

French beans from Senegal

Review of the 2009-10 season

Supply from Senegal was determinant once again in the recent counter-season period (December 2009 to March 2010). Shipments by sea continued to increase. However, weather problems such as drought and heat waves made the beans late and affected their quality. The quality of arriving produce still varied considerably according to brand. It would seem that the work upstream and the procedures used vary considerably from one company to another. The source would benefit from a uniformisation of cultural practices.

The French bean season in Senegal starts later and later. Shipments by sea have started in January for

two years or more whereas they used to begin around 15 December. This shift is enabling a source like Egypt, with its greenhouse production, to affirm itself as an alternative to supplies from Senegal.

However, the situation is still not very clear on the market for very fine beans. After deciding to halt filet bean production for reasons of profitability and yield, several Senegalese operators seem to have changed their minds. Competing supply—mainly from Burkina Faso—has not yet achieved production and quality levels that would allow it to context Senegal's position in a certain segment. Indeed, Senegal currently has an intermediate position in France and ships large volumes, which is not the case of Burkina Faso and Kenya, and the prices are somewhat lower than those of Kenyan beans. However, Burkina Faso is gaining ground but produce quality must become steadier

before it can start to truly bother Senegal.

A dip in supply after several years of increase

Whereas the European market had grown by 15% from 2005 to 2009, it shrank by 6% from 2008 to 2009, dropping from 197 000 tonnes to about 185 000 tonnes.

Shipments from the two leading export countries, Morocco and Kenya, fell by 9 and 6% respectively from 2008 to 2009. In contrast, exports from Egypt and Senegal, the third and fourth largest suppliers of the EU, both increased by 13%. Although Senegalese exports are concentrated on the December to March counter-season only, beans are harvested in Egypt almost all the year round. Greenhouse production is used to handle questions of climate and water supply, but costs are higher than for open field crops.

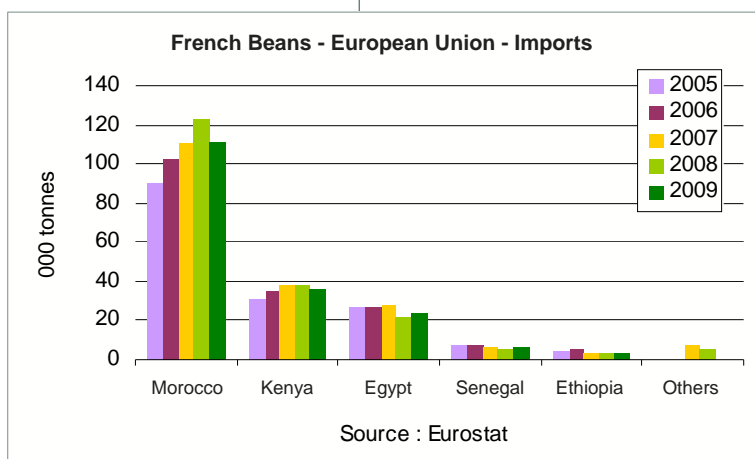
In spite of a recent fall in volume, Morocco is still by far the leading supplier of the

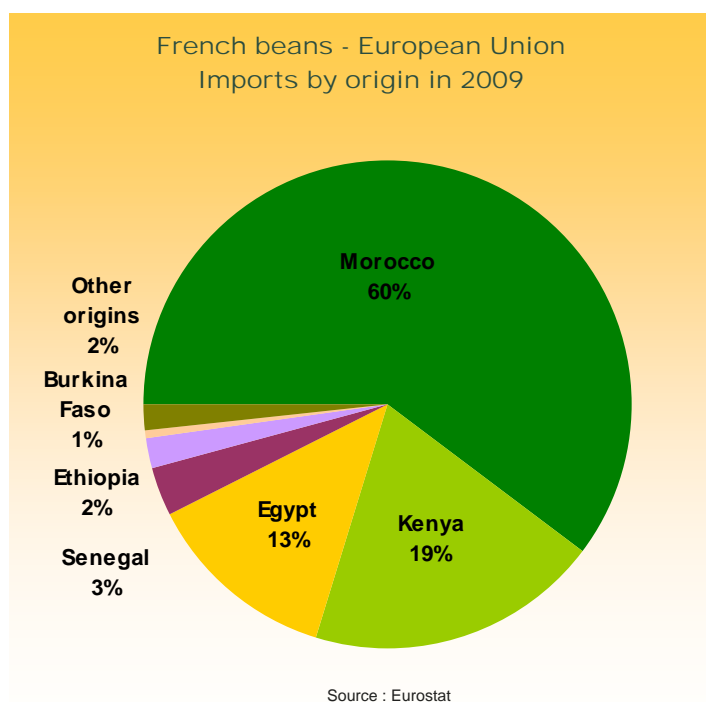


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European market, with a 60% share. Only Egypt has gained ground with an increase from 11 to 13%. The situation is unchanged for Kenya and Senegal, with market shares of 19 and 3% respectively.

Flow trends were monitored throughout the season on three markets: France, Belgium and Italy. France is the only market on which both filet and Bobby beans can be found. The two others are more specialised in Bobby beans.





France

This is the filet bean market. High-quality batches fetch good prices, not leaving much room for poor produce. Four sources supplied the French market regularly with filet beans during the season.

Sales were fairly steady overall. However, prices often fluctuated according to brand.

Batches from Kenya are still the absolute reference on the filet bean market. Average wholesale prices varied from EUR 3.20 to 3.55 per kg with a few higher peaks (from EUR 4.05 to 4.10 per kg). Shipments were smaller (probably a 25% fall) but this source has been the steadiest in terms of quality in spite of a few concerns related to rust. The batches from Kenya sold at much higher prices than those of its main competitors. Prices were a little higher in Weeks 6, 7 and 9 when supply was very small. The average reached EUR 4.00 per kg. Handling logistics was the main problem for Kenyan export. As Air France cancelled one of its cargo services to Kenya, the

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Fresh from KENYA

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Contaminated seed!

Seed supply in counter-season French bean producer countries seems to have been strongly disturbed in recent months. Production in the United States by one of the large seed groups has been affected by the serious disease bacterial wilt of bean, caused by *Pseudomonas syringae* pv *phaseolicola* or *Curtobacterium flaccumfaciens*. Contamination by the bacterium causes wilt and no crop. More serious still, the bacterium is seed-borne and remains present in the soil and can therefore infect new sowings. There is no real treatment for this wilt. Some methods limit

spread but do not eradicate the disease.

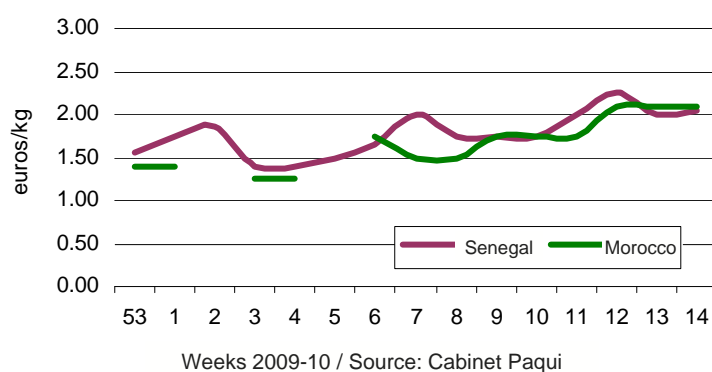


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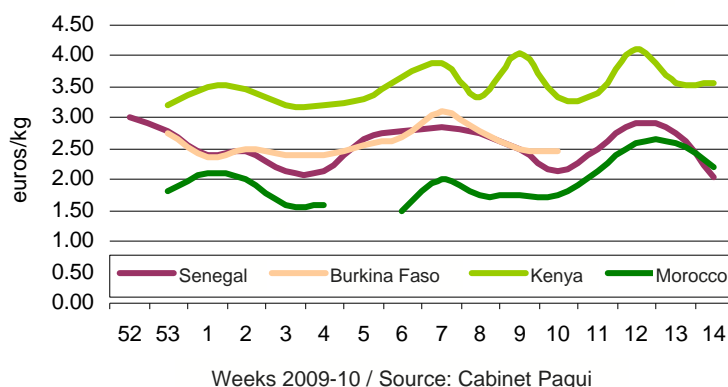
Producer countries quickly prohibited the import of seed of the varieties proposed by the seed company in question. The bacterium was first reported in the USA in July 2009. In order to protect the large bean crops in the country, the Kenyan authorities forbade the import of seed from the United States from September 2009 onwards. Growers had to change their supply sources. Local seed production and the availability of uncontaminated stocks have seemingly allowed producer countries to continue to grow beans with no loss of harvest quantity.

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Bobby Beans - France - Average import price



Very fine filet beans - France - Average import price



produce had to be carried on passenger flights, with consequent uncertainty as regards the reception of the goods as the space awarded to freight depends on the number of passengers on each flight.

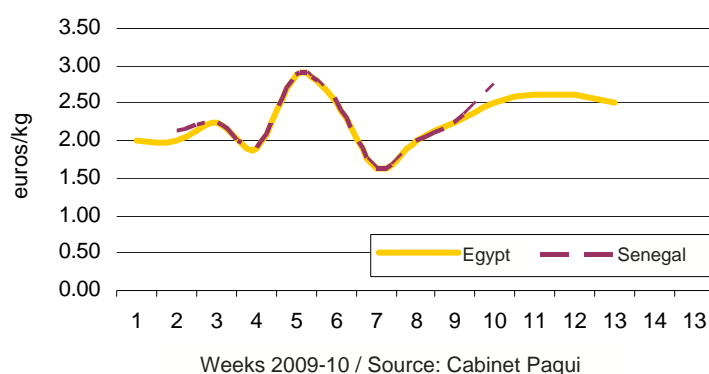
Exports from Burkina Faso are slow to increase as supply volumes are limited and fewer and fewer operators are interested in French beans. Although these operators are generally capable of producing high-quality beans, problems of logistics (and especially breaks in the cold chain) have a negative impact on the general quality of the produce sold. The criticisms are always the same—the produce is fragile, deteriorates quickly and has a short shelf-life. Indeed, the batches received have often suffered from fairly broad temperature variations that shorten selling life, forcing operators to sell off their stocks. The Burkina Faso season was very irregular, with average prices at between EUR 2.35 and 2.70 per kg. Operators did not know what the quality of the produce would be from one week to the next. This prevented batches from Burkina Faso from profiting from good market conditions when supply was smaller and prices higher. The best sales were in Weeks 6 and 7 when market supply was small.

The first batches in containers from Senegal arrived in the first week of 2010. Volumes were not sufficient for shipments by sea at the end

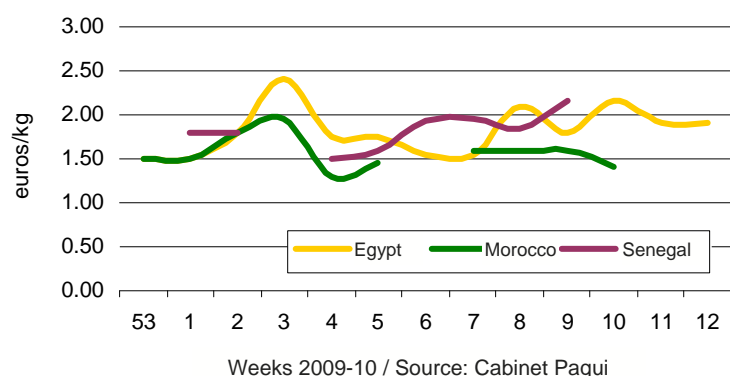
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Bobby Beans - Belgium - Average import price



Bobby Beans - Italy - Average import price



of 2009 and all sales were of produce shipped by air. Exports by air from Senegal now form less than 25% of the country's total French bean exports.

Evaluating the Senegalese season is always somewhat difficult as there is no distinction between goods shipped by air or by sea in the prices reported. And more than for other sources involved in the filet market, certain brands stand out as quality references that make it possible to raise or at least attenuate the average of the low prices sometimes observed. Thus, as in preceding seasons, the prices differences between brands were fairly large in the same week—some produce could be twice the price of other brands! But overall the average price was between EUR 2.10 and 2.50 per kg, with a few peaks when market supply was shorter.

Supply from Morocco was very irregular during the counter-season period. Heavy rain and flooding affected quality and produce was frequently sold at low prices on a market that remained very fussy. A few brands succeeded in maintaining decent prices but the volumes were too limited for there to be a positive impact on the development of the season.

Senegal and Morocco were present on the Bobby market in France. Most batches were re-exported to neighbouring markets. It should also be noted that batches sold as Bobby beans were often batches of beans labelled as filet but that were downgraded for reasons of large pod size.

Belgium

With a slow start to the Senegalese season and more irregular quality, the produce no longer stands out from Egyptian produce, grown under glass and now of better quality.

Egypt is gaining increasing importance on this market while Senegal, which used to reign over the counter-season, is losing more and more ground. In previous seasons, the arrival of batches by sea from Senegal marked the end of the Egyptian season. The greenhouse produce grown in Egypt was considered to be too expensive for quality equivalent to that of Senegalese beans. The situation has since changed considerably as, apart from the



Mangetout peas making progress



European mangetout pea (snowpea) imports were smaller in 2009 than in 2008. EU statistics indicate a fall of about 2 000 tonnes, that is to say 10% less. Kenya and Guatemala, the two leading suppliers of the European market, have kept their positions although there have been some changes. Kenyan exports decreased by about 2 000 tonnes while those from Guatemala gained 550 tonnes. These conjunctural changes have not resulted in fundamental changes in market domination by the two sources. The other producer countries remained at much the same levels as in 2008, often increasing their shipments by a few tens or hundreds of tonnes. Only Zambia displayed a decrease of 800 tonnes, taking it to the sixth position among EU suppliers after being in third position in 2008. The main reasons were disturbances in production and transport conditions.

The overall decrease in the quantities released on the market does not seem to have reduced distributors' interest in peas, whose democratisation is continuing. It is true that mangetout are a favourite of restaurants and high-quality greengrocers and they are used increasingly in mixed salads. Increasing quantities are also found in supermarkets, loose in 2 kg boxes or in smaller punnets. They add diversification to French bean producer countries like Kenya or have become a specialised activity in other sources such as Guatemala.

Kenya can export both French beans and mangetout peas throughout the year. Shipments might only be disturbed by bad weather or occasional pest pressure, resulting in temporary decreases in volume. Guatemala seems to have a more clearly defined export season that generally runs from the end of November/beginning of December to mid-June although the season can start and end a little earlier or later. The Zimbabwean export period is from June to October-November. The prices most commonly observed on the French market in 2009 were around EUR 4.50 per kg (Kenya), EUR 4.20 per kg (Zimbabwe) and EUR 5.00 (Guatemala). These prices occasionally increased by EUR 0.50 to 1.00 per kg during periods when supply did not match demand. These prices depend of course on cost and freight prices on departure from the various sources. They may vary further along the chain according to demand. Disturbances to supply during festive periods may sometimes result in significant price rises. Although demand for mangetout peas peaks during the Christmas period and at Easter, it seems to be growing outside these periods, marketing wider distribution and better perception by consumers.

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improved quality of Egyptian production, a growing number of operators in Belgium are switching from sea shipments with their recurrent quality problems to air shipments that are more expensive but that sell better.

Sales proceeded well overall except in Weeks 4, 7 and 8 when demand was somewhat lacklustre. Prices were similar for produce from both sources, with the averages ranging from EUR 2.00 to 2.50 per kg. The Senegalese season on the Belgian market ended in Week 10, allowing batches from Egypt to continue to sell well.

Italy

The start of the Senegalese season was fairly difficult on the Italian market. Overall, produce from all sources displayed problems of quality, with increasing criticism of Moroccan produce.

Italian operators are wondering whether it is worth working with Senegal as the quality problems reported for nearly two years do not seem to have been solved.

The arrival of Senegal did not force out and complicate sales of produce from other sources, as used to happen in the past. Quite the opposite, it would seem that Senegal suffered from the availability of the Egyptian greenhouse crop.

The distinction between Senegal and Egypt during the season was based on the quality of the batches available. The quality of Egyptian produce grown in greenhouses is now more regular while Senegalese exports often suffer during sea transport as the beans tend to evolve rapidly. The presence of poorer quality batches from Morocco was not good for sales of Bobby beans from competing sources either.

Italian operators halted their Senegalese imports in Week 10, preferring to opt for Egyptian supplies whose quantity and quality were more regular ■

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