



# Litchi Letter

2008-2009 Campaign  
Week 06 - 2nd to 06th February 2009

Sulphured fruits by air	
Week	Week

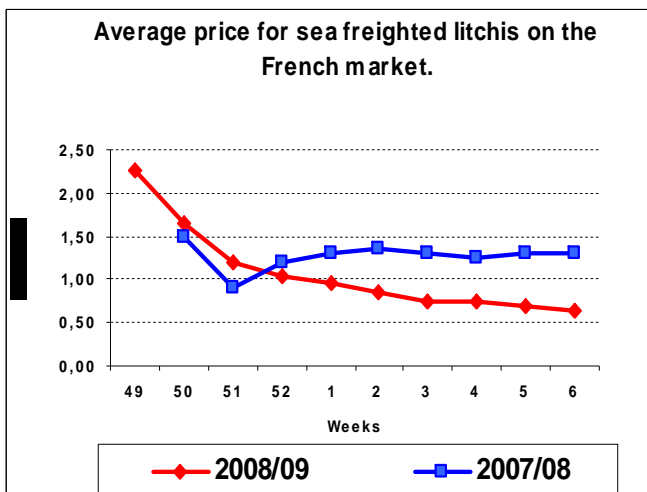
On stem fruits by air	
Week	Week

Sea freight Madagascar	
Week 05	Week 06
↓	↓

Sea freight South Africa	
Week 05	Week 06
↓	

The marketing campaign for litchis from Madagascar is coming to an end. Only very small volumes of fruits remain available on the different European markets. Sales are more and more difficult. Operators that still have some fruits are doing their best to clear their stocks generally at open prices. The deterioration of fruits in terms of quality no longer allows operators to set a market price especially considering that the demand for the fruit is non existent. Operators have moved to other commodities and the risk of buying litchis considering the present quality of fruits limits even more the demand for the fruit. Sales no longer represent the reality of the trade.

Already, the 2008/2009 marketing campaign appears to have been gloomy. Supplies much more important than the European markets' capacity, a rather average quality of fruits, the effects of the economic crisis and strong competition between operators are as much elements that have strongly disrupted the marketing of fruits. The first estimates in terms of volumes for the ending campaign are as follow:



Litchi - Estimates of incoming volumes by Air - In Tons					
Weeks	51	52	01	02	03
Mauritius	5/8	5/8			
South Africa					
Madagascar	5/8	2/3	2/4		
Reunion	60/70	60/70	5/10	5/10	
Total	70/86	65/78	7/14	5/10	

Air		
Mauritius	200	
Madagascar	450	
South Africa	200	
Reunion	300	
Sea	Conventional	Containers
South Africa		500 / 1 000
Madagascar	10 500	13 000

(in tons)

Incoming tonnages Sea freighted							
Incoming tonnages				Forecasted tonnages			
Provenance/départ	Navires	Dates / Ports	Tonnage	Provenance/départ	Navires	Dates / Ports	Tonnage
Tamatave	Conventionnels		10 500				
Tamatave	Conteneurs		11000/13000				
Afrique du Sud		Du 15/12 au 04/01	500				

The above mentioned indications are subject to confirmation. . F: Felixstows, Z: Zeebrugge, StN: St Nazaire, VL: Vlissingen, Röt: Rotterdam

Litchi - Prix stade import - En euros / kg

Weeks	GERMANY		BELGIUM		SPAIN		FRANCE		HOLLAND		UNITED KINGDOM	
	05	06	05	06	05	06	05	06	05	06	05	06
Air												
Mauritius (b)												
Mauritius (s)												
Madagascar (s)												
Madagascar (b)												
Reunion (b)												
South Africa (s)												
Sea												
Madagascar	0.80-1.00	nc	nc	nc	nc	nc	0.60-0.80	0.50-0.80	1.00-1.20	nc		
South Africa							2.00-2.50					

) : On stem /fresh ; (s) : sulphured / note : Indicative and average price given by operators most representative of the industry for fruits of satisfactory quality

Litchi - Trends on different markets

**Germany** : Clearance of the last lots available with sales done as they come and depending on the quality of fruits. Some lots not very representative of South Africa sold selectively.

**Belgium** : End of the marketing campaign.

**Spain** : End of the marketing campaign.

**France** : This week marks the end of the marketing campaign for litchis from Madagascar even if there still are some small lots available. Sales are no longer representative. The demand for the fruit is extremely weak and this affects the sales of the last lots for which quality is continuing to deteriorate. The last operators that still have some fruits are clearing their stocks and trying to sell the remaining fruits to the best. If prices for fruits of satisfactory quality are still around 0.50€ to 0.80€/kg, several sales are done at much lower prices. The mixed quality of fruits is also acting as a sharp brake to the sales of the last lots. Retailers no longer show an interest in selling such low quality fruits even at clearance prices. There still are some litchis from Madagascar in some supermarkets but in very limited volumes. Prices done are around 1.50€ to 2.00€/kg.

Very small volumes of fruits from South Africa (Red Mc Lean variety) not so appreciated on the French market. There is a general weariness towards litchis and almost all the operators consider that the campaign is finished. Litchi will resume its position as an « exotic » with supplies from Thailand probably in April after a substantial shortage.

**Italy** : End of the marketing campaign.

**Netherlands** : End of the marketing campaign for litchis from Madagascar. The remaining lots are unsal-

able considering the deterioration of the quality of the fruits. Very small volumes of fruits from South Africa (Red Mc Lean variety) that are difficult to sell.

**United Kingdom** : Little change compared to last week on the British market. The marketing campaign for litchis from Madagascar is coming to an end. There are practically no more litchis on the wholesale markets. The remaining lots were sold at the beginning of the week. Lots of satisfactory quality were sold on the basis of 1.70€ to 2.30€/kg. Lots of lesser quality were sold at open prices. It would seem that there still are no Red Mc Lean fruits available on the market.

change rates - February 09

1 euro =

Royaume Uni	0.917250 GBP
Madagascar	2 508.71 MGA (Ariary)

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**Litchis from Madagascar of average quality with some mould stains.**



**Litchis from Madagascar. Mould stains.**



**Old litchis from Madagascar. « Blown », soft fruits with oxidations.**



**Litchis from Madagascar. Boxes at the bottom of pallet with smashed fruits.**



**Madagascar stand at the « Fruit Logistica » in Berlin.**