Indicators
July/August 2002

The main fruits

In shares by total volume and expenditure on fruits for the month in France		
%	Volumes	Expenditure
Peach/Nectarine	33	33
Apricot	12	12
Apple	11	9

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

Peach/Nect.

July/Aug. 02 / July/Aug. 01			
Price	↘	Vol.	↗

The situation was difficult in July. Very large quantities were available for most of the month (production peak in a year with large volumes) and unfavourable weather slowed demand. However, the market improved in August and the average price improved, after being lower than 2002 in July.

Apricot

July/Aug. 02 / July/Aug. 01			
Price	↘	Vol.	↗

The situation has been very similar to that of peaches and nectarines. The potential was also very large this year. After a difficult start, the season finished under comparatively favourable conditions.

Apple

July/Aug. 02 / July/Aug. 01			
Price	=↗	Vol.	-

The early varieties and Gala started at the end of July/beginning of August under good conditions, with prices distinctly higher than last year's.

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

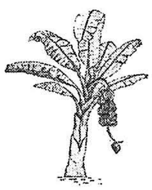
JULY/AUGUST 2002

Monthly comparison: August 2002 / July 2002

Price	Volumes
↗↗ +78%	↘ -12%

Annual comparison: July-Aug 02 / July-Aug 01

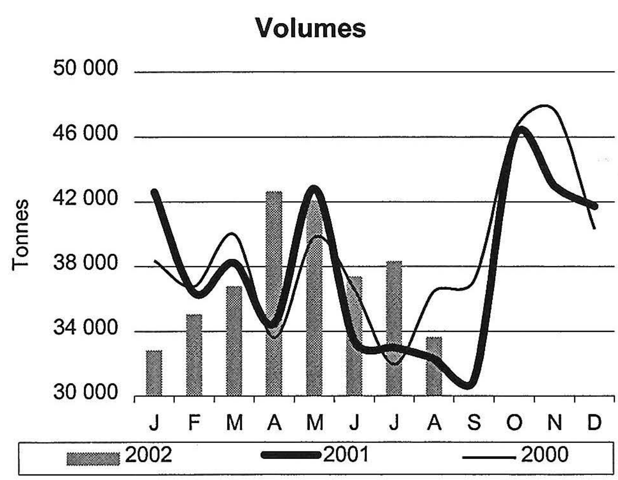
Price	Volumes
↘↘ -26%	↗ +10%

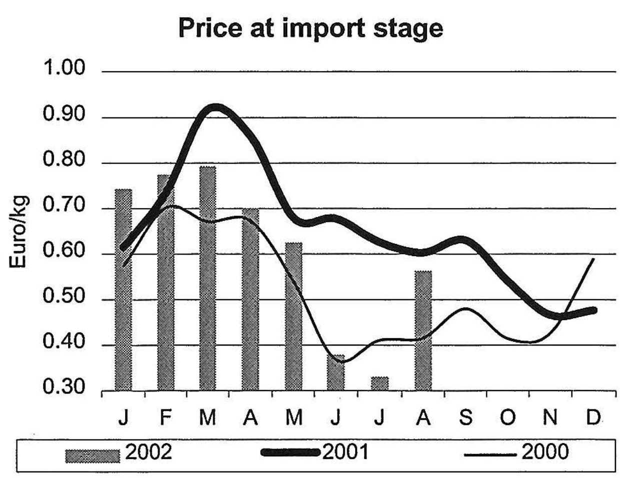


The serious slump that started at the beginning of June was shorter than feared, even though shipments from the West Indies and Africa were still noticeably larger than average in July and August. The rapid recovery can be ascribed to a dynamic export flow to markets in the northern EU, where dollar banana supplies were much more modest than expected, and to a return to more reasonable retail prices in France.

Two main factors enabled the market to regain its balance from mid-July onwards.
Firstly, supplies to the European market decreased considerably. The very substantial arrivals from the West Indies and Africa decreased, although they remained distinctly higher than average. Simultaneously, the quantities of dollar bananas in the north of the EU were much smaller than expected (losses caused by leaf spot disease in Ecuador), making it possible to re-launch exports. Furthermore, local demand was less lack-lustre than in June and competition from summer fruits decreased. Above all, retail prices came down, returning to levels close to those of 2000. Thus, performance was still poor overall in July (prices 30% down in comparison with the average and volumes up by 15%) and became satisfactory in August (price +15% and volumes –1%).

Banana — Estimated market releases in France





Estimated market releases in France by origin — July / August 2002

Tonnes	July 2002	August 2002	Comparisons (%) 2002/2001 July	Comparisons (%) 2002/2001 August	Comparisons (%) 2002/2000 July	Comparisons (%) 2002/2000 August	Season total 2002	Comparisons (%) 2002/2001	Comparisons (%) 2002/2000
Côte d'Ivoire	6 360	5 938	- 6	- 13	+ 27	- 1	64 029	0	+ 1
Cameroon	9 201	6 411	+ 12	- 16	+ 55	+ 2	67 736	- 6	+ 2
Martinique	15 718	14 954	+ 29	+ 23	0	- 16	115 543	+ 8	- 5
Guadeloupe	7 040	6 353	+ 21	+ 12	+ 35	- 1	51 463	+ 4	+ 24
Total	**38 319**	**33 656**	**+ 16**	**+ 4**	**+ 20**	**- 8**	**298 771**	**+ 2**	**+ 2**

Avocado

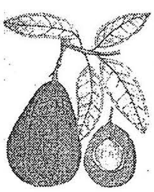
JULY/AUGUST 2002

Monthly comparison: August 2002 / July 2002

Price	Volumes
↗ +14%	↗ +13%

Annual comparison: July-Aug 02 / July-Aug 01

Price	Volumes
↘ -5%	↘ -15%

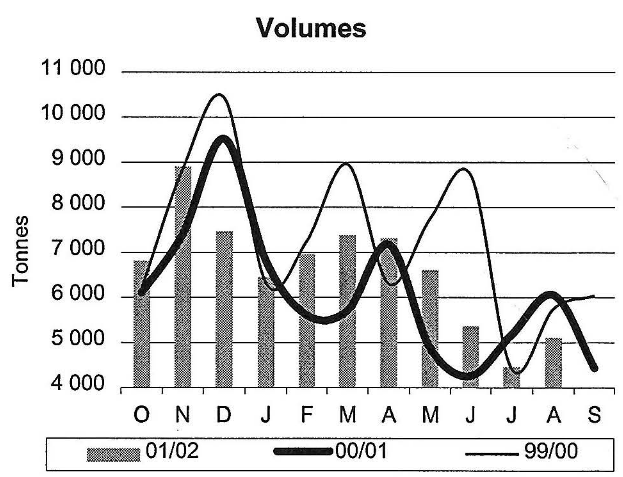


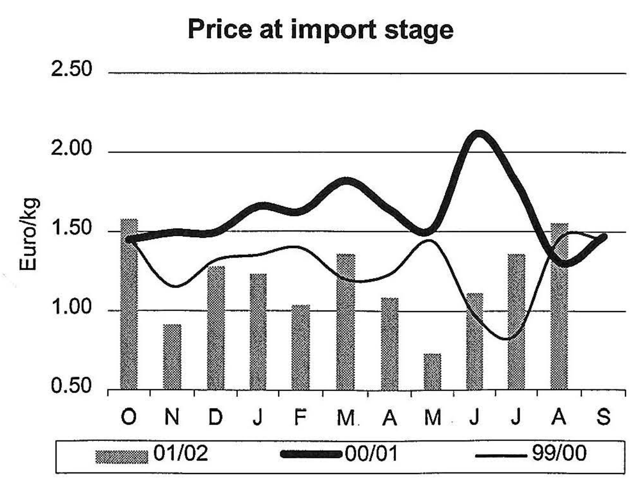
Volumes were only average during the two-month period and demand was insufficient for the season until mid-August. In addition, quality problems affected the market for green varieties. Thus, price performance was still poor in July and recovered to a satisfactory level in August.

The market for Hass remained disappointing in July. Demand was particularly sluggish whereas the level of supplies was strong. Indeed, shipments from South Africa gathered momentum early, Spanish shippers continued to supply significant volumes and the complementary origins (Peru, Argentina) were very present. The situation only really started to improve in August thanks to the early falling-off of South African shipments and the recovery of demand.

The market for green varieties was still difficult at the beginning of July (carryover of June stocks) and improved gradually in mid-July thanks to the end of the season for Fuerte from South Africa. Nevertheless, large shipments from Kenya at the end of the month broke the rising trend in prices. No improvement was observed in August as the volumes from Kenya were as large as last year and the quality was sometimes uneven.

Avocado — Estimated market releases in France





Estimated market releases in France by origin — July / August 2002

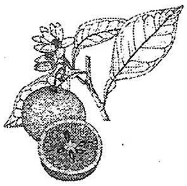
Tonnes	July 2002	August 2002	Comparisons (%) 2002/2001 July	Comparisons (%) 2002/2001 August	Comparisons (%) 2002/2000 July	Comparisons (%) 2002/2000 August	Season total 2002/2001	Comparisons (%) 2002/2001	Comparisons (%) 2002/2000
Spain	812	479	+ 11 517	-	+ 85	-	479	-	-
Mexico	-	218	0	- 83	0	+ 16	218	- 88	+ 16
Kenya	666	1 265	- 64	- 2	+ 89	+ 67	5 089	- 43	- 31
South Africa	2 980	3 142	+ 4	- 9	- 18	- 35	12 836	+ 15	- 17
Total	**4 458**	**5 104**	**- 14**	**- 16**	**+ 1**	**- 11**	**18 622**	**+ 62**	**+ 37**

Orange

JULY/AUGUST 2002

Monthly comparison: August 2002 / July 2002	
Price	Volumes
↘ -1%	↘ -38%

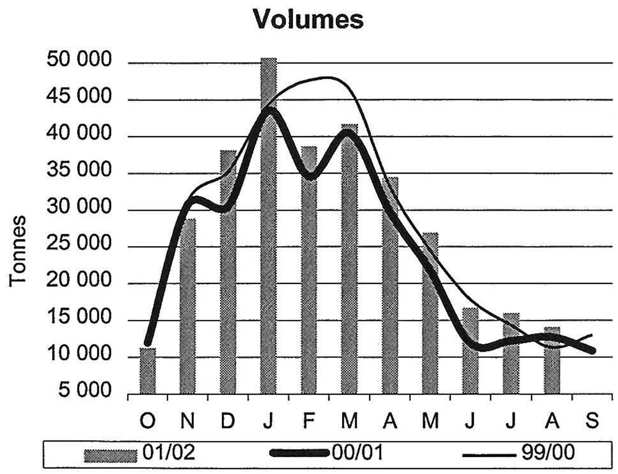
Annual comparison: July-Aug 02 / July-Aug 01	
Price	Volumes
↘ -22%	↘ -26%

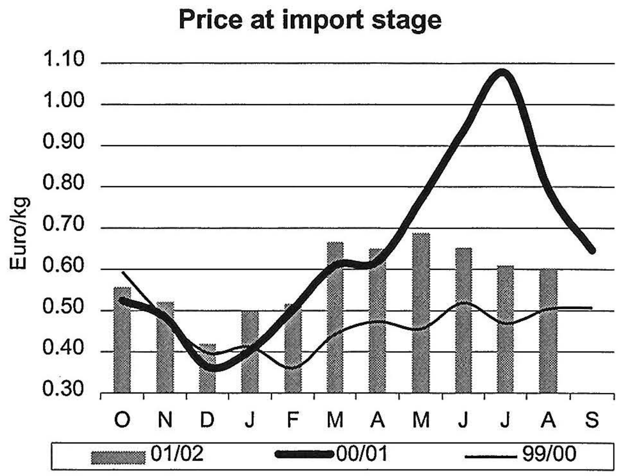


Prices were down by nearly 20% in comparison with the average in July and nearly 10% down in August. The volumes increased in roughly similar proportions. Performance was therefore mediocre as a result of the continuation of the winter seasons in a context of relatively slow demand.

As for other imported produce demand was smaller than usual for the season, especially in July. In addition, the prolonging of the winter Valencia seasons continued to weigh heavily on releases of Navel from South Africa in July and for a fair part of August. Indeed, the Maroc Late season did not finish until mid-July and, above all, supplies of late fruits from Spain were distinctly larger than in preceding years (+7% in July and +40% in August). The prices of South African Navel were comparatively disappointing and flexible, especially as supplies were slightly more plentiful than the average for the preceding seasons. The late marketing of this variety also led South African exporters to limit their shipments of Valencia to the EU (turning rather to the markets in the Far East and the Middle East). Overall supplies were therefore more modest in August in spite of much weaker—but nonetheless affirmed—presence of Argentina than in 2001. Price thus kept at an average level, especially as demand woke up in mid-August.

Orange — Estimated market releases in France





Estimated market releases in France by origin — July / August 2002

Tonnes	July 2002	August 2002	Comparisons (%) 2002/2001 July	2002/2001 August	2002/2000 July	2002/2000 August	Season total 2002/2001	Comparisons (%) 2002/2001	Comparisons (%) 2002/2000
Spain	5 161	3 902	+ 80	+ 63	- 20	+ 27	248 602	+ 24	0
South Africa	10 137	10 223	+ 9	- 1	+ 28	+ 24	25 963	+ 3	+ 17
Morocco	670	0	-	0	-	0	18 344	- 33	+ 24
Total	**15 968**	**14 125**	**+ 31**	**+ 11**	**+ 11**	**+ 25**	**292 909**	**+ 15**	**+ 3**

Grapefruit

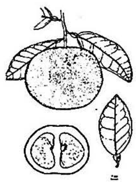
JULY/AUGUST 2002

Monthly comparison: August 2002 / July 2002

Price	Volumes
↗ +8%	↘↘ -83%

Annual comparison: July-Aug 02 / July-Aug 01

Price	Volumes
↘↘ -30%	↗ +8%



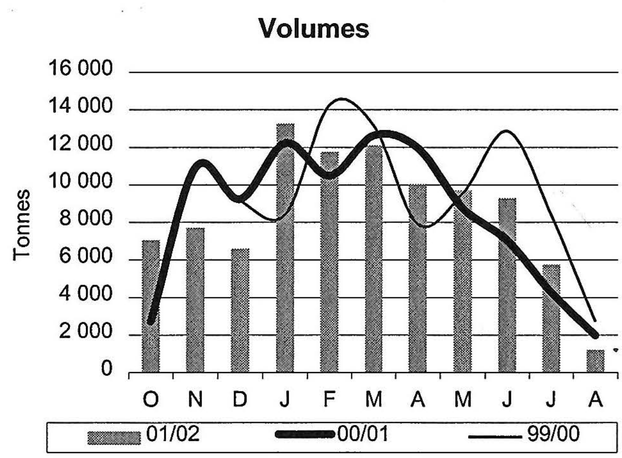
Operators did not really manage to profit from the early decrease in arrivals from South Africa as considerable stocks had accumulated in June and the quality of some batches was uneven. Prices therefore only reached an average level in spite of the comparatively low level of supplies.

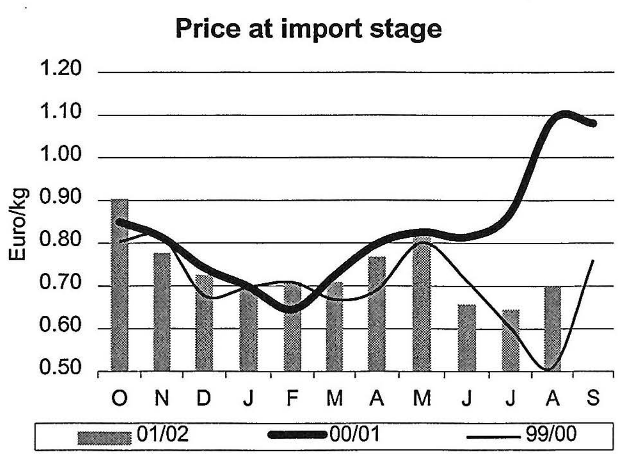
Arrivals were distinctly smaller than the average for recent years, especially in August, because the South African season tailed off very early. However, the large stocks that had accumulated in June, consisting in particular of small fruits (50/55), weighed on the market. Furthermore, the quality of certain batches obliged several importers to clear stocks; this concerned goods from Argentina in particular.

Finally, demand was weaker than the level for the season until mid-August.

Operators were thus unable to unstick prices from their unsatisfactory June level, except for certain very specific produce (Star Ruby grade 35 to 45).

Grapefruit — Estimated market releases in France





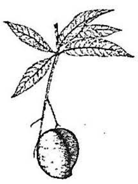
Estimated market releases in France by origin — July/August 2002

Tonnes	July 2002	August 2002	Comparisons (%) 2002/2001 July	2002/2001 August	2002/2000 July	2002/2000 August	Season total 2002/2001	Comparisons (%) 2002/2001	Comparisons (%) 2002/2000
South Africa	3 800	984	+ 11	- 23	- 41	- 64	12 463	+ 14	- 26
Argentina	1 948	216	+ 130	- 70	+ 4	0	6 060	+ 52	+ 48
Total	**5 748**	**1 200**	**+ 35**	**- 39**	**- 31**	**- 56**	**18 523**	**+ 3**	**- 6**

Mango

West African Season

JULY/AUGUST 2002 — Import price		
Euros/kg	Min	Max
Senegal Kent - air	2.30	3.50
Senegal Kent/Keitt - sea	0.75	2.50
Côte d'Ivoire Kent - sea	1.37	1.75



The end of the Côte d'Ivoire season at the beginning of July left the market under-supplied for a fortnight. New origins made up the deficit in the second half of the month, resulting in a more chaotic transition period. In August, massive arrivals from Brazil and Puerto Rico (shipped to northern Europe) and also Mexico, Senegal and Israel resulted in a difficult period for the market, with demand weakening to the benefit of the season's fruits.

The **Côte d'Ivoire** season ended in the second week of July with the arrival of the last significant batches. Kent sold steadily while Keitt was more difficult because of the lesser interest of buyers in the variety and its poorer performance in time (anthracnose, spotting, etc.). The small volume of mango available kept prices firm.

The situation worsened distinctly in the second half of July with the arrival of larger and larger shipments from **Brazil**, **Mexico** and **Puerto Rico** and the gradual beginning of the Senegalese and Israeli seasons. This marked increase in the volumes available coincided with the main holiday departure season, resulting in a decrease in consumption.

The **Senegalese** season suffered initial difficulties. With the exception of a few arrivals of poor quality fruits by air from Casamance and small container shipments of insufficiently ripe fruits between the end of June and mid-July, the season really only started in the third week of July. The overall quality of the fruits was satisfactory but they were sometimes hardly ripe and displayed uneven colouring. Increasingly serious anthracnose attacks caused quality to deteriorate rapidly. The spread of these attacks gradually put off the clientele for the origin. However, these quality problems seem to have benefited Mexican produce (Kent) with good colour and better keeping qualities.

The regular flows of goods from Latin America and Senegal in August resulted in the accumulation of stocks that operators found it difficult to shift. At the end of August, market conditions deteriorated in proportion to the fall in the quality of the stored fruits and still dull demand.

The **Israeli** season started at the end of July with Maya mangoes shipped by air. The fine quality of the fruits and the small quantities available favoured high selling prices. The price fell in the second half of August as a result of problems of over-ripeness. The little attractive fruits (imported by sea) from Israel—Tommy Atkins and then Kent—had a hard time finding a place on the market.

Small batches of mangoes from **Pakistan** (the varieties Chausa and Sindhri) and from **Egypt** (Mabrouka) completed supplies during the period.

Mango — Prices in euros per kg — At import stage

Weeks	27	28	29	30	31	32	33	34	35
By air									
Senegal									
Kent			3.35-3.50	2.80-3.50	2.30-3.00	2.30-2.75	2.30	2.30-2.50	
Mexico									
Kent	4.30	4.30-4.60	4.00-4.50	3.50-4.50	3.50-4.00	3.00-3.50			
By sea									
Côte d'Ivoire									
Kent	1.37-1.75	1.50-1.75	1.37-1.50						
Senegal									
Kent/Keitt		2.40-2.50	1.62	1.50-1.62	1.37-1.50	1.12-1.50	1.00-1.50	0.75-1.37	1.00-1.25
Mexico									
Tommy Atkins	1.62	1.50-1.62	1.37-1.50						
Kent					1.60-1.75	1.60-1.75	1.50-1.60	1.50-1.60	1.20-1.50
Brazil									
Tommy Atkins	1.50	1.37-1.50	1.25-1.50	1.25-1.50	1.00-1.37	0.87-1.00	0.87-1.10	0.87-1.10	0.87-1.00

Estimated market releases from Senegal