Indicators
March 2001

The main fruits

In shares by total volume and expenditure on fruits for the month in France

%	Volume	Expenditure
Apple	26	21
Orange	22	17
Banana	14	13

The trends for the main produce of the month significantly influence the overall situation of the fruit market. A column entitled 'Indicators' discussing these fruits precedes the pages devoted to a selection of exotic and citrus fruits.

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Apple

March 2001 / March 2000			
Price	↗	Vol.	↗

The market has been active (the quantities released are estimated to be 20% up on March 2000). Domestic demand is still dynamic and fair volumes have been exported in spite of the stopping of exports by sea and a decrease in shipments to eastern and northern Europe. Prices rose by 8%.

Orange

March 2001 / March 2000			
Price	↗↗	Vol.	↘

Sluggish market. Demand seems to be slowed by a strong price increase. Releases are down by 7%.

Banana

March 2001 / March 2000			
Price	↗↗	Vol.	=↘

Active market. Major promotion operations continue to stimulate domestic market sales. In addition, exports remain buoyant because of the modest quantities arriving from the dollar origins. Prices are increasing markedly.

Strawberry

March 2001 / March 2000			
Price	↗	Vol.	↘↘

Although they are not in the leading trio, strawberries from the Mediterranean region are traditionally a feature in March. The quantities available have been limited this year (poor weather conditions resulted in a 35% decrease in shipments from Spain). The season also began very late (in week 12 in comparison with week 10 in 2000).

Notes concerning market appraisal methodology

The statistics on the following pages are estimates of quantities put on the market in France. They are only calculated for the main supplier countries and are drawn up using information on weekly arrivals or market release statements by representative operators. The past figures are kindly provided from the POMONA data base and processed by CIRAD. The figures in the 'Main fruits' section above are provided by the CTIFL, with SECODIP being the source. The data published in the French market pages is provided solely as a guide and CIRAD accepts no responsibility for their accuracy. The illustrations are reproduced with the kind permission of Fabrice Le Bellec (CIRAD-FLHOR).

Banana

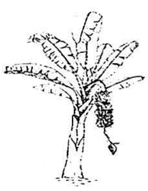
MARCH 2001

Monthly comparison: March 2001 / Feb. 2001

Price	Volumes
↗ + 7%	↗ + 25%

Annual comparison: March 2001 / March 2000

Price	Volumes
↗ + 37%	=↘ - 2%

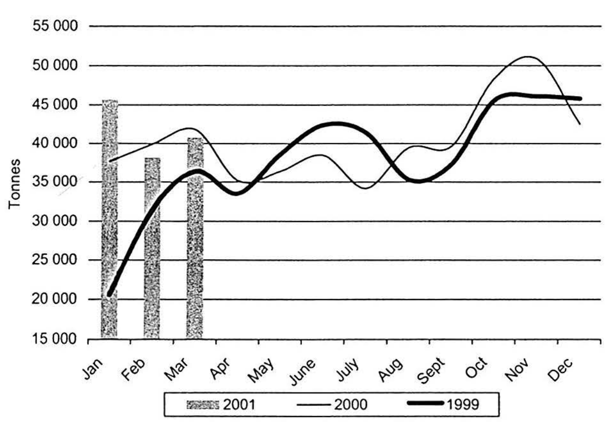


March is traditionally one of the best months of the year. Performance in 2001 can be considered to be exceptional. Indeed, estimates of the volumes marketed in France are very close to last year's figures while the average price has increased by nearly 40%.

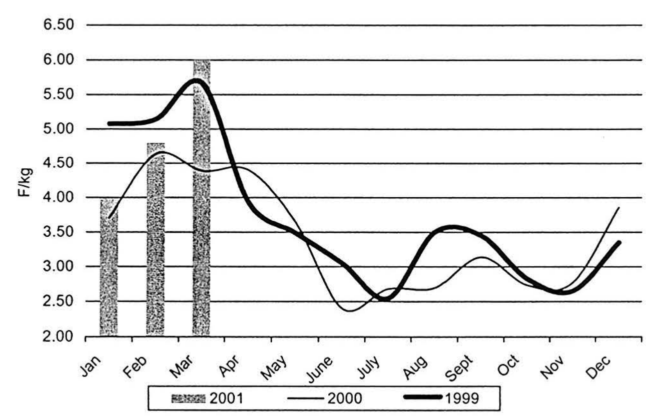
A marked increase in shipments from **Guadeloupe** almost totally compensated from the considerable decrease in arrivals from **Africa** (particularly **Côte d'Ivoire**) and a slight dip in the quantity of fruits from **Martinique**. However, the decrease in shipments to northern EU markets (dollar banana arrivals down by about 6%) and eastern European countries (-14% approximately) is much more marked. Export demand was therefore particularly strong throughout the month. In addition, the domestic market remained dynamic even though the average retail price climbed by more than 9%. Special offers were almost as numerous as last year (28.5% of shops ran 'banana operations' against 30% last year) at an average price 4% lower. The very limited quantities of Spanish strawberries available until week 12 probably goes some way towards accounting for this dynamism.

Banana – Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin – March 2001

Tonnes	March 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Côte d'Ivoire	8 317	-16	-8	23 634	-11	3
Cameroon	9 552	-8	10	30 580	2	17
Martinique	15 630	-4	0	49 140	0	39
Guadeloupe	7 288	38	150	21 245	52	212
Total	**40 787**	**-2**	**12**	**124 599**	**4**	**41**

Avocado

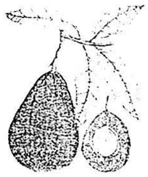
MARCH 2001

Monthly comparison: March 2001 / Feb. 2001

Price	Volumes
↗ + 10%	↗ + 10%

Annual comparison: March 2001 / March 2000

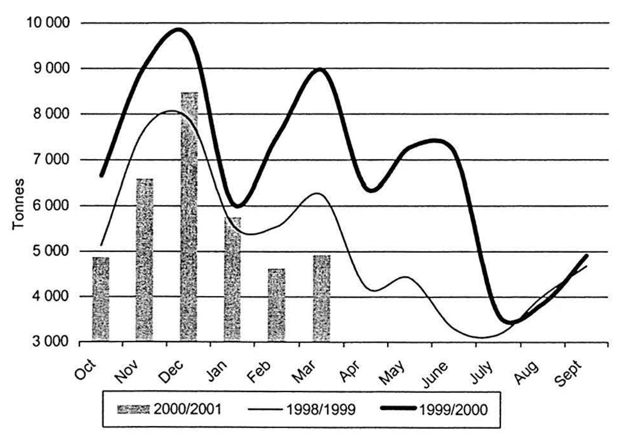
Price	Volumes
↗ + 49%	↘ - 44%

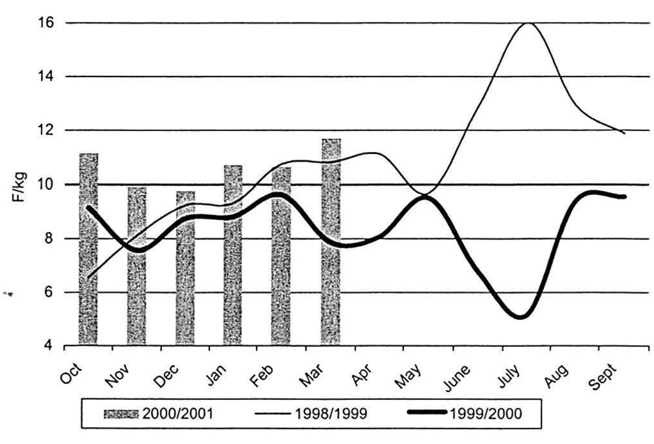


The start of the Kenyan season has not resulted in a substantial change in market conditions. Under-supply was even more marked than in February (-44% in comparison with the 1999/2000 season and even -20% in comparison with the 'small' 1998/1999 season). As a corollary, prices were nearly 50% higher than last year's.

Decreases in shipments from the two origins—**Israel** and **Spain**—that form the backbone of the market in March were particularly significant at –48% and –32% respectively. In addition, the closing of the North American market resulted in only very limited shipments from Mexico to the EU. Indeed, the euro continued to lose ground against the US dollar. The late start of the **Kenyan** season aggravated the overall shortage (the first fruits arrived in week 11 this year in contrast with week 6 last year). It is noted that the first cargoes unloaded included a very large proportion of size 20/22/24. In spite of distinctly less active demand than last year, prices remained very firm until the end of the month when some adjustments were made for the smallest sizes.

Avocado – Estimated market releases in France





Estimated market releases in France by origin – March 2001

Tonnes	March 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Israel	2 009	-49	32	15 848	-21	43
Spain	1 958	-32	-43	13 138	-25	-38
Mexico	361	-55	-28	7 065	-37	-18
Kenya	597	-55	-23	597	-69	-23
Total	**4 925**	**-45**	**-21**	**36 648**	**-26**	**-7**

Orange

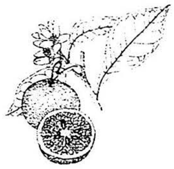
MARCH 2001

Monthly comparison: March 2001 / Feb. 2001

Price	Volumes
↗ + 20%	↗ + 10%

Annual comparison: March 2001 / March 2000

Price	Volumes
↗ + 42%	↘ - 7%

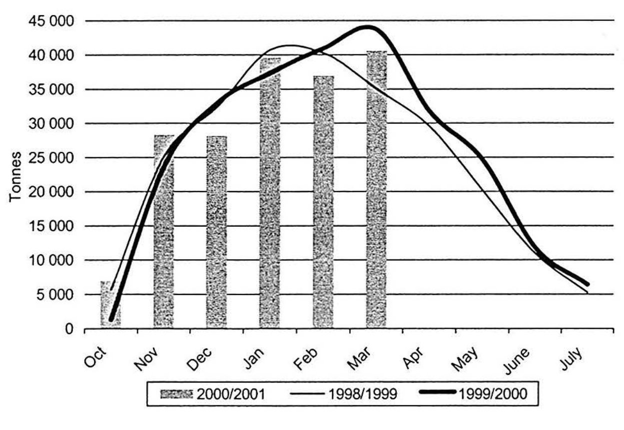


The fall in supplies remained marked in March (-7 % in comparison with last year). Prices rose by more than 40% in spite of relatively sluggish demand throughout the month.

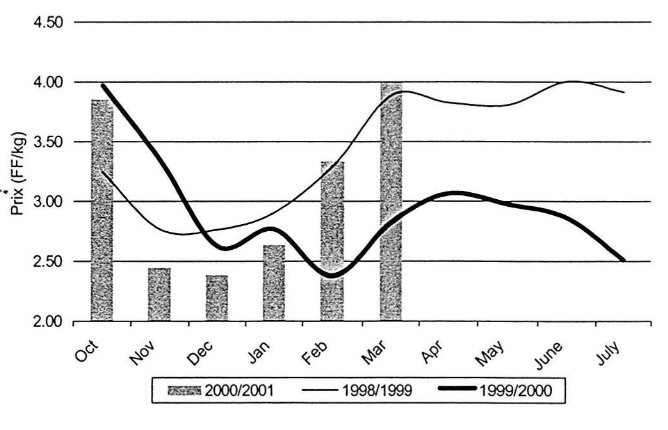
The dwindling of arrivals of Naveline and Navel from **Spain** an astonishing 4 or 5 weeks earlier than last year is the main cause of the shortfall in supplies. Indeed, the shipments of these two varieties only reached a third of last year's volumes. The increase in the quantities of Navelate from week 9 onwards was only a very partial compensation. Likewise, the volumes of Valencia remained small in spite of an early start to the season as a result of strong speculation concerning this variety in the production zones. Thus, the volumes available in **Spain** decreased by more than 25%. The very early start of late fruits from **Morocco** reduced the overall shortfall in supplies (four times more put on the market in comparison with last year). The volume of supplies of Maltese oranges from **Tunisia** is similar to that of 2000. Complementary origins traditionally supplying small quantities were observed in March (**Turkey**, **Cyprus**, **Greece**, **Egypt** and a few batches from **Israel**).

Orange – Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin – March 2001

Tonnes	March 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Spain	25 398	-27	0	153 846	-3	-2
Morocco*	8 110	333	89	8 772	368	104
Tunisia	7 081	2	4	17 938	-11	-3
Total	**40 589**	**0**	**1**	**180 556**	**0**	**1**

* Maroc Late only

Easy peelers

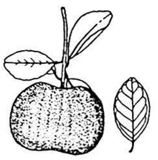
MARCH 2001

Monthly comparison: March 2001 / Feb. 2001

Price	Volumes
↗ + 14%	↗ - 62%

Annual comparison: March 2001 / March 2000

Price	Volumes
↗ + 77%	↘ - 36%



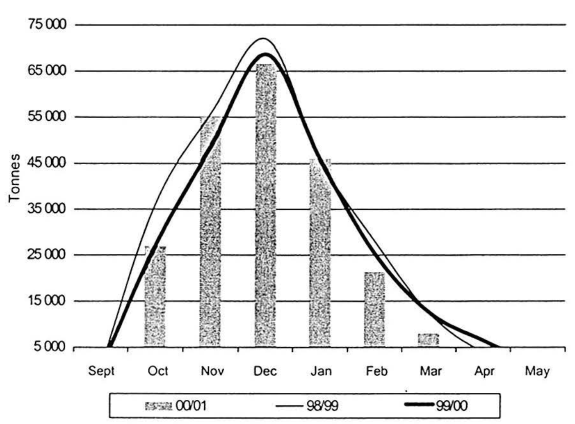
The shortage of supplies of easy peelers was very significant in February and intensified in March. Overall supplies decreased by more than 35%, falling below the 10 000 t mark. The resulting increase in prices was particularly marked, especially as the 1999/2000 season was marred by numerous problems of fruit quality.

Ortaniques formed most of the supplies of easy peelers in March this year. Indeed, the volumes of Fortuna from **Spain**—generally still plentiful during the first fortnight in March—were particularly limited. The season finished nearly three weeks earlier than usual. In addition, fruits from **Morocco** were particularly scarce. Substantial re-exports to the more profitable markets in northern Europe added to the problems caused by a significant production deficit (problems of grade). Batches of fruits from **Cyprus** and **Israel** completed supplies, as every year.

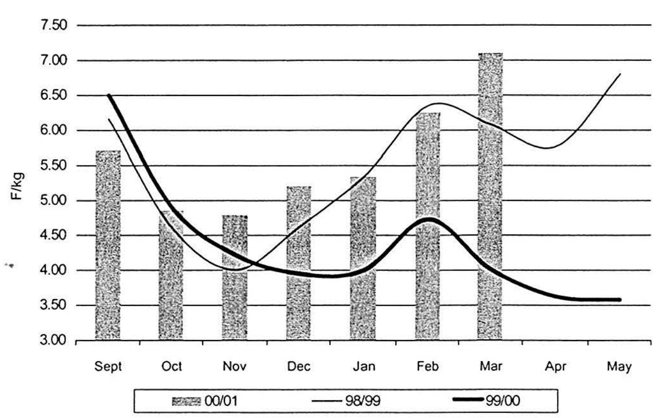
Prices remained very firm throughout the month, in spite of the end of sales of easy peelers in some retail chains in week 10.

Easy peelers– Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin – March 2001

Tonnes	March 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Spain	7 290	-25	-9	191 600	2	-9
Morocco	831	-71	-81	16 952	-36	-35
Total	**8 121**	**-36**	**-35**	**208 552**	**-3**	**-12**

Grapefruit

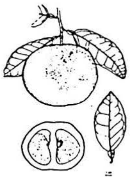
MARCH 2001

Monthly comparison: March 2001 / Feb. 2001

Price	Volumes
↗ + 11%	↗ + 24%

Annual comparison: March 2001 / March 2000

Price	Volumes
↗ + 9%	↘ - 6%

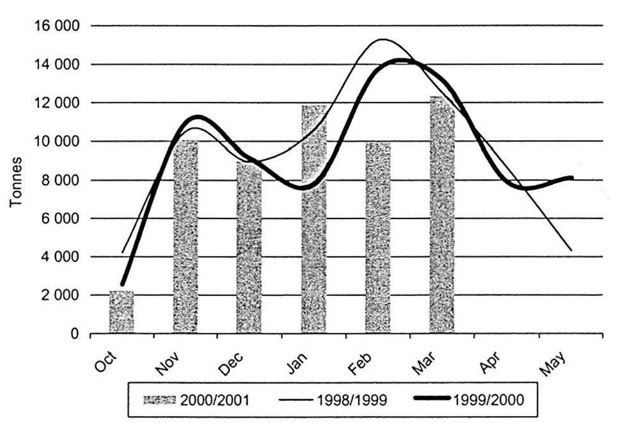


The grapefruit market recovered its dynamism after the marked sluggishness observed in February. The average price increased distinctly, especially as supplies fell slightly short of demand.

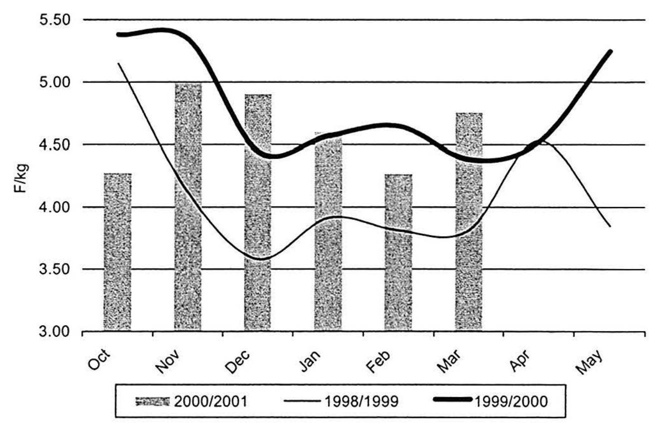
After a serious dip in February, shipments from **Florida** increased considerably but without attaining last year's level. Simultaneously, the early end of exports from **Turkey** enabled operators in **Israel** to increase their market share, especially in the supermarket/hypermarket sector. Demand remained at a healthy level throughout the month thanks to important promotion operations. Prices increased steadily.

Grapefruit – Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin – March 2001

Tonnes	March 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Florida	10 330	-4	6	44 913	-3	2
Israel	1 683	38	-17	4 970	-27	-3
Turkey	337	-70	37	5 553	7	27
Total	**12 350**	**-6**	**9**	**55 436**	**-3**	**-1**