Indicators

November 2001

The main fruits

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

%	Volumes	Expenditure
Clementine	20	22
Apple	21	17
Grapes	9	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.

Clementine

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

Performance was comparatively satisfactory with significant increases (more than 10%) in both prices and volumes in spite of a difficult first fortnight. Thus the transition to varieties with better keeping qualities and temperatures more propitious for citrus consumption led to a reversal of the trend in mid-November.

Apple

Nov. 2001 / Nov. 2000			
Price	↗	Vol.	↘

The situation is still favourable. Sales of fresh fruits were similar to last year's (+ 3% on the home market and – 2% on the export market) in spite of the strong rise in the average price (+ 20% approximately). Stocks were more than 10% down on 2000 levels.

Grapes

Nov. 2001 / Nov. 2000			
Price	↘	Vol.	↗

Competition in grapes has been much livelier than last year. Indeed, demand remained sluggish with markedly larger volumes available. French production stocks were larger as a result of poor sales in September and competition from Italy and Spain was stronger.

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

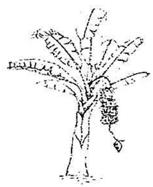
NOVEMBER 2001

Monthly comparison: Nov. 2001 / Oct. 2001

Price	Volumes
↘ – 14%	↘ – 7%

Annual comparison: Nov. 2001 / Nov. 2000

Price	Volumes
↗ + 10%	↘ – 10%



The banana market recovered in November, as usual, after a very difficult October. Supplies were markedly down in comparison with last year's and demand picked up, especially for export sales.

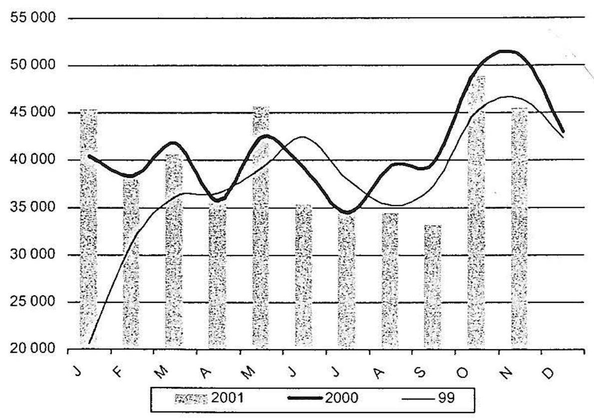
After a very difficult situation in week 45, the market gradually improved as the month went by. On the one hand, after a supply peak in October, overall supplies decreased to a much lower level than last year and a shortage of West Indian fruits was observed in particular. On the other hand, demand perked up. In fact domestic market sales have been better in spite of much less promotion activity than last year.

The flow of exports was also strong, especially from Africa, in spite of the decrease in interest from Spanish customers. Market demand in the north of the European Union (especially Germany and the United Kingdom) recovered because of a substantial decrease in arrivals of dollar bananas.

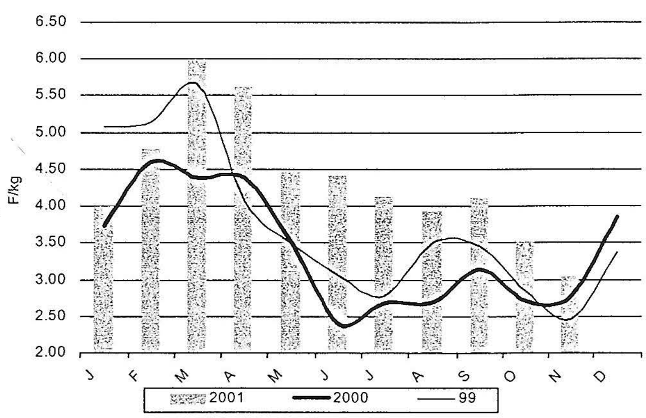
Large shipments were also made to North Africa. Prices therefore climbed throughout the month.

Banana — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — November 2001

Tonnes	November 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Côte d'Ivoire	10 599	+ 15	+ 6	92 908	+ 4	+ 6
Cameroon	11 593	- 8	+ 22	101 456	+ 5	+ 20
Martinique	16 539	- 18	- 21	168 966	- 14	- 5
Guadeloupe	6 788	- 22	+ 13	76 362	+ 10	+ 29
Total	**45 519**	**- 10**	**- 2**	**439 692**	**- 3**	**+ 8**

Avocado

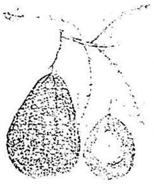
NOVEMBER 2001

Monthly comparison: Nov. 2001 / Oct. 2001

Price	Volumes
↘ - 42%	↗ + 30%

Annual comparison: Nov. 2001 / Nov. 2000

Price	Volumes
↘ - 39%	↗ + 18%



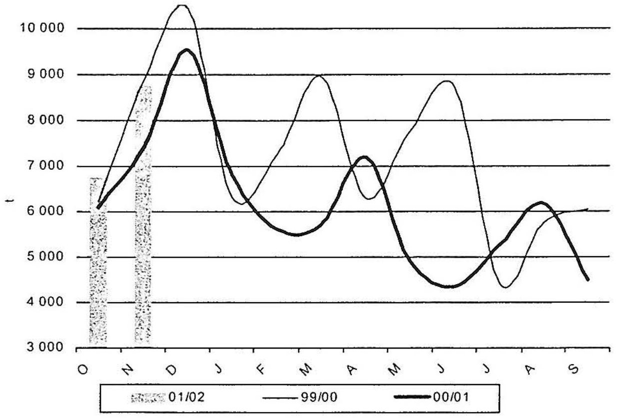
The avocado market has rarely been as difficult as it was in November 2001 even though overall supplies were just at an average level. The very poor performance is explained by the abnormally low demand (especially in the supermarket and hypermarket sector) and by particularly strong competition between Israeli operators.

Considerably larger quantities were available than in 2000/2001, when there was a serious shortfall in both Israeli and Spanish production. However, the total just returned to a 'normal' level (average November supplies totalled 8 900 t from 1995/96 to 1999/2000). But demand was extremely sluggish, especially in supermarkets and hypermarkets. It would appear that the new regulation governing promotion operations has had a strongly negative effect, with the retail price of avocado remaining high. The increased competition between Israeli operators further accelerated the downward price trend.

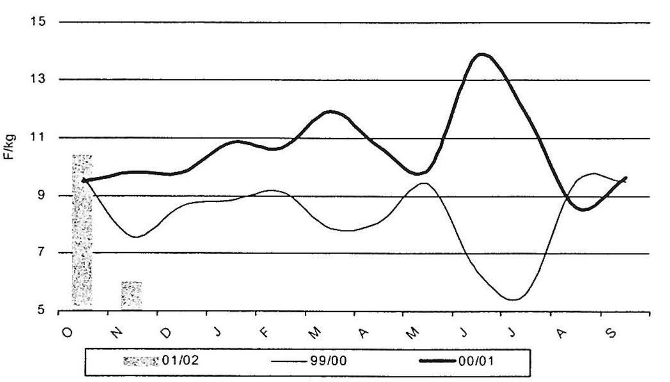
The green avocado market only began to improve at the end of the month, after a strong decrease in shipments from Israel. In contrast, no improvement was noted for Hass.

Avocado — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — November 2001

Tonnes	November 2001	Comparisons (%) 2001/2000	Comparisons (%) 2001/1999	Season total 2000/2001	Comparisons (%) 2001/2000	Comparisons (%) 2001/1999
Israel	4 005	+ 17	- 8	5 302	+ 22	+ 17
Mexico	1 390	+ 8	- 26	6 811	+ 37	- 11
Spain	3 348	+ 23	+ 20	6 663	+ 35	+ 11
Total	**8 743**	**+ 18**	**- 1**	**18 776**	**+ 32**	**+ 3**

Orange

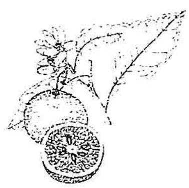
NOVEMBER 2001

Monthly comparison: Nov. 2001 / Oct. 2001

Price	Volumes
↘ - 6%	↗ + 155%

Annual comparison: Nov. 2001 / Nov. 2000

Price	Volumes
↗ + 8%	↘ - 6%



As usual, demand for oranges was slow throughout November. However, the balance for the month is comparatively satisfactory as prices are noticeably up on last year's.

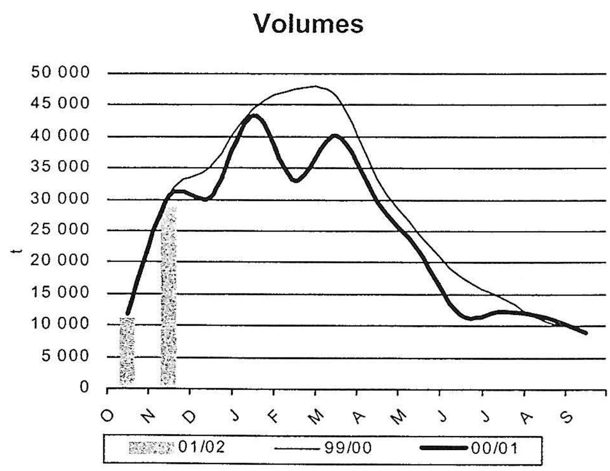
The southern hemisphere season finished with a measure of difficulty in mid-November, even though supplies from Spain were fairly restrained during the first half of the month because of frequent rainfall in the Valencia region.

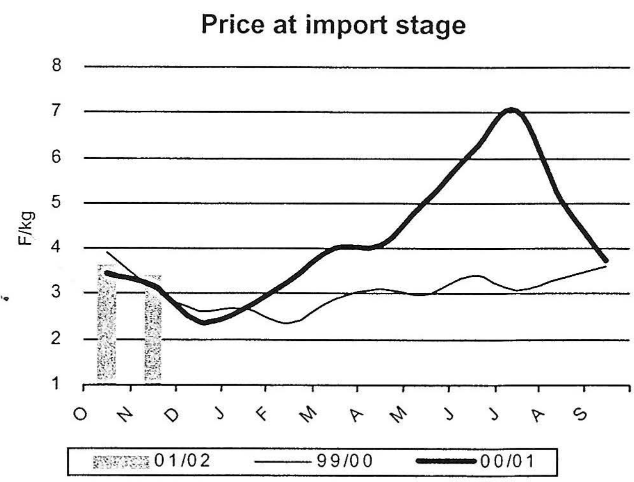
Spanish Naveline had a near-monopoly from week 47 onwards but prices lost ground steadily as demand tended to favour clementines, as is usual at this time of year.

The market recovered slightly at the end of the month thanks to the St Nicholas operations in northern Europe, but prices continued to fall.

The Salustiana season started in week 47 but the quantities were marginal in November.

Orange — Estimated market releases in France





Estimated market releases in France by origin — November 2001

Tonnes	November 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Spain	28 761	- 6 %	- 7 %	35 581	- 6 %	- 7 %

Grapefruit

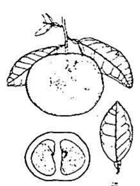
NOVEMBER 2001

Monthly comparison: Nov. 2001 / Oct. 2001

Price	Volumes
↘ - 14%	↗ + 8%

Annual comparison: Nov. 2001 / Nov. 2000

Price	Volumes
= ↘ - 4%	↘ - 30%

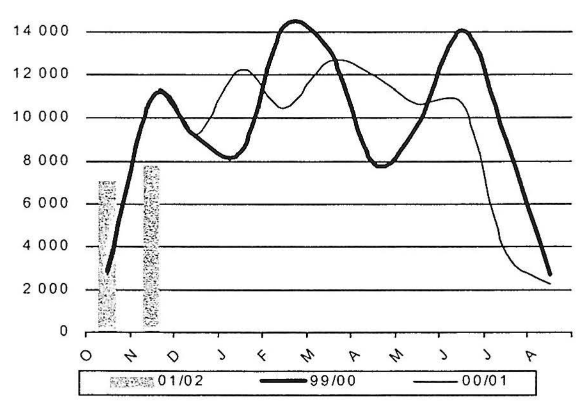


Performances varied considerably from one origin to another. The market was fairly well-balanced for pink fruits from Florida and large Turkish fruits. In contrast, other origins (Israel, Cuba, Mexico and Honduras) and small Turkish fruits found it difficult to gain a position.

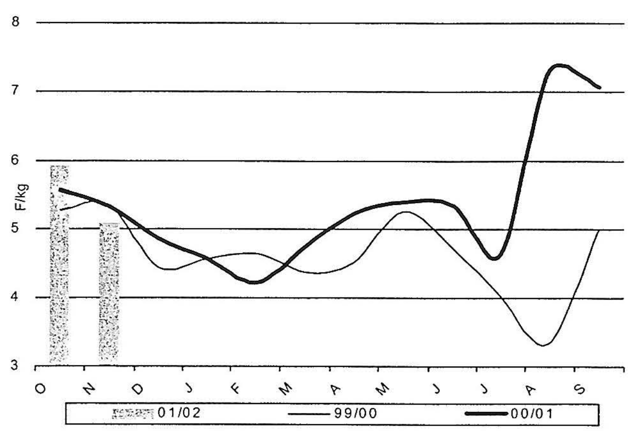
The quantities of shipments were markedly smaller than last year. Frequent rainfall hindered loading in Florida and the rate of shipments from Turkey was smaller than in October because of the shortage of large fruits and large remaining small fruits further down the chain. Demand was quite lively but remained very selective, mainly targeting pink fruits from Florida and Turkish grade 40/45. As a result, the prices of these categories held up comparatively well. In contrast, fruits from Cuba, Mexico and Honduras found it difficult to establish a market position. Sales slowed and prices fell regularly. Sales of Israeli fruits were also much slower but the rapid decrease in supplies stemmed the fall in price.

Grapefruit — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — November 2001

Tonnes	November 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Florida	5 787	- 22	- 33	9 808	+ 18	+ 10
Israel	656	- 16	- 48	1 227	+ 6	- 58
Turkey	1 217	- 55	+ 13	3 684	- 11	+ 77
Total	**7 659**	**- 30**	**- 30**	**14 719**	**+ 8**	**+ 6**

Easy peelers

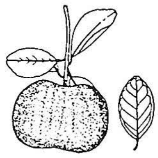
NOVEMBER 2001

Monthly comparison: Nov. 2001 / Oct. 2001

Price	Volumes
↗ + 31%	↗ + 80%

Annual comparison: Nov. 2001 / Nov. 2000

Price	Volumes
↗ + 10%	↗ + 14%

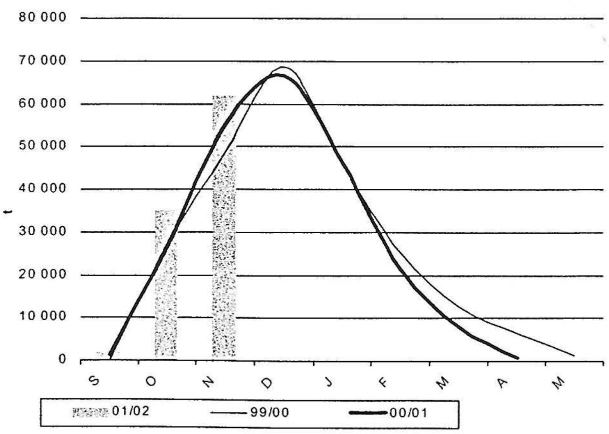


These performed fairly satisfactorily as prices and volumes both increased by more than 10%. However, demand was mediocre during the first half of the month because of the fragility of a large proportion of the fruits supplied. The transition to varieties that keep better and temperatures that better encourage citrus consumption reversed the trend in mid-November.

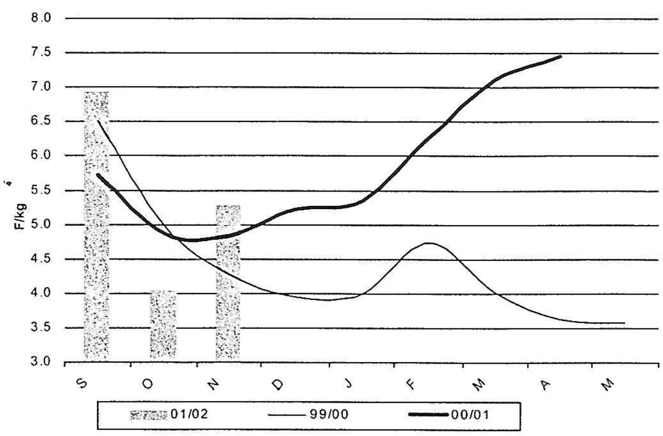
The situation was very difficult for the first half of the month. The quality of a large proportion of the Marisol and Oroval available was poor and did not awaken demand that had been slow since the beginning of the season. The limited volumes—until mid-November— of Commune from Corsica and Morocco (Berkane) profited from the situation because of their good condition. The switch to Nules, which accounted for most of the quantities from week 46 onwards, re-stimulated demand for Spanish fruits, especially as the climatic conditions were more favourable for citrus consumption. The market remained balanced for this origin, with firm prices, until the end of the month. Likewise, the situation remained good for Corsican and Spanish fruits until week 48, when a marked increase in shipments caused a significant price adjustment. The first batches of Clemenvilla arrived in week 47 but remained limited in November.

Easy peelers — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — November 2001

Tonnes	November 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Spain	49 695	+ 4	+ 18	85 800	+ 13	+ 25
Morocco	6 143	+ 119	+ 454	6 500	+ 129	+ 486
Corsica	7 181	+ 59	+ 33	7 447	+ 64	+ 30
Total	**63 019**	**+ 14**	**+ 30**	**99 747**	**+ 20**	**+ 32**