

# OVERVIEW GLOBAL STRAWBERRY MARKET

Strawberries remain the undisputed summer fruit. Despite all efforts to ensure a year-round supply, it appears that, in many countries, the peak in demand still takes place in the summer months. The spring weather of the past week in northern Europe and the high temperatures recorded in Huelva have been good for the sector. In France, Belgium and the Netherlands, the first domestic strawberries are hitting the market. In the US, growers in California are taking advantage of the good weather. The production is increasing and the market conditions are favourable.

## Early start French season

The first harvest from the greenhouses in the Dordogne has hit the market. A grower reports that he has already harvested 3 tonnes since the beginning of the month. The campaign started a few weeks earlier than usual. There is a good demand for these early strawberries, which can be supplied at the same time as those from Lot-et-Garonne and Brittany. For ten years, the Dordogne has been in second place, behind Lot-et-Garonne, in the ranking of largest strawberry production departments. According to estimates, this season's harvest will amount to 45,000 tonnes, which is comparable to last year's. It will still be some time before the open ground production season kicks off. This is expected to happen early next month.

Traditionally, the strawberry season starts in late April, but this year it has begun two months earlier. The warm weather contributed positively to the growth of strawberries, but the cultivation methods and the variety are also decisive factors.

## Summer temperatures boost production in Spain

This week, the mercury rose to 28 degrees Celsius in parts of Huelva. This unprecedented high temperature has given a boost to the production process. As a result, there was more supply this week, which directly translated into prices falling by 10 to 15 percent. However,

the temperature is now dropping and rain is expected. Next week, the production volume is expected to be similar to that of two weeks ago. March is an important month for Spanish growers. In this month, producers can take advantage of a significant market share in Europe. Italy and France are not yet on the market. According to the latest figures, the acreage devoted to strawberries in Huelva amounts to 5,400 hectares. This acreage is still under pressure. Strawberries are currently losing ground to blueberries and raspberries. This trend has been observed since 2014 and was motivated by a number of bad seasons in a row. The reason for this lay in overproduction and thus low prices.

### **Italy fears overlapping campaigns**

According to statistics, Italian families spent an average of 14.40 Euro last year to buy 4.14 kilos of strawberries. The acreage has increased by 3% this year compared to the previous one and amounted to 3,640 hectares. There are 144 hectares in the north-west (Piedmont), 551 hectares in the north-east (Emilia Romagna and Veneto), 2,224 hectares in the south (Basilicata, Campania, Calabria, Sicily) and 488 hectares in the remaining areas. Between 2009 and 2017, Basilicata's share of the production has increased from 14% to 24%.

Depending on the region, popular varieties include the Sabrosa, Melissa, Marisol, Sabrina, Nabila, Fortuna and Camarosa. Some 88% of exports remain within Europe, with Germany, Austria and Switzerland as major markets. Last year, exports grew by 6% compared to the previous season.

The supply is arriving slowly. The harvest in the Metaponto area is gradually moving forward. In Salerno, the harvest has been delayed by temperature drops towards the end of the week, which have been causing the fruit to ripen slower. This delay in the supply and high demand are resulting in high prices. The coming month is the most crucial period, as there will be supply from Basilicata and Spain, and the production from the greenhouses in the north of the country will also hit the market. Because of the cold temperatures in January, the season has been delayed and there is a risk of overlapping campaigns.

### **Ukraine prefers own production**

The strawberry season generally starts several weeks earlier than in other Eastern European countries. Traditionally, it kicks off in mid-April, so it is still early to offer any estimates for the upcoming season. A trader reports that strawberries are not imported out of season. Some tests were carried out a few years ago that were deemed unsuccessful, as consumers prefer to wait for the start of the domestic season. Exports, however, are expected to increase in the next campaign. There is apparently strong demand from countries such as Belarus and Poland.

### **Sweden waiting until summer**

In summer, strawberries are very popular, but at this time of year there is hardly any demand for summer fruits. Most of the demand currently comes from caterers and restaurants. A major importer points out that they have a preference for Dutch strawberries in the hospitality industry, because "the fruit is healthier and stronger." Consumers hardly demand any strawberries, mostly because they are not willing to pay the current prices; however, if purchased, consumers often choose Spanish or Italian strawberries.

### **Belgian spring weather boosts demand**

The strawberry market is changing rapidly, with market fluctuations almost on a daily basis. Domestic production is still low and prices are high. The spring weather this week has stimulated demand; moreover, there is a lower supply of other soft fruits, like raspberries and blueberries, which further boosts the demand for strawberries. The market is mostly dominated by Spanish strawberries. Due to the high temperatures recorded in Huelva last week there was a rebound in the supply, but the cooler days that followed reduced it again.

Due to the larger volume early this week, prices were under pressure. On 13 March, the price was 30 to 40 cents higher than a week earlier. There is hardly any competition with domestic strawberries. These strawberries are expensive and attract a different type of customer.

### **Stable market in the Netherlands**

Unlike other soft fruits, which are recording double figure growth rates, the demand for strawberries is stable or rising only slightly. Currently, the bulk of the supply comes from Spain, but the first Dutch and Belgian greenhouse-grown strawberries are also back on the market. While the strawberries from Egypt, Israel, Morocco and Spain were once considered "water bombs", these countries have been gradually replacing those with tastier varieties. The Spanish season started out very slow this year due to the cold weather, although later it got a lot warmer and the volumes increased; however, Spanish strawberries do not compete with the domestic production, as they are in a different price category. In the Netherlands, the greenhouse acreage devoted to strawberry production has increased sharply in recent years, mainly due to the expansion of existing producers. April to June is traditionally the peak period for Dutch strawberries, but since the larger strawberry growers have been increasingly planting varieties that are most productive from May to September, the supply during that peak period has been falling.

### **Every week more strawberries from California**

The rain had a small impact on strawberries, but California's production is now growing every week. The weather is better and that has a positive impact on the supply. Although this is now showing a good development, the volume available is slightly below that of last year. The rain and lower temperatures are the cause of this.

There is also supply from Florida and Mexico, but according to a California-based grower, those strawberries have quality issues as a result of high temperatures. "That has helped us get more Californian strawberries on the shelves," says the producer.

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