

Indicators

November 2002

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

The main fruits	%	Volumes	Expenditure
Easy peelers		20	22
Apple		21	17
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.

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Nov. 2002 / Nov. 2001

Price	↗	Vol.	↘
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Easy peelers

The market recovered rapidly after a very difficult start. Performance was good in November as both prices and the volumes sold were above the average for the last three years. The overall increase in quality resulting from the transition from Marisol/Oroval to Nules probably stimulated demand.

Nov. 2002 / Nov. 2001

Price	↘	Vol.	↗
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Apple

The volumes available were slightly greater than last year (+ 2%); this concerned small grades in particular. Demand was stimulated by the broadening of the varietal range. Prices were strong for 75/80 fruits but more competitive than last year for small fruits.

Nov. 2002 / Nov. 2001

Price	↘↘	Vol.	↘
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Banana

The market recovered from the October slump. Supplies fell to a below-average level. Demand reawoke thanks in particular to good supermarket mobilisation in favour of this fruit. However, prices only began to recover in the middle of the month because of the stocks available. The average price therefore remained very mediocre.

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 2002

Monthly comparison: Nov. 2002 / Oct. 2002

Price	Volumes
↘ - 5%	↘ - 17%

Annual comparison: Nov. 2002 / Nov. 2001

Price	Volumes
↘↘ - 24%	↘ - 6%



The market emerged from the October slump. West Indian, African and dollar supplies fell to below-average levels. Demand reawakened thanks in particular to good supermarket mobilisation in favour of this fruit. However, prices only began to recover in the middle of the month because of the stocks available. The average price therefore remained very mediocre.

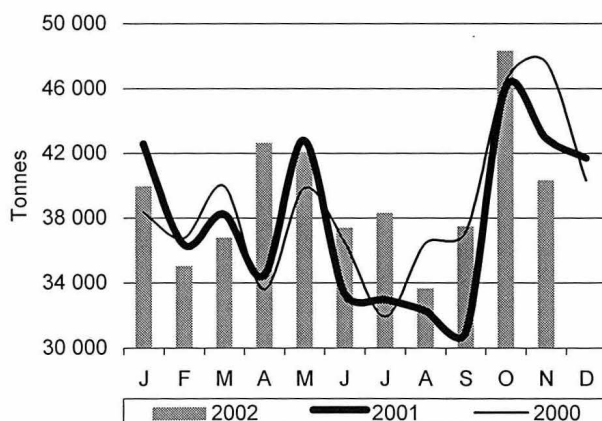
The market gradually recovered from the October dip. Firstly, local demand perked up from the beginning of the month onwards in most countries in the European Union. On the French market, this improvement was linked with a distinct increase in promotion operations combined with much

more attractive retail prices. In parallel, the substantial shipments of October dwindled noticeably. The volumes shipped from Africa and the West Indies were distinctly smaller than average (- 14% and - 6% respectively). Those from the dollar zones were also much limited. The export flow to northern

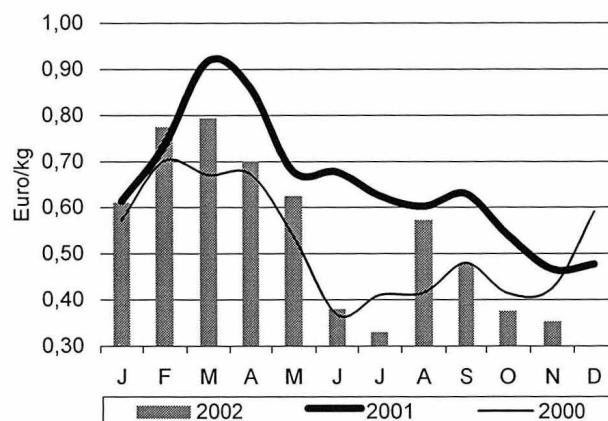
Europe became lively again. Furthermore, the increase in the price of Canary Island bananas stimulated interest in Spain. Prices were still very low until the middle of the month because of the stocks held and then increased during the second half of the month.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	November 2002	Comparisons (%)		Season total 2002	Comparisons (%)	
		2002/2001	2002/2000		2002/2001	2002/2000
Côte d'Ivoire	8 502	- 20	- 8	91 563	- 1	+ 2
Cameroon	9 368	- 19	- 26	96 344	- 5	0
Martinique	16 380	+ 12	- 9	170 363	+ 13	- 3
Guadeloupe	6 088	+ 0	- 22	73 761	+ 9	+ 16
Total	40 338	- 6	- 15	432 031	+ 5	+ 2

Avocado

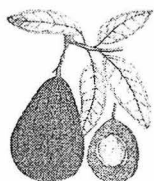
NOVEMBER 2002

Monthly comparison: Nov. 2002 / Oct. 2002

Price	Volumes
↘ - 33%	↗ + 16%

Annual comparison: Nov. 2002 / Nov. 2001

Price	Volumes
↗ + 75%	↘ - 40%

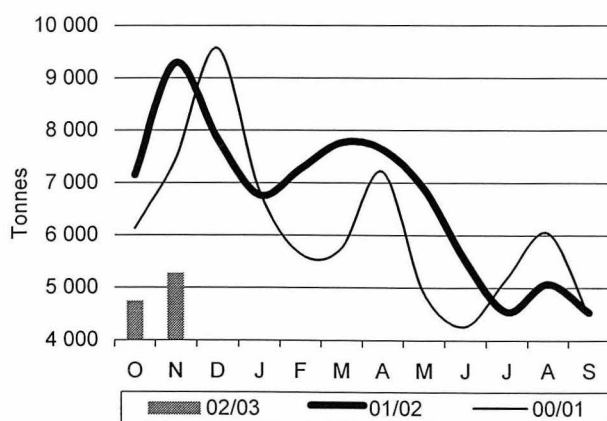
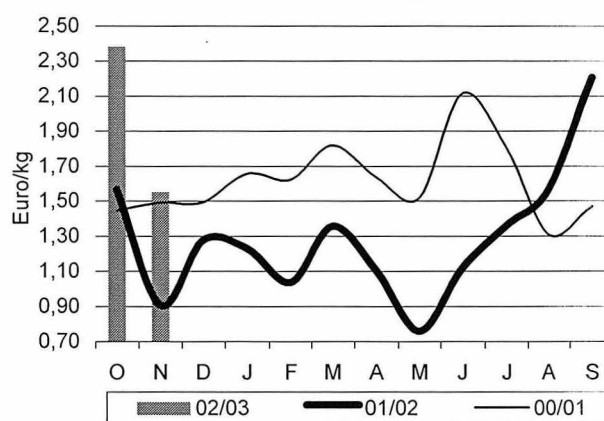


The performance in November 2002 is a perfect illustration of the old saying 'Every day is a new dawn'. The average price of avocado bottomed out as never before in November 2001 and broke all records in November 2002. The shortage of supplies—already marked in October—became acute this month.

The small quantities available account for the exceptionally high prices. On the one hand, shipments from Spain that normally lead in November remained very limited. The start of Hass, whose production shortfall is less marked than those of the early

varieties, did not cause a noteworthy increase in supplies. Indeed, speculation centred on this variety was active in the Malaga region. Furthermore, Israeli supplies had been substantial in October but were short in November. Finally, the supplies of

Mexican Hass were very limited. The market thus rapidly emerged from the usual early November slump. Prices rose throughout the month, accelerating in the second fortnight with the approach of the December selling period.

Estimated market releases in France
Volumes

Price at import stage

Estimated market releases in France by origin

Tonnes	November 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000		2002/2001	2002/2000
Israel	2 970	- 29	- 9	4 537	- 17	+ 4
Mexico	954	- 31	- 26	4 733	- 31	- 7
Spain	1 350	- 64	- 54	3 142	- 58	- 37
Total	5 274	- 43	- 29	12 412	- 37	- 14

Orange

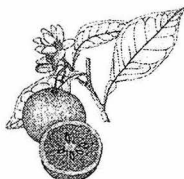
NOVEMBER 2002

Monthly comparison: Nov. 2002 / Oct. 2002

Price	Volumes
↘ - 24 %	↗ + 124 %

Annual comparison: Nov. 2002 / Nov. 2001

Price	Volumes
↘ - 11 %	↘ - 13 %

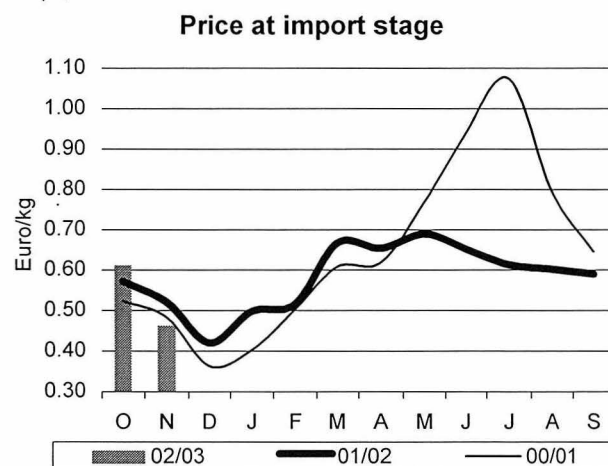
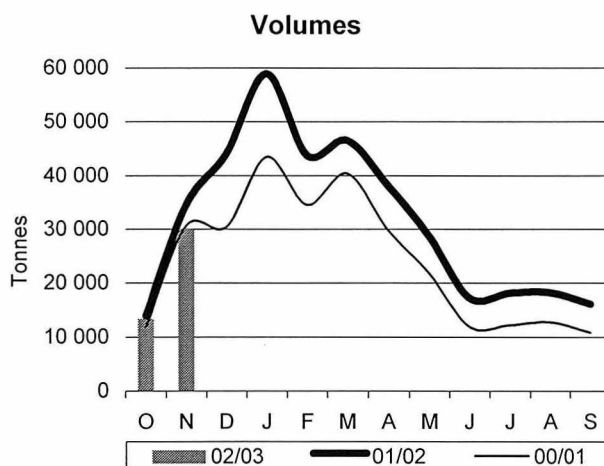


The orange market worsened after getting off to a good start in October. The quantities of Naveline from Spain were too large for this year's particularly sluggish demand. In addition to an unfavourable economic context, orange has received strong competition from the broad range of clementines available and whose quality better met consumer requirements.

As might be supposed, the very good October performance was unrelated to any particular consumer enthusiasm for oranges but resulted rather from the small supplies of late fruits from South Africa. Market balance was therefore upset during the first half of the month. On the one hand the rapid increase in quantities of

Naveline from Spain filled the trade channels empty of South African fruits. On the other hand, demand was the focus of strong competition with the increase in shipments of clementines in weeks 45 and 46. This competition was all the more fierce as the ripeness of Naveline did not reach last year's excellent level, whereas the

taste qualities of this season's clementines has been most satisfactory. Spanish shippers were unable to further regulate their shipments as the fruits were ripe and the processing industries were already working at full capacity. Prices therefore fell to 10% below last year's levels.

Estimated market releases in France

Estimated market releases in France by origin

Tonnes	November 2002	Comparisons (%)		Season total	Comparisons (%)'	
		2002/2001	2002/2000		2002/2001	2002/2000
Spain	29 997	- 13	- 2	38 713	- 12	+ 2
South Africa	-	- 100	- 100	47 555	+ 23	+ 28
Total	29 997	- 13	- 2	86 268	+ 4	+ 15

Grapefruit

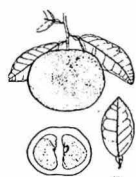
NOVEMBER 2002

Monthly comparison: Nov. 2002 / Oct. 2002

Price	Volumes
↘ - 16 %	↗ + 58 %

Annual comparison: Nov. 2002 / Nov. 2001

Price	Volumes
↘ - 7 %	↗ + 56 %

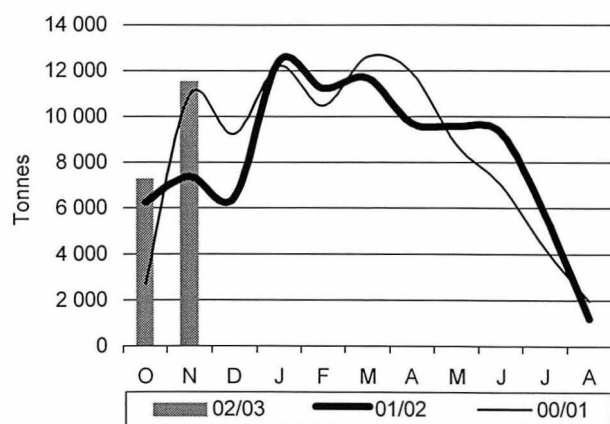
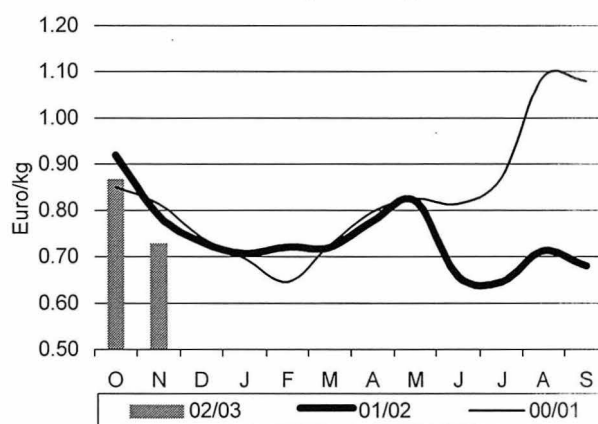


Performance has been relatively satisfactory in spite of supplies that have been markedly larger than average and much larger than last season. The average price remained at a good level thanks to comparatively brisk demand during the first part of the month.

The marked increase in arrivals from Florida (+ 22% in comparison with the average for the past four seasons) goes a long way towards explaining the large increase in the overall supplies available. Firstly, early fruit ripeness has enabled a rapid increase in exports. Secondly, the euro:dollar

exchange rate has been much less dissuasive than in preceding seasons and has encouraged importers to order larger quantities. Arrivals in the EU from Turkey have also been distinctly larger. Busy sales in the first half of the month resulted in the marketing of these fruits at satisfactory prices.

In contrast, business decreased markedly as usual in the second half of the month. However, operators only changed their prices slightly as the re-launching of demand for grapefruit would be illusory at this time of year. Stocks accumulated, in particular of goods from Florida and Israel.

Estimated market releases in France
Volumes

Price at import stage

Estimated market releases in France by origin

Tonnes	November 2002	Comparisons (%)		Season total 2002/2001	Comparisons (%)	
		2002/2001	2002/2000		2002/2001	2002/2000
Florida	9 484	+ 62	+ 27	14 710	+ 49	+ 77
Israel	720	+ 10	- 8	1 406	+ 15	+ 22
Turkey	1 343	+ 51	- 50	2 719	+ 7	- 35
Total	11 547	+ 56	+ 6	18 835	+ 38	+ 38

Easy peelers

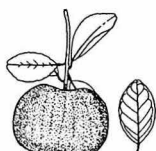
NOVEMBER 2002

Monthly comparison: Nov. 2002 / Oct. 2002

Price	Volumes
↗ + 37 %	↗ + 59 %

Annual comparison: Nov. 2002 / Nov. 2001

Price	Volumes
↗ + 4 %	↘ - 5 %



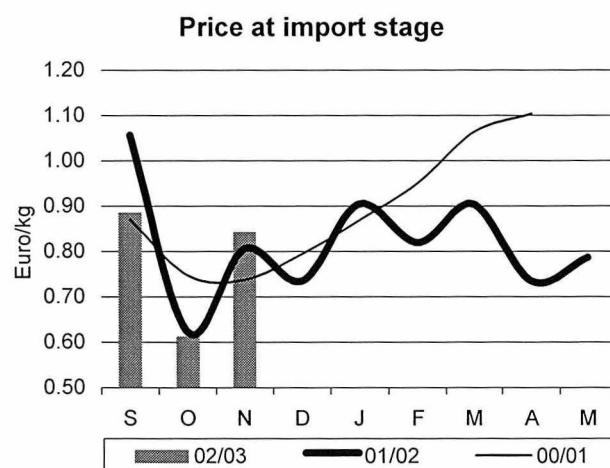
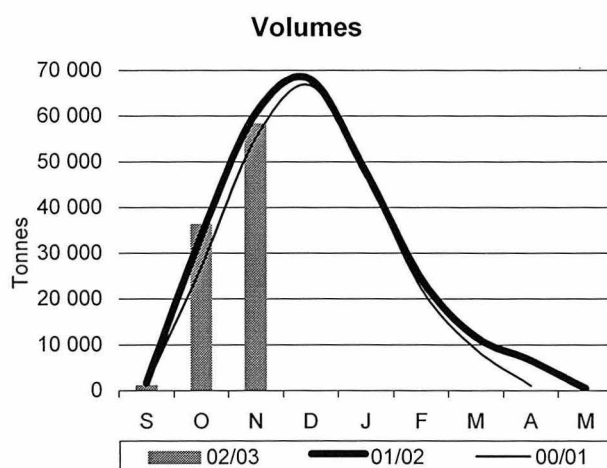
In contrast with that of orange, the clementine market recovered rapidly after a very difficult start. Performance was good in November with prices and quantities marketed up in comparison with the average for the past three years. The overall improvement in quality resulting from the transition from Marisol/Oroval to Nules very probably stimulated demand.

Although it was smaller than last year, overall demand remained slightly higher than average. Arrivals from Spain were slightly more plentiful than last year. Indeed, the very rapid increase in quantities of Clemenvilla compensated the slight decrease in the amount of clementines resulting from the slight production

shortfall of Nules. Likewise, Corsican clementine with leaves was particularly in view (+ 11% in comparison with the average quantity) although the quantities available were lower than in 2001. In contrast, the availability of fruits from Morocco was very limited as the north American and eastern European markets were favoured.

Prices nevertheless returned to those of the beginning of the season. Demand was reactivated thanks to the transition to varieties better appreciated by consumers and whose quality was satisfactory. Performance was most satisfactory in spite of a slight dip in demand at the end of the month.

Estimated market releases in France



Estimated market releases in France by origin

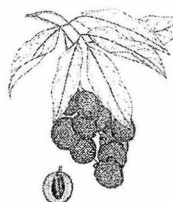
Tonnes	November 2002	Comparisons (%)		Season total 2002/2001	Comparisons (%)	
		2002/2001	2002/2000		2002/2001	2002/2000
Spain	49 036	+ 2	+ 3	86 135	- 1	+ 8
Morocco	2 131	- 62	- 24	2 131	- 64	- 25
Corsica	6 564	- 7	+ 46	7 032	- 4	+ 55
Total	57 731	- 5	+ 5	95 298	- 1	+ 14

Litchi

NOVEMBER 2002

Wholesale market price

Euros/kg	Min	Max
Mauritius - on the branch	9.00	11.00
sulphur treated	7.00	8.00
Madagascar - on the branch	9.00	9.00
sulphur treated	7.50	7.50
Réunion - on the branch	10.00	11.00



The alternate bearing phenomenon in production in the Indian Ocean and the weather conditions during growth of fruits should affect the quantities sold this year. Smaller harvests are already announced in Réunion (- 40%) and Madagascar (- 50%). Thanks to production potential distinctly greater than the quantities exported, Madagascar should nevertheless be able to deliver the same quantities to Europe as last year. Only South Africa has announced a larger crop.

As each year, the first litchis to arrive on the French market are from Mauritius, which is strengthening its 'first litchis' feature. The first batches arrived at the end of October and consisted of fresh litchis on the branch. The quality of these first batches was mediocre; the fruits were small and had an acid taste as they had probably been picked too soon. Nevertheless, these fruits delivered in small quantities fetched high prices that were not really in relation with the quality. Mauritius remained the only supplier for the first three weeks of November. The other Indian Ocean countries also started shipping by air in the last week. Supplies from Madagascar, Réunion and South Africa were added to the quantities exported from Mauritius. Diversification of origins and the increased quantity of fruits available on the market weighed on prices, which tended to

decrease although they remained high. Demand was mediocre throughout the month and sales were slow. This context was particularly difficult for fresh litchis on the branch which entered a cycle of slow sales—deterioration of



quality—fall in price. The first litchis from Madagascar were put on sale at the end of October. Their good taste qualities enabled them to gain a market position in the face of competing origins. The few batches from South Africa available in the

same week were of fairly uneven quality and, in particular, many fruits had been picked before optimum ripeness. Operators are waiting above all for the first ships from Madagascar for the real launching of the season and promotion of the fruit in supermarkets. Four ships are expected from Madagascar carrying some 11 950 palettes, that is to say a little more than 10 000 tonnes of fruits. These should be on sale throughout Europe before Christmas and the New Year. The weather conditions in Madagascar were poor during the harvest and loading period and the date of the start of the season was postponed. This leaves a doubt with regard to the quality of the fruits on arrival.

The Madagascar litchi season was monitored by Pierre Gerbaud for CHTT thanks to European Union funding (STABEX resources).



Litchi by air — Price in euros per kg — Wholesale market stage in France

Week	45		46		47		48	
Season	2001/2002	2002/2003	2001/2002	2002/2003	2001/2002	2002/2003	2001/2002	2002/2003
Mauritius								
on the branch	12.19-13.72		9.15-11.43	10.00-11.00	7.62-8.38	9.00-10.00	6.10	9.00-10.00
sulphur treated			8.38-9.15	8.00	6.86	7.00-8.00	5.03-5.49	
Madagascar								
on the branch							5.79-7.62	9.00
sulphur treated					7.62-9.15		4.88-5.49	7.50
Réunion								
on the branch							5.33-7.62	10.00-11.00
South Africa								
sulphur treated							5.79	