

OVERVIEW GLOBAL MANDARIN MARKET

The campaigns have kicked off in the northern hemisphere. Spanish growers look back on a difficult start with the early varieties due to an overlap with the supply from the southern hemisphere. The Spanish sector is expecting a smaller production, just like the growers in Morocco and Italy. In the three countries, the heat has had a big impact on the volumes. Israel does see opportunities for export. The United States also expects to harvest a smaller volume. However, no shortages are reported. Prices in China are rising because of a reduction in the harvest volume due, among other reasons, to the impact of citrus greening.

United States: Mandarins give a push to citrus category

The mandarins from Morocco and Spain are widely available on the market, says a trader. The volumes are comparable to those reached at around this time last year. Prices are low compared to the past few weeks and stand at around 25 to 26 dollars, which is 10 dollars below the price of a few weeks ago. The Spanish Clementines can no longer make the trip to the US because of their ripeness. The production of Nour mandarins in Morocco is smaller this year, so a trader expects the price to rise in January, since there is likely to be a gap in the Californian supply. From February, this importer expects a good supply of the Orri from Israel.

However, imported mandarins don't have the market for themselves, as Californian growers also produce the fruit. A producer says that the estimates have been adjusted downwards, as has been the case with other citrus fruits in the State. The season starts in October with the Satsumas, later followed by the Clementines and Murcotts, which remain available until the end of the season in May. Within the citrus category, mandarins are the most cultivated. The brands Halo and Cuties have grown considerably in recent years.

Australia: Growers hope for more export

It has been a successful citrus year and mandarins are no exception. The export volume up to September grew by 38%, to 64,755 tonnes. That figure will be even higher when the annual balance is drawn up. The largest buyer of Australian citrus is China. The peak of the season falls in the middle months of the year. According to Citrus Australia, growers are switching to mandarins because it is a

lucrative crop. This is partly due to the growth in export markets in Asia. Moreover, work is underway to gain access to the US market. Queensland is the most important growing region in Australia. The Murcott variety has been doing very well in recent years. Recently, there have been changes in the protocols which also affect the cold treatments that the fruit must undergo. The Riverland, in South Australia, has been able to confirm that fruit flies are no longer present in the area and some phytosanitary protocols have been modified. Growers hope that exports to Asia can still grow.

China: Citrus greening pushing prices up

Prices have increased in China, as producers suffer frequent problems caused by citrus greening and unfavourable weather conditions. Meanwhile, with the help of e-commerce and the expansion of the sales channels, local citrus companies are obtaining a growing share of the domestic market. Also, the prices for labour and raw materials, including transport and packaging costs, have increased. Citrus greening has taken a toll on the crops in the south of the country, especially in the provinces of Guangdong and Guangxi. This is partly offset by the production in the central and northern regions, including Hubei, Hunan and Sichuan.

The import of mandarins is growing rapidly. The country imported 21,000 tonnes in the 2015/2016 season; an increase of 10% compared to the previous year. Some of the most popular are the Israeli Jaffa Orri, the Australian Empress mandarin and the South African Clemengold.

Pakistan: A lot of demand for kinnows

According to an exporter of kinnow mandarins, there is a lot of demand for them at the moment. Customers are mainly looking for large sizes, which do well in markets like Russia and Ukraine. The supply is limited, however, because the colouring of the mandarins is still insufficient. The harvest is expected to pick up in about 10 days, and the peak in the season will follow shortly after that.

The Gulf countries are another growing export market. The exporter points to two reasons for that trend. On the one hand, consumers in these countries tend to eat more mandarins when temperatures are high, he argues. On the other hand, a considerable part of the population is of Pakistani or Asian origin.

Morocco expects smaller production

The hot weather in Morocco has caused a sharp drop in the production volume. A citrus exporter estimates a reduction of 15 to 20%, bringing the harvest to 2 million tonnes. The harvests in the eastern region of Oriental and in the area around Marrakesh have been the most affected by the heat. Due to the strict requirements that the country itself sets for export mandarins, there has been less fruit available for export this year. The season runs from October to mid-December. Due to the heat in those months, the quality is disappointing. The most important markets for the clementines are the US, Canada and Russia.

Italy: Fewer clementines

The harvest of the clementines started in October. As a result of the drought recorded last summer, the Brix is two degrees higher; however, the production volume is smaller for the same reason. A grower estimates that around 20% less will be harvested. Another grower estimates the drop in the clementine production at between 30 and 50%.

In late November, a trader reported that the demand was greater than the supply due to the lower production. The higher price reached because of this has put pressure on the demand. On the international market, the country competes, among others, against Spain.

Spain: Difficult start to the season

The Spanish production of mandarins and clementines is 30% lower in the provinces of Castellon and Valencia, which are the most important growing areas. As a result, the prices at origin have risen sharply compared to last year, although traders have had difficulties to implement this price increase, as they have had to deal with the fierce competition from the southern hemisphere at the beginning of the season. This has been especially the case for extra early varieties like the Okitsu and Iwasaki, followed by the Clemenrubi, Oronul, Loretina, Arrufatina or Orogrande. These varieties have a better quality, which attracts demand in Europe.

The Clemenules harvest is currently underway. Most of the losses recorded by the producers have come as a result of the high temperatures and lack of rainfall. Last year, the market conditions for the Clemenules around this time were disastrous due to the heavy rainfall. This year, the season is coming to a close with fewer volumes and is also ending a week or two earlier than usual. The price at origin stands at 0.36 Euro per kilo, which is a good price for the growers.

In Andalusia, where Huelva is the largest growing region, production is stable. The earliest clementines of the season are virtually off the market by now. The quality of early varieties such as the Clemenrubi, Oronules and Orogross has been disappointing according to the branch organization. Moreover, this supply overlapped with the late varieties from the southern hemisphere, mainly from South Africa. As a result, prices fell at the start of the season. However, the biggest concern of the growers in this region is the lack of labourers for the harvest, mostly caused by the growth of the soft fruit sector.

Belgium: Stable market with lower prices

According to a Belgian trader, the taste of the clementines is currently "nice and sweet." The fruit that arrives in Belgium comes from both Morocco and Spain and is only intended for the Belgian market. The trader has no insight into how many tonnes of mandarins arrive in Belgium every week. He does notice, however, that the prices are somewhat lower this year, compared to last year. Although the prices are somewhat lower, he also believes that the market is stable.

The Netherlands: Moderate demand for mandarins despite lower volume

The mandarin market has been very slow so far this season. There are fewer mandarins this year, but there is more than enough to cover the demand. The market now has Clemenules from Spain, which are expected to remain available for no more than 2 or 3 weeks; then the Clemenvillas will arrive and then the Nadorcott. For its part, Morocco is currently supplying Clemenules and the first Nour mandarins will arrive early in January, followed shortly afterwards by the Nadorcott. The prospect of Dutch importers is for the fruit's market conditions to improve in January and for it to become more expensive.

Germany: Mandarins with leaf in demand

German traders are currently satisfied with the demand for mandarins. The clementines with leaf, for example, are very popular during the Christmas period. From January, the demand will gradually drop. The market is mostly dominated by Spanish products, even though the harvest volumes have been somewhat smaller due to the temperatures recorded, which have been lower than usual for this time of the year. The impact of this on prices has been very limited, and both clementines and mandarins are only a little bit more expensive than last year.

The market is also supplied with Italian and Moroccan products. The quality is good across the board. Among the clementines, the Clemenules is the most popular at the moment. For the mandarins, customers usually prefer the Clemenvilla. From mid-January, the availability of Hernandina clementines will also gradually increase.

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