Indicators
October 2002

The main fruits

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

%	Volumes	Expenditure
Grapes	21	25
Apple	24	19
Banana	13	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.

Pages

Grapes

Oct. 2002 / Oct. 2001			
Price	↗	Vol.	↘

The quantities available have been much smaller than they were last year. This concerned the black varieties in particular. Bad weather caused substantial production losses in south-east France and Italy. The average price therefore increased markedly but the range was broad because quality varied according to the origin.

Apple

Oct. 2002 / Oct. 2001			
Price	↘	Vol.	↗

Larger volumes were sold than in 2001. The production of early varieties such as Gala displayed a distinct increase. Furthermore, export flows were less dynamic, probably as a result of competition from Italy where production is large. The average price decreased in spite of good sales of large fruits.

Banana

Oct. 2002 / Oct. 2001			
Price	↗↗	Vol.	=

The market suffered the second major slump of the year, with the average price slipping below Euro 0.40 per kg once again. The French market has been particularly generously supplied while local demand still suffered from high retail prices and poor emphasis on the fruit by the multiples.

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 2002

Monthly comparison: Oct. 2002 / Sept. 2002	
Price	Volumes
↘ - 20%	↗ + 29%

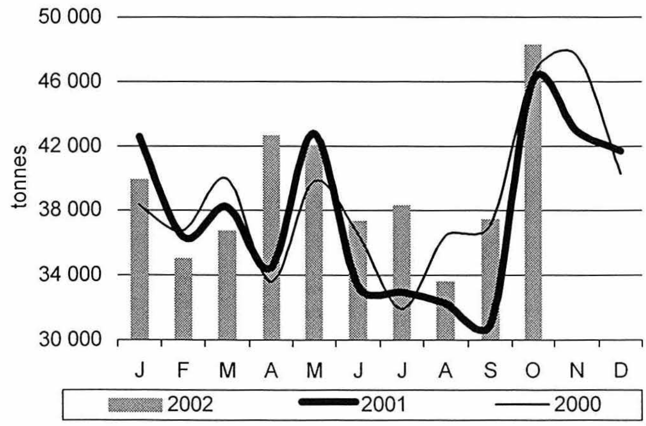
Annual comparison: Oct. 2002 / Oct. 2001	
Price	Volumes
↘ - 29%	= ↗ + 5%

The market suffered the second major slump of 2002. The average price fell below Euro 0.40 once again, that is to say nearly 20% down on the average price during the last three seasons. The French market was particularly amply supplied whereas local demand still suffered from high retail prices and poor emphasis on the fruit in supermarkets.

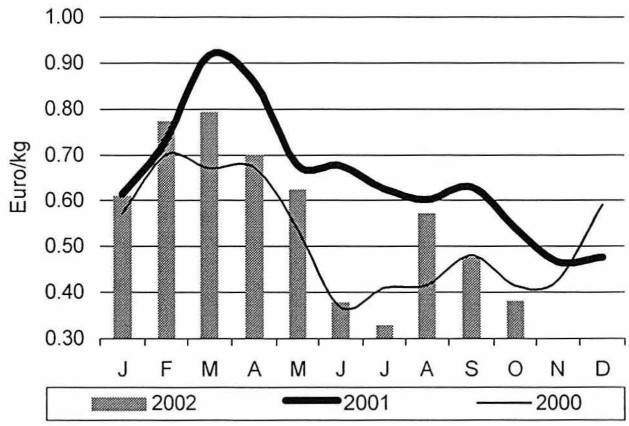
Particularly large quantities of fruits were available in spite of the only average presence of African origins. Shipments from the West Indies were particularly substantial during the first half of the month. Meanwhile, local demand was disappointing once again. Promotion operations were at a mediocre level, 15% down on 2001 and 25% down on 2000 in spite of substantially more generous supplying of the market. The retail price was also down in comparison to 2001 but still firmer than in 2000. Export sales were more difficult as the British market closed and the flow to Germany dwindled. Stocks were large and export operations to Germany and southern Europe were organised to the detriment of prices.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

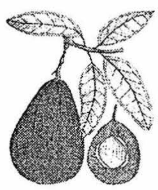
Tonnes	October 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002	2002/2001	2002/2000
Côte d'Ivoire	10 138	- 12	- 4	83 061	+ 1	+ 3
Cameroon	10 221	- 9	+ 3	86 976	- 3	+ 4
Martinique	19 787	+ 22	+ 8	153 983	+ 13	- 2
Guadeloupe	8 181	+ 17	+ 9	67 671	+ 9	+ 21
Total	**48 327**	**+ 5**	**+ 4**	**391 691**	**- 2**	**+ 4**

Avocado

OCTOBER 2002

Monthly comparison: Oct. 2002 / Sept. 2002	
Price	Volumes
↘ - 10%	↗ + 24%

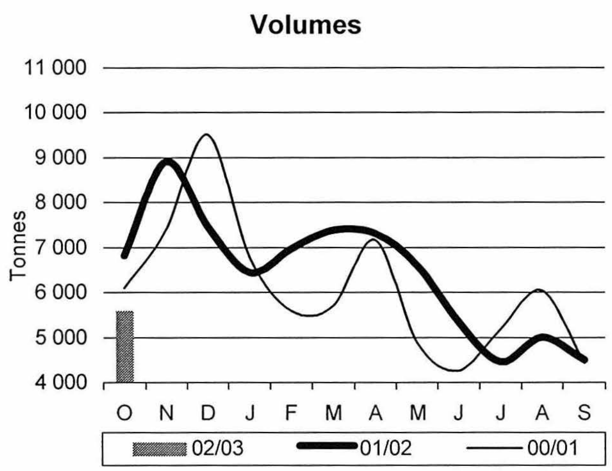
Annual comparison: Oct. 2002 / Oct. 2001	
Price	Volumes
↗ + 25%	↘ - 18%

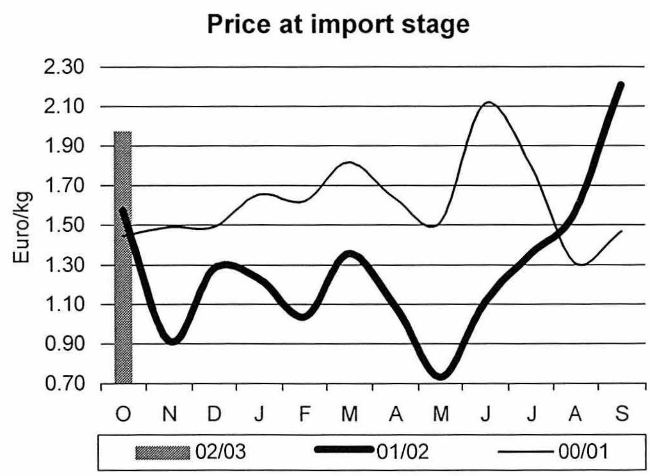


The 2002-2003 winter season has got off to a spectacular start, with record prices approaching Euro 2 per kg in October. However, this performance is explained by the fact that volumes hit historically low levels.

The quantities available were particularly modest in spite of the prolongation of the summer seasons. On the one hand, the severe Spanish production deficit in early varieties (Bacon and then Fuerte) resulted in a nearly 70% decrease in arrivals in France. On the other hand, importers of Hass from Mexico were cautious in their schedule because of the problems experienced in 2001. Israel is the only winter origin where the quantities available approached last season's. Prices were very firm at the beginning of October and fell during the second half of the month because of the very high retail prices attained and the increase in arrivals of Ettinger from Israel.

Estimated market releases in France





Estimated market releases in France by origin

Tonnes	October 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2001	2002/2001	2002/2000
Israel	1 567	+ 20	+ 44	1 567	+ 20	+ 44
Mexico	2 129	- 10	+ 4	3 779	- 30	+ 2
Spain	920	- 68	- 48	1 574	- 53	- 24
Kenya	383	+ 46	+ 147	6 136	- 40	- 24
South Africa	594	-	- 43	15 572	+ 22	- 23
Total	**5 593**	**- 18**	**- 8**	**28 628**	**- 14**	**- 19**

Orange

OCTOBER 2002

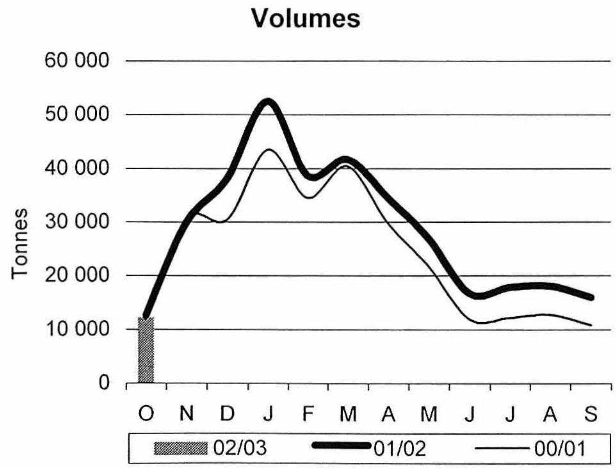
Monthly comparison: Oct. 2002 / Sept. 2002	
Price	Volumes
↘ - 2%	↗ + 27%

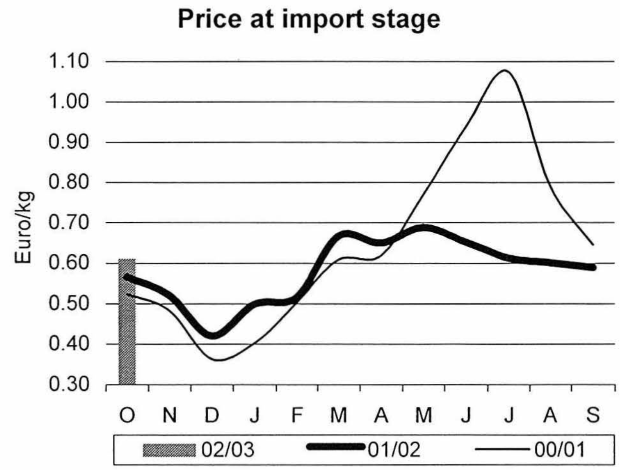
Annual comparison: Oct. 2002 / Oct. 2001	
Price	Volumes
= 0%	↗ + 1%

Performance was fairly satisfactory thanks to a smooth transition from the summer origins to Spanish origins. Valencia releases were satisfactory at the beginning of the month and importers handling summer origins benefited from an extra week of sales as the Spanish Navel season started fairly late.

Markedly larger quantities of Valencia from South Africa were available this year. However, the export flow to northern Europe was active. Furthermore, competition from Argentinian fruits faded rapidly as the modest volumes from this origin had been sold in mid-October. Finally, the importers of South African fruits had one more week of sales than last year because the Spanish Naveline season got off to a late start. The Valencia season thus ended under good conditions. Prices increased substantially, even for grades such as 88 that had previously been difficult to shift. The Spanish season started well. Shipments were very modest until right at the end of the month and were well down in comparison with previous years because the fruits ripened about a week late.

Estimated market releases in France





Estimated market releases in France by origin

Tonnes	October 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2001/2002	2002/2001	2002/2000
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**

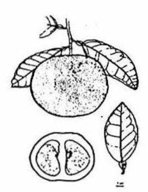
Grapefruit

OCTOBER 2002

**Note:
this comparison concerns
only winter origins**

Annual comparison: Oct. 2002 / Oct. 2001

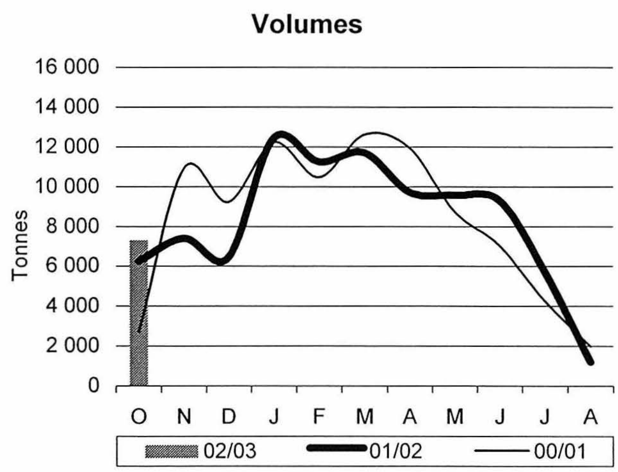
Price	Volumes
↘ - 6%	↗ + 17%

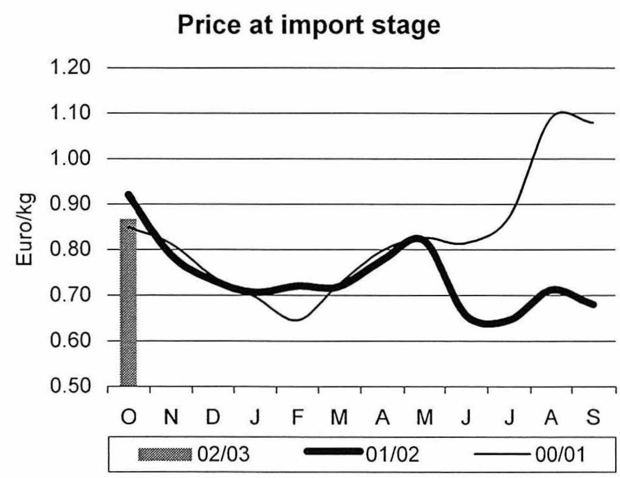


Performance was satisfactory thanks to a change from off season origins (Honduras and Cuba) to winter origins. Overall supply of the market was only modest as a result of serious production losses in Cuba and in spite of substantial volumes from the winter origins. Although the average price was down in comparison with 2001 it thus remained distinctly higher than average.

The total quantities of off season grapefruit have been comparatively modest. The Cuban season ended early as a result of the considerable losses caused by hurricane Isidore. The last stocks of fruits from Honduras sold under good conditions (especially the large fruits). Only Mexican fruits continued to experience marketing problems because of the uneven quality of some batches. The winter season really started in mid-October with an uncluttered market. Shipments increased rapidly, especially from Florida. Demand responded well and releases were in phase with supply, for both Florida and Turkey. In contrast, Israeli fruits found it difficult to gain a position at the end of the month.

Estimated market releases in France





Estimated market releases in France by origin

Tonnes	October 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2001	2002/2001	2002/2000
Florida	5 226	+ 30	+ 499	5 226	+ 30	+ 499
Israel	686	+ 20	+ 84	686	+ 20	+ 84
Turkey	1 376	- 17	- 6	1 376	- 17	- 6
Total	**7 288**	**+ 17**	**+ 169**	**7 288**	**+ 17**	**+ 169**

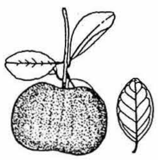
Note: this table does not include quantities from Cuba and Honduras.

Clementine

OCTOBER 2002

Monthly comparison: Oct. 2002 / Sept. 2002	
Price	Volumes
↘ - 31%	↗ + 2 887%

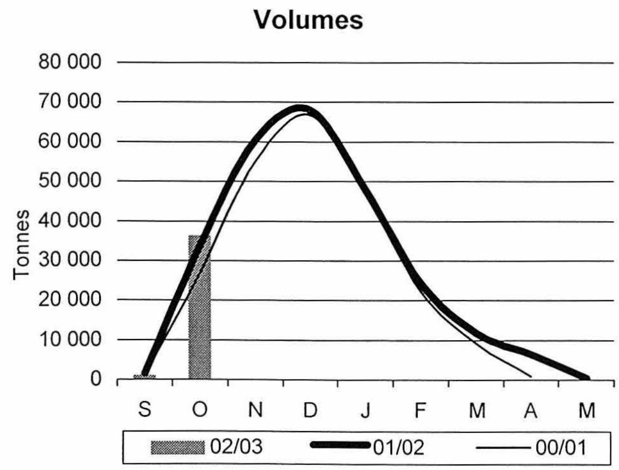
Annual comparison: Oct. 2002 / Oct. 2001	
Price	Volumes
= ↘ - 1%	↗ + 8%

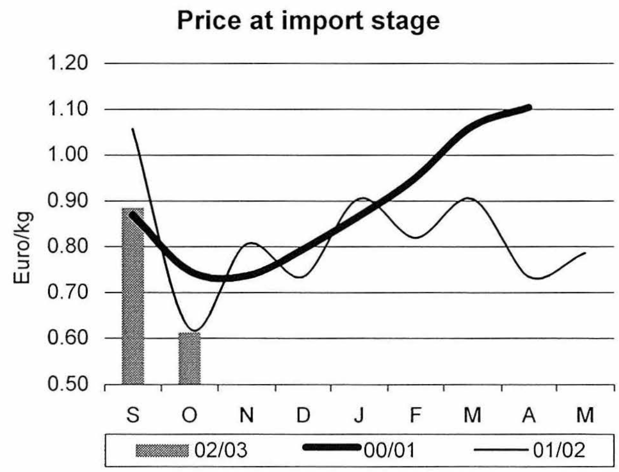


The start of the clementine season has been particularly difficult this year once again. The market was soon over-supplied. The Marisol crop in Spain has been very large this season and the share reserved for community markets was larger because of the late opening of the North American market.

The quantities available were particularly large in October, even though the fruits ripened about a week later than during the last season. The Spanish Marisol crop was nearly 15% larger than in 2001. Furthermore, the share earmarked for the EU was distinctly larger because of the late opening (15 October) of the US frontiers. The market soon became over-supplied as the result of these large volumes of a variety that seems to be less and less well-accepted. Prices soon hit rock bottom—as low as those of the last season. Shipments of higher quality early clementines (Oronules, Arrufatina and Clemenpons) totalled significant but still modest volumes for the first time this season. The fairly early start of the Corsican season in the second half of the month should also be noted. In contrast, Morocco has not displayed interest in the EU markets.

Estimated market releases in France





Estimated market releases in France by origin

Tonnes	October 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2001	2002/2001	2002/2000
Spain	35 881	+ 9	+ 34	37 099	+ 7	+ 32
Morocco	0	-	-	0	-	-
Corsica	498	+ 87	+ 1 020	498	+ 87	+1 020
Total	**36 379**	**+ 8**	**+ 35**	**37 597**	**+ 6**	**+ 33**