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World Market for Passion Fruit

RAP Market Information Bulletin No. 8

INTRODUCTION

More than 400 different varieties of passion fruit are grown in the Americas, Africa, and Asia, *passiflora edulis* being the most commonly cultivated for commercial consumption. Still, the fruit remains unfamiliar to many Western consumers. Fresh passion fruit (usually of sweet, purple varieties) is currently considered a specialty, low-volume item in the United States and Europe. Passion fruit juice, however, is a common ingredient in blended juice drinks. Recently, because of decreasing production, prices for juice have increased dramatically, giving remaining suppliers a handsome profit. North America

PRODUCTION AND EXPORTS

North America

In the **United States**, purple passion fruit is grown primarily in California and Florida, with Hawaii producing yellow passion fruit for concentrate. Although exact production figures are unavailable, RAP estimates production at 35,000 4.5-pound boxes per year. Two companies, J.R. Brooks (Florida) and California Tropics (California), account for the majority of U.S. production. Passion fruit is available nearly year round: from May to July it comes from Florida, and from July to March, from California. Wholesalers report that domestic production is enough to meet most domestic demand for fresh product, which is still quite limited. Imports from New Zealand supplement domestic production. Mexico also produces a limited amount of passion fruit.

South and Central America

Ecuador, Brazil, Peru, and Colombia produce fruit of the yellow-skinned flavicarpa variety, mostly for processing. They supply the majority of the world market for passion fruit juice, with combined annual exports of 12,000 metric tons (MTs). Production has dwindled in these countries in recent years as a result of low prices of passion fruit juice on the world market. This year, a production shortfall of 20 to 40 percent is predicted. Stocks are practically depleted, and no improvement is likely before the end of the year, when growers are expected to begin replanting to take advantage of the current high prices being paid for concentrate.

Ecuador was the only country to continue producing and processing large volumes of juice in the face of low world prices and is currently the only significant supplier of concentrate to the European market. Ecuador exported 4,200 MTs of concentrate in 1994, but expects to export only about 3,000 MTs in 1995. New plantings are expected to bear fruit in 1996, increasing exports to an estimated 5,000 MTs. Ecuador is currently the most important world supplier of juice to the United States and Europe as well as to large regional markets such as Brazil, Chile, and Argentina.

Brazil reports production of 450,000 MTs of passion fruit annually on almost 40,000 hectares, making Brazil the largest passion fruit producer in the world. The states of Para, Segipe, and Bahia account for most of national production. More than half of passion fruit produced is used to

manufacture frozen concentrated juice; the remainder is either used to produce juices and fresh beverages in homes or to produce juices and cocktails sold at small stalls throughout the country. Juice production seems to have declined drastically, however, because Brazil is now reportedly importing juice from Ecuador and Colombia for domestic consumption.

Production of passion fruit in **Peru** is year round on the northern coast, from January to June in Amazona, and from March to September in the central coastal region. Land area for production is around 1,000 hectares, down from 3,000 hectares in 1988. However, thousands of hectares of new plantings in northern Peru should begin producing by 1996. Most fruits are now sold on the domestic market. Peru's juice companies can process more than 30,000 MTs of passion fruit annually (10 MTs of fruit make 1 MT of concentrated juice). Peruvian exports of single-strength and concentrated juice totaled 768 MTs (US\$1.1 million) from January to September 1994, compared with 2,409 MTs (US\$3.9 million) in 1993. Output is forecast to total 500-800 MTs in 1995. The United States is one of Peru's primary markets for passion fruit concentrate.

In **Colombia**, processing of passion fruit for juice decreased from 40,000 MTs in 1992 to 12,000 MTs in 1994. Colombia was the second-largest world producer of concentrate in 1992, but farmers cut back production as world prices fell. Colombia has five companies that produce export-quality juice and juice concentrates. Colombia also exports fresh product to Europe.

Africa

Production of passion fruit in Africa is destined either for the local market in the form of fresh product or juice, or for export to Europe in fresh form. Zimbabwe, Kenya, Burundi, and South Africa all send purple passion fruit to Europe for the fresh market.

Kenya reports exports of 948 MTs of passion fruit in 1994, compared with 770 MTs in 1993. The primary markets for Kenyan passion fruit, accounting for 95 percent of all exports, are the Netherlands, the United Kingdom, Belgium, and France. Growers produce passion fruit year round in Kenya, June and July being the months of lowest production.

Asia

Many countries in Asia including Australia, New Zealand, Malaysia, Indonesia, Thailand, India and the Philippines—produce passion fruit. Of these countries, New Zealand exports fresh product to the United States, and Malaysia is a player on the world passion fruit concentrate market. In most of the other countries, production is primarily to meet domestic demand for both fresh and processed fruit.

Indonesia has approximately 1,000 hectares of purple passion fruit and 1,000 hectares of yellow passion fruit under cultivation at the current time. Domestic consumption of both fresh product and juice and pulp is on the rise, and there are plans to increase production.

Information on annual production of passion fruit in **New Zealand** is unavailable. The season begins in February and ends around July, with peak production in March-April. Industry sources estimate that 25-30 percent of production is exported. In 1994, exports were NZD 489,000 free on board (FOB) for approximately 20,000-25,000 two-kilogram trays. The largest markets are the United States and Canada, with the United States taking 80 percent and Canada 15 percent. The remainder goes to a few islands in the Pacific and to Japan.

MARKETS

Passion fruit, despite its abundant production in South America and Africa, has yet to catch on as a large-volume item. Low import volumes caused by low demand have led to high prices, which further constrain demand. Another perceived problem is the wrinkling of the skin that takes place during ripening; some supermarkets have been known to throw out ripe fruit because it is visually unappealing. A concerted campaign of consumer education and marketing of passion fruit, in conjunction with lower prices, will be needed for demand to grow appreciably, according to industry experts.

The market for passion fruit juice (both single strength and frozen concentrate) is highly unstable. A lack of coordination among suppliers in the early 1990s led to overproduction, driving many South American producers out of business because of low prices. Now, with heavy production shortfalls in

major producing countries of Latin America, prices are skyrocketing because current supplies cannot meet world demand.

North America

New York Hunt's Point Wholesale Market prices for 1994 showed 28 per 30-count two-layer 10-pound cartons of fresh passion fruit from New Zealand and California arriving on the market in March and selling for between US\$25.00 and US\$35.00 each. By the end of May, Californian product no longer was being quoted. In mid-June, 30-count one-layer 10-pound flats from Florida arrived on the market and sold for between US\$20.00 and US\$25.00 each. By the end of June, the price of Floridian passion fruit had dropped to US\$10.00 per carton, and by mid-July, no more produce was quoted. In September and November, Florida product reappeared and sold for between US\$20.00 and US\$30.00 per carton.

U.S. and Puerto Rican demand for passion fruit juice concentrate is estimated at 1,000 MTs per year. In 1994, one buyer in Puerto Rico imported 3,000 MTs of single strength juice. The United States is feeling the pinch of reduced supplies this year, with March concentrate prices increasing to US\$3,100 per MT.

Europe

Europe imports purple passion fruit from Africa and yellow passion fruit from South America, primarily Colombia, for sale on the fresh market. Volumes are not large; most major European tropical fruit importers interviewed imported 100-150 MTs per year. Imports are highest in November and December for the holiday season.

In **France**, importers reportedly sold purple passion fruit from Kenya, South Africa, and Zimbabwe for an average price of FF24.00-25.00 per kilogram in 1994. Product from Burundi was slightly cheaper, averaging FF23.00 per kilogram. Prices were highest in December, when importers sold Kenyan product for as much as FF36.00 per kilogram. Yellow passion fruit from Colombia sold for an average price of FF36.00 per kilogram (see Table 1 and Figure 1).

Importers in **Germany** sold South African fresh passion fruit for an average price of DM7.68 per kilogram in 1994, and Zimbabwean and Kenyan product for about DM7.19 per kilogram. Colombian passion fruit averaged DM8.49 per kilogram.

In the **Netherlands**, importers in 1994 sold Kenyan product for slightly more than Zimbabwean product, with average prices of Hfl7.83 per kilogram and Hfl7.51 per kilogram, respectively. Burundian passion fruit received lower prices, averaging Hfl7.00 per kilogram. Prices were highest in November and December for fruit from all sources, reaching Hfl9.62 per kilogram. Prices were lowest during the summer months, sinking to Hfl6.25 per kilogram for Zimbabwean and Hfl5.00 per kilogram for Burundian fruit.

United Kingdom importers sold Kenyan passion fruit for an average price of £2.95 per kilogram in 1994, and Zimbabwean product for £2.57 per kilogram. Prices were highest in November and December, reaching £3.50 per kilogram. According to U.K. importers, rising freight rates in Kenya and Zimbabwe, along with the appreciation of their currencies against the pound, have made passion fruit unprofitable.

European prices for passion fruit juice concentrate, which had reached US\$8,000 per MT in the late-1980s, caused several South American nations to increase production and oversupply the market, driving the price down to US\$2,000 per MT. Many producers abandoned their passion fruit plantations at this low point because the cost of production exceeded what they could receive on the world market. European producers were content to hold onto large volumes of juice bought at low prices until early 1995, when stocks became depleted and a rush ensued for new product. According to juice traders, Ecuador is the only country currently supplying the European market with substantial volumes of concentrate, and prices have risen to more than US\$10,000 per MT (Table 2 and figure on page 6). Traders believe that prices will continue to increase in 1995 before tapering off in 1996. The main European juice importers are Germany and the Netherlands.

Asia

Although very limited information is available on Asian markets, it is said that Japan, Taiwan, and South Korea are new markets for passion fruit and that they have diverted some of the passion fruit juice that Europe usually buys.

South and Central America

Brazil, Chile, and Argentina are all rapidly developing regional markets for passion fruit juice. It is expected that the production shortfall will lead Brazil to import 500-1,000 MTs of passion fruit juice from Ecuador and other nearby suppliers this year. Recent reports (July 1995) indicate that Ecuadorian concentrate is selling at US\$10,500 per MT in Brazil, which just became the world's largest consumer of fresh and processed passion fruit.

Middle East

No import figures are available for imports of passion fruit into the Middle East, but price statistics show that supplies are received from Kenya and Australia, along with re-exported product of indeterminate origin from Holland. In Bahrain from January 1994 to June 1995, Australian product commanded between 2.00 and 2.50 dinars per kilogram. In Saudi Arabia during the same period, Australian product fluctuated between 20.00 and 30.00 riyals per kilogram. In Kuwait, Dutch, Kenyan, and Australian product were all available at some point during these 18 months, as they were in the United Arab Emirates (see Table 3).

GRADES AND STANDARDS

There are no official standards for passion fruit. Passion fruit sold in the United States is usually 2-3 inches in diameter and is packed 30 fruits per 10-pound cell-packed fiberboard or wood flat box (in one or two layers).

European importers receive product in 2-kilogram boxes, 48 fruits per box, in one or two layers. The one-layer box is usually for the supermarkets, and the two-layer box for the wholesale markets. Importers expressed a preference for smooth, well-colored fruit of uniform sizes. Sizing is a problem, with one U.K. importer reporting that some supermarkets often don't carry passion fruit because they sell fruit by the piece for a flat rate, a practice that customers object to if fruit fluctuates in size.

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