968**	**37,086,269,224**	**463,846,468**
Fresh Vegetables	78,157,022	17,948,404,024	251,152,253	73,872,358	17,168,849,884	214,734,740
Processed Vegetables	24,056,365	4,489,709,960	62,824,570	14,442,302	1,981,998,733	24,789,312
Dried Vegetables	17,090,863	931,729,309	13,037,700	4,169,053	240,428,746	3,007,097
Other Vegetable Products*	6,290,137	5,602,583,261	78,397,021	6,652,819	5,534,751,076	69,224,400
Spices**	4,182,433	607,225,914	8,496,920	4,974,646	724,099,742	9,056,481
Total Veges	**129,776,820**	**29,579,652,468**	**413,908,464**	**104,111,178**	**25,650,128,181**	**320,812,030**
Fresh Fruits	24,053,946	1,790,362,015	25,052,559	35,266,454	2,380,727,699	29,776,307
Nuts	29,463,369	1,169,976,847	16,371,501	27,410,997	1,278,347,491	15,988,585
Processed Fruits	121,208,724	6,889,044,929	96,398,496	73,290,517	5,202,521,497	65,069,129
Total-Fruits	**174,726,039**	**9,849,383,791**	**137,822,556**	**135,967,968**	**8,861,596,687**	**110,834,021**

Volume

	2008	2009
FLOWERS	118,626,644	120,394,968
VEGETABLES	129,776,820	104,111,178
FRUITS	174,726,039	135,967,968
TOTAL	423,129,503	360,474,114

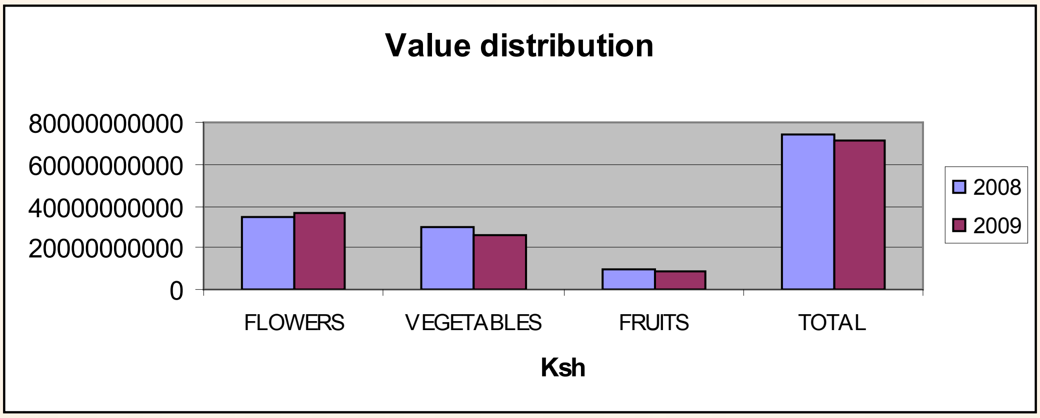


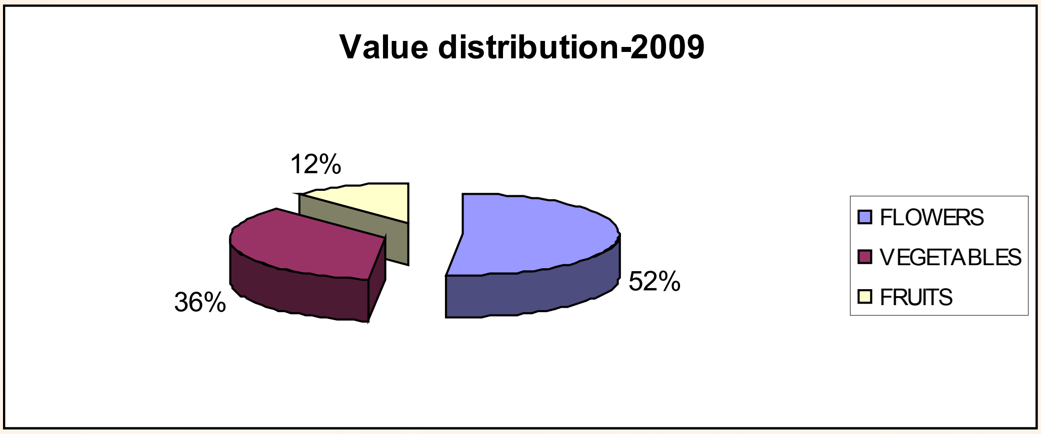
The volume exported in 2009 decreased by -14.807% i.e. 62,655,389kgs from the volume exported in 2008.The total volume exported for flowers were 33% of the total volume of horticultural produce exported ,the biggest export came from fruits at 38% of the total volume.



Value

	2008	2009
FLOWERS	34,308,758,172	37,086,269,224
VEGETABLES	29,579,652,468	25,650,128,181
FRUITS	9,849,383,791	8,861,596,687
TOTAL	73,737,794,431	71,597,994,092





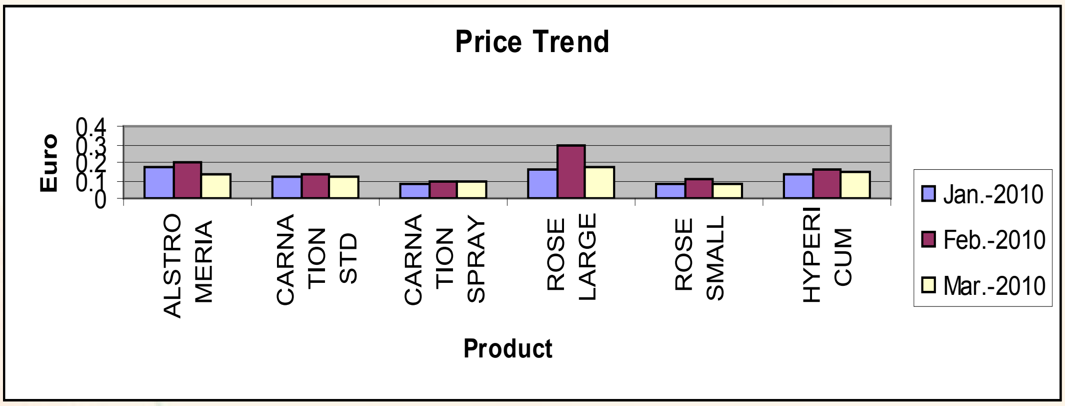
The total value for 2009 decreased by -2.90% i.e. Ksh2,139,800,339 from the total value exported in 2008.The larger share of foreign exchange from the export of 2009 came from flowers which contributed 52% of the total value gotten from horticultural produce.

Analysis March 2010

AVERAGE PRICES FOR THE EUROPEAN EXPORT MARKET

Flowers

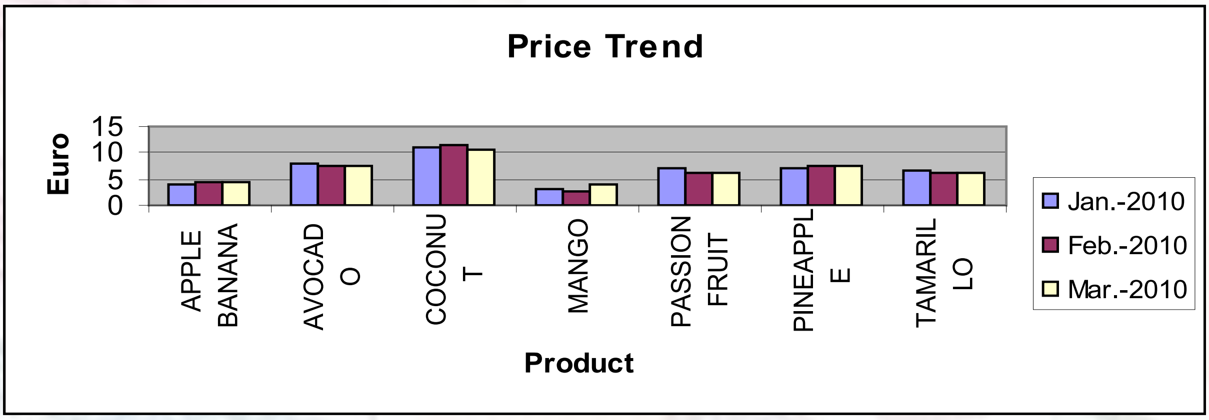
	Jan.-2010	Feb.-2010	Mar.-2010
ALSTROMERIA	0.175	0.205	0.135
CARNATION STD	0.125	0.1375	0.125
CARNATION SPRAY	0.075	0.095	0.095
ROSE LARGE	0.155	0.295	0.17
ROSE SMALL	0.075	0.105	0.075
HYPERICUM	0.135	0.1625	0.14



The prices of flowers were stable in the period of January to March 2010.Carnation std saw an price decrease of 0.0125 Euro i.e. 9.09% while rose large prices went down by 0.125Euro i.e. 42.37%.

Fruits

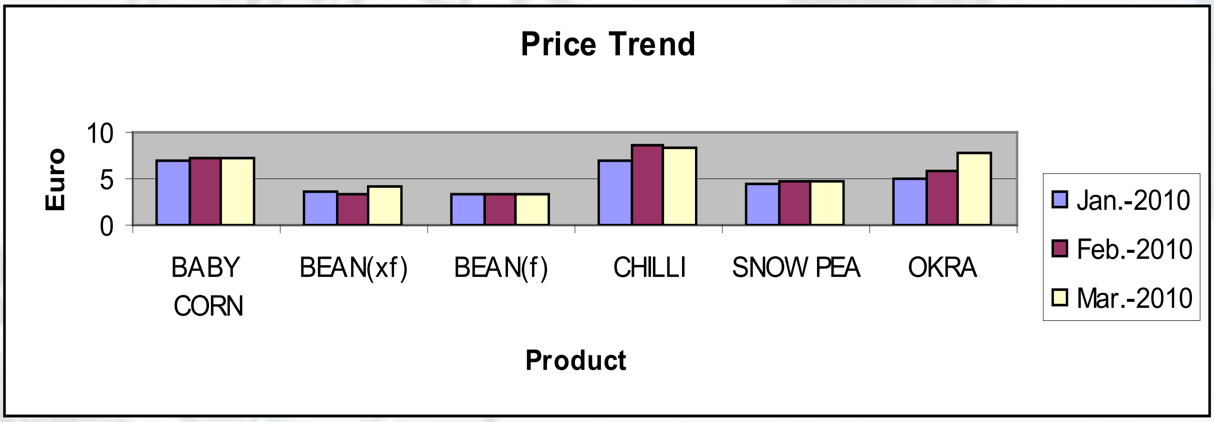
	Jan.-2010	Feb.-2010	Mar.-2010
APPLE BANANA	3.9	4.24	4.2575
AVOCADO	7.95	7.6	7.525
COCONUT	11.0525	11.5	10.625
MANGO	3.15	2.79	3.8425
PASSION FRUIT	7.045	6	5.9825
PINEAPPLE	7.11	7.34	7.41
TAMARILLO	6.41	6.2	6.0325



Fruits prices had slight fluctuations in the period of January to March 2010.Mango prices saw an increase of 1.0525 Euro i.e. 9.152%.

Vegetables

	Jan.-2010	Feb.-2010	Mar.-2010
BABY CORN	7.025	7.335	7.2925
BEAN(xf)	3.4825	3.445	4.24
BEAN(f)	3.47	3.26	3.3825
CHILLI	6.9325	8.5	8.2675
SNOW PEA	4.4825	4.725	4.64
OKRA	4.9675	5.7	7.8575



Okra prices rose rose by 2.157 Euro i.e. 37.85%.Bean (xf) 0.795Euro i.e. 23.076%.

European Markets - February

The month has been characterized by some good sales in week 8 but the storms that affected Central and Northern Europe at the end of week 8 have certainly had a negative effect on distribution and sales. Markets for fresh fruits and vegetables have therefore been sluggish also in Februarv.

Avocado – Prices remained low during the first weeks of the month as fruits encountered a very low demand. Hass supply remained heavy and green supply continued to develop particularly from Peru. Only the Israeli green varieties managed to obtain more interesting price levels.

Mango – Volumes on the market are big, demand is low. Prices are stable, slightly higher in comparison to the last reported information, with price range reaching 0.50 euro cents per kg depending on quality and sizes. The market might nevertheless enter the traditional supply gap in March with the end of season from Peru/ Ecuador, before the beginning of sea freighted arrivals from West Africa. A production shortfall is forecasted for the Mexican season as rainy weather conditions affected the north of the country.

Pineapples – Prices remained stable at the beginning of the month and decreased in week 7 due to quality problems; with fresh arrivals in week 8 prices returned to the average values. Other occurrences registered this month include lower prices for grapes, coconuts and dates, and slightly higher prices for melons (excluding watermelons) and blackberries. *mns@intracen.org*