CALIFORNIA KIWIFRUIT COMMISSION
INTERNATIONAL MARKET REPORT
(Central America – November 5th, 2009)

Current Market Conditions

Costa Rica: Port Moin, one of the most important ports in Costa Rica, is currently on strike. The port is closed and the strike has delayed the arrival of containers to the whole country. The government does not know exactly when this situation is going to be resolved, but we expect the strike will only last a week or two as the port is vitally important to Costa Rica's commerce.

In general, the importers in this country will be receiving their last containers from Chile for the season at very low prices. Importers should be switching soon to California suppliers in order to keep kiwifruit in the market.

Guatemala: The market has received its first shipments of California kiwifruit for the 2009/10 season. One of Guatemala's largest supermarket chains is still importing large volumes from New Zealand and could continue to do so into late November.

El Salvador: Importers expect that Chile will continue to ship to El Salvador for 2 to 3 more weeks, selling the last of the Chilean supply. California kiwifruit is already present in the market but with very low volumes. Importers expect to increase supplies from California in the upcoming weeks.

Honduras: One of the leading importers in this country has received the last containers from Chile. California shipments have begun to enter the market but they are competing with very low prices (but lower quality) from the remaining Chilean fruit. Importers have said that they will switch over to California product in the coming month.

Panama: Currently this market has very low volumes of kiwifruit of any origin. Chile is currently the only origin in the market with very low prices. Panamanian importers are hesitant to import California fruit at the current price.

Exchange Rate:

Costa Rica	US$1= 574 Colones
Guatemala	US$1= 8.35 Quetzales
Honduras	US$1= 18.89 Lempiras
Panama	US$1= 1.00 Balboa

Competition

As mentioned, Chile is the leading competitive origin in the region. The fruit available is the last of the Chilean supply, as the season for this origin is over. Being the last fruit of the season, the quality is very low, very soft. Due to the low quality the fruit is being sold at very low prices.

Kiwifruit from New Zealand is also present in the region and it's reaching the end of its season as well. New Zealand is all but finished in Central America except for some limited specific cases. The origin should be completely finished in a couple weeks, certainly by the end of November. Despite being the end of the season, the New Zealand fruit has maintained pressure and quality. Poor quality Chilean fruit is driving down the price, but the New Zealand fruit is still moving at a higher price.

CKC Quality

The CKC's first loads to Central America are in very good shape. Importers have said that the fruit quality is good, with no problems, good size and flavor. Some have mentioned that the fruit arrived with very high pressure, too high in some cases, taking a long time to ripen.

CKC Arrivals

Importers have already received California kiwifruit but most have received limited volumes, only one to two pallets each in most cases. Importers in the region have ordered and are expecting to receive two or three more pallets each in the next couple of days.

Trade Comments

In general, the importers have mentioned that California Kiwifruit's prices are very high limiting the volumes by which they can handle the fruit. Importers are buying only what they need to cover the dwindling supplies from Chile and New

Zealand. Importers in the region have also said that they are waiting for CKC prices to drop, which they said will dramatically increase shipments from California.

Prices

Retail Level:

Variety	Origen	Size/Count	Retail Price US$/lb
Hayward	CA	36	1.81-2.15

Other	Origin	Size/Count	Retail Price US$
Kiwifruit	New Zealand, Chile	70	1.20-1.20
Kiwifruit	Chile	33	1.30-2.15
Apples	Chile, WA, USA	42 lbs	0.79-1.48
Peach	CA, GT	56-70	0.64-1.86
Plum	CA, GT	50-70	1.56-3.30
Grape	CA	18 lbs	1.63-2.74
Pears	Arg, CA	44 lbs	1.08-1.75
Orange	Peru, USA, Chile	44-72	1.29-1.84
Tangerine	Chile, Peru	22 lbs	1.58-1.68
Cherries	USA	15 lbs	7.03
Apricot	CA	10 M	3.22
Grapefruit	USA	30-33 lbs	0.83
Strawberries	GT, HO		1.04-1.69

Wholesale Level:

Variety	Origen	Size/Count	Wholesale Price US$
Hayward	CA	36	$25.00-$27.00

Other	Origin	Size/Count	Wholesale Price US$
Kiwifruit	New Zealand, Chile	70	23.35-23.35
Kiwifruit	Chile	33	22.00-28.57
Apples	Chile, WA, USA	42 lbs	17.97-41.38
Peach	CA, GT	56-70	22.41-34.48
Plum	CA, GT	50-70	23.65-34.48
Grape	CA	18 lbs	24.70-29.31
Pears	Arg, CA	44 lbs	18.39-41.38
Orange	Peru, USA, Chile	44-72	27.08-29.91
Tangerine	Chile, Peru	22 lbs	26.86
Cherries	USA	15 lbs	51.89
Apricot	CA	10 M	30.52

Public Markets:

Variety	Origen	Size/Count	Retail Price US$/lb
Hayward	CA	36	1.65-2.15

Other	Origin	Size/Count	Retail Price US$
Kiwifruit	Chile	33	1.70-2.15
Apples	Chile, WA,	42 lbs	0.79-1.48

	USA		
Peach	CA, GT	56-70	0.64-1.86
Plum	CA, GT	50-70	1.56-3.30
Grape	CA	18 lbs	1.63-2.74
Pears	Arg, CA	44 lbs	1.08-1.75
Orange	Peru, USA, Chile	44-72	1.29-1.84
Strawberry	GT, HO		1.04-1.69

List of Trade Contacts:

Name	Last name	Tel.	Company
Karen	Merck	(502)2421-3800	Dispersa
Guillermo	Burgos	(503) 2231-3100	Fruteria Vidaurri
Johanna	Reyes	(503) 2243 1265	Importfruit