

Indicators

April 2003

The main fruits	In shares by total volume and expenditure on fruits for the month in France		
	%	Volumes	Expenditure
	Apple	29	22
	Orange	20	15
Strawberry	9	20	

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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April 2003 / April 2002			
Price	↓	Vol.	↓

Apple

The end of the season has been satisfactory for most French varieties. Releases were regular and stocks decreased, except for those of Golden Delicious with substantial volumes this year. Prices thus continued to rise but less than last year because of the more flexible prices of Golden Delicious.

April 2003 / April 2002			
Price	↓	Vol.	↓

Orange

Although performance was not as good as last year it was distinctly better than average. The market was very buoyant for Spanish operators, especially for Navelate. The results were much more contrasted for Morocco late, which did not really find a market position during the first half of the month.

April 2003 / April 2002			
Price	↑	Vol.	↓

Strawberry

The quantities of French strawberries returned to normal at the beginning of this season after the increase in 2002. Likewise, volumes of Spanish fruits were limited, particularly at the beginning of the month, because of heavy rain. The average price was therefore distinctly higher than in 2002.

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

APRIL 2003

Monthly comparison: April 2003 / March 2003

Price $\Downarrow\Downarrow - 20\%$ Volumes $\Uparrow + 13\%$

Annual comparison: April 2003 / April 2002

Price $\Downarrow\Downarrow - 16\%$ Volumes $= \Downarrow - 3\%$



The second quarter of 2003 started very badly after three very difficult months. The on-quay price fell by 30 percent in comparison with the average in France. This very poor performance was mainly the result of over-supply of the EU market together with a very difficult world banana trade situation.

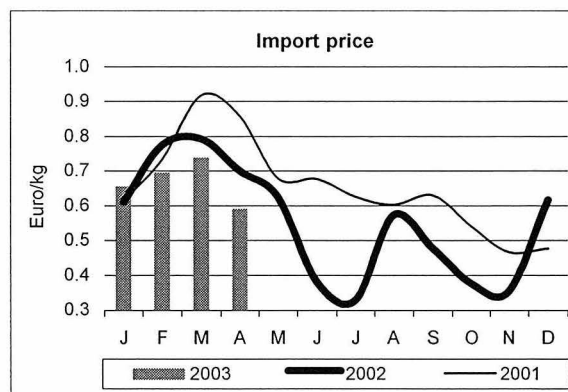
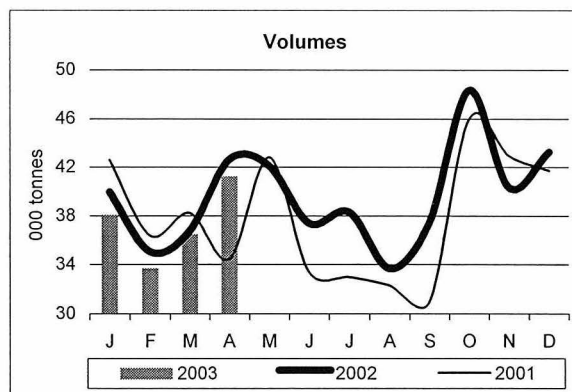
Large quantities were available in April. Shipments from the West Indies and Africa were 15 percent up on the average for the past three years. The local market was sluggish, in spite of a slight brightening in the second half of the month as a result of a marked fall in retail prices and better promotion

activities. But exports lacked dynamism throughout the month. Arrivals of dollar bananas in the EU were substantial (7 percent above the average for the past three years) in spite of substantial re-exports to Eastern Europe. Indeed, the North American market remained very

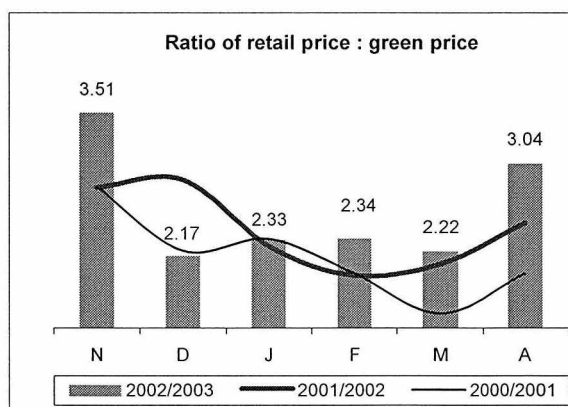
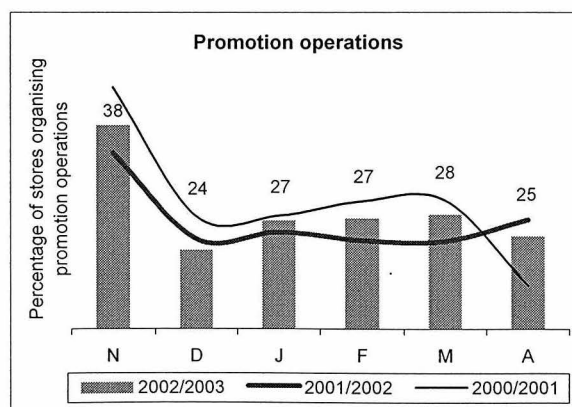
difficult and Mediterranean outlets were uncertain. Thus, in spite of retail business continuously supported by attractive prices (7 to 10 percent lower than average), the German and British markets soon became saturated. Spain was the only peaceful country.

Estimated market releases in France

Tonnes	April 2003	Comparisons (%)		Season total 2003	Season comparisons (%)	
		2003/2002	2003/2001		2003/2002	2003/2001
Côte d'Ivoire	8 225	- 19	- 14	30 927	- 10	- 7
Cameroon	11 118	+ 29	+ 25	39 764	+ 10	+ 1
Martinique	15 789	- 3	+ 46	54 942	- 5	+ 1
Guadeloupe	6 113	- 20	+ 16	23 835	- 9	- 2
Total	41 245	- 3	+ 20	149 468	- 3	- 1

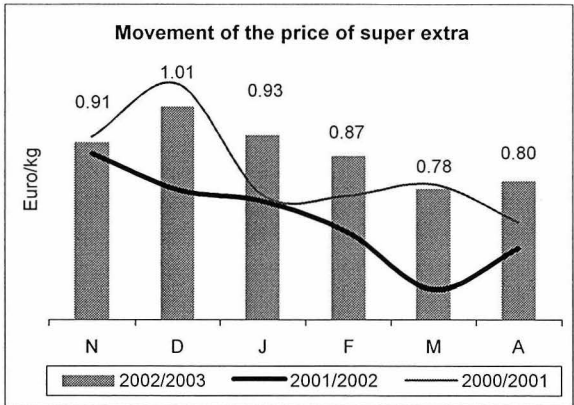
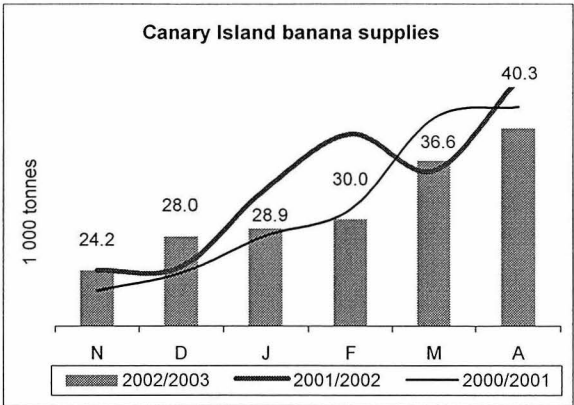


Retail market in France

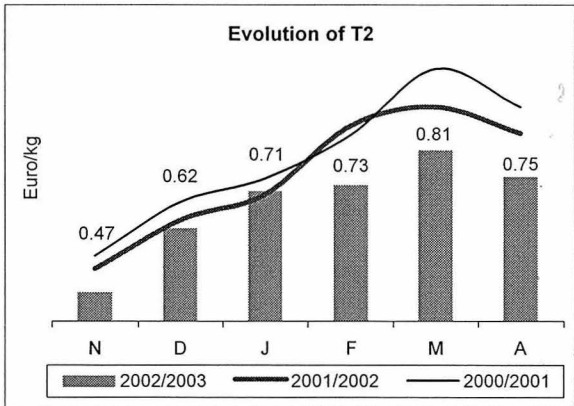
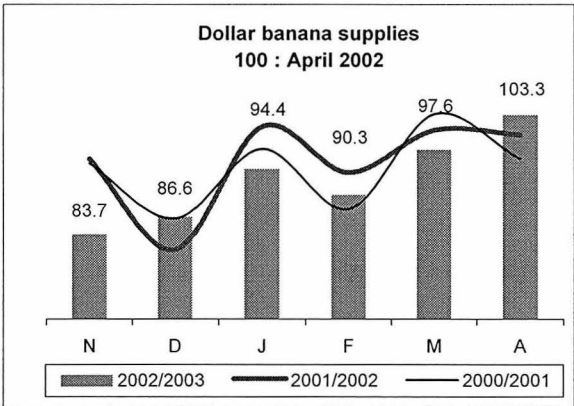


Banana — Indicators for French export markets

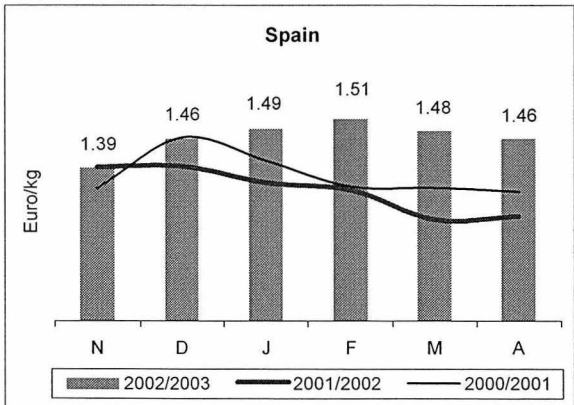
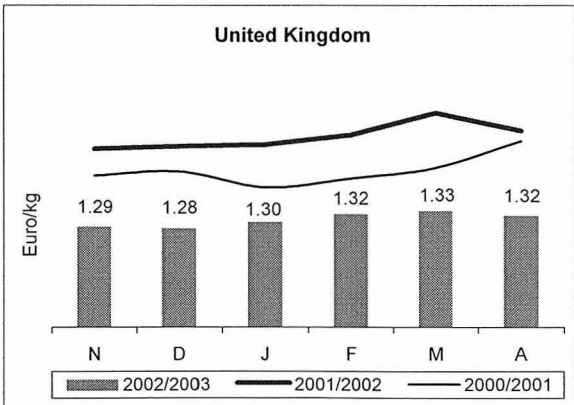
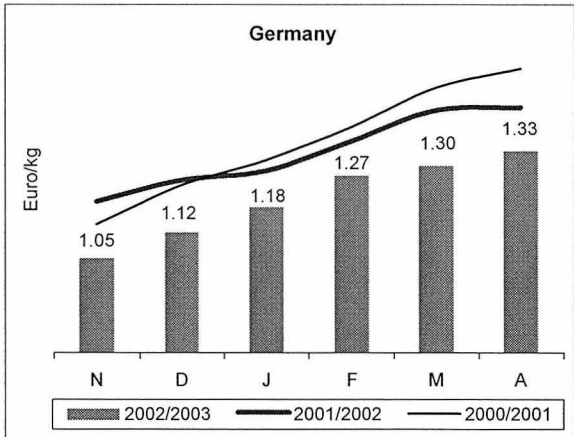
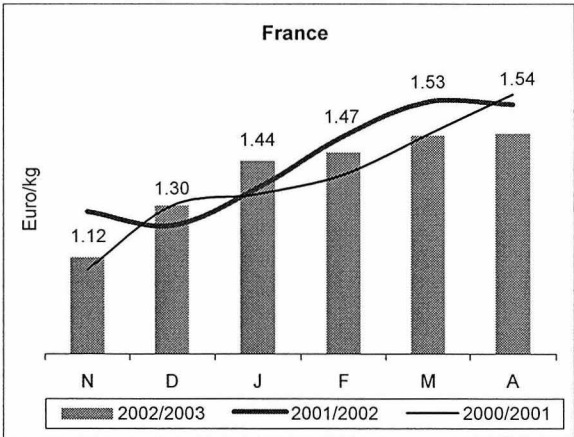
Spain



Northern Europe



Retail price in Europe



Sources: CIRAD-FLHOR, SNM, TW Marketing Consulting

Avocado

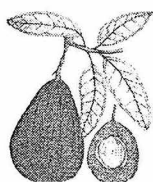
APRIL 2003

Monthly comparison: April 2003 / March 2003

Price	Volumes
= ↘ - 2%	↗ ↗ + 43%

Annual comparison: April 2003 / April 2002

Price	Volumes
↗ ↗ + 58%	↘ - 8%

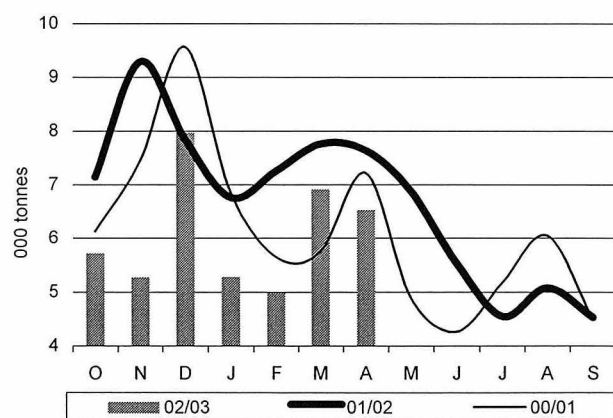
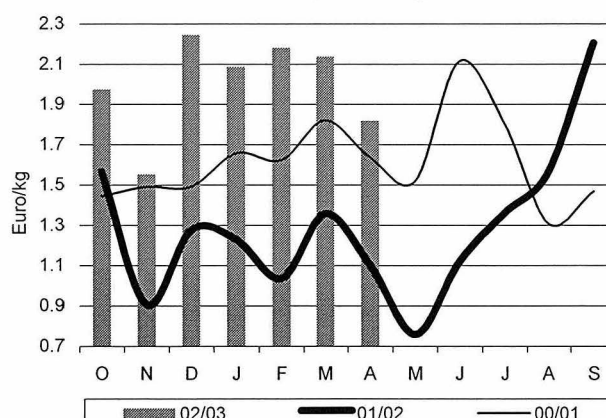


Overall performance was good but the average price was markedly down in comparison with previous months. Degradation of the green avocado market increased as a result of particularly plentiful supplies from Kenya, with quality often failing to come up to expectations. In contrast, the market for Hass remained extremely satisfactory as a result of continued marked under-supply.

Market supply remained much smaller than that of an average season. However, only supplies of Hass were markedly short. The strong increase in arrivals of fruits from Mexico did not make up for the decrease of supplies from Israel and Spain. In contrast, supplies of green varieties (mainly

Fuerte) remained substantial in spite of a very slow start to the South African season as a result of bad weather. Massive amounts of Fuerte continued to arrive from Kenya but the quality was often not up to standard. Purchase centre buyers therefore highlighted Hass for Easter sales

operations. As a result, the price for this variety hit a historical high point while that of Fuerte continued to fall for lack of demand—even for 16/18 fruits. The first Fuerte from South Africa found it difficult to gain a foothold in this context.

Estimated market releases in France
Volumes

Price at import stage

Estimated market releases in France by origin

Tonnes	April 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001		02-03/01-02	02-03/00-01
Israel	134	- 94	- 89	11 728	- 47	- 31
Mexico	2 028	+ 2 973	+ 681	13 129	+ 64	+ 77
Spain	1 693	- 47	- 42	14 551	- 39	- 32
Kenya	1 854	+ 173	+ 80	3 857	+ 212	+ 133
South Africa	820	- 28	+ 42	820	- 28	+ 42
Total	6 529	- 15	- 10	44 085	- 23	- 11

Orange

APRIL 2003

Monthly comparison: April 2003 / March 2003

Price	Volumes
↗ + 2%	↘ - 11%

Annual comparison: April 2003 / April 2002

Price	Volumes
↘ - 2%	↘ - 4%



Although performance was poorer than last year it was distinctly better than average. The market was extremely buoyant for Spanish operators, especially for Navelate. The results for Maroc late were much more contrasted as this did not really find its place on the market during the first half of the month.

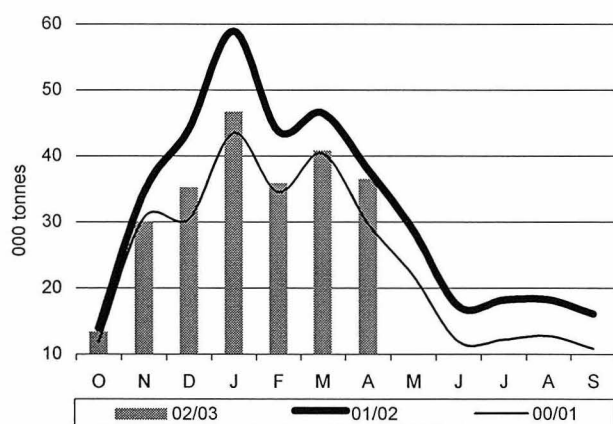
April was satisfactory for Spanish operators. Distinctly larger quantities of Navelate were marketed than in previous years thanks to substantial releases during the first fortnight. Demand remained focused on this variety whose quality has been high this season and prices were higher than those of past years. Because of

the pressure exerted by Navelate, the results were only average for Valencia, especially as the start of the season for late varieties from Morocco was very difficult. Indeed, sales of Maroc late were very slow until week 16 as a result of strong competition from Navelate and sometimes irregular quality. Releases improved only in

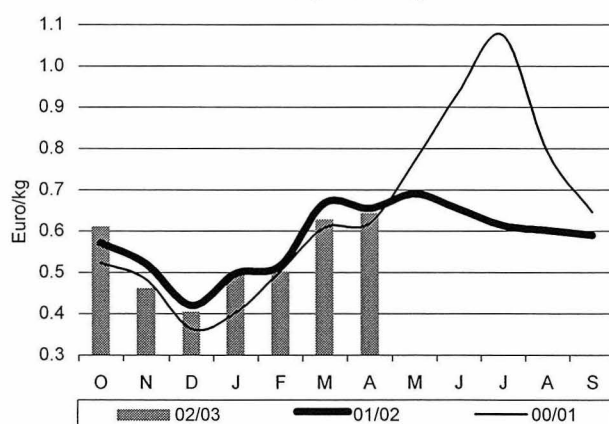
week 17, as the slowing of the Navelate season allowed Moroccan operators to gain a position on the wholesale market. Stocks were substantial during the first fortnight and then decreased gradually, especially as exporters decided to halt shipments in weeks 17 and 18.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	April 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001		02-03/01-02	02-03/00-01
Spain	30 876	+ 2	+ 65	208 949	- 14	+ 18
Morocco	4 858	+ 2	- 7	9 365	- 10	- 51
Tunisia	824	- 71	- 75	15 727	- 26	- 25
Total	36 558	- 4	+ 23	234 041	- 15	+ 8

Grapefruit

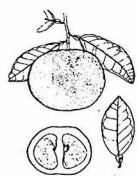
APRIL 2003

Monthly comparison: April 2003 / March 2003

Price	Volumes
↗ + 6%	↘ - 40%

Annual comparison: April 2003 / April 2002

Price	Volumes
↗ + 6%	↘ - 36%



The market was very satisfactory. The total quantities available were much smaller than in preceding years, mainly as a result of the early slowing of arrivals from Florida and Turkey. Thus Star from Israel, that had hitherto found it difficult to find a market position, dominated supply and benefited from lively demand in spite of sometimes uneven quality.

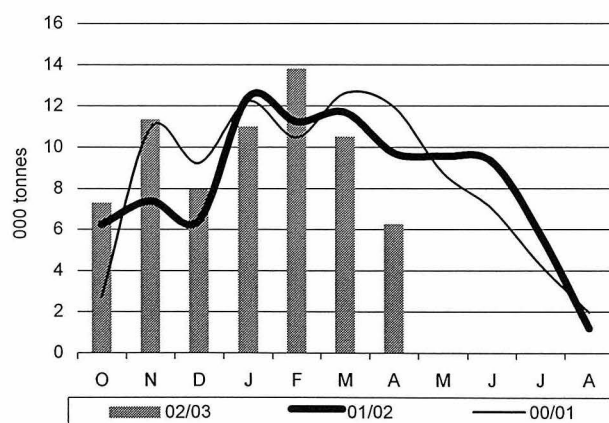
The early maturity of the harvest in Florida—already strongly affected by tristeza—resulted in an early end to the season. Arrivals in mid-April were distinctly smaller than those of the 'small' 1999/2000 season. Furthermore, Turkish shipments went

mainly to the Eastern European markets and became marginal in the EU from the same time onwards. This open market enabled Israeli operators to increase their sales strongly and gradually raise prices. However, a few quality problems caused by heavy

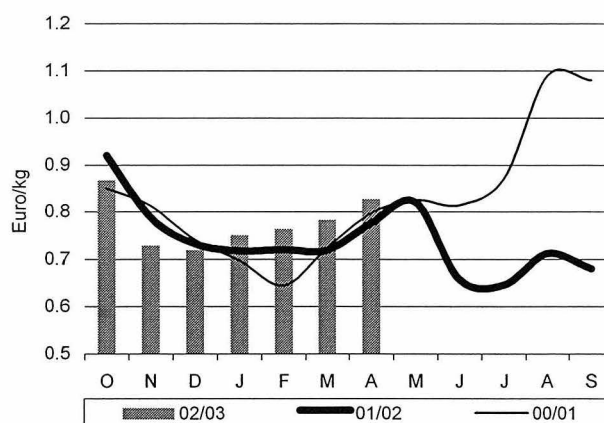
rainfall and cold weather during the winter encouraged caution in their price policy. The southern hemisphere season started early with the very first shipments from Argentina, but the quantities available were very limited.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	April 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001		02-03/01-02	02-03/00-01
Florida	3 657	- 53	- 61	54 780	+ 3	+ 1
Israel	2 283	+79	- 4	6 382	+ 28	- 13
Turkey	184	- 71	+ 6	6 835	- 3	- 18
Argentina	135	-	-	135	-	+ 108
Total	6 259	- 36	- 48	68 132	+ 5	- 3

Easy peelers

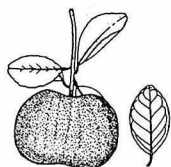
Monthly comparison: April 2003 / March 2003

Price	Volumes
↘ - 6%	↘ - 65%

Annual comparison: April 2003 / April 2002

Price	Volumes
↘ - 3%	↘ - 3%

APRIL 2003



The last month of the season gave less positive results than in 2002. The quantities sold and the average price fell to average levels. Quality was often uneven, resulting to more rapid slowing of demand than during the last season.

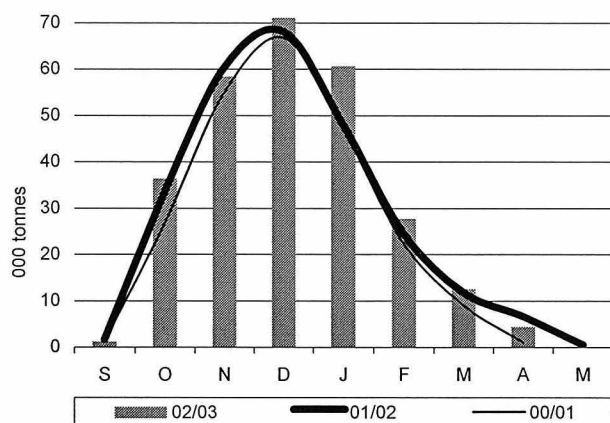
In spite of the prolonging of the Fortuna season, supplies from Spain returned to an average level after the large amounts sold last year. Likewise, shipments from Morocco decreased considerably. Ortaniques are being gradually abandoned as the

ageing of the orchards has a negative effect on fruit quality (grade, etc.) under the cultivation conditions of Morocco. Cyprus and Israel shipped their last Mandora/Topaz. End-of-season quality was uneven for all origins (climatic problems at the

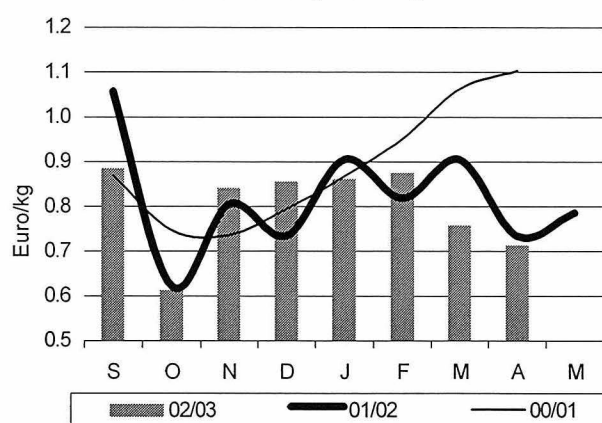
beginning of 2003), resulting in more rapid slowing of demand than in previous years. Prices fell strongly at the beginning of the month. The situation recovered for the last high-grade fruits available at the very end of the season.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	April 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2002/2001	2002/2000		02-03/01-02	02-03/00-01
Spain	4 394	- 17	+ 414	234 893	+ 12	+ 22
Morocco	0	0	0	18 735	- 23	+ 10
Israel	33	+ 100	- 75	1 632	- 38	- 50
Total	4 427	- 33	+ 329	255 260	+ 8	+ 20

Mango

West African season



After a month of March of transition and clearing of the market, limited supplies caused business to perk up rapidly at the beginning of April. The lengthening of the Peruvian season could not continue indefinitely to make up for the temporary gap left by Côte d'Ivoire. Operators therefore fell back on other Latin American origins. The price of mangoes nearly doubled in April as a result of this unusual situation.

At the beginning of April, the 'sea' mango market was still based on dwindling shipments from Peru and South Africa. Quality was very irregular. The increased scarcity of supplies from these two origins in the second week caused a sharp increase in prices, although this should be seen in perspective as quality was very uneven in a large proportion of the fruits. The drawing up of schedules for the Easter period was strongly disturbed and operators generally just covered orders without attempting to stimulate sales. In the second half of the month, prices reached high price levels that had not been seen for a long time, in spite of recurrent quality problems. Many importers turned to Latin American origins such as Nicaragua, Guatemala, Venezuela and Brazil to fill the gap left by Côte d'Ivoire. Arrivals of fruits from these

origins (except for Brazil) ceased gradually at the end of the month with the start of supplies from Côte d'Ivoire. The first batches from this origin arrived in week 17. The fruits were of good quality and changed hands at about EUR 8.00 per box (Kent). Hardly any Amélie fruits arrived during this period. Because of the absence and then lateness of the first shipments from Côte d'Ivoire, neighbouring countries—mainly Mali and Burkina Faso—profited from the occasion to ship increasing quantities of fruits by air. It can be estimated that these export volumes more than doubled in comparison with those of the same period in 2002. The inflow of air-freighted fruits caused a drop in prices and the selling of fruits of heterogeneous quality (unripe, overripe, numerous defects). Exporters fearing the seizure of batches for

reasons of infestation by fruitfly generally sent fruits picked too early that did not correspond to the quality of air-freighted fruits required by buyers. The situation worsened with the arrival of the first 'sea' mangoes from Côte d'Ivoire, as the difference in quality between fruits carried by air and by sea became indistinct, as did the difference in price. The main varieties marketed were Kent, Valencia (whose quality deteriorated throughout the month) and, in smaller quantities, Smith and Irwin. Exports from Burkina Faso increased strongly, with the origin seeming to return to the international trade scene after several years of almost complete absence. Several batches of mangoes shipped by air from Côte d'Ivoire and Burkina Faso were seized by the fraud control authorities because fruitfly larvae were present.

APRIL 2003	Import price		
	Euros/kg	Min	Max
	By air		
	Peru	Kent	4.00 4.50
	Mali	Amélie	2.00 2.60
	By sea		
	Peru	Kent	1.00 1.75
	Brazil	Tommy Atkins	1.12 1.75

Mango — Price in euros per kilo — Import stage					
Weeks		14	15	16	17 18
By air					
Peru	Kent	4.20-4.50	4.00-4.50	4.00-4.50	4.00-4.50
Mali	Kent	3.50-4.00	3.00-4.00	2.50-3.50	3.00-3.30 2.50-3.00
Mali	Amélie	2.40-2.60	2.40-2.60	2.20-2.50	2.00-2.50 2.00-2.30
Mali	Valencia	3.00-3.80	3.00-4.00	3.00	2.20-2.50 2.00-2.80
Venezuela	Haden	3.00	3.00-4.00	3.00-3.50	2.80-3.00 3.00
Burkina Faso	Amélie	2.40-2.60	2.40-2.60	2.10-2.30	2.00-2.50 1.80-3.30
Burkina Faso	Kent			3.00-3.50	2.50-3.00
Burkina Faso	Valencia			3.00	
Côte d'Ivoire	Kent			4.50	4.50 4.00-4.50
By sea					
Peru	Kent	1.00-1.25	1.12-1.50	1.25-1.75	1.50-1.75
South Africa	Kent/Keitt	1.00-1.25	1.12-1.37	1.25	1.12
Brazil	Tommy Atkins	1.12	1.12-1.50	1.50-1.75	1.25-1.75 1.25-1.62
Puerto Rico	Keitt	1.25-1.37			
Guatemala	Tommy Atkins		1.25-1.37	1.50-1.62	1.37-1.62
Nicaragua	Tommy Atkins		1.25-1.37	1.50-1.62	1.37-1.62 1.50
Costa Rica	Haden			1.50-1.62	1.37-1.62
Côte d'Ivoire	Kent			1.75-2.12	1.87-2.00
Côte d'Ivoire	Amélie			1.37-1.50	1.50

Mango — Estimated market releases in tonnes	
By air	
Mali	400-450
Côte d'Ivoire	200
Burkina	80
Venezuela	30
Peru	55
By sea	
Côte d'Ivoire	130-160