Indicators
February 2002

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

The main fruits

%	Volumes	Expenditure
Apple	27	23
Orange	24	18
Easy peelers	12	15

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.

Pages

Apple

Feb. 2002 / Feb. 2001			
price	↗↗	Vol.	↗

February was very favourable overall in spite of the slowing resulting from the school holidays. Although withdrawals from stocks were smaller than last year because export outlets were more limited, the level remained excellent (higher than in 1999 and 2000). Sales on the local market were substantially greater than last year's in spite of a strongly rising price.

Orange

Feb. 2002 / Feb. 2001			
price	↗	Vol.	↗

Even if the market remained satisfactory (increase in sales and rising prices), February marked a break in the excellent dynamics that had lasted since December. Indeed, the sudden decrease in the quality of Navels and Navelines had a strongly negative impact on consumption already weakened by warmer weather than usual. This situation weighed on the market for the other varieties.

Easy peelers

Feb. 2002 / Feb. 2001			
price	↘	Vol.	↗

The interest shown in easy peelers decreased distinctly in February, as usual. The balance was nevertheless satisfactory as volumes and prices returned to an average level after last year's strong deficit. The change of varieties in the middle of the month counterbalanced the poor performance caused by quality problems in the first fortnight.

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

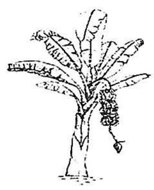
FEBRUARY 2002

Monthly comparison: Feb. 2002 / Jan. 2002

Price	Volumes
↗↗ + 23%	↘ – 9%

Annual comparison: Feb. 2002 / Feb. 2001

Price	Volumes
↗ + 6%	↘ – 4%

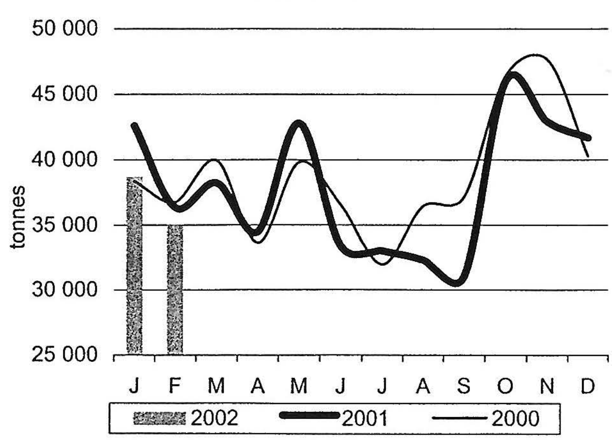


The average price increased markedly in comparison with last year's already firm level, in spite of the fairly mediocre quality of a significant proportion of the fruits from the West Indies. The fairly marked decrease in shipments (especially from Africa and the dollar zones) and dynamic demand during the first two-thirds of the month account for this good performance.

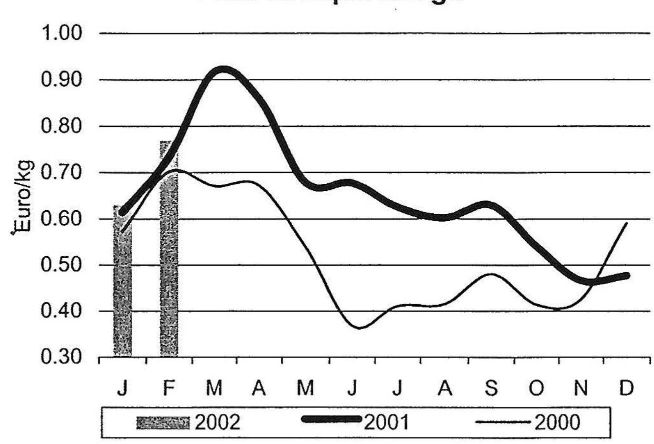
The quantities available in France were distinctly smaller than those of the last two years as a result of more modest shipments from Africa (especially from Cameroon). Demand was also good. Indeed, the export flow was dynamic for most of the month, in particular to clientele in northern Europe (shipments from the Windward Islands and especially the dollar zones were markedly down in comparison with 2000 and 2001). The local market was also active during the first two-thirds of the month. Prices thus increased steadily during this period, although the difference between those of Africa and West Indian fruit nevertheless remained marked (as a result of serious quality problems in a significant proportion of supplies from the West Indies).
The slowing of local and export demand at the end of the month (with a return to a higher rate of shipments in northern Europe) caused a broadening of the price range.

Banana — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — February 2002

Tonnes	February 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002	2002/2001	2002/2000
Côte d'Ivoire	7 207	- 2	- 16	14 701	- 4	- 12
Cameroon	8 596	- 11	- 16	19 733	- 6	+ 1
Martinique	13 058	- 4	- 1	27 020	- 10	- 7
Guadeloupe	6 192	+ 5	+ 30	12 286	- 4	+ 26
Total	**35 053**	**- 4**	**- 5**	**73 740**	**- 7**	**- 2**

Avocado

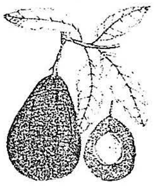
FEBRUARY 2002

Monthly comparison: Feb. 2002 / Jan. 2002

Price	Volumes
↘ – 16%	↗ + 8%

Annual comparison: Feb. 2002 / Feb. 2001

Price	Volumes
↘↘ – 36%	↗↗ + 25%



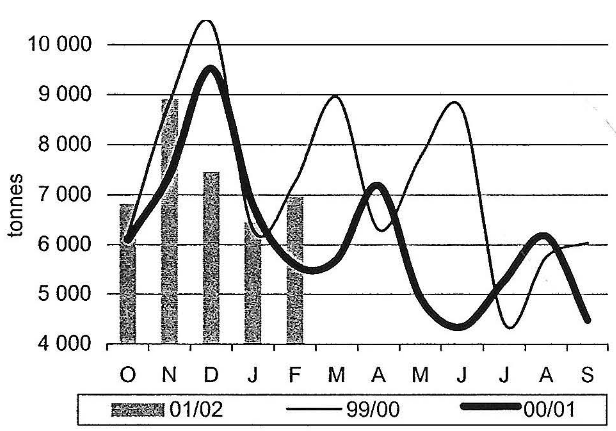
Performance was very poor once again. The recovery observed at the very end of the month could not make up for the extremely low prices of the first two-thirds of February. Indeed, demand was extremely disappointing once again during this period, with a strong level of dispersed supplies from Israel.

The market remained extremely difficult during the first fortnight of the month, with prices sticking at the floor price to which they had sunk at the end of January. Although the presence of Kenyan and Spanish fruits was discreet because of market conditions, large quantities of avocado were available as the result of substantial shipments from Israel. Furthermore, demand did not become more active in a context of fierce competition between Israeli operators.

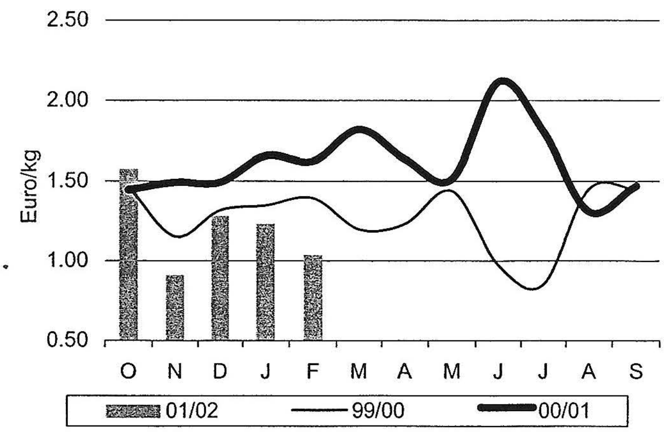
The first signs of improvement were seen in the middle of the month. The particularly low price level stimulated demand while Israeli shipments became more moderate and less dispersed. The market gradually improved. Nevertheless, no significant rise in prices was observed until the very end of the month.

Avocado — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — February 2002

Tonnes	February 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2001	2002/2001	2002/2000
Israel	3 962	+ 106	0	16 603	+ 20	+ 2
Spain	2 524	- 26	- 20	15 337	- 2	+ 5
Mexico	215	0	0	7 670	+ 14	- 28
Kenya	274	-	- 55	300	-	- 51
Total	**6 975**	**+ 25**	**- 4**	**39 910**	**+ 8**	**- 6**

Orange

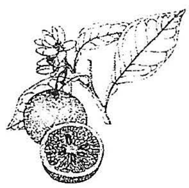
FEBRUARY 2002

Monthly comparison: Feb. 2002 / Jan. 2002

Price	Volumes
↗ + 4%	↘ - 26%

Annual comparison: Feb. 2002 / Feb. 2001

Price	Volumes
↗ + 3%	↗ + 13%

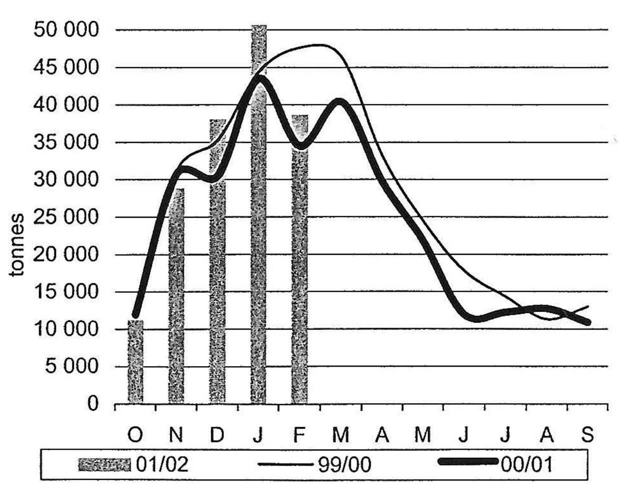


Although the market remained satisfactory (increase in sales and prices), February marked a break in the excellent dynamics that had prevailed since December. The sudden decrease in the quality of Navels and Navelines strongly affected consumption already dwindling because of higher than normal temperatures. This situation weighed on the market for the other varieties available.

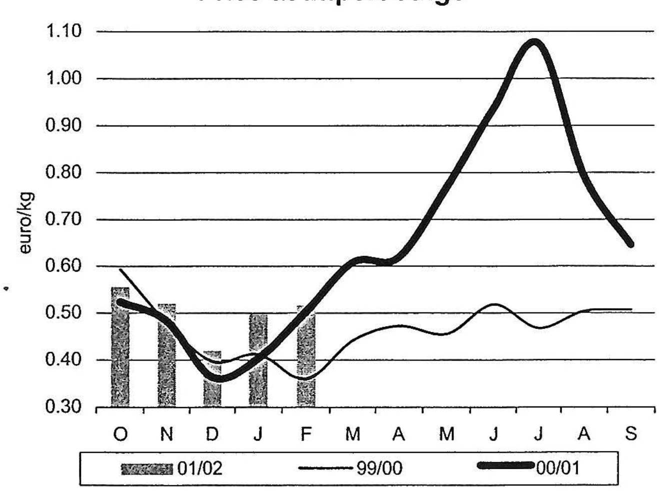
Demand slowed distinctly at the beginning of the month as a result of a distinct decrease in the quality of Navels and Navelines from Spain. Abnormally mild weather and the start of the half-term holidays further slowed purchases. The particularly slow movement of these goods, with significant quantities available until week 9, weighed on the market for the entire month. As a result, the marketing of the other varieties available (Washington Blood orange, Maltese) was very slow. The market began to improve at the end of the month but demand nevertheless remained dull. The halting of shipments from North Africa because of the el Aid festivities cleared the market of the fruits of this origin. In addition, the quieter rate of shipments of Navels allowed the steady increase in shipments of Navelate.

Orange — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — February 2002

Tonnes	February 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2001/2002	2002/2001	2002/2000
Spain	33 172	+ 21	- 12	148 983	+ 12	+ 3
Tunisia	4 523	- 7	- 32	12 706	+ 20	- 4
Morocco	1 251	- 43	- 62	3 438	+ 39	- 28
Total	**38 946**	**+ 13**	**- 18**	**165 127**	**+ 12**	**0**

Grapefruit

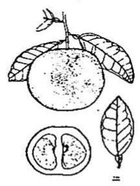
FEBRUARY 2002

Monthly comparison: Feb. 2002 / Jan. 2002

Price	Volumes
➚ + 3%	➘ – 12%

Annual comparison: Feb. 2002 / Feb. 2001

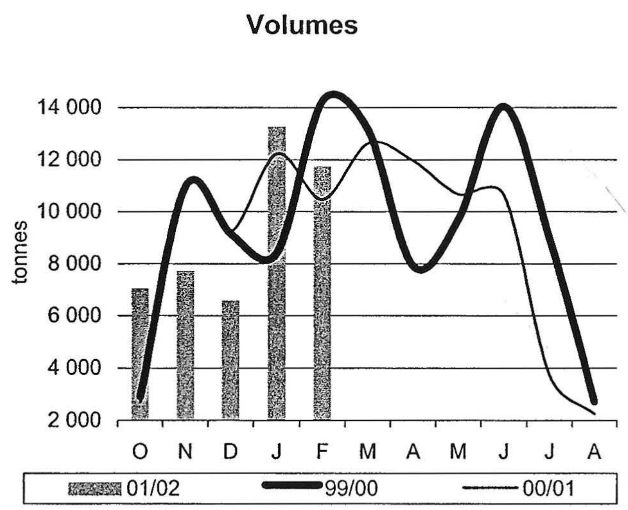
Price	Volumes
➚ + 10%	➚ + 12%

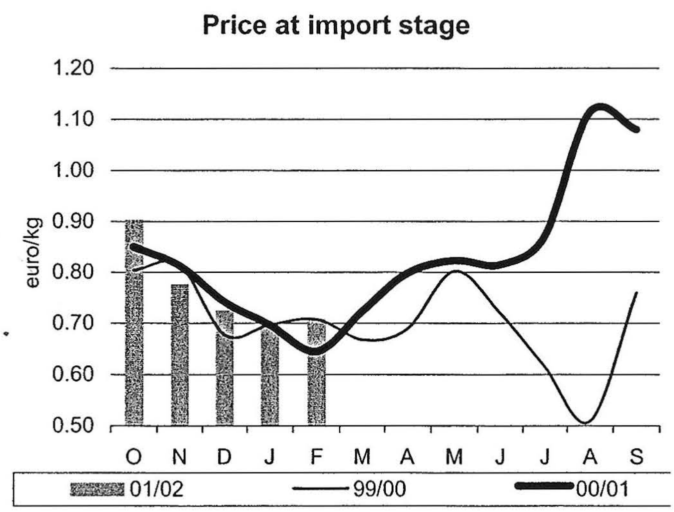


Performance was satisfactory overall as price and volumes increased distinctly in spite of the traditional slowing of business in February. However, although the market remained balanced for Turkish and Israeli operators thanks to a reduction in their shipments, the results were more contrasted for Florida. More substantial shipments led importers of fruits from Florida to broaden their price range.

As every year, the beginning of the school holidays had very negative effects on the volumes released. However, the effects of the marked slowing in demand on price levels were relatively limited. Indeed, shipments from Turkey decreased strongly from Week 7 onwards and remained concentrated in the hands of a small number of operators specialising in this origin. Arrivals from Israel remained very modest. In contrast, the marked increase in shipments from Florida at the beginning of the month made the market balance for this origin delicate, especially for small fruits. However, the effect on price was limited as operators were experiencing a rise in cost prices and stocked fruit with a view to the traditional recovery in March.

Grapefruit — Estimated market releases in France





Estimated market releases in France by origin — February 2002

Tonnes	February 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2001/2002	2002/2001	2002/2000
Florida	10 210	- 1	+ 52	25 721	- 4	+ 9
Israel	489	- 38	- 59	2 182	- 7	- 54
Turkey	2 570	+ 129	+ 436	6 704	+ 11	+ 121
Total	**13 269**	**+ 9**	**+ 58**	**34 607**	**- 1**	**+ 10**

Easy peelers

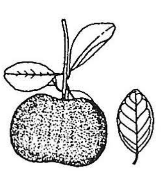
FEBRUARY 2002

Monthly comparison: Feb. 2002 / Jan. 2002

Price	Volumes
↘ - 9%	↘ - 49%

Annual comparison: Feb. 2002 / Feb. 2001

Price	Volumes
↘ - 14%	↗ + 14%



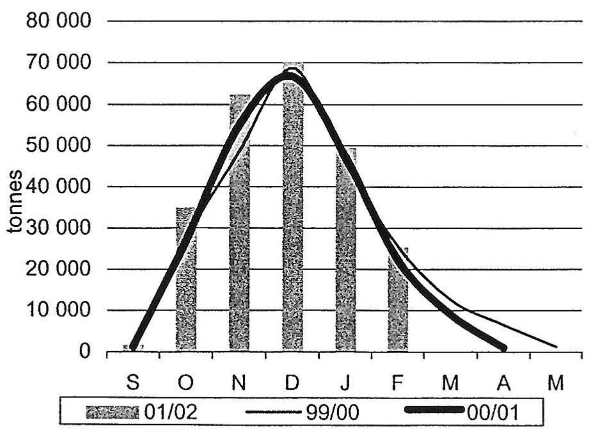
As usual, interest in easy peelers waned considerably in February. The balance was satisfactory nevertheless, as volumes and prices returned to a medium level in contrast with last year's marked shortage of supplies. The mid-month change of varieties made it possible to catch up on the poor performance of the first fortnight of the month resulting from problems of quality.

The traditionally February loss of interest in easy peelers (changes of ranges by multiple retailers, school holidays) was particularly marked this year. The quality of the fruits available, consisting mainly of end-of-harvest varieties (Nour and Hernandine), was mediocre, especially during the first half of the month. The price range therefore broadened, bringing the average price down.

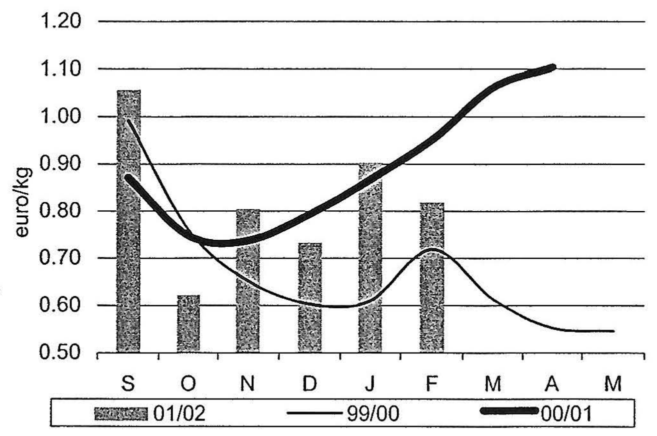
The overall quality became satisfactory in the middle of the month thanks to the starting of shipments of end-of-season varieties (Fortuna and Ortanique). Although demand was still comparatively slow, the market was healthier and reached a new balance with high prices.

Easy peelers — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — February 2002

Tonnes	February 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2001/2002	2002/2001	2002/2000
Spain	22 189	+ 20	+ 20	201 396	+ 9	+ 18
Morocco	2 882	0	- 60	23 051	+ 42	- 2
Israel	225	- 74	-	2 329	+ 6	+ 105
Total	**25 296**	**+ 14**	**- 1**	**226 776**	**+ 11**	**+ 13**