Indicators
October 2003

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	10	13

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.

Grapes

Oct. 2003 / Oct. 2002			
Price	=↗	Volume	↘↘

The market has been distinctly under-supplied as there was a marked production shortfall this year. The early start to the season accentuated the October shortage marking the last part of the season. Prices were fairly flexible at the beginning of October because of quality problems and increased throughout the month, finishing at a high level.

Apple

Oct. 2003 / Oct. 2002			
Price	↗	Volume	=↘

The release of the qualitatively most delicate fruits eased the production shortage at the beginning of the season. Prices nevertheless remained firm, in particular thanks to strong activity on the domestic market in the first half of the month.

Banana

Oct. 2003 / Oct. 2002			
Price	↗	Volume	↘

Although the quantities were modest, whatever the origin, the average monthly price was very disappointing on most European Union markets. Sluggish demand seems to be the main cause of this poor performance.

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 2003

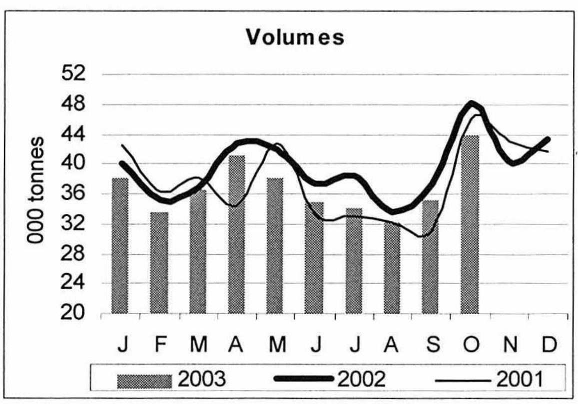
Monthly comparison: Oct. 2003 / Sept. 2003	
Price	Volumes
↘ – 17%	↗↗ + 25%
Annual comparison: Oct. 2003 / Oct. 2002	
Price	Volumes
↗ + 9%	↘ – 9%

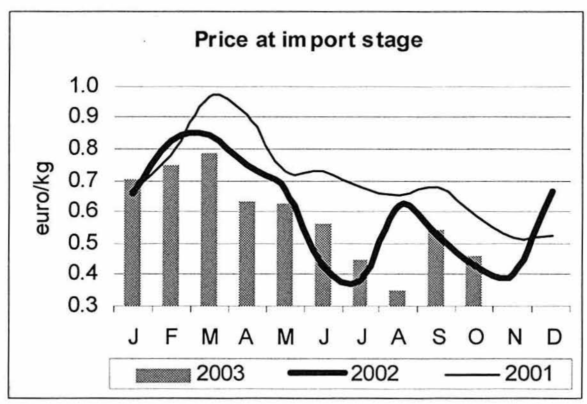
Although the quantities were modest, whatever the origin, the average monthly price was very disappointing on most European Union markets. Sluggish demand seems to be the main cause of this poor performance.

The quantities available have been fairly modest on all the community markets. Although the shortfall in West Indian and African fruits was only slight (1 to 2% down on average), it was much more marked for dollar origins (-6%). Large quantities were exported from Latin America but the share intended for extra-community destinations increased markedly. But the situation was fairly difficult in most EU markets as demand was very irregular and lacked dynamism. There have been fewer promotion operations in France than in the past four years. The retail price has increased considerably in Germany. The Spanish market is the only one not affected by the dip. The price of Canary Island bananas increased steadily throughout the month.

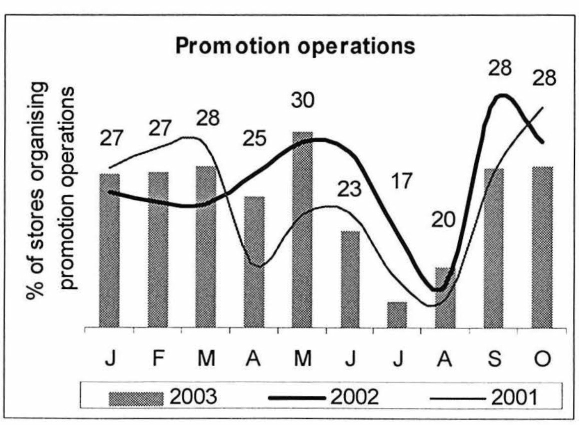
Estimated market releases in France

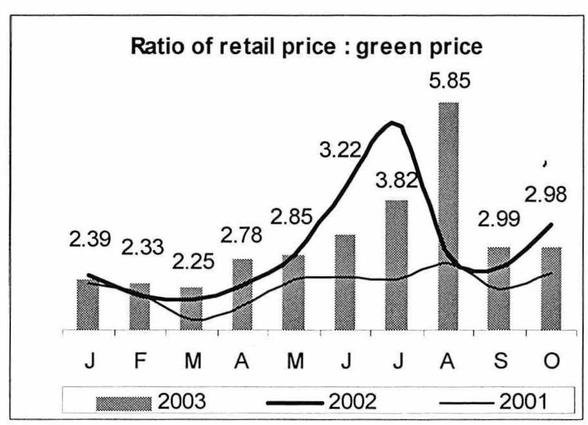
Tonnes	October 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2003	2003/2002	2003/2001
Côte d'Ivoire	7 554	- 25	- 34	73 463	- 12	- 11
Cameroon	11 022	+ 8	- 2	93 163	+ 7	+ 4
Martinique	18 477	- 7	+ 14	141 781	- 8	+ 4
Guadeloupe	6 744	- 18	- 4	59 407	- 12	- 4
Total	**43 797**	**- 9**	**- 5**	**367 814**	**- 15**	**- 11**





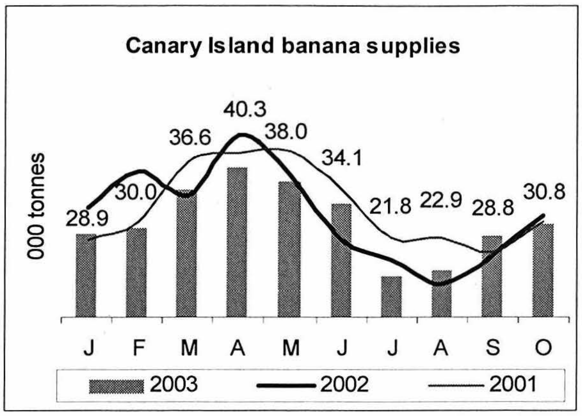
Retail market in France

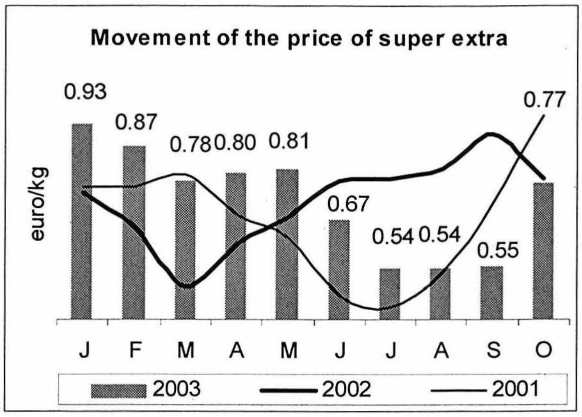




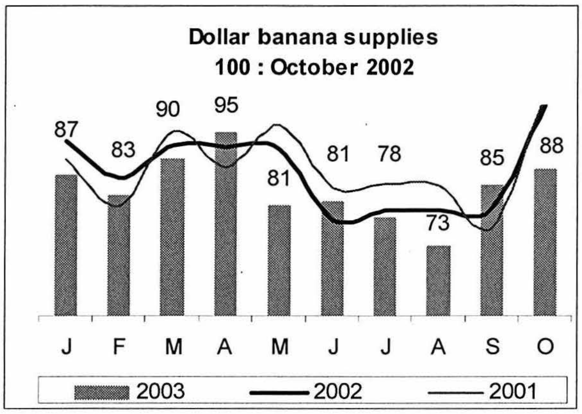
Banana — Indicators for French export markets

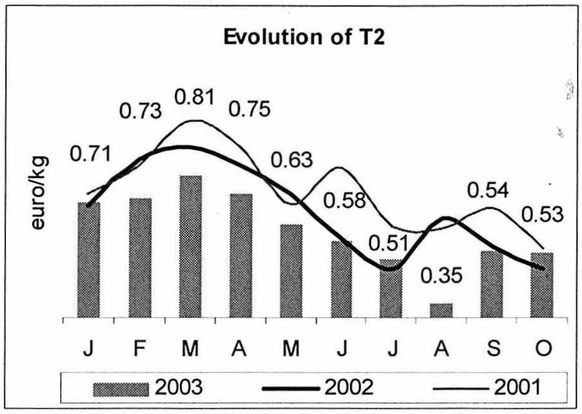
Spain



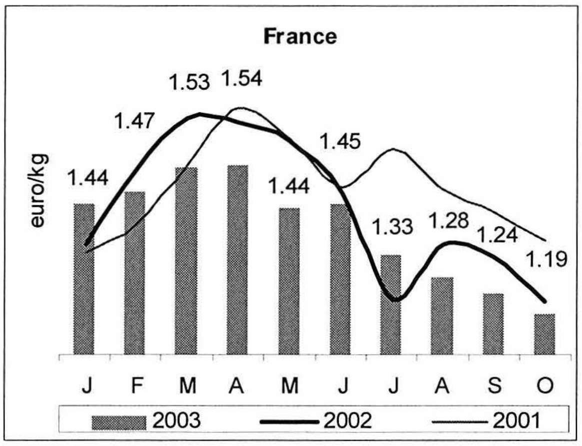


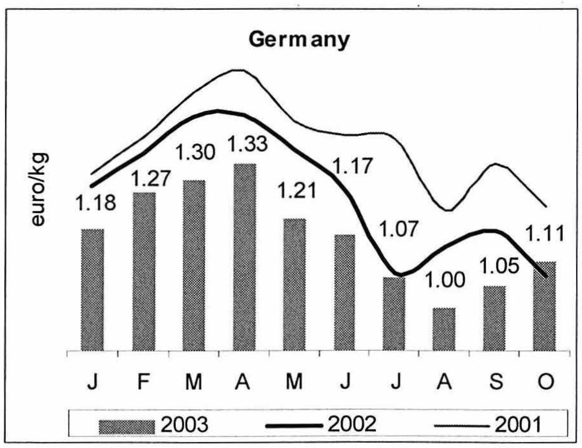
Northern Europe

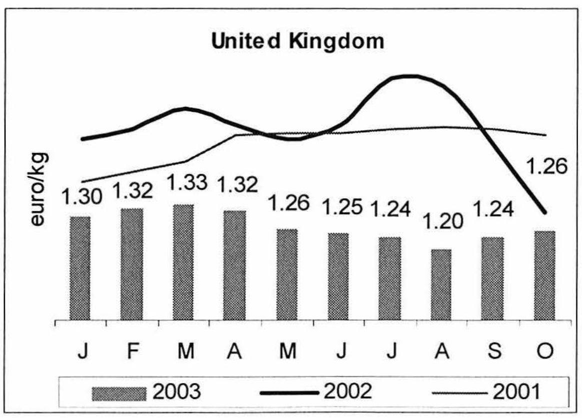


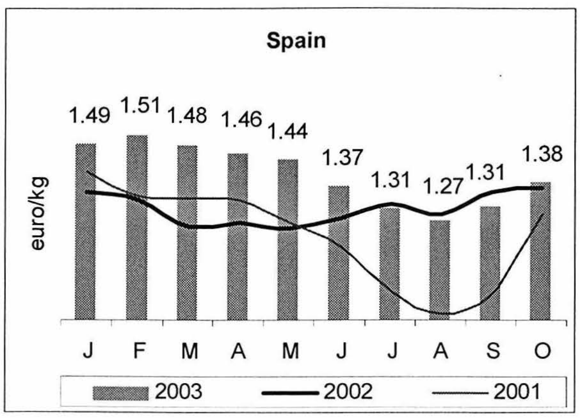


Retail price in Europe









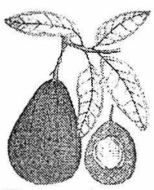
Sources: CIRAD-FLHOR, SNM, TW Marketing Consulting

Avocado

OCTOBER 2003

Monthly comparison: Oct. 2003 / Sept. 2003	
Price	Volumes
↘ – 13%	=↗ + 2%

Annual comparison: Oct. 2003 / Oct. 2002	
Price	Volumes
↘ – 18%	↘ – 9%

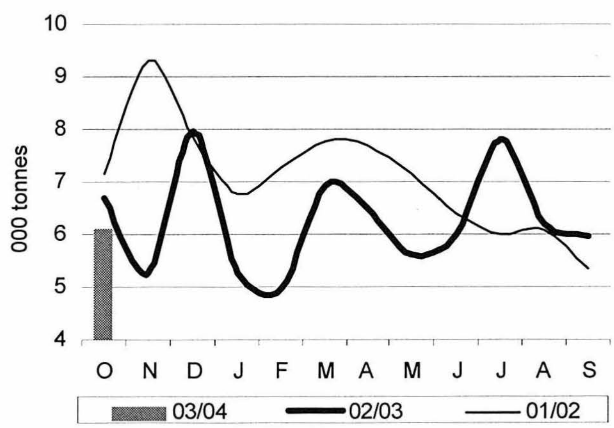


Overall performance has been much better than average. However, demand has been disappointing in spite of the usual wave of special offers during the first half of the month. The market for Hass—with ample produce of sometimes uneven quality—was comparatively difficult. Market balance for green varieties was maintained until the middle of the month thanks to an easing off of supply.

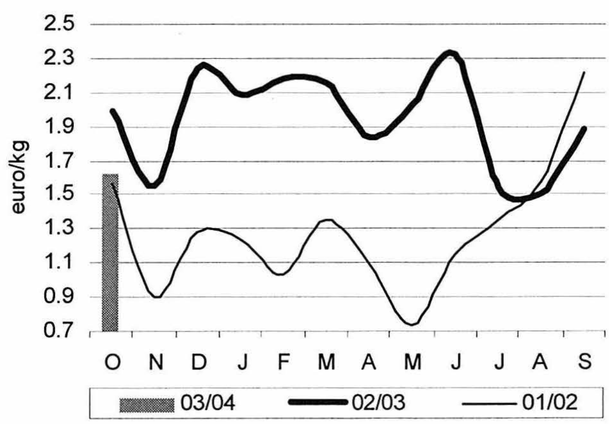
Demand was disappointing. High retail prices limited the impact of special offers during the first half of the month. The All Saints Day holidays then had their usual damping effect on sales. Supply volumes were close to the average for recent years but the varietal distribution was markedly different. Supplies of Hass were comparatively generous because of the firm presence of exports from Mexico and shipments from Chile that for the first time were not marginal. The market for this variety worsened rapidly at the beginning of the month, especially as the quality of a significant proportion of the Mexican fruits was not up to standard. The market for green varieties, with only small volumes during the first half of the month, displayed better resistance. The increase in supplies from Israel and Spain in the middle of the month, when the price of Hass was falling, brought prices down.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	October 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2003/2004	03-04/02-03	03-04/01-02
Spain	1 128	+ 8	- 65	1 537	- 14	- 59
Mexico	2 546	+ 20	+ 8	5 529	+ 46	+ 2
Israel	712	- 55	- 45	712	- 55	- 45
Kenya	420	+ 10	+ 60	10 068	+ 64	- 2
South Africa	518	- 49	-	14 606	- 15	+ 15
Chile	786	+ 38	-	1 249	+ 80	-
Total	**6 110**	**- 9**	**- 14**	**33 701**	**+ 2**	**+ 1**

Orange

OCTOBER 2003

Monthly comparison: Oct. 2003 / Sept. 2003

Price	Volumes
↗ + 3%	↘↘ – 42%

Annual comparison: Oct. 2003 / Oct. 2002

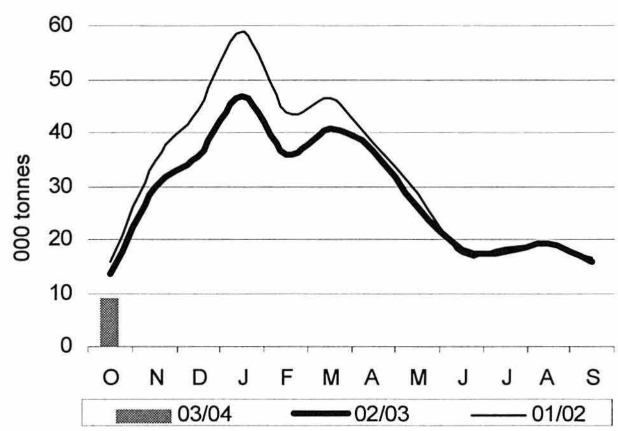
Price	Volumes
↗ + 11%	↘↘ – 32%

The excellent performance in terms of price should be viewed in perspective. Particularly small quantities were sold as a result of the early end to the South African late orange season and the late start of Spanish Navelines. The month's sales were therefore disappointing.

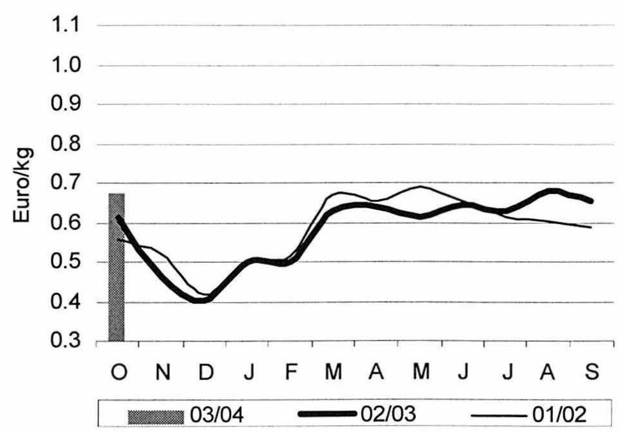
Only very modest quantities were available. On the one hand, supplies of Valencia from the southern hemisphere were much smaller than in previous years in spite of the arrival of larger shipments from Argentine in October (+ 11% in comparison with 2002 and + 130% in comparison with 2001). The South African season came to a very early end in week 41, causing a dip in monthly supply figures to a much lower level than those of previous years. On the other hand, the Spanish Naveline season started somewhat late (with the first significant quantities in week 44 instead of week 43 in preceding years). Demand has been fairly strong, probably because competition from clementines was weaker than usual (the Spanish season is late). The average price for the month was thus nearly 20% higher than the average for recent years, although the volumes handled were down in much greater proportions.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

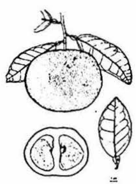
Tonnes	October 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2003/2004	03-04/02-03	03-04/01-02
Spain	5 304	- 39	- 44	5 304	- 39	- 44
South Africa	3 876	- 20	- 40	49 455	0	- 12
Total	**9 180**	**- 32**	**- 43**	**54 759**	**- 6**	**- 17**

Grapefruit

OCTOBER 2003

Monthly comparison: Oct. 2003 / Sept. 2003	
Price	Volumes
↘ – 22%	↗↗ + 1 036%

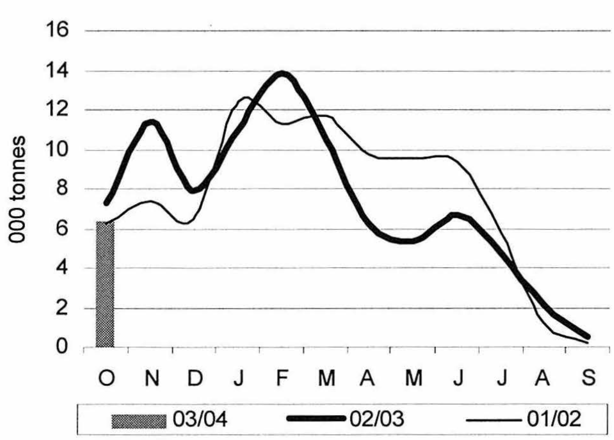
Annual comparison: Oct. 2003 / Oct. 2002	
Price	Volumes
↗ + 9%	↘ – 13%

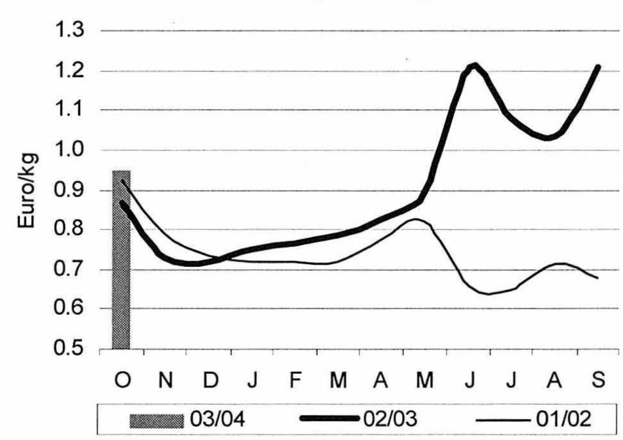


The months go by and origins change but the grapefruit market is still under-supplied—and continues to perform well!

The market was distinctly under-supplied until the end of the month. The volumes proposed by inter-season supplier countries were smaller than in previous seasons. Stocks are generally significant at the beginning of the month but were small this year, with supplies limited to arrivals. Shipments from Turkey and above all Israel were much larger than in preceding seasons. Overall grapefruit supplies were nevertheless smaller than average because shipments from Florida were late in getting under way (harvesting was slowed by heavy rainfall in the first part of the month). Prices were particularly high during the first half of the month and then readjusted considerably in the second half because of a slowing of demand and the increase in shipments. Monthly average arrivals were nonetheless the highest for the last five seasons.

Estimated market releases in France





Estimated market releases in France by origin

Tonnes	October 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2003/2004	03-04/02-03	03-04/01-02
Florida	3 411	- 35	- 15	3 411	- 35	- 15
Turkey	1 691	+ 23	+ 2	1 691	+ 23	+ 2
Israel	1 230	+ 79	+ 115	1 230	+ 79	+ 115
Total	**6 332**	**- 13**	**+ 1**	**6 332**	**- 13**	**+ 1**

Clementine

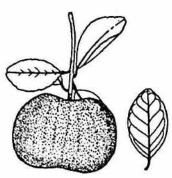
OCTOBER 2003

Monthly comparison: Oct. 2003 / Sept. 2003

Price	Volumes
↘ – 25%	↗↗ + 4 280%

Annual comparison: Oct. 2003 / Oct. 2002

Price	Volumes
↗ + 41%	↘ – 13%

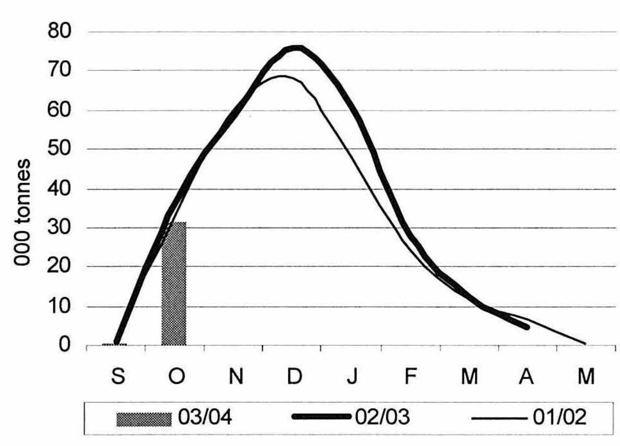


The start of the 2003/2004 season has been more promising that the two previous seasons. Over-supply in October has been recurrent in recent years but was avoided this year in spite of somewhat timid demand. The fairly modest quantities of fruits available—mainly as a result of the marked decrease in supplies from Spain—goes a long way to explaining this performance.

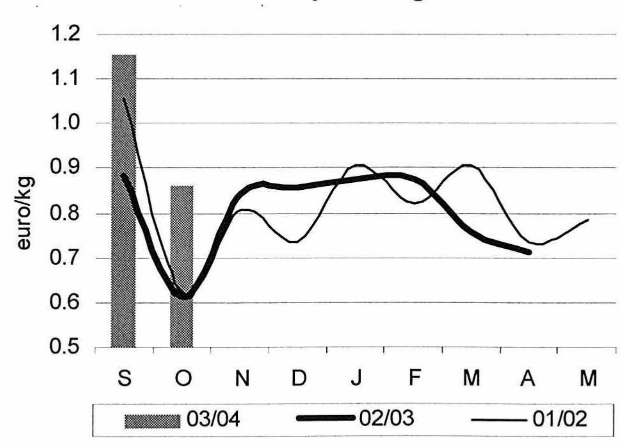
The return to a satisfactory price level in October after the very poor results of 2001 and 2002 is explained by two factors. Firstly, overall supplies were much smaller than in previous seasons as a result of a decrease in shipments from Spain. The reconversion of Marisol orchards is now causing a marked decrease in clementine production. Furthermore the season started late because of late ripening of fruits and slowness resulting from bad weather in the middle of the month. The volumes for extra-community markets have also been smaller than they were last year, with the noteworthy exception of those shipped to the United States. Moroccan produce was more present than last year but still marginal. The Corsican season did not start for reasons of late ripening. In addition, the overall quality of supplies is increasing, with Oronules and Clemenpons gradually replacing Marisol. Thus, in spite of mediocre demand, especially during the second half of the month, prices remained distinctly higher than in preceding years.

Estimated market releases in France

Volumes



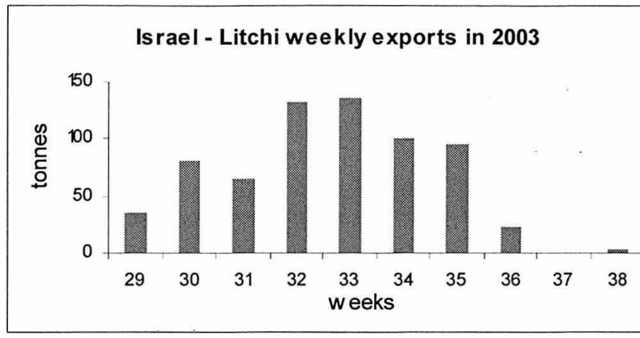
Price at import stage



Estimated market releases in France by origin

Tonnes	October 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2003/2004	03-04/02-03	03-04/01-02
Spain	31 020	- 14	- 6	31 742	- 14	- 9
Morocco	621	-	+ 71	621	-	+ 71
Corsica	0	- 100	- 100	0	- 100	- 100
Total	**31 641**	**- 13**	**- 6**	**32 363**	**- 14**	**- 9**

Litchi



October was marked by the total absence of litchi on European markets. The gap is between the end of the Israeli and Spanish export seasons and the start of the season in the Indian Ocean (Madagascar, South Africa, Mauritius and Réunion).

Litchi supplies are marginal outside the Indian Ocean export season, not because of shortage of production but for sales reasons at a time when the season's fruit dominate the market. In spite of the increase in exports from certain origins, litchi sales are seasonal and closely linked to the Christmas period. Eighty-five percent of the quantities distributed in Europe are shifted between October and March. In the other months of the year, the fruit has a secondary position in the range of imported tropical fruits.

Litchi supplies are at their scarcest in April and October and the fruit is replaced by fruits such as rambutan and longan. They are mainly exported from Thailand and sold in small quantities at high prices. The second European litchi import season runs from May to September with the seasons in Thailand (1 200 tonnes from May to August 2002) and then Israel (632 tonnes from August to September 2002). Although there is no comparison in terms of tonnage with the Indian Ocean litchi sales period, it means that supplies are available. The European markets targeted by the two origins are the Netherlands, the United Kingdom and France. Spain ships complementary litchi supplies from the end of August to the end of September.

Israel exported 673 tonnes of litchi during the 2003 season (see graph above). The graphs below show the fluctuations in the prices of litchis from Thailand and Israel during the summer season on the French and Dutch markets. The seasons are longer in the Netherlands, the main destination and distributor of litchis from Thailand. The list is completed by a few producer countries that made a few, generally one-off shipments, demonstrating the determination of some operators to address this specific market. Particular note should be made of India, which shipped a few batches in June, China with arrivals in May and June and finally Mexico (Sinaola area) in May. Pakistan can also be mentioned with a significant quantity (1 432 tonnes in 2002) shipped to the British market only.

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

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