

# Fruit Logistica 2007

## Less glamour but still just as professional

**F**ruit Logistica continued to develop peacefully once again this year. The 'happenings' of the early years have given way to strictly professional interests. It is true that the stands are still just as colourful as fruit and vegetable are a great source of inspiration for designers because of their shapes, colours and diversity. However, the resources deployed remain reasonable and the stands were identical to those of earlier editions.

Russian operators are practically the only people to make changes in style. This was one of the trends of the show. They are present in bananas where they give rise to much conversation, especially because of their investment in production in Ecuador (Bonanza, Sunway, Banana Exchange, Sorrus, etc.) and also because of their fresh fruit and vegetable imports with the Akhmed Fruit Company.

### Fresh-cut produce settling in

In contrast with preceding years in which there was emphasis on pineapple, melon, EurepGap certification and fresh-cut produce, the 2007 edition was not the occasion for the emergence of innovations or such distinct concepts. Fresh-cut produce now seems to have entered a period of trade maturity. Supplies have been rationalised through the use of

varieties suitable for processing and considerable progress in preparation (peeling and slicing) and conservation techniques. The snack market segment is clearly targeted, in particular with the pineapple bars produced by the company Coeur de fruits (a subsidiary of Compagnie Fruitière). The alternative now seems economically and technically serious. Chocolate bars had better look out!

### When certification goes hand in hand with marketing

The themes of social or environmental protection defended in particular by the fair trade and organic movements are quietening down or blending in with the proposals of other exhibitors who have firmly included the concept in their marketing policies. Promoted by alternative channels, these socio-environmental policies are now being taken over by the biggest names in trade. The approach remains to be objectivised in the field and shown to be as reasonable or even more so than those of competitors. Certification is thus going strong. Each distributor (Tesco Natural Choice), each brand (Chiquita) and each country (Sello Social Ecuador) draws up its own specification. European distributors are taking out insurance in case of food crisis and producers do not want to seem to lag behind. The message is muddled, confused and hence inaudible in many cases. The reason is obviously the multiplication of

approaches, with no less than 14 references for the banana sector alone in the Dominican Republic, and also the recurrent absence of value-added for the product and hence for consumers. Producers do not come out any better. They are obliged to be certified but without any improvement to their sales accounts. In a context in which everybody washes whiter than white and where price competition is strong, it is difficult to make a specific feature seen and more difficult still to gain recognition for it, even if it is real and certified. French banana producers are relying on this in any case by airing their socio-environmental commitments in their marketing.

### True innovations?

Examining the innovations proposed by the organisers leads to legitimate doubt as to the capacity of the industry to renew the goods proposed each year. The umpteenth new—but organic—apple called 'Juliet'® is put forward, the umpteenth tomato segmentation is proposed (origin: Reichenau, Germany) and the umpteenth mini-vegetables are promoted to the rank of source of vitamins (Vitamini's FresQ). This varied list also includes potatoes for microwaving, a new cut flower idea with no need for water, a packing unit made entirely from recyclable materials and an unconvincing marketing concept aimed at promoting sales of fruit and vegetables on markets! In short, this year the creative wizards on the fruit and vegetable planet have

**The overall impression was one of success at the closing of Fruit Logistica. The show is becoming more professional and is growing, confirming its global success year after year. Supplies from the Americas starred and not just banana, although this is a subject encountered everywhere.**

concentrated on health (organic products and vitamins), convenience (transport packaging, cooking and storage) and varietal segmentation.

### Not much room for exotics

Pineapple and mango, the two heavyweights of the sector, have become something ordinary. Papaya is not longer the star of the show that it was in 2005. A few rare, modest importers and several traditional origins promoted small exotics from Colombia, Peru, Mali, etc., but no underlying trend was observed. Avocado was clearly the main concern of Chilean exporters. The Comité de la Palta stand stood out, illustrating the need for the origin to gain a better foothold in Europe. Indeed, the US market was practically the sole outlet for Chilean 'Hass' until the end of the 1990s but has now been totally open to Mexican avocado since 1 February. The showing of several tropical fruits from southern Morocco and the Sudan is noted. Only China indicated a new pathway. The mini-citrus 'Kino kuni' launched in Europe by a Swiss importer ('cherry orange' from Green Leaf Trading) is certain to be one of the commercial successes of the coming years. 'Kinnow' from Pakistan is another rising star in the citrus world. The number of exhibitors displaying this mini citrus has rocketed, as have

exports from Pakistan—rising from about 50 000 t at the end of the 1990s to 150 000 t in 2004.

### China is still modest and the Americas very present

China has confirmed its modest presence in recent years. While the world trembles or dreams while watching its development, it has been in the background as far as fruit and vegetables are concerned (see box). The tradition was respected with garlic, ginger, apple and pear. Mini-citrus is about the only produce that highlights China as a provenance.

This comparative modesty contrasts with the strong presence and affluence of the Americas with a whole pavilion devoted to them for the first time. Banana—especially from Ecuador—drew the most interest. This was not because the attractions were greater than elsewhere but the context of liberalisation and strong growth of consumption on the European banana market and on the Russian market too makes them a favoured trading target. Ecuador's banana production potential and the vitality of its export sector represent an opportunity for a large number of new importers. Enthusiasm was less obvious in the United States and especially California where, after the

frost in mid-January, attention must be paid to the domestic market and cool the export side for the moment. Opportunities for exporting late orange and lemon to the USA and countries whose supplies consist mainly of Californian fruits (Japan, Korea, Canada, etc.) were clearly the main subject of conversation on the stands of Mediterranean citrus specialists. The last frost on the West Coast at the end of the 1990s had allowed Spanish operators to export nearly 50 000 t of citrus to the United States at a time when supplies of late oranges were much more limited. This is a line that should not be neglected in these difficult times for the Spanish citrus industry. Operators in Eastern Europe seem to be increasingly present on the market with capacities as both suppliers and importers.

Finally, with regard to consumption, the various national and international measures aimed at increasing fruit and vegetable consumption were very much in the background, with the noteworthy exception of France with its 'Fresh Attitude' concept.

Having succeeded in Europe, the organisers are trying to repeat the exploit in Asia. We hope that they are just as successful there ■

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European Union — Imports of fresh and semi-processed fruits and vegetables from China

	1999	2000	2001	2002	2003	2004	2005
<b>Total fruits</b>	<b>29 197</b>	<b>28 396</b>	<b>38 120</b>	<b>55 626</b>	<b>114 355</b>	<b>149 169</b>	<b>168 448</b>
<b>Semi-processed (dried, frozen, etc.)</b>	<b>18 153</b>	<b>15 547</b>	<b>17 190</b>	<b>23 648</b>	<b>63 940</b>	<b>59 642</b>	<b>80 223</b>
<b>Dry</b>	<b>6 195</b>	<b>5 402</b>	<b>7 278</b>	<b>6 626</b>	<b>6 267</b>	<b>10 654</b>	<b>13 711</b>
<b>Fresh, including</b>	<b>4 849</b>	<b>7 448</b>	<b>13 652</b>	<b>25 352</b>	<b>44 147</b>	<b>78 873</b>	<b>74 515</b>
Apple	1 900	4 015	8 007	14 932	28 722	62 658	50 289
Pear/quince	2 519	3 052	5 182	9 641	13 835	13 229	16 752
Grapefruit	31	15	53	35	227	1 435	5 911
Pineapple	9	35	35	122	343	507	416
Misc. exotics	133	70	73	154	131	338	395
Kiwi	26	76	6	227	77	331	278
Orange	0	0	1	2	114	4	134
Date	89	79	148	110	140	142	108
Raisins	9	14	60	27	143	46	85
Easy peelers	8	8	0	4	19	73	33
<b>Total vegetables</b>	<b>185 722</b>	<b>211 892</b>	<b>259 357</b>	<b>283 751</b>	<b>306 232</b>	<b>303 585</b>	<b>339 911</b>
<b>Semi-processed (dried, frozen, etc.)</b>	<b>157 929</b>	<b>181 064</b>	<b>222 425</b>	<b>240 337</b>	<b>255 165</b>	<b>268 800</b>	<b>301 952</b>
<b>Fresh, including</b>	<b>27 794</b>	<b>30 829</b>	<b>36 933</b>	<b>43 415</b>	<b>51 067</b>	<b>34 785</b>	<b>37 959</b>
Garlic	26 031	28 567	34 114	39 305	47 077	29 361	31 236

Source: EUROSTAT, Chapters 07 and 08

### Strong increase in EU imports of fruit and vegetables from China

However, this should be seen in relative terms as the goods consist above all of semi-processed fruit and vegetables. The quantities of fresh vegetables are still modest, consisting mainly of garlic. The range of imported fresh fruits is still just as small (apple, pear and grapefruit since 2004-2005). The quantities of other fruits are marginal. Nevertheless, the example of apple shows the capacity of Chinese operators to develop their presence in an explosive manner. Imports of 'Fuji' from China increased from less than 10 000 t in 2001 to more than 60 000 t in 2004 before the import certificate system was set up.