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MNS December 2009

ORGANIC PRODUCTS
MARKET NEWS SERVICE (MNS)
BI-MONTHLY EDITION

International Trade Centre

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Market News Service: Organic Products

Issue No. 6, of December 2009

The Market News Service (MNS) Organic Products Bi-Monthly Report presents informative notes and statistical analysis on selected Organic produce covering fruits and vegetables, fruit juices, coffee and cocoa, herbs and spices, essential oils and oleoresins, traded in major European and international markets. The report is divided by product sectors and each section covers "market trends" with qualitative information focusing on current market situation and price information. The report also offers news and reviews of published articles about the industry. It presents major international events, exhibitions and conferences. Finally each issue will provide a country focus covering the production, consumption, exports, certification, etc of the organic sector in the country.

MNS information providers for organic products include major importers, wholesalers, and organizations. Market information is collected throughout the year and is available for transmission to subscribers on a monthly basis.

We welcome new sources of information, news that subscribers and readers might have on their specific products or areas, inquiries or information requests on the products and markets covered by the report as well as suggestions, remarks and indications on the report content.

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Fruit and Vegetables

Price Information

The price quotations below (low-high) give a view of the market for different fresh fruit and vegetables imported from developing countries. If not otherwise stated prices are per kg. Prices were collected during week 49 primarily from major importers based in different EU countries. Prices are EXW unless otherwise stated, and all prices are in Euro (rate of exchanges for conversion in local currencies are listed).

EXCHANGE RATES

	Local currency	1 EURO equals
Sweden	Swedish Kroner (SEK)	10.4803

APPLE BANANA

		Euro							
Market	*Origin*	*L-price*	*H-price*	*Variety*	*Size*	*Pack*	*Transport*	*CB*	*Remarks*
Denmark	Uganda	2.70	2.70			2.7 kg	Air	IMO	
Germany	Uganda	1.97	1.97			3 kg	Air	IMO	Delivered

AVOCADO

							Sea		
Market	*Origin*	*L-price*	*H-price*	*Variety*	*Size*	*Pack*	*Transport*	*CB*	*Remarks*
Belgium/Netherlands	Mexico	2.24	2.24	Hass		4 kg, 16-22 pieces		IMO	Delivered
France	Mexico	2.24	2.36	Hass		4 kg, 16-22 pieces		IMO	Delivered
Germany	Mexico	2.24	2.24	Hass		4 kg, 16-22 pieces		IMO	Delivered
Germany	Mexico	2.70	2.70	Hass		4 kg, 18-20 pieces			Delivered
Netherlands	Mexico	2.13	2.13	Hass		4 kg, 16-22 pieces		IMO	
Netherlands	Mexico	2.25	2.34			4 kg, 20-22 pieces			
United Kingdom	Mexico	2.31	2.31	Hass		4 kg, 16-22 pieces		IMO	Delivered London

BANANA

Sea

		Euro							
Market	*Origin*	*L-price*	*H-price*	*Variety*	*Size*	*Pack*	*Transport*	*CB*	*Remarks*
France	Dom. Republic, Peru	1.25	1.25	Cavendish		Loose		Ecocert	
France	Dom. Republic, Peru	1.30	1.30	Cavendish		Loose		Ecocert	Fairtrade
Germany	Ecuador	1.50	1.50			18 or 14 kg			Delivered
Germany	Ecuador	1.70	1.70			18 kg			Banafair. Delivered
Germany	Ecuador	0.55	0.55			18 kg			Very yellow. Abundance. Delivered
Sweden	Dom. Republic	2.09	2.09			18 kg			Fairtrade
Sweden	Dom. Republic	2.00	2.00			18 kg			Demeter
Sweden	Dom. Republic	2.19	2.19			3 kg			Demeter
Sweden	Dom. Republic	1.90	1.90			18 kg			
Sweden	Dom. Republic	2.10	2.10			3 kg			
Sweden	Ecuador	1.17	1.17			18.5 kg			
Sweden	Ecuador	1.69	1.69			18.5 kg			Fairtrade
Sweden	Ecuador	1.60	1.60			13 kg bag			Fairtrade

BEAN

		Euro							
Market	*Origin*	*L-price*	*H-price*	*Variety*	*Size*	*Pack*	*Transport*	*CB*	*Remarks*
Germany	Egypt	4.40	4.40	Green bean		4 kg		Ecocert	Delivered
Netherlands	Egypt	2.56	2.78	Green bean		4 kg	Air	COAE	
Netherlands	Egypt	3.17	3.17	Green bean		14x250g	Air	COAE	
Sweden	Egypt	5.92	5.92	Green bean		5 kg			
Sweden	Egypt	6.54	6.54	Green bean					

BLUEBERRY

Market	Origin	Euro L-price	Euro H-price	Variety	Size	Pack	Transport	CB	Remarks
Netherlands	Argentina	12.19	12.19			12x150g		OIA/Argencert	

CAPSICUM

Market	Origin	Euro L-price	Euro H-price	Variety	Size (Caliber (mm))	Pack	Transport	CB	Remarks
France	Morocco	1.90	1.90	Red	50/70/ 90/110	5 kg	Truck	Ecocert	
Germany	Israel	0.79	0.79	Red		5 kg		PPIS	Delivered
Germany	Israel	0.88	0.88	Yellow		5 kg		PPIS	Delivered
Germany	Israel	0.88	0.88	Orange		5 kg		PPIS	Delivered
Netherlands	Israel	2.05	2.05	Red		5 kg		PPIS	2 pallets, promotion
Netherlands	Israel	2.19	2.29	Red		5 kg		PPIS	
Netherlands	Israel	1.69	1.79	Red	60+ /small	5 kg		PPIS	
Netherlands	Israel	2.45	2.55	Yellow		5 kg		PPIS	
Netherlands	Israel	2.53	2.63	Orange		5 kg		PPIS	

CHILLI

Market	Origin	Euro L-price	Euro H-price	Variety	Size	Pack	Transport	CB	Remarks
Denmark	Uganda	16.67				20 x 30g	Air	IMO	Preorder
Denmark	Uganda	6.33		Jamaica Bell		300 g	Air	IMO	Limited
Denmark	Uganda	6.40		Lemon drops		500 g	Air	IMO	
Germany	Israel	2.50		Red		3 kg		PPIS	Delivered

COCONUT

Sea

		Euro*							
Market	*Origin*	*L-price*	*H-price*	*Variety*	*Size*	*Pack*	*Transport*	*CB*	*Remarks*
Belgium/Netherlands	Sri Lanka	0.99	0.99			6 pieces, box		CU	Delivered
Belgium/Netherlands	Sri Lanka	0.60	0.60			20 pieces, net		CU	Delivered
France	Sri Lanka	0.99	1.08			6 pieces, box		CU	Delivered
France	Sri Lanka	0.61	0.70			20 pieces, net		CU	Delivered
Germany	Sri Lanka	0.99	0.99			6 pieces, box		CU	Delivered
Germany	Sri Lanka	0.61	0.61			20 pieces, net		CU	Delivered
Netherlands	Sri Lanka	0.99	0.99			6 pieces, box		CU	
Netherlands	Sri Lanka	0.61	0.61			20 pieces, net		CU	
Sweden	Dom. Republic	1.53	1.53			20 pieces			Delivered locally
Sweden	Dom. Republic	1.67	1.67			5 pieces			Delivered locally
United Kingdom	Sri Lanka	1.02	1.02			6 pieces, box		CU	Delivered London
United Kingdom	Sri Lanka	0.61	0.61			20 pieces, net		CU	Delivered London

** Price per piece*

CUCUMBER

		Euro							
Market	*Origin*	*L-price*	*H-price*	*Variety*	*Size*	*Pack*	*Transport*	*CB*	*Remarks*
France	Morocco	1.05	1.05	Long	Caliber 300g/400g/500g	With film	Truck	Ecocert	
France	Morocco	1.05	1.05	Long	200-300g		Truck	Ecocert	
France	Morocco	1.40	1.40	Noa		6 kg	Truck	Ecocert	
Netherlands	Israel	2.55	2.55	Mini		5 kg		PPIS	Week 51

DATE

Market	Origin	L-price (Euro)	H-price (Euro)	Variety	Size	Pack	Transport	CB	Remarks
France	Iran	7.56	7.56	Mazafati		16 x 500g	Air	Ecocert	Preorder. Fairtrade
Sweden	Algeria	12.40	12.40	Medjool. On the vine		5 kg			Delivered locally

GINGER

Sea

Market	Origin	L-price (Euro)	H-price (Euro)	Variety	Size	Pack	Transport	CB	Remarks
Denmark	Uganda	3.50	3.50			3.50 kg	Air	IMO	
Denmark	Uganda	3.80	3.80			1 kg net	Air	IMO	
Denmark	Uganda	11.43	11.43			300 x 35g bags	Air	IMO	With EAN code
Denmark	Uganda	10.29	10.29			300 x 35g bags	Air	IMO	Without labelling
France	Uganda	4.00	4.00			3.5 kg	Air	Ecocert	
Germany	Uganda	5.50	5.50			1 kg	Air	IMO	Delivered
Germany	Peru	1.39	1.39			5 kg		Ecocert	Delivered
Netherlands	Cameroon	2.38	2.38			5 kg		Ecocert	

GINGER

Sea

Market	Origin	L-price (Euro)	H-price (Euro)	Variety	Size	Pack	Transport	CB	Remarks
Sweden	Peru	6.68	6.68			5 kg			Delivered locally
Sweden	Peru	7.35	7.35			1 kg			Delivered locally

GOOSEBERRY

		Euro							
Market	*Origin*	*L-price*	*H-price*	*Variety*	*Size*	*Pack*	*Transport*	*CB*	*Remarks*
Denmark	Uganda	4.90	4.90			1 kg	Air	IMO	
Denmark	Uganda	9.00	9.00			8 x 100g punnits	Air	IMO	

GRAPEFRUIT

Sea

		Euro							
Market	*Origin*	*L-price*	*H-price*	*Variety*	*Size*	*Pack*	*Transport*	*CB*	*Remarks*
Belgium/Netherlands	Israel	1.20	1.20	Sunrise		15 kg		PPIS	Delivered
France	Israel	1.20	1.28	Sunrise		15 kg		PPIS	Delivered
Germany	Israel	1.20	1.67	Sunrise		15 kg		PPIS	Delivered
Germany	Israel	1.85	1.85	Red		8 kg, 16-18 pieces		PPIS	Delivered
Germany	Israel	1.69	1.69	White		8 kg		PPIS	Delivered
Netherlands	Israel	1.18	1.18	Sunrise		15 kg		PPIS	Delivered
Netherlands	Israel	1.07	1.13	Star Ruby		15 kg		PPIS	
United Kingdom	Israel	1.23	1.23	Sunrise		15 kg		PPIS	Delivered

KUMQUAT

Sea

		Euro							
Market	*Origin*	*L-price*	*H-price*	*Variety*	*Size*	*Pack*	*Transport*	*CB*	*Remarks*
Germany	Israel	3.40	3.40			2 kg		PPIS	Delivered

LEMON GRASS

Air

		Euro							
Market	*Origin*	*L-price*	*H-price*	*Variety*	*Size*	*Pack*	*Transport*	*CB*	*Remarks*
Denmark	Uganda	7.00	7.00			1 kg		IMO	
Denmark	Uganda	16.00	16.00			10x50g bunch		IMO	

LIME

Sea

		Euro							
Market	*Origin*	*L-price*	*H-price*	*Variety*	*Size*	*Pack*	*Transport*	*CB*	*Remarks*
Belgium/Netherlands	Dom. Republic	1.54	1.54			4.5 kg		BCS	Delivered
France	Dom. Republic	1.54	1.67			4.5 kg		BCS	Delivered
France	Mexico	1.68	1.68			4.5 kg		Ecocert	Limited
Germany	Dom. Republic	1.54	1.54			4.5 kg		BCS	Delivered
Germany	Mexico	2.50	2.50			4.5 kg			Delivered
Netherlands	Dom. Republic	1.54	1.54			4.5 kg		BCS	
Netherlands	Mexico	1.60	1.71			4.5 kg		ICEA	
United Kingdom	Dom. Republic	1.61	1.61			4.5 kg		BCS	Delivered London

MANDARIN

Sea

		Euro							
Market	*Origin*	*L-price*	*H-price*	*Variety*	*Size*	*Pack*	*Transport*	*CB*	*Remarks*
France	Morocco	1.30	1.30	Clementine	Cal 2/3/4	Loose		Ecocert	

MANGO

Sea

		Euro							
Market	*Origin*	*L-price*	*H-price*	*Variety*	*Size*	*Pack*	*Transport*	*CB*	*Remarks*
Belgium/Netherlands	Brasil	1.74	1.74	Tommy Atkins		4 kg		SES	Delivered

MANGO

Sea

		Euro							
Market	***Origin***	***L-price***	***H-price***	***Variety***	***Size***	***Pack***	***Transport***	***CB***	***Remarks***
Belgium/Netherlands	Ecuador	1.74	1.74	Tommy Atkins		4 kg		Ceres	Delivered
France	Brasil	1.74	1.74	Tommy Atkins		4 kg		SES	Delivered
France	Ecuador	1.74	1.74	Tommy Atkins		4 kg		Ceres	Delivered
France	Ecuador	2.36	2.36	Tommy Atkins		4 kg		Ecocert	
Germany	Brasil	1.74	2.48	Tommy Atkins		4 kg		SES	Delivered
Germany	Ecuador	1.74	1.74	Tommy Atkins		4 kg		Ceres	Delivered
Netherlands	Brasil	1.69	1.69	Tommy Atkins		4 kg		SES	
Netherlands	Ecuador	1.69	1.69	Tommy Atkins		4 kg		Ceres	
United Kingdom	Brasil	1.74	1.74	Tommy Atkins		4 kg		SES	Delivered London
United Kingdom	Ecuador	1.74	1.74	Tommy Atkins		4 kg		Ceres	Delivered London

PAPAYA

		Euro							
Market	***Origin***	***L-price***	***H-price***	***Variety***	***Size***	***Pack***	***Transport***	***CB***	***Remarks***
Germany	Thailand	9.00	9.00	Hawaii		2 kg, 4-5 pieces	Air		Delivered
Germany	Cameroon	6.50	6.50			5 kg			Delivered

PASSIONFRUIT

		Euro							
Market	***Origin***	***L-price***	***H-price***	***Variety***	***Size***	***Pack***	***Transport***	***CB***	***Remarks***
Denmark	Uganda	0.45*	0.45*			25 pieces	Air	IMO	
Germany	Uganda	4.00	4.00			2x1 kg	Air	IMO	Delivered
Netherlands	Cameroon	2.57	2.57			3 kg		Ecocert	

PASSIONFRUIT

		Euro							
Market	***Origin***	***L-price***	***H-price***	***Variety***	***Size***	***Pack***	***Transport***	***CB***	***Remarks***
Sweden	Uganda	9.73	9.73			25 pieces, 2 kg	Air		Delivered locally
Sweden	Uganda	10.69	10.69			1 kg	Air		Delivered locally

** Price per piece*

PINEAPPLE

		Euro					Sea		
Market	***Origin***	***L-price***	***H-price***	***Variety***	***Size***	***Pack***	***Transport***	***CB***	***Remarks***
Belgium/Netherlands	Costa Rica	1.16	1.16	Gold extra sweet		11 kg		Eco-logica	Delivered. Limited
Denmark	Uganda	2.50	2.50			12 pieces, 7 kg	Air	IMO	
Denmark	Uganda	2.60	2.60			6 pieces, 5 kg	Air	IMO	
Denmark	Uganda	2.60	2.60			6 pieces, 8 kg	Air	IMO	
France	Costa Rica	1.20	1.31	Gold extra sweet		11 kg		Eco-logica	Delivered. Limited
France	Togo	1.00	1.00	Smooth Cayenne		6 pieces, 11 kg		Ecocert	
France	Togo	1.09	1.09	Smooth Cayenne		8 pieces, 11 kg		Ecocert	
France	Togo	1.18	1.18	Smooth Cayenne		9 pieces, 11 kg		Ecocert	
France	Togo	1.09	1.09	Smooth Cayenne		4 pieces		Ecocert	
Germany	Costa Rica	1.20	1.20	Gold extra sweet		11 kg		Eco-logica	Delivered. Limited
Germany	Uganda	4.90	4.90			8.66 kg			Delivered
Netherlands	Costa Rica	1.07	1.07	Gold extra sweet		11 kg		Eco-logica	Limited
Netherlands	Costa Rica	1.30	1.32			10 kg			Week 50
Netherlands	Cameroon	1.83	1.83			12 kg		Ecocert	
Netherlands	Ghana/Costa Rica	1.40	1.40			10 kg			
Sweden	Togo	2.19	2.19			15 kg			Delivered locally
Sweden	Togo	2.43	2.43			5 kg			Delivered locally
United Kingdom	Costa Rica	1.23	1.23	Gold extra sweet		11 kg		Eco-logica	Delivered London. Limited

PLANTAIN

		Euro							
Market	***Origin***	***L-price***	***H-price***	***Variety***	***Size***	***Pack***	***Transport***	***CB***	***Remarks***
Denmark	Uganda	2.50	2.50			6 kg	Air	IMO	

POMEGRANATE

		Euro							
Market	***Origin***	***L-price***	***H-price***	***Variety***	***Size***	***Pack***	***Transport***	***CB***	***Remarks***
France	Morocco	1.60	1.60				Truck	Ecocert	
Germany	Turkey	0.64	0.64			5 kg		CU	Delivered
Netherlands	Israel	2.70	2.70			4.5 kg, 9 pieces		PPIS	
Netherlands	Israel	2.70	2.70			4.5 kg, 12 pieces		PPIS	

ROSEMARY

							Air		
Market	***Origin***	***L-price***	***H-price***	***Variety***	***Size***	***Pack***	***Transport***	***CB***	***Remarks***
Denmark	Uganda	20.00	20.00			20x40g bunch		IMO	With EAN code. Demeter

SHARON FRUIT

Market	***Origin***	***L-price***	***H-price***	***Variety***	***Size***	***Pack***	***Transport***	***CB***	***Remarks***
Germany	Israel	0.55*	0.55*			18 pieces		PPIS	Delivered

** Price per piece*

SWEET POTATO

Sea

Market	Origin	Euro L-price	Euro H-price	Variety	Size	Pack	Transport	CB	Remarks
Germany	Israel	2.20	2.20			6 kg		PPIS	Delivered
Netherlands	Israel	1.46	1.54		Medium/ Large	6 kg		PPIS	
Netherlands	Israel	1.33	1.41		Extra large	6 kg		PPIS	

SWEETIE

Sea

Market	Origin	Euro L-price	Euro H-price	Variety	Size	Pack	Transport	CB	Remarks
Belgium/Netherlands	Israel	1.10	1.10			13 kg, 24-55 pieces		PPIS	Delivered
France	Israel	1.14	1.15			12.5 kg, 24-55 pieces		PPIS	Delivered
Germany	Israel	1.08	1.14			12.5 kg, 24-55 pieces		PPIS	Delivered
Netherlands	Israel	1.06	1.13			12.5 kg, 24-55 pieces		PPIS	

TOMATO

Sea

Market	Origin	Euro L-price	Euro H-price	Variety	Size(caliber (mm))	Pack	Transport	CB	Remarks
France	Morocco	1.05	1.05	Ronde	67/77/82	loose		Ecocert	
Germany	Israel	2.80	2.80	On the vine		5 kg		PPIS	Delivered
Netherlands	Israel	1.76	1.98	Cherry		9x250g		PPIS	
Netherlands	Israel	2.07	2.23	Cherry on the vine		3 kg		PPIS	
Netherlands	Israel	4.31	4.31	Cherry on the vine		9x250g		PPIS	

ZUCCHINI

		Euro					Sea		
Market	***Origin***	***L-price***	***H-price***	***Variety***	***Size***	***Pack***	***Transport***	***CB***	***Remarks***
Germany	Morocco	1.90	1.90			6 kg		Ecocert	Delivered

Fruit Juice

Market Trends

The organic fruit juice market has changed during the past seven weeks since our last report. From a flat market where it was difficult to extract a premium for organic production, there has been a return to the type of market that prevailed two years ago.

It seems as if consumers are coming back to the organic sector and are prepared to pay the required price premiums to compensate producers and growers for their additional efforts and risks. We have seen evidence of increased shipments of organic fruit juice to major consuming markets in the Far East, Europe and North America.

Organic food and drink is a luxury and requires deliberate financial commitment. Fruit juice plays a large part in the sector, but it is unlikely that a consumer would only buy organic fruit juice and not seek organic food to go with it. In general, we could say that fruit juice is not a high risk part of the whole spectrum of food and beverages. Sprays are used and consumers would prefer to avoid them. But the outlook for organic juices is inextricably entwined with the whole organic movement. For predictions for the future, we need to look at the sector as a whole.

Industry News:

FoodNews reports that:

- DREAM Foods International, a US-based company specialising in organic citrus juices, has launched its new 8oz single serve Italian Volcano blood orange and tangerine juices following the success of the company's larger family size NFC organic juices. Sales manager, Michelle Hankins, said: "These single serve bottles give the organic consumer the opportunity to enjoy these juices more conveniently outside of the home." The suggested retail price is US$3.59.

- FRESH Harvest Products Inc, a US manufacturer of organic foods and beverages, has signed a letter of intent to acquire a privately held purveyor of organic and natural frozen foods, located in Washington state. The as yet un-named company sells to retailers across the US, including Kroger, H-E-B, Albertson's, and the largest natural food retailer in the US. The deal is subject to the completion of due diligence by both parties, at which time a definitive acquisition agreement will be completed. Fresh Harvest anticipates closing the acquisition within 60 days.

- NEW organic fruit juice brand Pip, designed to "fill a gap in the market for an affordable premium juice that is accessible to eco-conscious large families", will appear on UK supermarket Waitrose's shelves from 27 November. The apple juice, which was developed by Boost Trading, will be backed by an "aggressive" pricing promotion. Until January, the drink will be sold for UK£1.99, instead of the usual UK£2.69.

- APPLE Rush Co Inc of the US has developed a new lower calorie (a 40% reduction is claimed) version of its organic Apple Rush beverages. Three new organic 'light' flavours will be introduced in early 2010: pomegranate, original apple and black cherry. The products will be packed in 12oz recyclable aluminium cans. Each can will contain less than100 calories. The new beverages will have 60% juice content and will be sweetened with a blend of stevia and erythritol. Apple Rush is positioning itself for growth it foresees in schools and other on-premise locations like hospitals and physical fitness centres across the US.

Price Information

Orange

Origins	Concentration	Price	Transportation
Italy	frozen concentrate, 60 brix low ratio	€2.90-3.09/kg	DDP Northern Europe (in drums)
Brazil	frozen concentrate, 66 brix	US$4300-4500/mt	FCA Rotterdam
Brazil	frozen concentrate, 66 brix	US$4000/mt	FOB Santos
Spain	frozen concentrate, 60 brix, low ratio	€1.20-1.45/kg	Ex-Works in bulk
Italy	NFC (Not from concentrate), Valencia, 12 brix,	€1.09/kg	CIP Northern Europe in bulk/tanker

This market has changed rapidly over the past few weeks.

There is a big problem with organic orange juice. Many origins, including Brazil and Mexico are experiencing severe 'greening' which affects orange trees and usually means a destruction of trees within a 200 metre radius of any infected tree. In order to fight this disease, growers need to use sprays which do not conform to organic standards.

Most growers would prefer to redirect their crop to the 'conventional' market than destroy trees, which would take up to five years to replace. This is what is causing a shortage in organic FCOJ. Presently the organic fruit price in Brazil is very high at B.R$17.00 – 22.00 per box of 40.8kgs. This is why the price shown above is so high.

Most of our contacts advise that organic orange juice is very hard to procure at the moment. The European prices are for the new season which will get underway in the next few weeks.

Grapefruit

Origins	Variety	Concentration	Price (US$)	Transportation
Argentina,	white	frozen concentrate, 58 brix	US$2875-2925/mt	FOB Buenos Aires

Demand for this variant is very low. European prices have not yet been announced for the next season.

Banana

Origins	Concentration	Price	Transportation
Costa Rica	aseptic puree, 22 brix	US $950-1000/mt	FCA Holland Duty Free
Ecuador	aseptic puree, 22 brix	US$975-1050/mt	FCA Holland Duty Free

The market for banana puree has firmed slightly in the past few weeks. Demand is strong.

Mango

Origins	Variety	Concentration	Price (US$)	Transportation
Colombia/Peru	Magdalena	aseptic puree, 14-16 brix	US$1500-1550/mt	CFR Rotterdam Duty Paid
Brazil	Tommy Atkins	single strength aseptic pulp, 14-16 brix	US$1490-1520/mt	FOB Santos

Brazil	Tommy Atkins	concentrate, aseptic pulp, 28-30 brix	US$2150-2200/mt	FOB Santos

Prices have risen due to high winds and heavy rain in Brazil. There is a shortage of organic mango puree and pulp. There is unlikely to be much Palmer available in the early 2010 and the Tommy Atkins crop has been reduced by up to 50%.

This will probably mean that prices will continue to rise.

Lemon

Origins	Concentration	Price	Transportation
Italy	frozen concentrate, 400gpl cloudy	€3.75- €4.25/kg	DDP Northern Europe
Italy, Sicilian	NFC	€2.10/kg	CIP Germany, in drums
Brazil	frozen concentrate, 400gpl cloudy	US$3800-4000/mt	FOB Santos

After a short period in the middle of 2009 when prices were lower, organic lemon juice prices have risen back up to the same very high levels seen in early 2009. ‘Conventional’ lemon juice prices have risen at the same time.

History is likely to repeat itself in that some organic lemons, which were destined to the fresh market, will have to be turned into juice to meet strong demand. This increased demand is coming from the drinks market as well as for prepared foods such as hummus and dips.

European production will be back on stream in a few weeks but with the strength of the Euro, they will find it hard to compete with Latin America. Their prices above are for the new season, but are earlier indications

Apple

Origins	Concentration	Price (EUR)	Transportation
Poland	NFC	€0.40-45/kg	ex works
Poland	concentrate	€1.40-1.45/kg	DDP Northern Europe

Prices are moving up, albeit in a controlled fashion. The early frost and snow in Germany and Poland, that we mentioned in our last report, had a damaging effect on the 2009 crop on the trees, but we have seen reports that this has led to more organic fruit being processed.

Grape

Origins	Variety	Concentration	Price (EUR)	Transportation
Italy	white	aseptic concentrate ,65 brix	€2.10- 2.30/kg	DDP Northern Europe
Italy	red	aseptic concentrate, 65 brix	€3.00-3.20/kg	DDP Northern Europe

The market is described as weak with slow demand.

Pear

Origins	Variety	Concentration	Price (EUR)	Transportation
Argentina	Sweet	aseptic puree, 12/14 brix	€750-760/mt	DDP Northern Europe
Argentina,	Williams	aseptic puree, 12/14 brix	€900-920/mt	DDP Europe

Demand is still described as normal and the price is stable.

Peach

Origins	Concentration	Price (EUR)	Transportation
Italy	aseptic puree, single strength, 9-10 brix	€0.80-.90/kg	DDP Northern Europe

Demand is still reported as slow and stock levels continue to rise, which is driving prices down.

Pineapple

Origins	Variety	Concentration	Price (US$)	Transportation
Costa Rica	MD2	frozen concentrate	US$3500-3800/mt	C+F Europe
China	Queen	aseptic concentrate	US$2950-3000/mt	FCA Holland
Costa Rica	MD2	NFC (Not from concentrate)	US$1650-1800/mt	C+F Europe/East or West Coast USA

Supply of pineapple concentrate is very limited. Due to weather problems, NFC is practically unavailable. Prices are continuing to rise for the small quantities of stock available.

Apricot

Origins	Concentration	Price	Transportation
Spain	frozen puree single strength, 9-10 brix	€1.20-1.30/kg	DDP Northern Europe
Argentina	aseptic puree, single strength, 9-10 brix	US$1275-1300/mt	CFR Rotterdam

Demand has weakened and prices have started to decline.

Lime

Origins	Concentration	Price (US$)	Transportation
Brazil	NFC, 400gpl, single strength	US$1000-1050/mt	FOB Santos

Prices have continued to reduce. This is due to increased supply and low demand..

Passion Fruit

Origins	Concentration	Price (US$)	Transportation
Brazil	NFC	US$3150/mt	FCA Rotterdam

Passion Fruit organic juice is not a major seller. This price for NFC is one of the few that we could find for organic passion fruit juice. We understand that it is used in blends, but the need for certified organic supply may outweigh the taste aspects.

Guava

Origins	Concentration	Price (US$)	Transportation
Brazil,	single strength pulp, 9-12 brix	US$1350-1375/mt	FOB Santos
Brazil	concentrate, 18-20 brix	US$2125-2150/mt	FOB Santos

There is still a significant shortage of this product – apart from weather related problems with the harvests, demand is reported to be strong for use in blends.

Acerola

Origins	Concentration	Price (US$)	Transportation
Brazil	single strength pulp, 7-9 brix	US$1050-1075/mt	FOB Santos

Demand seems to be reducing for organic acerola. The use of it in blends for vitamin enhancement makes it important particularly in the Japanese market.

N.B. The prices shown above are for organic juices and purees, and were current in Week 51, 2009 for an unspecified delivery date. They have been collected from a range of correspondents in Europe, North and Latin America, Australasia and Africa.

Market Trends

Export sales prices for (organic) cocoa and coffee are usually fixed at a certain moment against the price level at New York (ICE Futures[1]) and London (LIFFE[2]) futures markets for conventional cocoa and coffee, adding an agreed upon premium (differential).

Therefore, it is recommended to follow the prices and trends at these futures markets for conventional coffee and cocoa.

It has to be noted that, more and more, especially in the US and Japan, organic cocoa and coffees are traded at fixed prices, reflecting the intrinsic quality of the coffee, and the added value of organic (and social and economic) ways of production.
In that case, the New York and London futures markets play a less important role in determining the export sales price levels.

Cocoa

Since the last report of the MNS, the cocoa world market price continued to show the same upward trend: The ICCO daily price went from US$ 3134 in September to US$ 3373 in October, to US$ 3384 in November and to 3502 per tonne in December. So far in the new year 2010, prices have decreased, but only slightly.
The New York terminal cocoa market reached a 30 year high on 16 December at US$ 3510 basis March.

The high world market price levels for cocoa are supported by the relative optimism about the recovery of the world economy and by the expected deficit in the total cocoa production: The ICCO, the International Cocoa Organisation, expects a deficit of 28.000 tonnes for the crop year 2008/2009. Another factor that supports the high prices are the low stock levels of cocoa beans in the consuming countries.

The **market for organic cocoa** has not much changed: at the moment very quiet. It is a buyers market and differentials are still low. The growth of consumption of organic cocoa is lagging behind the growth in organic production.
Differentials for organic cocoa are US$ 0 to US$ 100. Only for FLO-certified organic and Rain Forest Alliance cocoa there is more demand at the moment, but the demand for organic cocoa continues to be low.

Kit Kat - Nestlé[3]

FLO has congratulated the Fairtrade Foundation[4] and Nestle UK for the announcement that Kit Kat will be Fairtrade certified in the UK and Ireland. The first Fairtrade Kit Kat bars will appear on shelves in mid-January 2010. “This announcement brings the possibility of real change to tens of thousands of cocoa farmers and their communities in Ivory Coast – one of the world’s poorest countries. The Fairtrade certification of Kit Kat in the UK and Ireland gives farmers the opportunity to sell more than 16,000 tonnes of cocoa on Fairtrade terms annually to supply the largest global chocolate brand in its largest global market,” says Rob Cameron, CEO of FLO.
Farmers in the Kavokiva cocoa cooperative will be one of the first to benefit from the switch. The organization was Fairtrade certified in 2004, but until now has sold only small volumes on Fairtrade terms. The move will not only enable them to increase Fairtrade cocoa sales but will also impact other Fairtrade certified farmers’ groups looking to enter the Fairtrade market. There are currently seven Fairtrade certified cocoa co-operatives in Côte d’Ivoire and many eager to gain certification.

Utz certified cocoa beans[5]

On Saturday November 7 2009 the 1st batch

[1] https://www.theice.com/coffee.jhtml
https://www.theice.com/cocoa.jhtml
[2] LIFFE is the derivatives business of Euronext, a subsidiary of NYSE Euronext, comprising derivatives markets in Amsterdam, Brussels, London, Lisbon and Paris.

[3] www.nestle.co.uk/Home/Fairtrade
[4] www.fairtrade.org.uk/press_office/press_releases_and_statements/december_2009/kit_kat_gives_cocoa_farmers_in_cte_divoire_a_break.aspx
[5] www.duurzamehandel.com/en/news/sustainable-cocoa

of sustainable UTZ cocoa was welcomed by Dutch Minister of Development Cooperation Bert Koenders. On request of IDH Mars Veghel made the first sustainable Mars with the batch.All members of the cocoa consortium were present on November 7 in the harbour in Amsterdam to welcome the first batch that was presented in a sensational way by acrobats and percussionist from Ghana. Cocoa farmers from West-Africa offered the first bag of beans to Minister Bert Koenders who distributed the beans amongst the consortium members. He also talked with different stakeholders about the need for sustainable production and development. The first sustainable UTZ was made possible through public private partnership between Mars, Heinz, Nestlé, Cargill, ECOM, Ahold, IKEA, Solidaridad and UTZ. The consortium is powered by IDH.

Cargill offered the first batch of cacao to Mars who made the first ever sustainable Mars with it, as a new years present for relations of Mars, Cargill and IDH.

Coffee

Since October 2009, the ICO monthly average price went up from US$ 121 in October, to US$ 120 in November to US$ 125 US cents per lb. in December.
In the first days of January 2010, prices have gone up further.[6]

The total coffee production in crop year 2008/2009 is now estimated at 128 million bags, compared to 118.3 million bags in 2007/2008. World consumption in is estimated at 130 million bags and 2010 consumption might approach 135-136 million bags. World production in 2009/2010 is estimated by the ICO at 123 – 125 million bags, as Brazil's and Colombia's production will be lower.
This implies a shortage in supply in the near future. But of course, worldwide consumption is difficult to predict in the present economic situation.

The **organic coffee market** is a bit quiet at the moment, and differentials have slightly decreased.

[6] www.ico.org : several Coffee Monthly Reports

Price Information

Cocoa beans

Price differentials are presented in relation to the ICCO daily price[7]. Prices were collected during the weeks 51 and 52.

Origin	Price differential (USD/MT) FOB	
	Organic	Organic and Fairtrade
Dominican Republic	+ 50 – 75	
Peru	+ 50	

Fairtrade minimum price

	Conventional	Organic
Cocoa beans	US$ 1650 per MT	US$ 1950 per MT

The Fairtrade premium is established by FLO at US$ 150 per MT for conventional cocoa and US$ 200 per ton FOB for organic cocoa beans.[8]

Coffee

In the table below, price differentials to the ICE (Arabica) and LIFFE (Robusta) are presented for organic coffees from several origins. It should be noted that all differentials vary with the specific coffee grade and quality. Price information was collected during weeks 51 and 52.

Arabica

Origin	Price differential (USD cents/lb), FOB
Peru	+ 22 to + 30
Bolivia	+ 15 to + 20
Mexico	+ 32 to + 45
Honduras	+ 20 to + 25 (FLO: + 34)
Colombia	+ 70 to + 90
El Salvador	+ 32 to + 40
Uganda	+ 8 to + 18
Brazil	+ 80 to + 120
Ecuador	+ 28 to + 35
Nicaragua	+ 40 to + 47 (FLO)
Tanzania	+ 25 to + 35

Robusta

Origin	Price differential (USD/ton), FOB
Uganda	+ 500
Tanzania	+ 350 to 500 (FLO)

The Fairtrade premium is USD 10/100lbs.
The premium for organic Fairtrade coffee is USD 20/100lbs.
FLO has decided in December 2007 to increase the fair-trade minimum price levels for Arabica coffee[9]. This is effective from 1st June 2008. The new minimum FOB prices will be:

[7] ICCO, International Cocoa Organization, www.icco.org
[8] http://www.fairtrade.net/fileadmin/user_upload/content/Cocoa_SF_November_07_EN.pdf
[9] http://www.fairtrade.net/single_view.html?&cHash=b5f0cd1b64&tx_ttnews[backPid]=104&tx_ttnews[tt_news]=32

Fairtrade minimum price

	Conventional	**Organic**
Washed Arabica	135 USD cents/lb	155 USD cents/lb
Sundried Arabica	130 USD cents/lb	150 USD cents/lb
Sundried robusta	101 USD cents/lb[10]	121 USD cents/lb[11]

[10] US$/MT 2226.65
[11] US$ /MT 440.92

Herbs and Spices

World Market

Price Information

The following tables give indicative prices for certified organic spices and herbs in Europe and the USA. The prices are for bulk sales from importers/wholesalers. The prices do not include local transport, but will include cleaning and repacking. The prices are indicative of levels in week 50and they are not intended as quotations.

The prices represent the range among wholesalers. Clearly there will be differences in prices according to the pack size, and the upper and lower ends are not necessarily comparable. However, selling prices will likely fall within this range

Herbs

Herb	Price range (EUR/kg)		Origin	Notes	Price range (USD/kg)		Origin
	Dec 09	Sept 09			Dec 09	Sept 09	
Basil	3.85-6.05	3.85-6.05	Egypt		7.60-17.45	6.10-17.45	Egypt
Bay Leaf	8.20	8.20	Turkey		17.20	17.20	Turkey
Dill Weed	14.30-16.70	14.30-16.70	Germany/ Czech Republic/Egypt		10.60-30.00	10.60-30.00	Egypt
Marjoram	4.90-6.15	4.90-6.15	Egypt		6.60-20.95	6.60-20.95	Spain
Oregano	6.40-8.60	6.40-8.60	Turkey/Spain		13.25	13.25	Turkey/ USA
Parsley	7.80-9.90	7.80-9.90	Germany/Egypt		13.25	13.25	Egypt/USA
Rosemary	5.30	5.30	Spain/Turkey		5.30-20.25	6.60-20.25	Spain/ Croatia
Sage	8.20	8.20	Spain/Croatia		13.90	13.90	USA
Savory	11.85	11.85	France		11.90	11.90	Spain/USA
Spearmint	7.80	7.80	Egypt/Turkey		10.60-33.80	10.60-33.80	USA
Tarragon	10.65	10.65	Spain/ Netherlands		27.80	27.80	USA
Thyme	9.30	9.30	Germany		27.25	27.25	Spain

Spices

	Price range (EUR/kg)		Origin	Notes	Price range (USD/kg)		Origin	Notes
	Dec 09	Sept 09			Dec 09	Sept 09		
Allspice	14.65	14.65	Guatemala		11.90	11.90	Guatemala	
Aniseed	7.95-10.35	7.95-10.35	Turkey/ Egypt		7.95	7.95	Egypt/ Spain	
Star Anise	11.2	11.2	Vietnam		11.90	11.90	Vietnam	
Caraway	4.80-6.50	6.10-6.45	Czech Rep / Egypt		4.95-15.20	4.00-15.20	Egypt	
Cardamom	20.70	15.95	Guatemala		21.15	21.15	Guatemala	
Cassia	2.90-6.90	2.90-6.90	Indonesia	(Korintji B broken)	6.60	6.60	Indonesia	
Celery Seed	9.90	9.90	Egypt		7.45	9.90	Egypt	
Cinnamon	14.25	14.25	Sri Lanka		10.60-14.00	10.60-16.60	Madagascar	
Cloves	9.70-9.90	9.80-9.90	Sri Lanka		13.25	13.25	Indonesia/ Sri Lanka	
Coriander	3.65-7.75	3.65-7.75	Italy/ Turkey / Egypt	Max 1%	5.95	5.95	Netherlands/ Egypt/ Turkey	
Cumin	8.20	6.10-8.20	India		11.25-33.50	11.25-33.50	Turkey	
Dill Seed	6.90	6.90	Egypt		6.95-23.05	9.25-23.05	Egypt	
Fennel	5.35-6.05	5.35-6.05	Egypt/ Turkey	Max 1%	6.60	18.00	Turkey/ India	
Fennugreek	6.05	6.05	Egypt		4.95	4.95	India	
Garlic	3.10-7.75	3.10-7.75	China/ Egypt	Granulated	6.60–18.50	4.45-12.45	Egypt	Granulated
Garlic	2.50-7.75	2.50-7.75	Egypt	Powder	6.60-17.10	4.45-11.55	Egypt	Powder
Ginger	7.40-8.60	7.40-8.60	Sri lanka	Powder	7.15-14.25	10.60	China	
Mace	19.40	19.40	Sri Lanka		21.15	21.15	Sri Lanka	
Mustard	5.20	5.20	Canada	Brown	5.30-14.00	5.30	Canada	Brown
Mustard	5.60-7.45	5.60-7.45	Canada	Yellow	4.65-14.50	4.65-14.50	Canada	Yellow
Nutmeg	24.60	24.60	Sri Lanka		17.20	17.20	Indonesia	
Onion	3.70	3.70	Egypt	Granulated 1-3mm	9.25-20.25	9.25-20.25	Egypt	Granulated
Onion	3.80-7.75	3.80-7.75	Egypt	Powder	9.25-19.20	9.25-19.20	Egypt/USA Powder	
Paprika	11.30-14.20	11.30-14.20	Red granulate1-3mm		13.25	13.25	USA	
Pepper, black	4.40-8.20	4.40-8.20	India	Steam-treated cleaned	9.90-31.95	9.90-31.95	Indonesia/ Sri Lanka	
Pepper, white	7.80-10.80	7.80-10.80	India	Steam-treated cleaned	13.56	13.56	Sri Lanka	
Poppy	n.q.	n.q.	Turkey		10.25	10.25	Turkey	
Sesame	3.10-3.90	3.10-3.90	India, hulled		8.80-16.40	8.80-16.40	C America	
Turmeric	4.45-6.90	4.45-6.90	India	Ground	6.60-17.10	6.60-17.10	India/ Indonesia	Powder

EU Market Trends

Natural Ingredients Europe (NiE) 2009 was held in parallel with Food Ingredients Europe (FiE) at Frankfurt Germany over the period 17 to 19 November 2009. The Natural Ingredients part of the show was not as clearly divided from the FiE part compared to previous years, when NiE has been in its own hall, but on the positive side this year the organic pavilion was integrated with the NiE area. Out of the over 1,250 companies exhibiting, over 190 were listed as offering organic products – getting close to 20% of the exhibitors, indicating how mainstream the organic sector has become.

Consumer surveys show that in addition to direct demand for organically produced products, consumers want to know how products are sourced – how are the producers positioned and treated in the supply chain – and how the environment is treated. In the cosmetics sector, the Union for Ethical BioTrade (UEBT) has been established to provide a standard and a label that can be promoted and recognised in the market, to make a statement about how companies work with and treat their suppliers, and how their activities impact on the biodiversity of the production areas. In a survey commissioned by the UEBT, 87% of consumers said that they would favour ethically sourced products when shopping for cosmetics, and 79% said that they would boycott companies that disregarded environmental and ethical concerns.

UEBT promotes 'sourcing with respect' of ingredients that come from native biodiversity, and members commit to gradually ensuring that their sourcing practices promote the conservation of biodiversity, respect of traditional knowledge, and assure the equitable sharing of benefits along the supply chain. The Union's standards stem from the BioTrade Principles and Criteria developed by the United Nations Conference on Trade and Development (UNCTAD) through its BioTrade Initiative. These rules reflect the goals of the Convention on Biological Diversity (CBD), the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES), and the Millennium Development Goals.

In December 2008 the Union signed an agreement with the CBD to work together in encouraging companies involved in biotrade to adopt ethical biodiversity sourcing practices. 'Ethical sourcing of biodiversity' refers to practices that promote the sustainable use of natural ingredients derived from flora and fauna that naturally occur in the sourcing area. It aims to advance the conservation of biodiversity while ensuring that all contributors along the supply chain including small scale producers are paid fair prices and receive an equitable share in the benefits from the sale of the final products. Ethical sourcing biodiversity recognises countries' sovereign rights over biodiversity and respects the rights of local and indigenous communities over their traditional knowledge.

The ethical biotrade principles and criteria are:

- Conservation: preserving the variety and complexity of genetic, species and ecosystem diversity;
- Sustainable use: sourcing natural ingredients in a way and at a rate that does not lead to the long-term decline of the ecosystem;
- Equitable benefit sharing: ensuring that all contributions to a natural-based product are recognised and fairly compensated, and that all actors share in the benefits deriving from the use of biodiversity;
- Socio-economic sustainability: adopting production, financial, and marketing practices that are economically viable and socially acceptable;
- Legal compliance: following the relevant international, national and local regulations;

- Respect for the rights of actors: taking into account human rights, and gender and labour considerations for all contributors;
- Clarity about land tenure: respecting land tenure and requiring access to biological resources and traditional knowledge on the basis of prior informed consent.

Private and public companies, trade associations, NGO's, community producers or collectors, national biotrade programmes and any other organisation active in the biotrade arena can apply for membership to the Union. Further contact information is available at:

Union for Ethical Biotrade
32, rue de Berne
1201 Geneva. Switzerland
Tel: +41 22 566 1585
Fax: +41 22 731 0240
www.ethicalbiotrade.org

The Union for Ethical BioTrade (UEBT) had a stand at NiE/FiE, and in association with United Business Media (UBE) was launching the Ethical BioTrade Awards for Biodiversity, to celebrate the UN 2010 International Year of Biodiversity.

EU Price Information

Price indications (in Euro) collected from the markets within the EU are given for a range of essential oils, below. Prices were collected during weeks 48 to 52 from major importers and wholesalers in Europe. Prices are wholesale prices, per kg, for quantities of 25kg or more unless otherwise stated. Please remember that prices are indications only and that 1kg quantities obtain a very substantial price premium over the bulk wholesale quantities, and that there is very considerable variability in price between suppliers at this level.

Spice Oils

Product	Origin	Prices (EUR/kg)	Remarks
Black pepper	Madagascar	180-220	1 kg
Cardamom	India	400-500	1 kg
Cinnamon leaf	Madagascar/France	40-110	1 kg
Cinnamon bark	France (Madagascar)	475-800	1 kg
Clove bud	Madagascar	90-130	1 kg
	India	140-180	1 kg
Clove leaf	India	40-55	1 kg
Nutmeg	Indonesia	130-150	
Ginger	France	240-300	1 kg
Ginger	Sri Lanka	200-280	1 kg

Spice Seed Oils

Product	Origin	Prices (€/kg)	Remarks
Anise	Australia	250-275	
Coriander seed	Russia	250-360	1 kg
Cumin seed	Egypt	220-250	1 kg
	Egypt	200-240	
Fennel seed, bitter	Spain	160-200	1 kg
Fennel seed, sweet	Bulgaria, France	150-225	1 kg

Citrus Oils

Product	Origin	Prices (€/kg)	Remarks
Orange (sweet)	Brazil, Peru	20-40	
	Italy	30-35	
	Italy, Brazil, South Africa	30-40	1 kg
	African origins	30-40	
Orange (bitter)	Italy	150-160	1 kg
Bergamot	Italy	140-190	1 kg
	Italy	200-250	1 kg
Lemon	Brazil	45-55	
	France, Italy	75-130	1 kg
Lime	India	85-100	1 kg
Grapefruit	Israel, S Africa	160-200	1 kg
Mandarin, red	Brazil, United States	120-195	1 kg
Mandarin, green	Italy	240-250	1 kg
Petitgrain	South Africa	90-110	

Herb Oils

Product	Origin	Prices (€/kg)	Remarks
Basil	Egypt,	150-220	1 kg
	Italy	180-220	25 kg
Chamomile, German	United Kingdom, Hungary,	800-1,050	1 kg
Chamomile, Roman	United Kingdom/Italy	1,200-1,700	1 kg
Lavender	Bulgaria	100-130	
	French	135-215	
	France, Bulgaria,	180-240	1 kg
Lavendin	France	110-130	Grosso
	Spain	45-55	1 kg
Marjoram	India, Spain,	160-190	1 kg
	Spain	150-190	
Mint	France,	150-165	Piperita
Mint	UK, India, USA	70-125	Piperita, 1 kg
	India	70-75	Piperita, 1 kg
Mint	Nepal,	80-90	Cornmint (*M arvensis*)
Mint	United States	110-130	Spearmint (*M spicata*) 1 kg
Rosemary	Tunisia, Spain	60-90	1 kg
Sage	Bosnia, Croatia	60-200	1 kg
Thyme	Albania, Hungary	210-300	1 kg

Perfumery Oils

Product	Origin	Prices (€/kg)	Remarks
Citronella	Vietnam	25-30	
Citronella	Sri Lanka, India	35-50	1 kg
Eucalyptus citriodora	China	40-45	1 kg
Eucalyptus globulus & other high cineole types	Spain/Portugal	25-30	
Eucalyptus globulus & other high cineole types	Kenya, China, South Africa	40-80	1 kg
Geranium	Kenya, South Africa, Egypt,	200-240	1 kg
	Egypt	240	
Juniperberry	Bosnia, Croatia, India	160-330	1 kg
Lemongrass	Kenya, Nepal	45-65	1 kg
Litsea Cubeba	China	80-90	1 kg
Palmarosa	India	55-100	
Patchouli	Indonesia	130-160	
Rose (Otto)	Bulgaria, Iran	7,000-7,500	1 kg
Tea Tree	Australia	55-75	
Tea Tree	Zimbabwe, Australia	55-80	1 kg
Vetiver	Sri Lanka	225-350	
	Indonesian	290-350	
Ylang ylang	Madagascar/Comores	250-300	Complet, 1 kg

US Market Trends

Trade appears to be picking up overall. The only essential oil with large price differences is cardamom. Cardamom is currently scarce, and this has been reflected in skyrocketing prices of the essential oil. Organic (NOP) Cardamom essential oil is being quoted between 360 to 600/kg. Massoia is also reportedly in very short supply, and according to one importer, the last time this happened was in 2004 and it took two years to clear up.

Patchouli is also difficult to find, and what can be found is mostly bad quality.

Importation of Malagasy essential oil to the US is currently threatened. Madagascar continues to have political strife, and one US importer reports that this is severely affecting business with regards to importation to the US. The US government has issued a statement officially on December 10, 2009, regarding the pending loss in eligibility of Madagascar in AGOA. They state:

Madagascar has been a leader in the utilization of the trade benefits under the African Growth and Opportunity Act (AGOA) since becoming eligible in October 2000. The Act requires the President to annually designate countries as eligible to receive the benefits of AGOA if they have established, or are making continual progress in certain criteria, including the rule of law and political pluralism. The March 2009 undemocratic transfer of power and the inability to establish a return to democracy have violated one of the vital criteria for Madagascar's continued eligibility for these trade preferences. The U.S. Government urges the Malagasy political leadership to take concrete steps toward reestablishing a constitutional democratic government and the rule of law. These steps include the announcement of the full Transitional Government Cabinet; establishment of a National Reconciliation Council; clear progress toward establishing an Independent Electoral Commission; and setting an election deadline with an update of those election plans for the international community. Failure to achieve these benchmarks by December 15, 2009 would seriously threaten Madagascar's continued eligibility for AGOA's trade benefits in 2010. The United States Government reiterates its demand that Madagascar's political leadership move forward rapidly towards the establishment of democratic constitutional rule. Additional delay in meeting these benchmarks will undermine Madagascar's credibility and its prospects for continued eligibility for AGOA benefits.

US Price Information

Spices oils

Spice	Variety	Prices (USD/kg)
Cinnamon Bark	Madagascar	198 (10-49 kgs)
Cinnamon Bark	Madagascar	189 (50-99 kgs)
Cinnamon Bark	Sri Lanka	375 (5 kg)
Cinnamon Leaf	Madagascar	14 (25 liter min)
Clove Bud	Sri Lanka	60 (20 KG)
Ginger, fresh	Madagascar	254 (10-49 kgs)
Ginger, fresh	Madagascar	249 (10-49 kgs)
Ginger	Sri Lanka	195 (25 kgs)
Ginger, fresh	Madagascar	164 (25 liter min)
Tumeric, fresh	Madagascar	149 (25 liter min)

Spices seeds oils

Spice	Variety	Prices (USD/kg)
Coriander	France	403 (5 kg)
Cardamom	Guatemala	360-600 (25 kg)
Fennel	France	268 (5 kg)

Herb oils

Spice	Variety	Prices (USD/kg)
Basil	Egypt	225 (25 kg)
Lavender	France	271 (25 kg)
Sage	France	268 (5 kg)
Tarragon	France	447 (5 kg)

Citrus oils

Spice	Variety	Prices (USD/kg)
Bergamot	Italy	230 (15 kg)
Lemon	Argentina	75 (25 kg)
Orange	USA	15 (25 kg)

Perfumery oils

Spice	Variety	Prices (USD/kg)
Geranium	Egypt	173 (50 kg)
Geranium	Madagascar	194 (25 liter min.)
Eucalyptus citriodora	Madagascar	19 (25 liter min)
Issa (*Rhus taratana*)	Madagascar	109 (10-49 kgs)
Lantana	Madagascar	250 (10-49 kgs)
Niaouli var. cineolifera	Madagascar	38 (10-49 kgs)
Niaouli var. cineolifera	Madagascar	29 (50-99 kgs)
Niaouli var. cineolifera	Madagascar	25 (100 kg and more)
Niaouli var. viridiflora	Madagascar	40 (10-49 kgs)
Niaouli var. viridiflora	Madagascar	33 (50-99 kgs)
Niaouli var. viridiflora	Madagascar	30 (100 kg and more)
Patchouli	Indonesia	165
Ravensara aromatica	Madagascar	102 (10-49 kgs)
Ravensara aromatica	Madagascar	97 (50-99 kg)
Ravintsara (*Cinnamom camphora*)	Madagascar	158 (25 liter min.)
Saro (*Cinnamosma fragrans*)	Madagascar	109 (10-49 kgs)
Saro (*Cinnamosma fragrans*)	Madagascar	100 (50-99 kgs)
Saro (*Cinnamosma fragrans*)	Madagascar	95 (100 kg and more)
Ylang complete	Madagascar	172 (10-49 kgs)
Ylang complete	Madagascar	163 (50-99 kgs)
Ylang III	Madagascar	90 (25 liter min)

Honey

European Markets

Price Information

Price indications have been collected from importers based in the Northern part of the EU. The prices are examples of offers received during week 49 and they are not intended as quotations. Prices may fluctuate depending on different factors, including quality, type, and time of harvest.

Origin	Type	Price per kg
Romania	Acacia	EUR 3.60 – 3.75 EXW
	Linden	EUR 3.00 – 3.10 EXW
Latin America	Polyflora (Argentina)	EUR 2.70 DDP
	Polyflora (Brazil)	EUR 2.41-2.51 DDP
Asia	Polyflora (China)	EUR 2.45 DDP
	Polyflora (India)	EUR 2.60 DDP

Selected Organic World Info

2009 plantings of U.S. organic cotton are highest since 2001

U.S. growers of organic cotton increased plantings of organic cotton acreage by 26 percent in 2009 over that planted the previous year, according to preliminary data collected by the Organic Trade Association (OTA) in a survey funded by Cotton Incorporated.

Analysis of available data collected by an OTA survey of U.S. organic cotton producers and preliminary data from the Texas Organic Cotton Marketing Cooperative (TOCMC) put planted area at 10,731 acres in 2009, up from an estimated 8,539 acres in 2008. The 2009 plantings are the highest since 2001, when 11,586 acres were planted by U.S. cotton growers.

Harvested acreage figures for 2009 are not yet available. However, estimates show that this could be as much as 9,555 acres, up from 7,289 acres harvested in 2008.

Harvested organic cotton area in 2008 yielded 7,026 bales, of which 6,466 bales were upland cotton and 560 bales were pima cotton. This yield was significantly less than the 14,025 bales of organic cotton harvested from 8,510 acres in 2007. These yield differences reflected the extremely difficult weather conditions, including wind, hail and drought, in 2008 in contrast to excellent growing conditions in 2007.

Other survey findings revealed that the average price per pound farmers received for organic cotton in 2008 decreased from the previous year and ranged from 52 cents to $1.35 for organic upland cotton in 2008, compared to $1 to $1.50 in 2007. Organic pima cotton prices ranged from $1.05 to $3 in 2007, compared to $1.75 in 2008.

When asked what their greatest barriers are to planting more cotton in 2010, growers cited finding a market for their cotton, finding a market that will pay value-added costs of organic products, production challenges such as weeds and insects, weed control, and labor costs. Growers also cited competition from international organic cotton producers as well as the cost of transition to organic.

To enhance their ability to market organic cotton, survey participants suggested that the National Organic Program continue to allow organic growers to use acid-delinted cotton seed for planting and cited the need for greater enforcement for foreign certifications. Growers also said they needed further promotion geared toward organic products and greater consumer demand.

Organic cotton is grown without the use of toxic and persistent pesticides and synthetic fertilizers. In addition, federal regulations prohibit the use of genetically engineered seed for organic farming. All cotton sold as organic in the United States must meet strict federal regulations covering how the cotton is grown.

Source: Organic Trade Association

Future of Organic Ornamental Plants

Whether plants are grown for food or ornamental use, conventional agricultural production methods have the same environmental impact. Pesticides, herbicides, and chemical fertilizers can find their way into the air and groundwater, ultimately affecting the environment, wildlife, and communities.

Interest in reducing detrimental environmental impact by using organic production methods is catching on with growers and consumers alike. Increasing numbers of consumers are choosing organic foods for "ethical" reasons; they view organics as having a less harmful impact on the environment than foods grown using conventional production techniques. These eco-conscious consumers are also showing an interest in purchasing organically grown nonedible crops like ornamental bedding plants and cut flowers. Assuming this green trend continues, organic ornamental bedding plant production may soon be a new niche for conventional bedding plant growers.

A recent USDA report showed that acreage of organic nurseries and greenhouses in the United States has increased 83% since 2004. But supermarket sales of organic ornamental plants are not keeping up with this growth; organic herbs and flowers have been marketed primarily through the Internet, community-supported agriculture groups, and local farmers markets. Now, some larger ornamental greenhouse growers are starting to integrate organic production into their facilities in anticipation of a growth in consumer demand.

Stephanie Burnett and Lois Berg Stack of the University of Maine and the University of Maine Cooperative Extension surveyed growers in Maine to determine the perceived research needs of this emerging industry. Both organic and conventional greenhouse growers were included in the project to determine what problems organic ornamental bedding plant producers encounter and to find out what barriers prevent conventional bedding plant growers from converting to organic production. The study findings appeared in a recent issue of HortTechnology.

Organic growers were asked to identify their greatest motivator to determine whether they felt that there is a real market for organically grown ornamental plants. The greatest percentage (75%) of organic growers indicated that they choose to grow plants organically because "it's the right thing to do." Interestingly, none of the growers who responded said that "market demand" was their greatest motivation for organic ornamental production.

When asked to identify their challenges, organic bedding plant growers identified insect and disease management as their number one production challenge, and problems with fertility as their second greatest concern. Conventional growers indicated that they primarily avoid organic production techniques because they consider organic fertilization or organic insect management to be too big of a challenge.

According to Burnett, "because both organic and conventional growers consider insect and fertility or substrate management to be challenges facing organic growers, these topics should be top priorities for future research on organic greenhouse production."

Source: Science Daily

Sustainable Farming May Help Maintain Healthy Climate

Sustainable farming, initially adopted to preserve soil quality for future generations, may also play a role in maintaining a healthy climate, according to researchers at the Department of Energy's Oak Ridge and Los Alamos national laboratories.

ORNL and LANL scientists are exploring the large potential of the earth's soils to sequester carbon, with estimates claiming that new land-use practices could greatly reduce U.S. carbon emissions by as much as 25 percent. But exactly which practices are the most effective is still unclear, and a research paper published in the Soil Science Society of America Journal shines some light on this topic by introducing an easy-to-use field-portable approach to measure the carbon content of soils.

"This is a tool one could use to measure changes in soil carbon over time and try to establish whether soil carbon stocks are increasing or decreasing as a result of land-use practices," said lead author Madhavi Martin of ORNL's Environmental Sciences Division. "Although it is possible to measure these properties in the laboratory, the simplicity and portability of the device allow researchers exponentially greater flexibility to conduct their investigations."

The paper describes the adaptation of Laser Induced Breakdown Spectroscopy, or LIBS, a technique that once made Martin something of a celebrity when she used it confirm the common origin of two separate pieces of firewood -- evidence that eventually led to a confession in a 2006 Texas murder case. LIBS works by measuring the light emitted when a small portion of the sample is annihilated with a laser pulse, a flash that provides an elemental fingerprint of virtually any substance under examination.

The challenge for the authors was configuring the experimental design to ensure accurate measurements of carbon regardless of soil characteristics. To accomplish this, the authors acquired a varied set of soil samples with different sand, silt and clay compositions from the Natural Resources Conservation Service and tested them against numerous laser wavelength and energies.

"We found that LIBS is a promising technique that provides a robust method for the sampling of soil carbon, relying solely on technology that can be taken to the field," Martin said. "Crop scientists, carbon managers and instrument developers should find these results encouraging."

With new techniques such as LIBS to assist them, researchers hope they can eventually identify the agricultural practices that provide the maximum benefits to farmers and the climate alike. Intensive farming is a double-edged sword as it can greatly enhance crop production in many areas of the country. Often, however, this comes at the expense of soil health in addition to accelerating the rate of climate change, according to the researchers.

Twice as much carbon is stored in the soils of the world as in the atmosphere, thanks to centuries of decomposition of plants and other organic matter. Fertile (high carbon content) soil is necessary for the growth of large healthy crops. However, fertile soil is also a favorite target of naturally occurring bacteria.

Fortunately for farmers and plants, the majority of carbon beneath our feet is physically protected from bacteria in what scientists call soil aggregates. A large portion of that carbon is concentrated near the earth's surface and therefore highly vulnerable to changes in land use. When a soil's aggregate structure is disturbed, such as through intensive farming, the organic matter it protects becomes accessible to soil microorganisms that use it as an energy source, releasing the stored carbon back into the atmosphere as the greenhouse gas CO2.

"Disruption of soil structure is estimated to contribute to a 50 percent loss of soil carbon," said Chuck Garten, a soil scientist at ORNL. "When the microstructure of the soil is disturbed, it breaks down the aggregates allowing large losses of soil carbon as a result of microbial decomposition."

This lesson was learned the hard way by many American farmers when pressure for production leads to serious soil degradation through erosion and nutrient losses. Intense farming by pioneer farmers in the first 30 years of settlement depleted the organic matter in the U.S. Great Plains by more than 50 percent with soil productivity falling more than 70 percent during the same period.

Eventually, better agricultural practices were adopted and production recovered. Still, grassland and forest soils continue to lose 20 percent to 50 percent of their original carbon content within the first 40 years of cultivation while tropical climates that practice shifting cultivation or slash and burn agriculture can lose their fertility within two to three years. Farmers make up for the loss by simply moving to new fields or replenishing carbon stocks with the use of manures and other organic wastes.

The research at Oak Ridge National Laboratory was funded by the Department of Energy's Office of Science, Biological and Environmental Research.

Source: Science Daily

Protection of Organic Products Taken to Next Level

Ready-to-eat, organic processed pork products look similar to conventionally cured meats. The organic versions have become popular among consumers as processors work to meet the demand. Although the natural and organic processed meat products are manufactured to simulate traditionally cured meat products as closely as possible, they're not exactly alike.

One key difference is that the traditionally cured pork products contain nitrate and nitrite. Nitrite is a chemical preservative that's effective in inhibiting the growth of certain foodborne pathogens. Under government regulations, the organic products are not permitted to contain preservatives such as nitrate or nitrite. Instead, the organics may contain vegetable products that are considered natural ingredients and that contain high concentrations of nitrate, which is acceptable because it is from a natural source. The vegetable-based nitrate makes the organic pork product look and taste like it was traditionally cured.

The problem is that the organic products, lacking the directly-added nitrite, don't have the same level of built-in protection against pathogens such as Clostridium perfringens, Clostridium botulinum and Listeria monocytogenes.

"Consumers can't tell the difference, except that they're labeled natural and organic," said Joseph Sebranek, an Iowa State University food science professor who is researching the case for the Food Safety Consortium. "From the standpoint of consumers, if they have a natural organic hot dog, it looks the same. The issue is if consumers expect that product to be identical in terms of handling requirements and refrigeration, and if they happen to do some temperature abuse, there is going to be more potential for problems to develop."

Sebranek said his research team's analysis has determined that naturally occurring nitrate is not present in the organic products at as high a concentration as the nitrite preservative is in traditionally cured products. But the level of concentration isn't the only factor that affects the product's ability to fight off pathogens. The researchers are reviewing what other formulations in the products could have an effect.

The research has found that there is a way to use natural ingredients to fight the potential of pathogenic contamination in organic products to make up for what nitrite isn't present to do. Natural vinegar, lactate and lemon powder have recently become commercially available for use as natural preservatives in foods. Sebranek's group tested their effectiveness against the pathogens and found them to be effective against L. monocytogenes and C. perfringens, although not to the extent that nitrite is effective in traditionally cured products.

More remains to be explored. Sebranek's research group is studying other natural antimicrobial ingredients to determine their effectiveness against pathogens in organic processed meat products.

Source: Science Daily

Organic Weed Control Options For Highbush Blueberry; Pine Needle Mulch Most Effective

Research scientists at Nova Scotia Agricultural College have been working steadily to find effective organic methods to control weeds in cultivated blueberry crops. One resulting study, published in a recent issue of the ASHS journal HortScience, reported on the efficacy of three organic mulches used on highbush blueberry (HBB) produced under organic production practices. The research team determined that the major factor influencing weed suppression by compost mulches (for certain weed species) was likely mulch thickness and bulk density, which provide a barrier to weed growth and prevents light penetration to the soil surface.

Weeds are a widespread problem for the blueberry industry. North American commercial blueberry producers who took part in a recent survey indicated that weed problems were a concern in almost all production areas, particularly in young plantings when bushes are not fully established and most susceptible to competition. Weed control is even more of a challenge for growers of organic products, including organic highbush blueberry (Vaccinium corymbosum L.). The current study was initiated as an attempt to find feasible, effective organic weed control methods to sustain Nova Scotia's growing blueberry industry.

A two-year field study was conducted in 2005 and 2006 in an established field of 5-year-old northern highbush blueberry at Blueberry Acres, a commercial blueberry operation in the Annapolis Valley of Nova Scotia.

Mulches, applied in-row at a 20-cm depth, included pine needles, manure-sawdust compost, and seafood waste compost.

Dr. Derek Lynch, of the Department of Plant and Animal Science at NSAC, headed the research team. According to Lynch, organic materials such as pine bark, peat, and sawdust are commonly used as a preplant soil amendment to increase the organic matter content of mineral soils, but heavy applications of organic mulch can result in high soil salinity and impact plant yield and growth, even resulting in environmental impacts. "Alternately," noted Lynch, "thickly applied organic mulches may be an effective weed management option. Mulch thickness is an important consideration because the emergence of weed seedlings is inversely related to seed depth, meaning the efficacy of weed control tends to increase with mulch thickness."

The study reported that pine needles (PN) were the most effective mulch in suppressing weed growth, with 55% less and 73% less aboveground weed biomass compared with the control in 2005 and 2006, respectively. Pine needle productivity effects were much more modest, however. One year after application, pine needles lost some efficacy at suppressing weeds but the treatment was still superior to both composts. The researchers recommend continuing to topdress PN or similar mulches on a yearly basis to maintain mulch thickness.

Lynch summarized; "This approach can be cost-effective depending on local availability of mulch materials. However, precautions should be taken to avoid excess nutrients from heavy application of nutrient-rich mulches and weed-seed contamination of these types of mulch." He added that more research is needed to evaluate the long-term effects of different mulches on productivity and nutrient availability in these systems.

Source: Science Daily

Events Calendar

Fairs and Exhibitions

Date	Event	Place	Link
2010			
8-10 Jan.	The Food Fair	Singapore	http://www.amac.sg/events.html
11 - 17 Jan.	HortiEgypt	Cairo, Egypt	http://www.hortiegypt.com
20 - 21 Jan.	BioVak 2010	Zwolle, Netherlands	http://www.biovak.nl
25 - 27 Jan.	Millesime Bio 2010	Montpelier, France	http://www.millesime-bio.com
31 Jan.-Feb.3	ISM International Confectionary Trade Fair	Cologne, Germany	www.ism-cologne.com
8 - 12 Feb.	Nutra Bioorganic	Moscow, Russia	http://www.bioorganic.ru/
11-13 Feb.	7th African Fine Coffee Conference and Exhibition (EAFCA)	Mombasa, Kenya	www.eafca.org/afcc7
17 - 20 Feb.	BioFach 2010	Nuremberg, Germany	http://www.biofach.de/en/default.ashx
21- 24 Feb.	Gulfood	Dubai	http://www.gulfood.com/
26-28Feb.	World Coffee Conference 2010	Guatemala City, Guatemala	www.wcc2010guatemala.com/
3-7 Feb.	Int. Conference on Organic Agriculture	Famagusta, Cyprus	http://organic.emccinstitute.org/index.html
2-5 March	Foodex Japan	Chiba, Japan	http://www3.jma.or.jp/foodex/en/index.html
5-7 March	BioCultura	Valencia, Spain	http://www.biocultura.org/
12-14 March	Natural Products Expo West	Anaheim, USA	http://www.expowest.com
17-19 March	Tokyo Health Industry Show	Tokyo, Japan	http://www.this.ne.jp/eng/index.html
18-20 March	NCA's 99th Annual Convention - The Ritz-Carlton, Laguna Niguel,	Dana Point, CA, USA	www.ncausa.org/
19-22 March	Salon Vivre Autrement	Paris, France	http://www.salon-vivreautrement.com/
25-28 March	AgroBiorama Expo	Lausanne, Switzerland	http://www.mednatexpo.ch/
25-27 April	Tea & Coffee World Cup	Vienna, Austria	www.tcworldcup.com/vienna

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Annex

List of Certification Bodies mentioned in this MNS report

Name	Home page or Address
BCS Oeko-Garantie	www.bcs-oeko.de
COAE, Certer for Organic Agriculture in Egypt	Ibrahim El-Shawarby St. 14 11777 Cairo, Egypt Tel: +20 2 2624 88 19 / 123999153 Fax:+20 2 2624 88 19
Demeter-International	http://www.demeter.net/
Ecocert	www.ecocert.com
Institute for Marketecology (IMO)	www.imo.ch
Plant Protection and Inspection Services (PPIS)	www.moag.gov.il/ppis/
Soil Association Certification	www.soilassociation.org/certification

Fairtrade schemes mentioned in the price list:

Name	Home page or Address
Banafair	www.banafair.de
Fairtrade	www.fairtrade.net

Trade term abbreviations used in this report

Trade term abbreviation	Trade term
CFR	Cost and Freight
CIF	Cost, Insurance and Freight
CIP	Carriage and Insurance Paid To
DDP	DDP Delivered Duty Paid
EXW	Ex-works
FCA	Free Carrier
FOB	Free On Board

International Trade Centre

Street address
International Trade Centre
54-56 Rue de Montbrillant
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