

OVERVIEW GLOBAL MANDARIN MARKET

The seasons on the southern hemisphere are past their peak; however, around the Mediterranean Sea, growers are getting ready for the start of the new mandarin campaign. The first Spanish mandarins are already available. Prospects are not positive everywhere. Spain and Israel expect a smaller production. Egypt sees a chance for growth and in Italy things remain stable. An early start is also expected in California. In China, the demand for premium import mandarins is rising. The market is especially good for the ClemenGold and South African growers have known how to take advantage of that. China is the world's largest producer of mandarins worldwide. Of the 28 to 30 million tonnes produced globally per year, 24% is harvested in China. Next in the ranking are Brazil (14%), the US (7%), India (7%) and Mexico (6%).

Northern Cyprus is looking for new markets

An association in northern Cyprus is seeing an increase in the mandarin supply. The market for easy-peelers is growing. The growers have mostly planted Mandora (Ortanique) and W Murcott Mandarins, in addition to other citrus fruits. For the coming season, the Mandora production is expected to reach 30,000 tonnes. Exports go to Turkey, Iran, Iraq, United Arab Emirates, Russia, Ukraine and EU countries. Russia and Turkey are considered to be the most important markets for the near future. Additionally, exporters are looking to explore destinations in the far east, including Malaysia, Hong Kong, Bangladesh and Japan.

Egypt expects greater harvest

The season starts in November. Although several varieties are grown, there are three major varieties for export: Murcott, Clementine and Fremont. Prospects point to a greater mandarin harvest this year. Europe is the main market and there is a particularly high demand from Russia ahead of the New Year. The United Kingdom is also a good export market. An exporter assures not to worry about the competition. According to him, the market is big enough and Russia is a good market for the fruit. The exchange rate may have a negative impact on exports.

Spain expects 30% less mandarins

Although no official estimates have been published yet, growers and traders report that the volume in the entire Region of Valencia (provinces of Castellon, Valencia and Alicante) is expected to drop by 25 to 30%. The main reason for this is the heat waves recorded in spring and summer. All varieties will be affected by this, but especially the mid-summer ones, like the Clemenules, which are the most popular variety.

The extra-early mandarins, namely the Iwasaki, Owari and Okitsu, are already being harvested and marketed. At the moment, the market is already responding to the lower volumes, according to a trader. Prices are higher than in the same period a year earlier. Okitsu's are 17% more expensive than in the first week of September. Owari's are 10% more expensive, and the price for the Iwasaki remains stable.

In recent years, many growers have been switching from Satsuma breeds to other early varieties with more colour, or to alternative products, such as kakis. The supply from the southern hemisphere countries has led to a steady decline in their market share. The main markets for these mandarins are the Scandinavian countries and the United Kingdom.

Italy expects average harvest

In the regions of Calabria, Basilicata and Low Apulia, normal harvests are expected for the clementine. In the first estimates, a drop of between 5% and 7% is reported, but that negative rate is offset by the entry into production of new plantations. These include Clementines and other early and late breeds.

The Italian sector must compete with the Spanish, Turkish, Greek and North African mandarins. In general, sales are better organised and thereby integrated into the European market. The situation is quiet in the markets. In Piana or Sibari, Calabria, some contracts have been signed for the sale of clementines for 0.30 to 0.35 Euro per kilo. Other regions, such as Basilicata and Apulia, are still waiting to see how the harvest will go and there are no negotiations, yet. These will be closed within the next 15 days. A company in Calabria announced that the season will kick off in mid-October. Due to the heat, the calibres are smaller.

The Netherlands: First Spanish Iwasaki Mandarins arrive, Germany still waiting for a while

This and last week, the first Iwasaki mandarins from Spain arrived in the Netherlands. This is a few weeks earlier than normal. There is always caution with the first mandarins, because there is a danger

that these may still be too sour. According to importers, demand in the Netherlands is already quite good. Germany is always on the market a little later, since the colour and taste are even more important there. Within about four weeks, the mandarin season will be followed by the first Clementines.

Worldwide, mandarin plantings have experienced a huge growth, especially in South Africa and, to a lesser extent, in Peru. Importers expect that more than 30% more mandarins will become available in the coming years, which means that the world market will need to be further developed in order to ensure sales.

Belgium: Nadorcott popularity on the rise

The popularity of the Nadorcott is on the rise. In recent years, there has been a constant supply of these mandarins. According to a trader, the Nadorcott is the best easy-peeler. "We obtain nice prices for the fruit and the consumer is also willing to pay a higher price," said a trader. These mandarins cost an average of 2 Euro per kilo. South Africa supplies the Nadorcott for two months. The season will last until the end of September.

The start of the South African season was marked by shortages; a result of the severe drought. "It was a difficult and late start. The second part of the campaign has been normal in terms of supply, but the markets remain pretty good." The market is currently quiet, but traders are getting ready for an early start of the Spanish season.

The Belgian market is very season-oriented. From April to July, the demand for mandarins is limited. At that time, there are many other fruits on the market. A trader says to be concerned about the expansion of the acreage devoted to easy-peelers worldwide. "I do not want to expand and push this market too much. In other months, there are other items in season. In Belgium, I do not think consumers will eat easy-peelers all year round. We need to take the seasons into account."

California expects early start

Californian Mandarins will arrive early this year. A trader explains they will start in mid-October with an early Satsuma variety. The later Satsumas ensure a good supply until late December. "The fruit is looking good and reaching nice calibres," reports a trader enthusiastically. There is a lot of fruit on the trees, which is resulting in smaller sizes than usual. The hot summer in the Central Valley may result in burning spots appearing on the early mandarins.

Demand for mandarins is on the rise. The Kishu is doing well too. This mandarin looks like a Satsuma, but is much smaller. The Kishu has the size of a golf ball and is easy to peel. A trader reports to be getting good feedback on this variety. Kishus are available until mid-November, after which other varieties like the Daisy take over the market.

Peru sees potential in exports

Last year, mandarin exports grew by 20% compared to 2015. The country thus appears to be profiting from the rising demand for mandarins worldwide. Mandarins have a lot of potential for the Peruvian sector, as only 28% of the production is exported. The main cultivation areas are Lima (56%), Ica (25%) and Junin (13%). Although the harvests in Peru are spaced out over several months, the peak takes place between April and August. In those months, 85% of the mandarins are harvested. The main varieties are Satsumas and Clementines. Exports go mainly to the US, which accounts for 40% of all shipments. The second biggest destination is the UK, with a 25% share, which shows strong growth rates of about 18%. The Netherlands is in third place with a 12% share in exports and a slight 1% growth.

First Uruguayan mandarins to China

At the end of July, the necessary agreement was signed and the first mandarins from Uruguay could be shipped to China. The Clemenvilla were the first to arrive to Shanghai. Although, according to some, the skin of this variety is too thick, its good taste compensates for that. On the Chinese market, the mandarins generate between 140 and 150 yuan (17-19 Euro) per box.

Swinging moods about South African season

The ClemenGold season started in week 25 and lasted until week 36. "We have had good volumes, but not enough to meet the demand," stated a trader. Especially the Chinese market proved a success. This market is the fastest growing for the brand. It is the second year that ClemenGold is allowed to be shipped to China and there are already many demanding this mandarin specifically, according to a trader. A lot of work is being done to promote the ClemenGold, including advertisements and tastings in supermarkets. There appears to be great potential in the online market. Although the last mandarins have already been harvested and packed, they will be in China in three weeks.

The ClemenGold suffered little from the drought. The plantations are mainly located in northern Mpumalanga and Limpopo. These two areas had a normal season. Morocco and Spain are taking over the market for the ClemenGold from South Africa. There is probably a gap between the South African and Moroccan season, but the aim is to ensure a year round supply.

The total mandarin production in South Africa has grown by 88% over the last ten years. The late mandarins record the best results in this regard, with varieties like the Tango, Nadorcott, Orri, Valley Gold, Leanri and others. The season is as good as over. Of the 12.9 million boxes (15 kilos) packed, 12.2 million had already been shipped at the end of the week.

There were big differences between the seasons in the north and south. In the Gamtoos Valley/Patensie, Eastern Cape, the Satsuma season was "incredibly good." The highest average price ever was reached thanks to the empty markets at the time the season started. The Clementines and Nova also did well, but the market became saturated. New Nova plantations are now becoming productive. Also, exports went for the first time to Indonesia.

In the Western Cape, growers had plenty to say about the Orri, which is mainly demanded in France. In the north, the season was considered "challenging," with many new plantations that have come into production. In some regions, a loss of up to 20% has been reported as a result of the heat and winds. In Senwes, a company reports a "catastrophic" Satsuma campaign. The fruit grew to an unmarketable large calibre and there were internal quality problems. The late varieties, on the other hand, did very well, even though there was some wind damage. Destinations like Russia, the Middle East and South East Asia, where damaged mandarins had a market, are now looking more at the fruit's internal quality. An overlap between the early and late races has put the market under pressure.

Australian mandarins gaining ground in Asia

Over the last few weeks, good quality mandarins have been available. A retailer carried out an online promotion for the Honey Murcott, but the price of these mandarins will not fall shortly. Much of the harvest of this mandarin is intended for the Asian market.

The sector has a strong focus on exports and invests in profitable varieties. There is a strong demand for the mandarins in Asia, not just from China, but also from the Philippines, Thailand and Vietnam.

The season lasts from April to October. The domestic market absorbs about 70,000 tonnes of mandarins. One of the most popular varieties on the market is the Imperial, but in New South Wales

this variety has again had a difficult season because the large supply has been putting the market under pressure.

Chinese imports increase, domestic production stagnates

The Chinese mandarin production was smaller last season due to the bad weather conditions and the impact of citrus greening. This season, the production levels have not yet been restored. The harvest begins in November. At present, mandarins are mainly imported from Australia and Peru, with shipments arriving also from Israel and South Africa. Total mandarin imports are 10% higher each year due to stagnant domestic production and a rising demand for premium breeds. The demand for varieties like the Jaffa Orri and ClemenGold is on the rise.

Pakistan cultivates more Kinnow mandarins

Compared to last year, more Kinnow mandarins are being exported this season. A good harvest is expected this year. Exporters are looking for new markets, but the focus is still on traditional destinations like Iran, Russia and the Gulf States. Indonesia and the Philippines are also attractive markets. In the Philippines, Pakistani exporters are dealing with Chinese competition, but in terms of price, the Pakistani mandarins have the upper hand. In Russia, there is competition from Turkey and Egypt; therefore, the market is not expected to be as good as usual. Normally, 700 to 800 containers are shipped to Europe. Last year, the total did not exceed 200 containers, but exporters hope Ukraine will import more mandarins.

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