

Indicators
January 2003

The main fruits	In shares by total volume and expenditure on fruits for the month in France		
	%	Volumes	Expenditure
	Easy peelers	21	25
	Apple	23	21
Orange	24	18	

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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Easy peelers	20
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Jan. 2003 / Jan. 2002			
Price	= ↘	Vol.	↗

Easy peelers

Performance is still satisfactory. Although the quantities were markedly up on those of the past two years, the average price reached the high level of 2001/2002. Nevertheless, although the balance is positive overall, the second half of the month was less buoyant as a result of a distinct decrease in quality and the switch to varieties less preferred by consumers.

Jan. 2003 / Jan. 2002			
Price	↗	Vol.	↗

Apple

The rate of withdrawals from stocks was satisfactory in January. Releases on the market were greater than those of 2002. Sales were active, especially for 'bi-colour' varieties. Prices thus firmed, except for those of commercial grades of Golden Delicious, as a result of plentiful supply.

Jan. 2003 / Jan. 2002			
Price	=	Vol.	↘

Orange

Performance was satisfactory in spite of a distinct decrease in comparison with an excellent 2002 vintage. Demand was very active at the beginning of the month, taking large quantities. This balance then became more delicate because of general sluggishness and the uneven quality of the last batches of Naveline. The season for Maltese from Tunisia found it difficult to get off the ground.

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

JANUARY 2003

Monthly comparison: Jan. 2003 / Dec. 2002

Price	Volumes
↗ + 6%	↘ - 12%

Annual comparison: Jan. 2003 / Jan. 2002

Price	Volumes
↗ + 7%	↘ - 5%



After the spectacular recovery at the end of December, the banana market was more hesitant in January. The average price rose only slightly, in contrast with operators' expectations and in spite of smaller releases than in the previous seasons. Export movements remained dynamic while the local market was very disappointing.

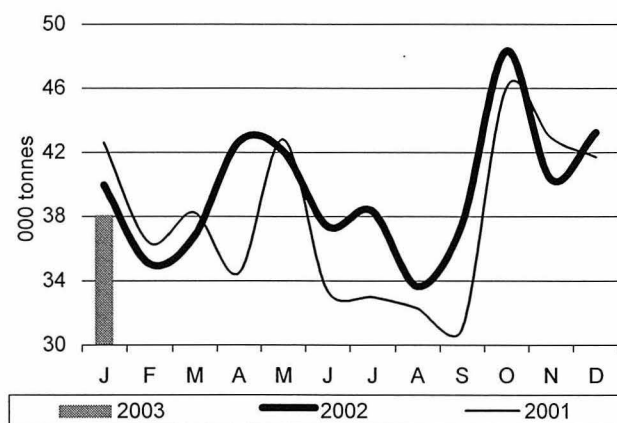
Demand recovered as expected after the Christmas holidays. Quay prices rose quickly especially as the supply of fruits from the West Indies and Africa was somewhat short. Furthermore, the shortage of dollar bananas on the northern European markets continued to

stimulate exports, although the quality level was a condition for certain West Indian brands. The situation slowed in spite of this and prices stopped rising in the middle of the month. Consumption slowed sharply because of the cold spell that hit the whole of Europe. The

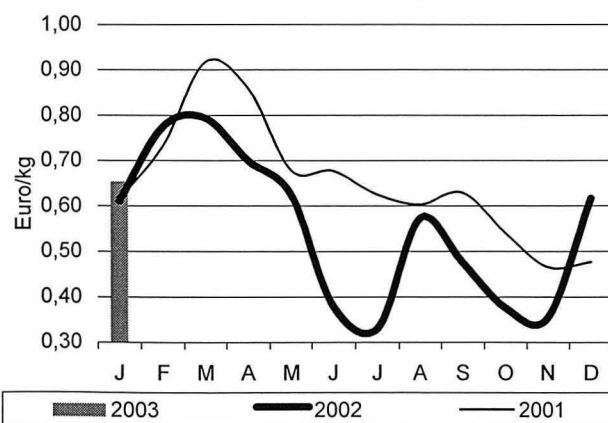
fall was particularly noticeable in France as a result of distinctly higher retail prices than in preceding years. Overall performance was satisfactory however because while market releases decreased, the average price rose in the same proportions.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	January 2003	Comparisons (%)		Season total 2003	Season comparisons (%)	
		2003/2002	2003/2001		2003/2002	2003/2001
Côte d'Ivoire	8 354	- 5	+ 5	8 354	- 5	+ 5
Cameroon	10 674	- 4	- 6	10 674	- 4	- 6
Martinique	13 160	- 6	- 19	13 160	- 6	- 19
Guadeloupe	5 878	- 4	- 14	5 878	- 4	- 14
Total	38 066	- 5	- 11	38 066	- 5	- 11

Avocado

JANUARY 2003

Monthly comparison: Jan. 2003 / Dec. 2002

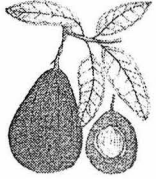
Price
 ↓ - 6%

Volumes
 ↓↓ - 34%

Annual comparison: Jan. 2003 / Jan. 2002

Price
 ↑↑ + 71%

Volumes
 ↓ - 22%



The return of supply to normal observed in December did not last long. Overall shipments displayed a distinct shortfall in January in spite of the still stronger presence of Mexico than in past years. The average price therefore remained particularly high at over Euro 2 per kg.

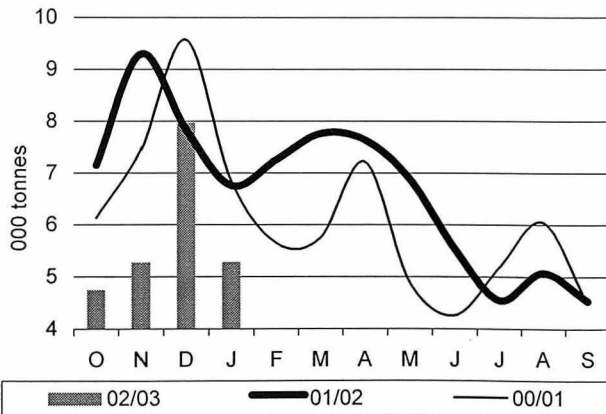
The December increase in quantities was short-lived, as could be imagined. Israeli supplies fell to distinctly inadequate levels. Likewise, the quantities arriving from Spain were very modest, consisting mainly of small Hass

fruits harvested for Christmas operations and stored since then. The still significant presence of Mexican fruits covered only a small part of the shortfall. Demand remained at a good level so that the average price remained

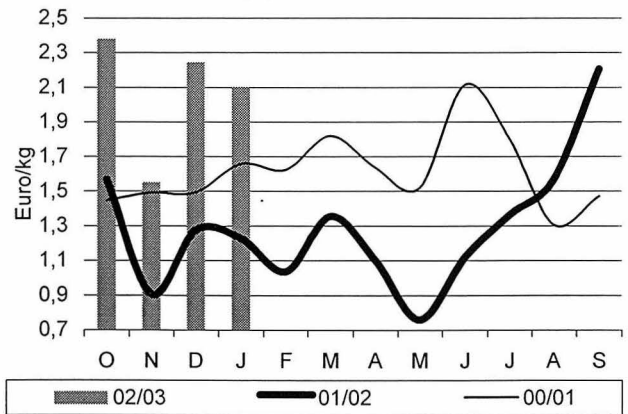
extremely firm. Nevertheless, a degree of price flexibility was observed for Hass during the first part of the month resulting from strong Spanish pressure on the market for small grades and some carryover of Mexican stocks.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	January 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001		02-03/01-02	02-03/00-01
Israel	1 869	- 48	- 38	9 499	- 25	- 20
Mexico	1 233	+ 595	+ 909	6 587	- 9	+ 3
Spain	2 180	- 27	- 41	8 345	- 41	- 33
Total	5 282	- 22	- 23	24 431	- 19	- 22

Orange

JANUARY 2003

Monthly comparison: Jan. 2003 / Dec. 2002

Price

↗ + 23%

Volumes

↗ + 31%

Annual comparison: Jan. 2003 / Jan. 2002

Price

= 0%

Volumes

↘ - 21%



Performance was satisfactory in spite of a marked decrease in comparison with an excellent 2002 vintage. Demand was vigorous at the beginning of the month, taking large quantities of fruits. But the balance then became delicate as the result of a general slump and the uneven quality of the last Navelines. The Tunisian Maltese season got off to a difficult start.

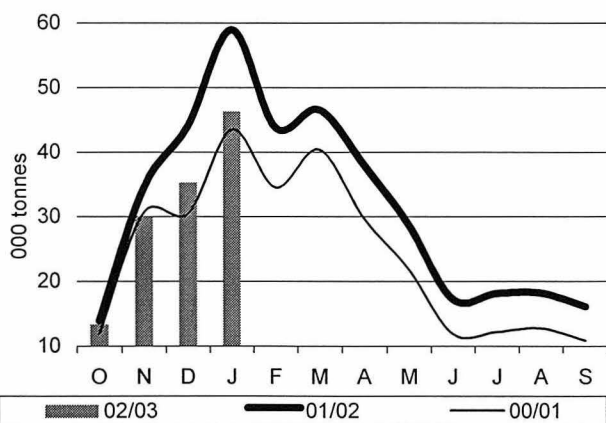
Market releases of Spanish oranges were considerably ampler than those of an average season. Sales of Naveline were 20 percent up. Those of Salustiana, whose season truly got under way in January, reached a normal level. Demand soon recovered from holiday lethargy and held a very

good level until the end of the second third of the month. This balance suffered, however, during the second part of the month in spite of weaker competition from easy peelers. The markets suffered from overall morosity. And, above all, the cold weather in Spain affected the quality of

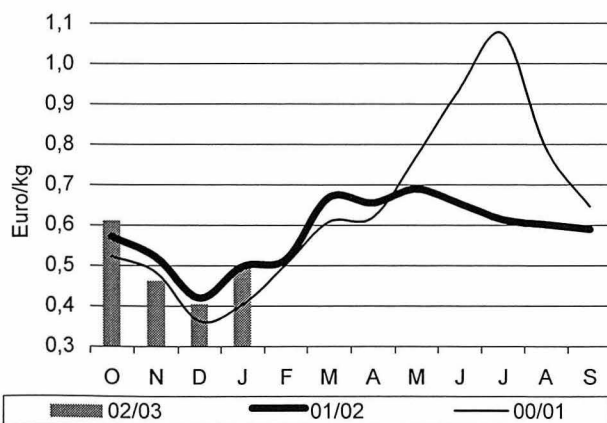
Navelines at the end of the season. The excessively large volumes of Maltese received during the early weeks of the season soon led to a difficult situation for this market, especially as the keeping quality of some brands was disappointing.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	January 2003	Comparisons (%)		Season total 2002/2003	Season comparisons (%)	
		2003/2002	2003/2001		02-03/01-02	02-03/00-01
Spain	39 145	- 20	+ 4	113 144	- 17	+ 7
Morocco	137	- 94	- 6	137	- 94	- 51
Tunisia	7 026	- 13	+ 23	7 026	- 13	+ 23
Total	46 308	- 21	+ 6	120 307	- 18	+ 7

Grapefruit

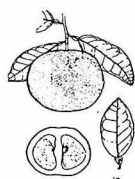
JANUARY 2003

Monthly comparison: Jan. 2003 / Dec. 2002

Price	Volumes
↗ + 4%	↗ + 33%

Annual comparison: Jan. 2003 / Jan. 2002

Price	Volumes
↗ + 6%	↘ - 15%



Lack-lustre performance. Although the balance is positive as a result of modest shipments and active demand, the situation is much more contrasted for the other origins on the market. Indeed, releases of Israeli and Turkish fruits were much slower but the prices nevertheless held up thanks to moderate quantities.

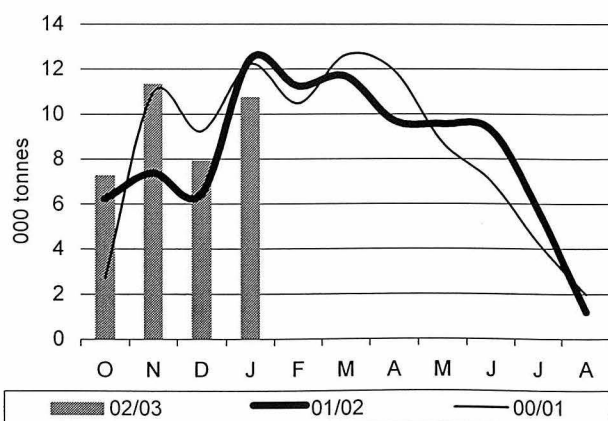
Demand woke up again from the beginning of the month onwards after the usual December calm. It was nevertheless very selective and focused on fruits from Florida. The prices for fruits from the latter

origin thus remained very firm, especially as the shipments were more modest than in previous years. Importers had reduced their orders because of the large stocks available at the end of December.

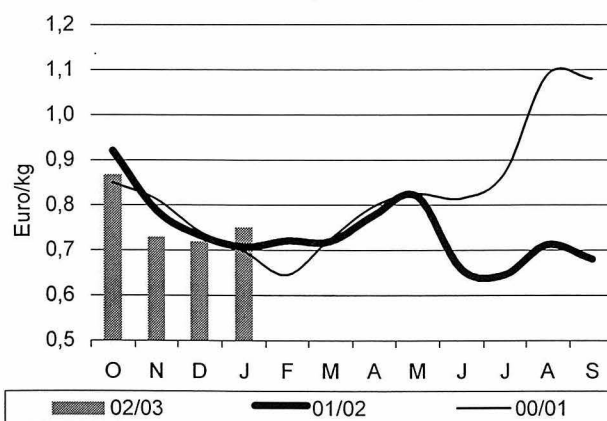
Releases were much less dynamic for the other origins present on the market but prices decreased only slightly. Supplies of both Turkish and Israeli fruits have been modest.

Estimated market releases in France

Volumes



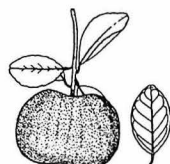
Price at import stage



Estimated market releases in France by origin

Tonnes	January 2003	Comparisons (%)		Season total 2002/2003	Season comparisons (%)	
		2003/2002	2003/2001		02-03/01-02	02-03/00-01
Florida	8 826	- 13	- 14	29 810	+ 16	+ 12
Israel	463	- 11	- 41	2 360	+ 7	0
Turkey	1 250	- 28	+ 11	4 931	+ 8	- 18
Total	10 539	- 15	- 14	37 101	+ 32	+ 16

Easy peelers



Performance was still satisfactory. Although quantities were distinctly higher than those of the past two years, the average prices attained the high 2001/2002 level. Nevertheless, although the balance is positive overall, the second half of the month was less buoyant as a result of a distinct decrease in quality and the switch to varieties less preferred by consumers.

Easy peeler supplies were distinctly more abundant than in recent seasons. The end of the season of Nules clementines and Clemenvilla from Spain and clementines from Corsica was better supplied. The natural fragility of the end-of-season fruits was accentuated by considerable differences in temperature,

affecting Clemenvilla in particular. Medium amounts were imported from Morocco but the quality of some brands was not perfect. Indeed, December rainfall had considerably affected the last common clementines and Nour, which had to be picked early. The second part of the month was therefore more difficult. This

considerable unevenness in quality meant that demand for the end-of-season varieties slowed distinctly and there was little enthusiasm for those that take over as this time of year (Hernandine and the first ortaniques). The season was satisfactory as a whole for Minneola from Israel and Turkey.

JANUARY 2003

Monthly comparison: Jan. 2003 / Dec. 2002

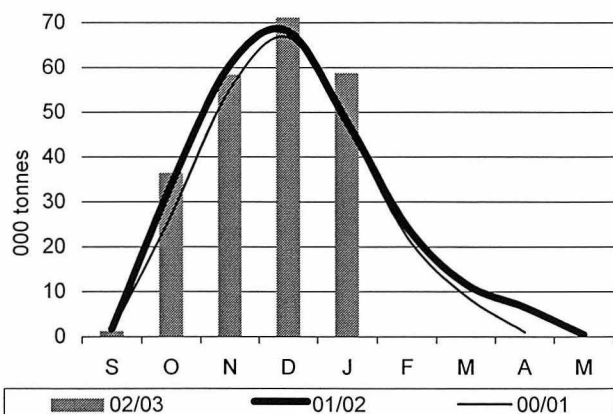
Price	Volumes
↗ + 5%	↘ - 22%

Annual comparison: Jan. 2003 / Jan. 2002

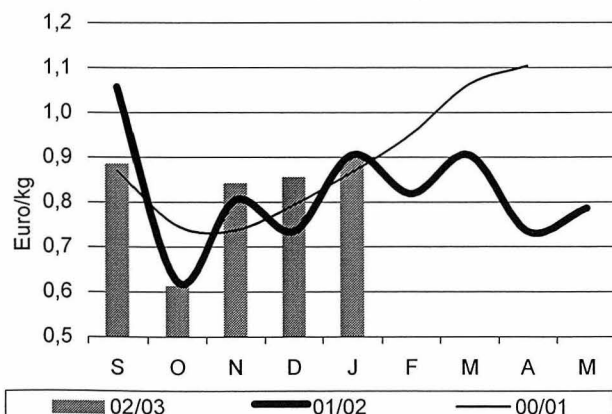
Price	Volumes
↘ - 1%	↗ + 21%

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	January 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2002/2001	2002/2000		02-03/01-02	02-03/00-01
Spain	47 427	+ 22	+ 25	192 839	+ 12	+ 16
Corsica	4 315	+ 385	+ 23	20 902	+ 22	+ 25
Morocco	6 136	- 3	+ 40	14 786	- 27	+ 11
Israel	865	- 53	- 29	1 012	- 52	- 25
Total	58 743	+ 22	+ 25	229 539	+ 8	+ 16

Litchi



The progress of the Madagascan litchi marketing season changed considerably for the worse in January. In spite of a decrease in the arrivals from Madagascar, the market gradually became saturated as a result of increasing supplies from South Africa and sluggish demand. Prices weakened progressively and then fell strongly at the end of the month.

The Reunion export season came to an end during the first 10 days of January with fresh litchis on the branch shipped by air. The last batches received in week 2 were sold at a lower price because of the poorer quality of the fruits. Reunion will have shipped about a hundred tonnes of litchi this season. Trade continued with fruits arriving from Madagascar and South Africa by sea. The goods from Madagascar carried by the last conventional vessel sold with difficulty because of their poor quality, leading to clearance selling. This cargo will weigh heavily in the balance for the season as it caused increasing loss of customer interest in Madagascan fruits, to the benefit of better quality litchis from South Africa. The same situation was observed in mid-January for fruits in containers from Madagascar. Counting on smaller supplies than last year, a number of operators

stocked large quantities of Madagascan litchis in containers to lengthen the selling period. The fragility of the fruits and the poor demand seem to have countered this strategy. Buyers were definitively put off by the uneven quality of the Madagascan produce. Re-export markets soon closed and the wholesale markets switched to purchases of fresher, better-graded South African litchis. Demand was particularly slow in the second part of the month causing increasingly marked over-supply. The slowing of retail purchases only aggravated existing quality problems and precipitated the downward price movement. The price of South African litchis also fell slightly because of the market situation and also because of a distinct deterioration in product quality (very uneven colour, over-estimated grade and mould on certain batches). A preliminary balance can already be drawn up

even though the season is not over. The announcement of small fruit production at the beginning of the season led to expecting fluid, regular marketing. In practice, Madagascar will have exported about 14 700 tonnes of litchis this year in comparison with 18 700 tonnes last year—a decrease of more than 21%. This fall in comparison with a production decrease estimated at 50% leads to supposing that exporters had to obtain supplies from remote production zones. The time required for harvesting, treatment, packing and loading may partly account for the quality defects and the poor keeping quality of the fruits during the season and especially during the second part.

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



Litchi — Price in euros per kg — Import stage in France

Week	1		2		3		4		5	
Season	2001/02	2002/03	2001/02	2002/03	2001/02	2002/03	2001/02	2002/03	2001/02	2002/03
By air										
Réunion										
fresh on the branch	4.57-5.33	7.50-8.00	4.57-5.18		4.57-5.33					
By sea										
Madagascar										
sulphur treated	1.37-1.68	1.90-2.10	1.22-1.37	1.80-2.10	1.14-1.22	1.70-2.00	0.99-1.22	1.30-1.70	0.99-1.22	0.5-1.30
South Africa										
sulphur treated	1.60-1.98	2.40-2.75	1.37-1.83	2.25-2.50	1.37-1.68	2.00-2.50	1.37-1.68	1.70-2.10	1.37-1.52	1.70-2.00