Indicators
May 2002

The main fruits

In shares by total volume and expenditure on fruits for the month in France		
%	Volumes	Expenditure
Apple	24	17
Banana	15	10
Orange	14	9
Strawberry	12	24

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

May 2002 / May 2001			
Price	↗	Vol.	↘

The apple market continued to perform well. Releases were down on last year. The fall is accounted for by a shortage of fruits as the season is practically over. Prices continued to firm and remained distinctly higher than last year's.

Banana

May 2002 / May 2001			
Price	↘	Vol.	=↘

Performance was satisfactory as the volumes marketed and the price increased by about 8% in comparison with the average for the past three seasons. Indeed, local demand and exports to northern Europe remained at a good level.

Orange

May 2002 / May 2001			
Price	↘	Vol.	↗

The orange market has been very satisfactory, in particular holding out against increasing competition from summer fruits. Although sales were smaller than in April, they were still significantly greater than those of the past two seasons. The average price did not therefore attain last year's heights but remained well above those of 2000.

Strawberry

May 2002 / May 2001			
Price	↗	Vol.	↗

In spite of larger quantities of French strawberries than in 2001, the market remained well oriented in May. Competition from Spanish strawberries was more limited than last year and the quality was more satisfactory. The average price was therefore noticeably higher than in 2001.

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

MAY 2002

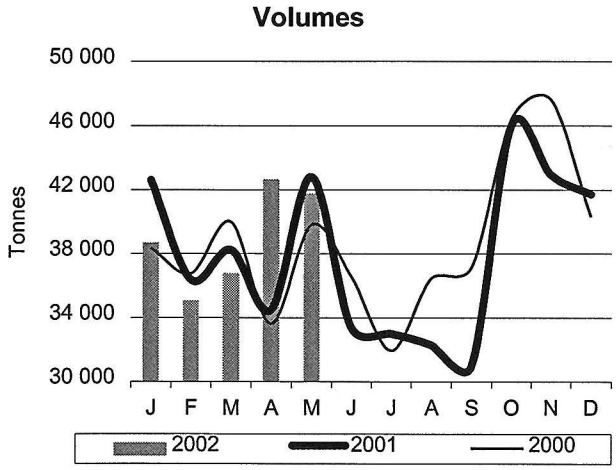
Monthly comparison: May 2002 / April 2002	
Price	Volumes
↘ - 10 %	= ↘ - 2 %

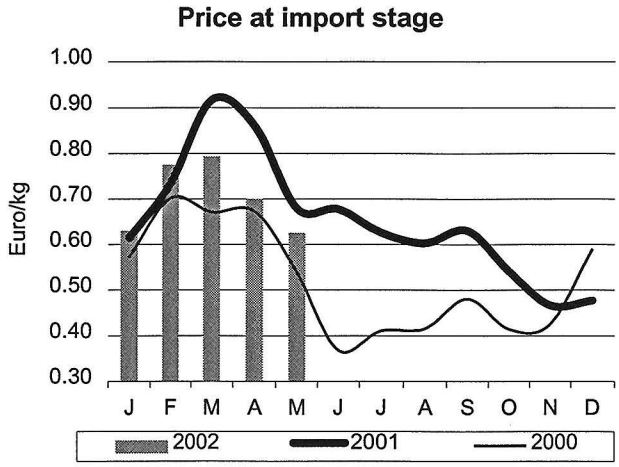
Annual comparison: May 2002 / May 2001	
Price	Volumes
↘ - 7 %	= ↘ - 2 %

Performance was satisfactory as the volumes marketed and the price increased by about 8% in comparison with the average for the past three seasons. Indeed, local demand and exports to northern Europe remained at a good level.

The quantities available were very similar to last year's but distinctly up on the average for the three preceding years as a result of the increase in the amounts of fruits from Africa and Guadeloupe.
The market nevertheless reacted well. On the one hand, exports to northern Europe conserved their dynamism as arrivals from the dollar zone were significantly smaller than in 2001 (-5%) and the quality of West Indian fruits recovered to a satisfactory level. On the other hand, local demand, supported as in April by strong promotional work (+ 24 % in comparison with 2001), was active in spite of the higher prices of special offers (12% higher than in 2001). Competition from strawberries and apples was discreet and the weather remained favourable for banana consumption.

Banana — Estimated market releases in France





Estimated market releases in France by origin — May 2002

Tonnes	May 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002	2002/2001	2002/2000
Côte d'Ivoire	10 100	+ 6	+ 26	33 080	0	- 4
Cameroon	8 618	- 3	+ 2	36 182	- 8	- 6
Martinique	16 311	+ 51	+ 28	57 729	+ 6	+ 3
Guadeloupe	7 624	+ 45	+ 73	26 188	+ 7	+ 34
Total	**42 653**	**+ 24**	**+ 27**	**153 179**	**+ 1**	**+ 4**

Avocado

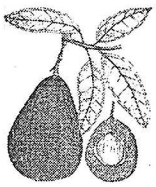
MAY 2002

Monthly comparison: May 2002 / April 2002

Price	Volumes
↘↘ - 31 %	↘ - 12 %

Annual comparison: May 2002 / May 2001

Price	Volumes
↘↘ - 51 %	↗↗ + 36 %

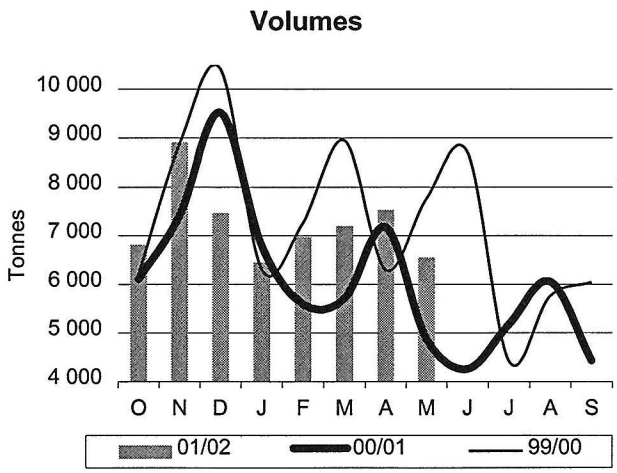


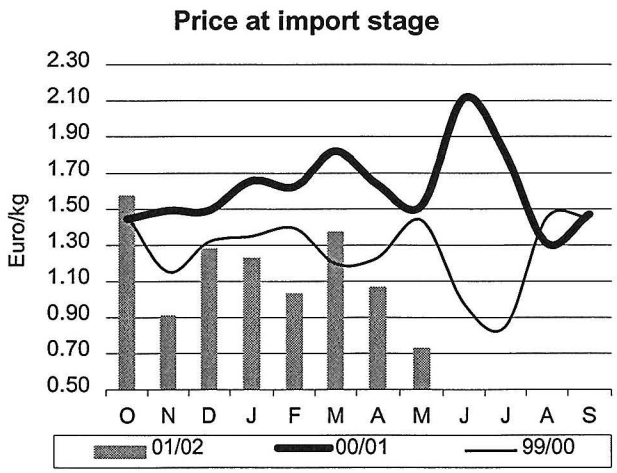
The avocado market—especially the green varieties—hit the low point of a particularly catastrophic season. Even though shipments from Kenya were limited, supplies were particularly large as a result of the continuation of the winter seasons and a high rate of shipments from South Africa. In addition, demand remained disappointing even though the low price levels tickled it a little.

Sales performance was particularly poor. Comparison of this season with the average for the past three seasons reveals a price decrease of more than 50%. Indeed, overall quantities were very large (+ 18 %). Firstly, shipments from the summer origins were about 10% up (with an increase of more than 35% in Fuerte from South Africa, making up for the discreet presence of Kenyan fruits after the very poor results in April). Secondly, larger quantities of Hass were also available. Spanish shipments recovered to the average level after a dip during the last season, and the Israeli season was extended.

Demand remained disappointing for the season in spite of a distinct improvement during the second half of the month as prices were extremely low.

Avocado — Estimated market releases in France





Estimated market releases in France by origin — May 2002

Tonnes	May 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2001	2002/2001	2002/2000
Israel	878	+ 136	+ 37	22 923	+ 32	0
Spain	2 466	+ 91	+ 30	24 053	+ 7	+ 4
Mexico	-	-	-	8 013	+ 9	- 34
Kenya	682	- 58	- 40	2 543	- 44	- 44
South Africa	2 610	+ 64	+ 17	3 744	+ 97	+ 1 539
Total	**6 636**	**+ 36**	**- 14**	**61 276**	**+ 18**	**- 3**

Orange

MAY 2002

Monthly comparison: May 2002 / April 2002

Price	Volumes
↗ + 6 %	↗ - 23 %

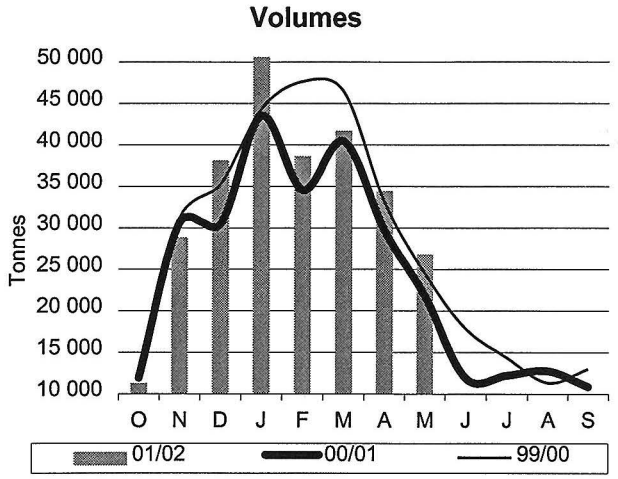
Annual comparison: May 2002 / May 2001

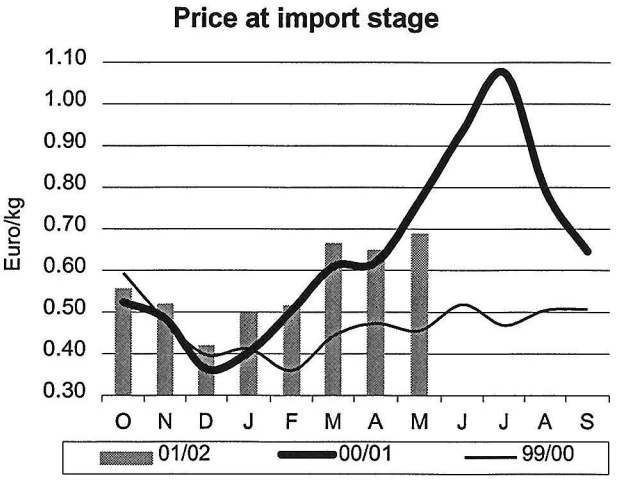
Price	Volumes
↘ - 10 %	↗ + 23 %

The orange market has been very satisfactory, in particular holding out against increasing competition from summer fruits. Although sales were smaller than in April, they were still significantly greater than those of the past two seasons. The average price did not therefore attain last year's heights but remained well above those of 2000.

Demand was active throughout the month, especially as temperatures were favourable. Releases were therefore brisk, especially for Spanish fruits, which recovered to 2000 volumes after the strong decreases in 2001. Nevertheless, the distribution among varieties evolved strongly in comparison with the previous seasons. Supplies of Navelate/Lanelate increased strongly as new orchards came into production. Arrivals of Valencia only began to develop substantially in the middle of the month in a comparatively calm atmosphere in spite of the lateness. Arrivals from Morocco were limited throughout the month because of very satisfactory local demand and substantial exports to Russia (more than 50 000 tonnes this season). Prices resisted well, with a downward trend at the end of the month, without reaching the exceptional 2001 level, and were higher than in 2000.

Orange — Estimated market releases in France





Estimated market releases in France by origin — May 2002

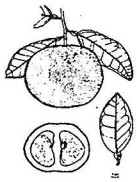
Tonnes	May 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2001/2002	2002/2001	2002/2000
Spain	20 355	+ 55	0	229 186	+ 21	+ 1
Tunisia	151	- 59	- 72	21 909	+ 3	- 13
Morocco	6 211	- 25	+ 77	16 654	- 39	+ 14
Total	**26 717**	**+ 23**	**+ 9**	**267 749**	**+ 12**	**- 1**

Grapefruit

MAY 2002

Monthly comparison: May 2002 / April 2002	
Price	Volumes
↗ + 6 %	↗ + 7 %

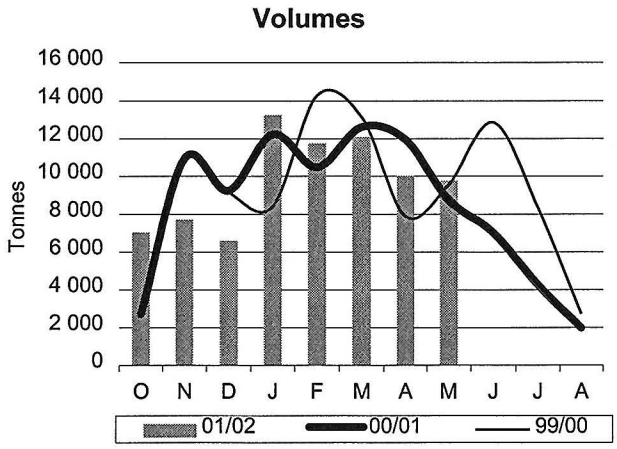
Annual comparison: May 2002 / May 2001	
Price	Volumes
↘ = - 1 %	↗↗ + 23 %

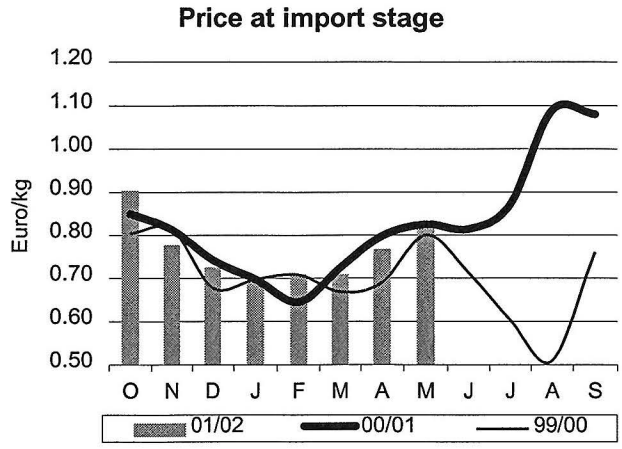


Performance was most satisfactory with prices the same as the average for the last three seasons and sales up by 25% in comparison with the same period. Demand remained very active, probably because the competition from the season's fruits was weaker than usual.

The strong demand made it possible to handle distinctly larger quantities than usual, resulting from substantially larger quantities than usual—because of the strong presence of fruits from Florida—at firm prices.
Indeed, the good performance observed in April encouraged importers of Florida fruits to order much larger quantities than in the preceding seasons, as fruit quality was still satisfactory even though the end of the season was approaching. The end of the particularly long Turkish season enabled Star Ruby from Israel to gain a foothold on the market at last, although releases were much smaller than in previous years.
The starting of the season in mid-May did not have an effect on the situation until week 22, when the massive increase in shipments from South Africa called the market balance into question.

Grapefruit — Estimated market releases in France



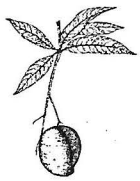


Estimated market releases in France by origin — May 2002

Tonnes	May 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2001/2002	2002/2001	2002/2000
Florida	4 545	+ 49	- 6	57 648	0	+ 2
Israel	1 981	- 38	- 38	6 964	- 29	- 42
Turkey	388	-	+ 535	10 815	+ 29	+ 73
South Africa	2 068	+ 28	+ 125	2 068	+ 28	+ 125
Argentina	1 764	+ 10	+ 252	1 764	+ 6	+ 252
Total	**10 746**	**+ 23**	**+ 13**	**79 259**	**0**	**+ 4**

Mango
West African season

MAY 2002	Import price	
Euros/kg	Min	Max
Mali Amélie - air	2.13	2.29
Côte d'Ivoire Kent - air	2.80	3.50
Côte d'Ivoire Kent - sea	1.37	1.62



After a difficult season for Amélie mangoes from West Africa in April, coloured mangoes formed the major part of supplies in May. Market conditions during this period were satisfactory as a whole, enhancing a good flow of produce at regular prices. This improvement will probably make it possible to make up for the poor start to the export season.

The first Kent shipped by sea from **Côte d'Ivoire** were landed at the end of April and marketed in early May. Shipments were regular but distinctly smaller than those of 2001 (120 to 250 tonnes per week less). This decrease and the good quality of the fruits ensured market balance and steady prices. Although fruit selection and presentation were satisfactory, uneven ripeness was the weak point, obliging importers to examine each batch before releasing them on the national market or other European markets. The average price was around EUR 1.50 per kg, with a range of EUR 1.37 to EUR1.62 per kg. The market remained firm during the first three weeks in spite of numerous bank holidays, poor weather and the stepping up of arrivals of the season's fruits. It weakened at the end of the week because of a distinct decrease in demand, partially compensated by the export market at the beginning of the second half of the month, but was subsequently affected by the general dullness of the market. A few remaining batches of Amélie found takers with difficulty during the first half of the month. Rapid ripening and competition from coloured varieties often made it necessary for importers to resort the fruits. The prices were open, with the goods going to purchasers making the best offer. The first Keitt shipped by sea were received in week 21. Quantities increased little by little but without forming the majority of shipments. Kent mangoes still formed over half of the shipments at the end of May. Batches of Palmer also completed the shipments. The diversification of varieties seems to indicate low availability and an early end to the season. Côte d'Ivoire also continued its shipments by air with quality fruits (about 150 t) sold at around EUR 3 per kg mainly on the wholesale market. A few insufficiently ripe batches were difficult to sell.

Shipments by air from **Mali** of Kent, Valencia and smaller quantities of Amélie decreased (130 t against nearly 200 in April). Quality was very uneven according to the batch, with numerous peel defects, fruits ranging from unripe to overripe and little flavour. Even when condition was satisfactory on arrival, it worsened rapidly and the fruits wrinkled when they ripened (especially Kent). Prices nevertheless remained stable for quality fruits, which doubtless benefited from market fluidity. Shipments of Valencia ceased in mid-May, with quality deteriorating seriously.

Burkina Faso also reduced shipments (20 t in comparison with more than 50 t in April). Good fruit quality ensured stable prices for both Amélie and Kent.

Guinea practically ceased its exports after serious quality problems in previous shipments. Quality improvement and the exporting of other varieties (Haden) were not enough to make up for the previous poor sales.

Supplies were completed by several batches from **Venezuela** and **Puerto Rico** (Keitt). The latter were very large and did not sell well as their condition changed rapidly.

Mango — Prices in euros per kg — At import stage

Weeks 2002	18	19	20	21	22
By air					
Côte d'Ivoire					
Kent	2.80-3.20	3.00	3.00-3.50	3.00	
Mali					
Amélie	2.13-2.29	2.13	2.13-2.29	2.13-2.29	
Kent	2.13-2.44	2.13-2.44	2.13-2.44	2.00-2.50	2.30-2.40
Valencia				2.44	
Burkina Faso					
Amélie	2.14-2.15	2.13	2.13-2.29		
Kent	2.55-2.60	2.55	2.13-2.44	2.6	2.4
Valencia	2.6			2.5	2.4
By sea					
Côte d'Ivoire					
Amélie	0.50-0.87				
Kent	1.50-1.60	1.50-1.60	1.37-1.62	1.37-1.57	1.37-1.50

Estimated market releases in France from Côte d'Ivoire (mango by sea)