Indicators
October 2001

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

The main fruits

%	Volumes	Expenditure
Grapes	20	24
Apple	24	19
Banana	14	10

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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Grapes

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

The situation has been much more difficult than last year. Competition from Italia among the white varieties has been more lively and a few quality problems have affected the market. The average price was down in comparison with last year in spite of a recovery at the end of the month.

Apple

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

The market was much slower than in September. Sales slowed considerably on the local market (temperature unsuitable for consumption, dull economic context). In addition, exports were less buoyant than usual (full season for local crops). However, prices are still higher than last year.

Banana

Oct. 2001 / Oct. 2000			
Price	↗↗	Vol.	=

Volumes returned to last season's level after a marked shortage in August and September. However, in spite of sluggish local demand and slower exports to countries in the north of the EU, prices remained higher than last year, carried by the momentum of the recent months.

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

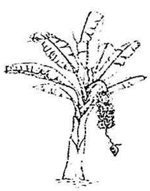
OCTOBER 2001

Monthly comparison: Oct. 2001 / Sept. 2001

Price	Volumes
↘ - 14 %	↗ + 47 %

Annual comparison: Oct. 2001 / Oct. 2000

Price	Volumes
↗ + 30 %	= ↘ – 1 %



As usual, the market deteriorated in October. Indeed, direct imports to France returned to last year's level after two months of marked shortage. In addition, local demand lacked spirit, as did exports to northern Europe. Prices fell distinctly in comparison with September but remained firmer than in 2000.

The increase in supplies that began in September continued and accelerated. Indeed, shipments from Africa increased considerably to last years' level. The shortfall of fruits from the West Indies was still marked.

Meanwhile, local demand was dull. Retail prices were still about 20% higher than in 2000. Promotion operations were still considerably down.

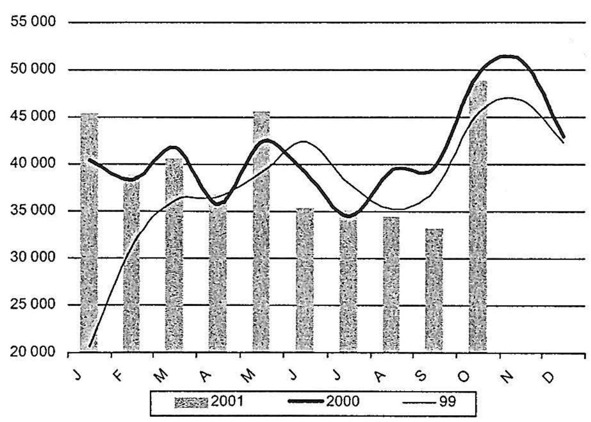
In addition, the export flow to northern and eastern markets decreased. The competition from dollar bananas increased with shipments up by 10% in October in comparison with last year.

Conversely, Spanish customers seemed more interested, as a result of a marked decrease in shipments from the Canary Islands.

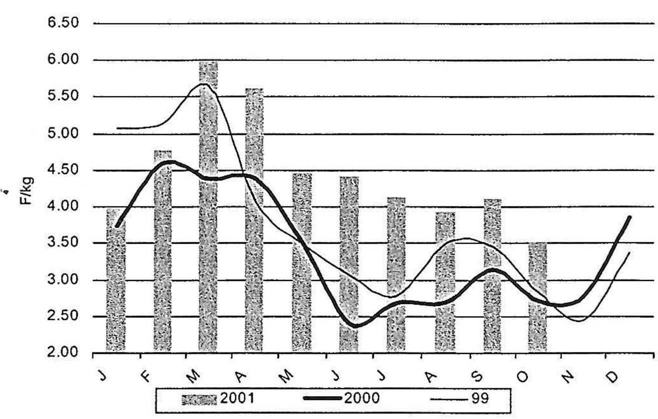
This factor made it possible to limit the downward price trend which was nevertheless steady and fairly marked throughout the month.

Banana — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — October 2001

Tonnes	October 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Côte d'Ivoire	11 462	+ 8	+ 16	82 309	+ 2	+ 6
Cameroon	11 276	+ 14	+ 35	89 863	+ 7	+ 20
Martinique	18 216	- 12	- 11	152 427	- 13	- 2
Guadeloupe	7 910	- 6	+ 17	69 574	- 10	+ 8
Total	**48 864**	**- 1**	**+ 7**	**394 310**	**- 2**	**+ 9**

Avocado

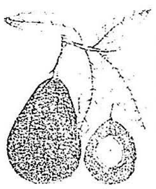
OCTOBER 2001

Monthly comparison: Oct. 2001 / Sept. 2001

Price	Volumes
↗ + 8 %	↗ + 50 %

Annual comparison: Oct. 2001 / Oct. 2000

Price	Volumes
↗ + 10 %	↗ + 11 %

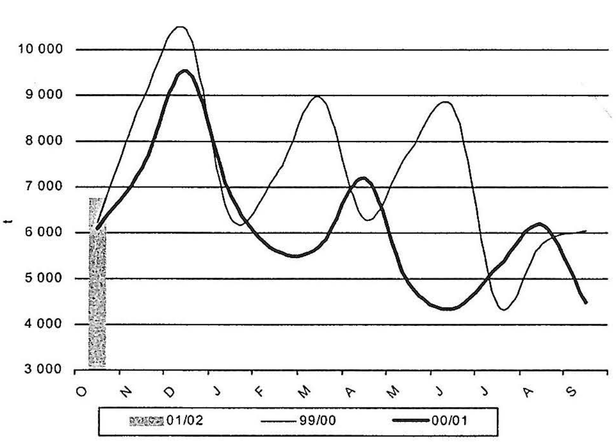


After a shortage during the first fortnight of the month, the return to normal supplies in the second half of the month broke market equilibrium that we suspected was fragile, mainly because of the lack of retail encouragement as a result of the new law concerning special offers.

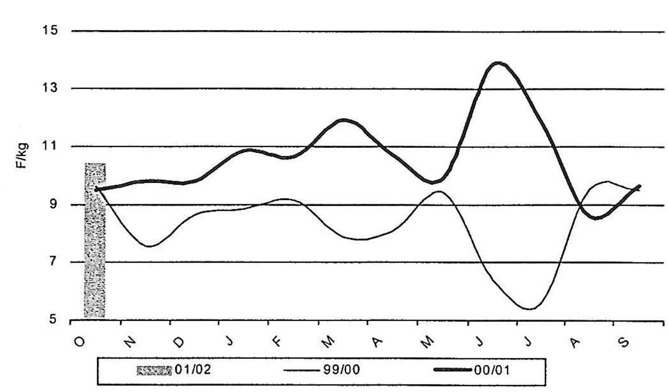
The market was under-supplied for the whole of the first half of the month. Indeed, arrivals from winter origins started gradually while the presence of summer origins (still substantial in October 2000) was marginal.
The situation changed radically in the middle of the month. Arrivals speeded up considerably, consisting of both green varieties (with the first strong arrivals of Ettinger from Israel) and Hass. In the latter variety, the presence of fruits from Mexico and Spain was more marked. Spanish avocados were only immature because of a mini-tornado in the Málaga aera.
In parallel, demand did not increase in the usual manner as the hypermarkets did not play their usual stimulating role. Prices slid markedly, a trend amplified by strong competition between Israeli operators on the market for green varieties.

Avocado — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — October 2001

Tonnes	October 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Israel	1 297	+ 19	+ 9	1 297	+ 19	+ 9
Mexico	2 366	+ 16	- 20	5 421	+ 47	- 7
Spain	2 824	+ 60	+ 53	3 315	+ 59	+ 41
Total	**6 487**	**+ 11**	**+ 9**	**10 033**	**+ 46**	**+ 7**

Orange

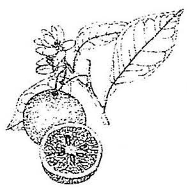
OCTOBER 2001

Monthly comparison: Oct. 2001 / Sept. 2001

Price	Volumes
↘ – 2 %	↗ + 27 %

Annual comparison: Oct. 2001 / Oct. 2000

Price	Volumes
= 0 %	↗ + 1 %



In spite of a very gradual start to Spanish Navelines, the end of the season was laborious for fruits from South Africa as there were large stocks of small grade fruits. The end of the season was also very difficult for Argentinian produce.

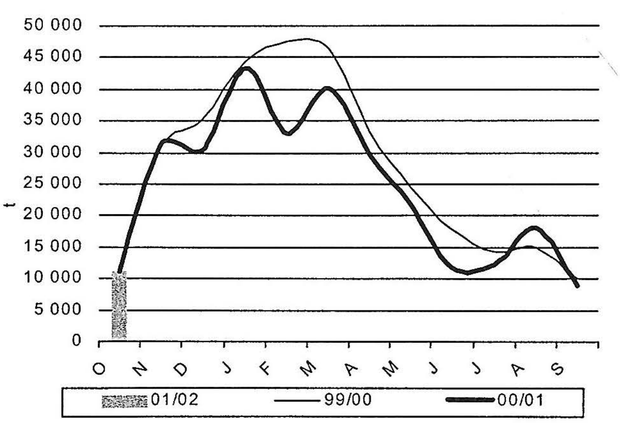
South African operators dominated supplies until Week 43. The large amounts of small fruits available (grade 88/105) weighed on the market and demand was fairly irregular. A considerable price difference was observed between these fruits and grades 56/64/72.

Furthermore, supplies of Spanish Naveline started very slowly since pickers were concentrating on Marisol which was reaching an advanced stage of ripeness. Rain also affected the crop. Supplies only really developed in weeks 43 and 44 when the referencing changed hands.

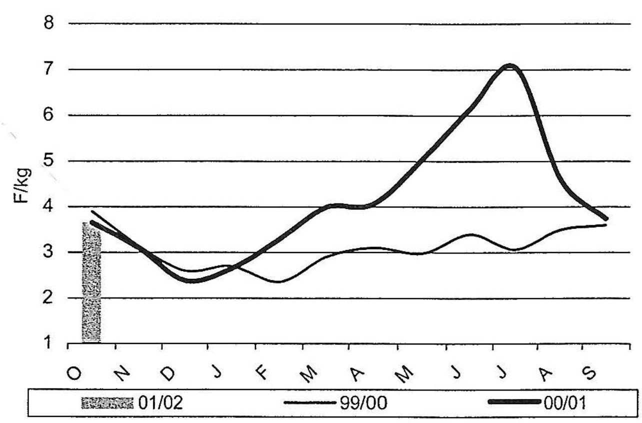
Argentina finished the season with great difficulty and the last fruits were sold at a loss.

Orange — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — October 2001

Tonnes	October 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Spain	6 820	- 7	+ 61	6 820	- 7	+ 61
South Africa	4 445	- 3	- 40	38 556	+ 5	- 17
Total	**11 265**	**- 5**	**- 4**	**45 376**	**+ 3**	**- 10**

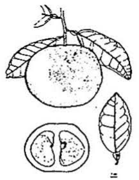
Grapefruit

OCTOBER 2001

Note: this comparison concerns the winter origins only

Annual comparison: Oct. 2001 / Oct. 2000

Price	Volumes
↘ - 14 %	↗ + 47 %



In spite of strongly increasing shipments from winter origins, prices remained considerably stronger than last year, thanks to a marked shortfall in fruits from inter-season origins (Cuba and Honduras).

The inter-season origins (Cuba and Honduras) dominated the beginning of the month but the market remained under-supplied. These two suppliers suffered a marked shortfall in comparison with last year (drought in Central America and the West Indies).

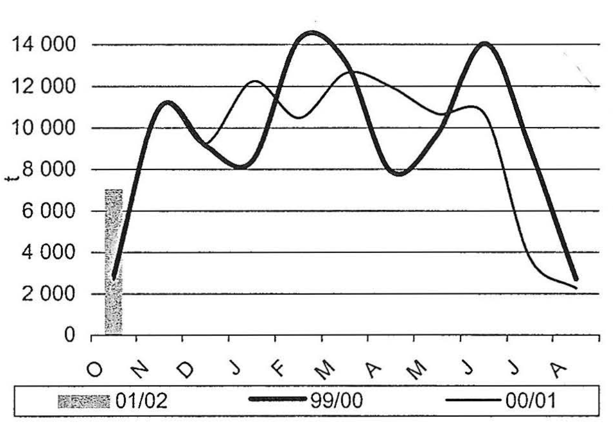
The first batches of winter origin fruits arrived in weeks 40 and 41. Supplies from Florida and Turkey increased very rapidly and demand for both of these origins was lively. In particular, Turkey made a remarkable breakthrough in hypermarkets because of attractive prices.

In this context, fruits from competing origins (Cuba, Israel and Honduras) had difficulty in gaining a position.

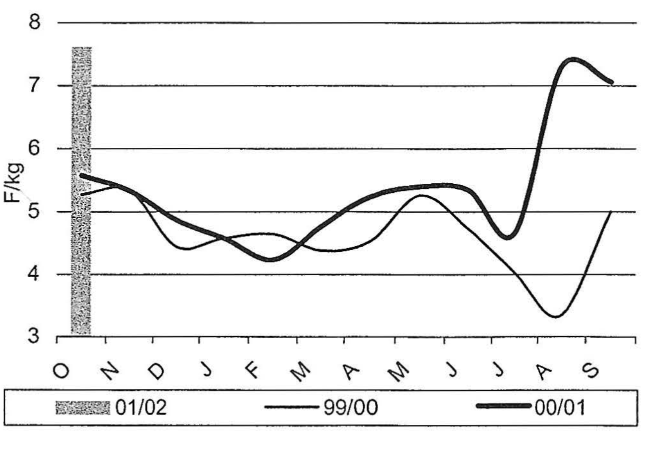
Prices dropped to last year's levels at the end of the month.

Grapefruit — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — October 2001

Tonnes	October 2001	Comparisons (%) 2001/2000	Comparisons (%) 2001/1999	Season total 2000/2001	Comparisons (%) 2001/2000	Comparisons (%) 2001/1999
Florida	4 022	+ 361	+ 1 548	4 022	+ 361	+ 1 548
Israel	571	+ 53	- 66	571	+ 53	- 66
Turkey	2 467	+ 68	+ 146	2 467	+ 68	+ 146
Total	**7 060**	**+ 160**	**+ 143**	**7 060**	**+ 160**	**+ 143**

Note: this table does not include volumes from Cuba and Honduras.

Clementine

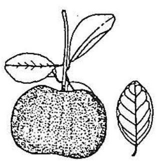
OCTOBER 2001

Monthly comparison: Oct. 2001 / Sept. 2001

Price	Volumes
↘ – 42 %	↗ + 1 884 %

Annual comparison: Oct. 2001 / Oct. 2000

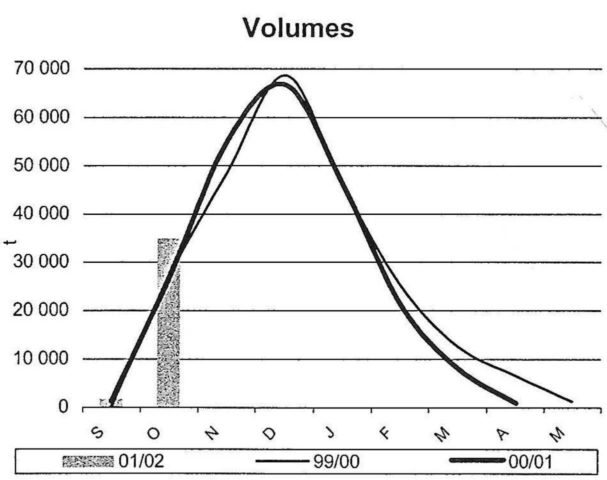
Price	Volumes
↗ + 21 %	↗ + 39 %

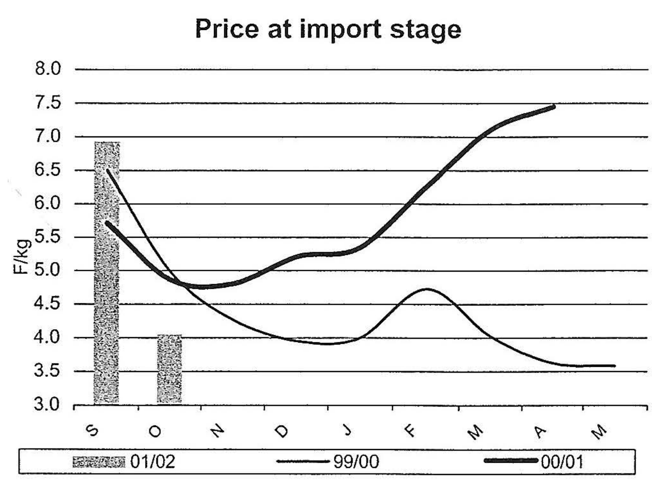


Spanish Marisol was particularly plentiful as the harvest was early and large and weather conditions resulted in the speeding up of picking. Demand was shy, causing a marked fall in price to a historic low. The first batches of clementines from Corsica and Morocco were well received by the market.

Shipments of Marisol increased rapidly. Frequent rainfall in the Valencia area did not cause a break in supplies. However, it made the fruits more delicate because high temperature encouraged producers to speed up picking. In addition, the crop was large and early. Demand was quiet as climatic conditions were not very favourable for consumption and the economic context had slowed. In addition, clients—especially supermarket chains—seemed increasingly reticent with regard to this variety. Finally, the average fruit grade was not very favourable. Prices therefore dropped markedly and reached a historic low in week 43. After a rather difficult start for early fruits, the first batches of Commune from Corsica and Morocco appeared at the end of the month, leading to demand driven by high fruit quality.

Clementine — Estimated market releases in France





Estimated market releases in France by origin — October 2001

Tonnes	October 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Spain	34 345	+ 28	+ 28	36 105	+ 28	+ 35
Morocco	358	+ 1 319	-	358	+ 1 319	-
Corsica	216	+ 387	- 31	216	+ 387	- 31
Total	**34 919**	**+ 30**	**+ 29**	**36 679**	**+ 30**	**+ 35**