

# Indicators

## May 2004

The main fruits	In shares by total volume and expenditure on fruits for the month in France		
	%	Volumes	Expenditure
	Apple	26	18
	Strawberry	12	23
Banana	11	14	

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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May 2004 / May 2003			
Price	↗	Vol.	↘

Apple

The market has been very well-oriented at the end of the season. Supplies, consisting mainly of Golden Delicious, were distinctly scarcer than usual. In spite of extremely limited interest from export clientele, demand remained satisfactory. Prices continued to increase and remained markedly higher than average.

May 2004 / May 2003			
Price	=↗	Vol.	=↘

Strawberry

The month's performance was satisfactory as a whole. A shortage of supplies from Spain and the late start of French production made the market buoyant at the beginning of the month. It worsened noticeably in mid-month with peak supplies from the main French production zones. The average monthly price was nevertheless fairly satisfactory.

May 2004 / May 2003			
Price	↗	Vol.	↘

Banana

The good behaviour of the market surprised a large proportion of operators. It is true that the average price only equalled that of 2003, but the divergence from average continued to close. In particular, fears of a collapse of prices following the increase in the quota proved to be unfounded. Supplies remained measured while temperatures lower than seasonal averages had a positive impact on demand and limited competition from the season's fruits.

### 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

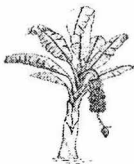
MAY 2004

Monthly comparison: May 2004 / April 2004

Price	Volumes
↘ -6%	↘ -6%

Annual comparison: May 2004 / May 2003

Price	Volumes
↗ +2%	↘ -7%



The good behaviour of the market surprised a large proportion of operators. It is true that the average price only equalled that of 2003, but the divergence from average continued to close. In particular, fears of a collapse of prices following the increase in the quota proved to be unfounded. Supplies remained measured while temperatures lower than seasonal averages had a positive impact on demand and limited competition from the season's fruits.

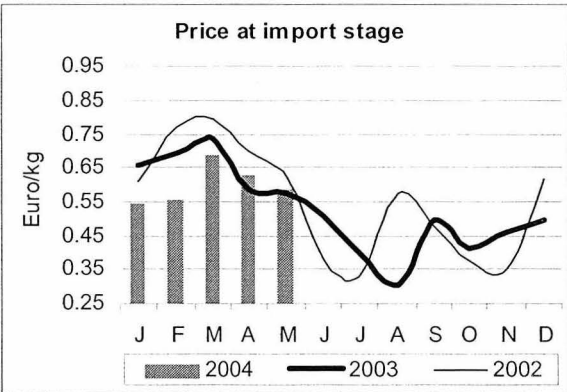
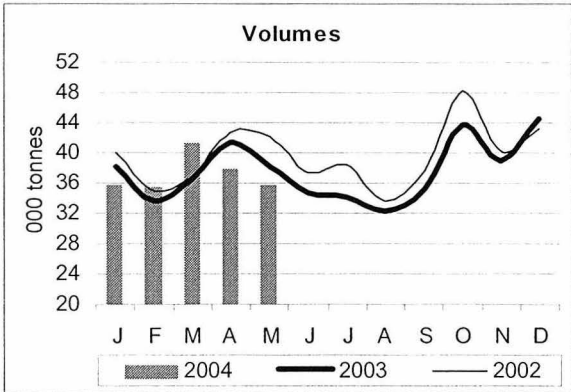
Only average quantities were available on the French market as shipments from the West Indies and Côte d'Ivoire were some 15 to 20% down on average. Furthermore, in contrast with the forecasts made by most operators, the increase in the quota because of the enlargement of the EU did not have the negative effect expected. The

markets in the new member countries were well-oriented and even helped to maintain the balance on markets in northern Europe. The very late awarding of the first licences led Polish and Czech operators and others to obtain supplies from importers in former EU-15. Demand was also satisfactory for the season. The fairly

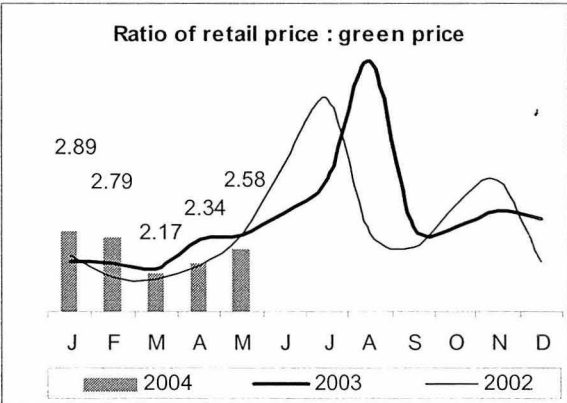
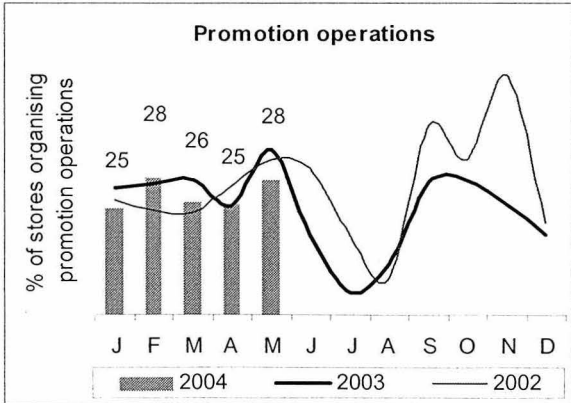
cool weather stimulated banana consumption and slowed the development of the season's fruits. Furthermore, the comparatively reasonable price policy of large distributors enabled banana to remain the most attractive major fruit during the month.

Estimated market releases in France

Tonnes	May 2004	Comparisons (%)		Total season 2004	Season comparisons (%)	
		2004/2003	2004/2002		2004/2003	2004/2002
Côte d'Ivoire	7 484	- 6	- 29	41 169	+ 6	- 8
Cameroon	8 543	- 12	- 2	48 625	- 2	+ 8
Martinique	14 808	+ 1	- 8	70 701	+ 2	- 4
Guadeloupe	4 871	- 17	- 27	25 497	- 14	- 22
Total	35 706	- 7	- 15	185 992	- 1	- 5

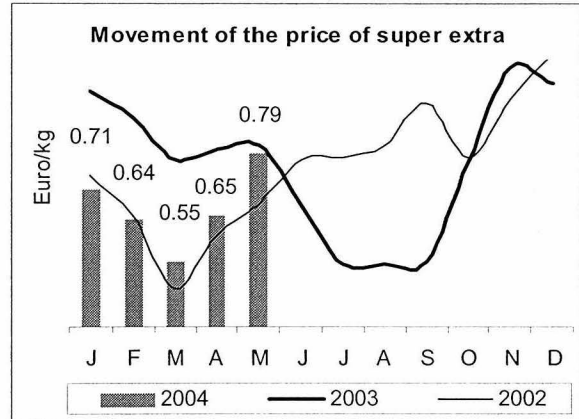
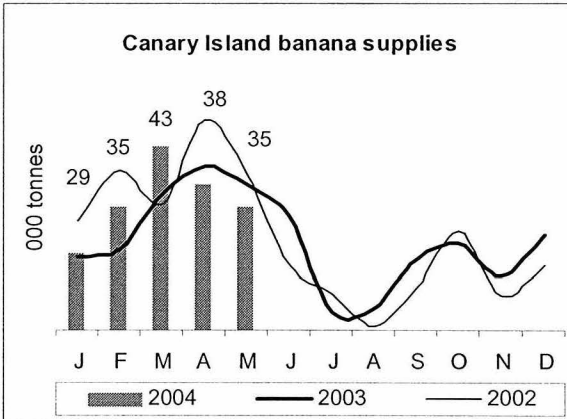


Retail market in France

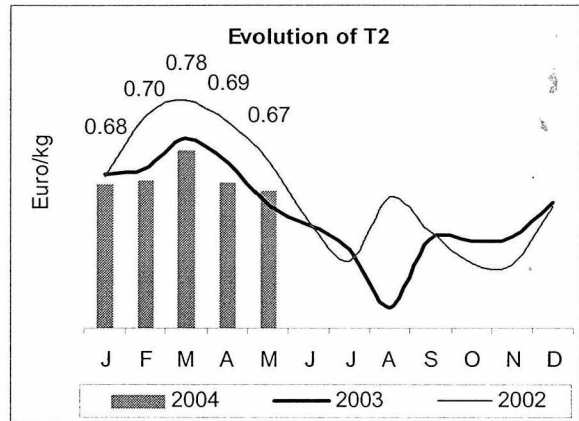
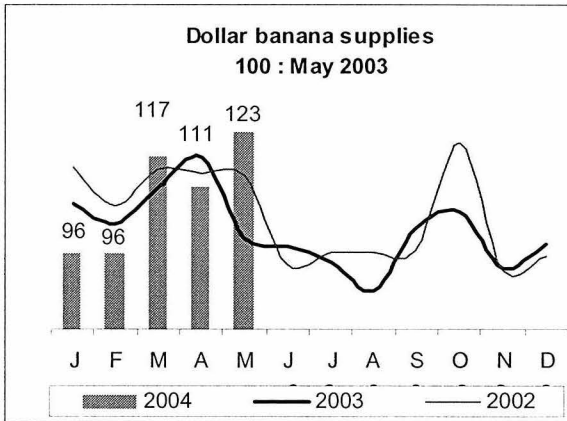


Banana — Indicators for French export markets

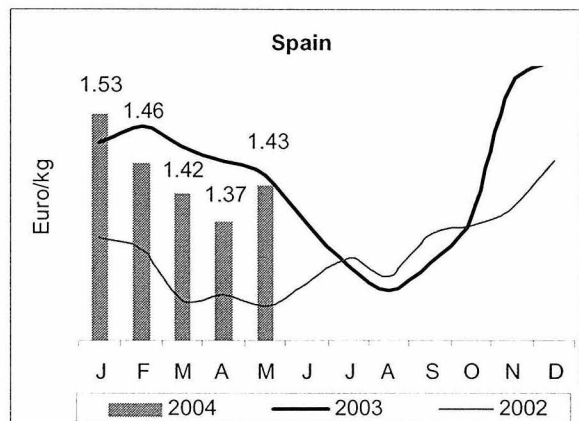
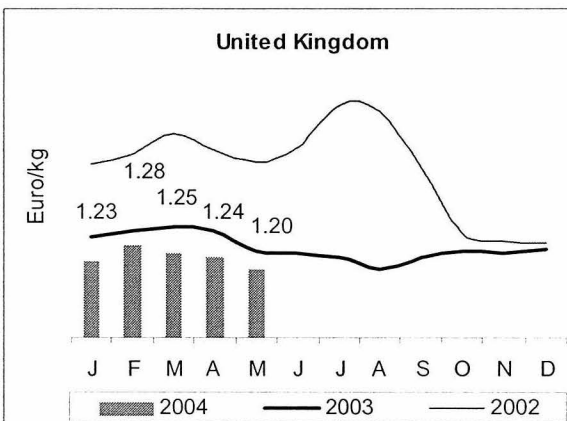
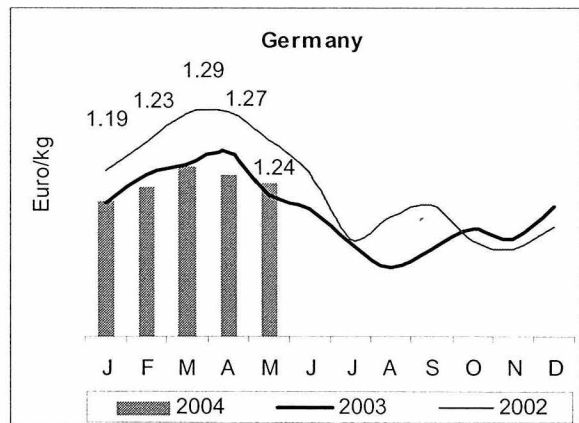
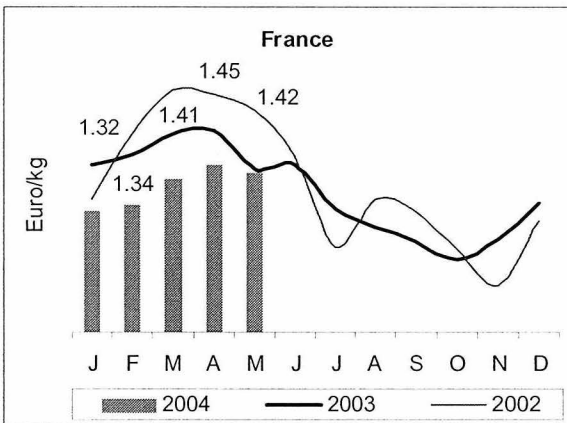
Spain



Northern Europe



Retail price in Europe



Sources: CIRAD-FLHOR, SNM, TW Marketing Consulting

# Avocado

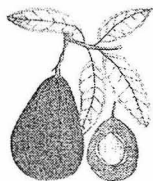
MAY 2004

## Monthly comparison: May 2004 / April 2004

Price	Volumes
↗ +7%	↘ -8%

## Annual comparison: May 2004 / May 2003

Price	Volumes
↘ -6%	↗ +39%



Performance was fairly satisfactory as the average price and the quantities sold were noticeably above the average for recent seasons. The green avocado market was less critical than in April as supplies from Kenya and South Africa were fairly moderate. The situation was relatively favourable for Hass until the end of the month, when the strong increase in shipments changed the market.

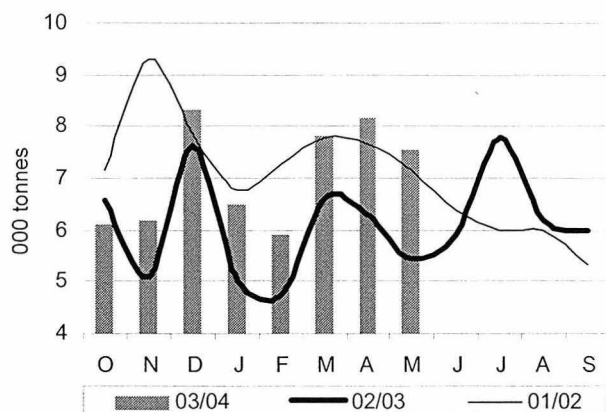
The market for green varieties picked up in May. Shipments from Kenya had been extremely large and returned to an average level. Furthermore, arrivals from South Africa were smaller until the end of the month because of a serious production shortfall in the early

zones. Sales remained laborious but prices rose from the April pits and returned to average. The market for Hass maintained its balance until the middle of the month. The Mexican season tailed off rapidly, balancing stronger Spanish presence than in

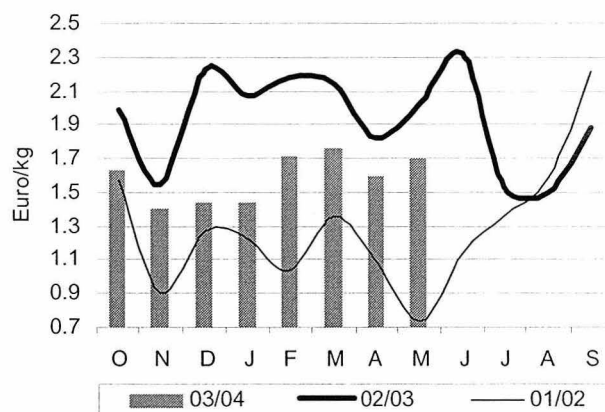
previous years. Nevertheless, although the volumes from South Africa were normal, shipments from Peru developed very early and strongly. Prices managed to hold out until the end of the month even though sales did not match the incoming shipments.

## Estimated market releases in France

### Volumes



### Price at import stage



## Estimated market releases in France by origin

Tonnes	May 2004	Comparisons (%)		Season total	Season comparisons (%)	
		2004/2003	2004/2002		03-04/02-03	03-04/01-02
Spain	3 752	+ 178	+ 37	24 972	+ 77	- 7
Mexico	360	- 27	-	14 362	+ 5	+ 79
South Africa	1 803	- 10	- 37	2 256	- 17	- 44
Israel	-	0	0	10 380	- 11	- 53
Peru	746	+ 233	-	881	+ 180	-
Kenya	869	- 36	+ 32	5 052	- 3	+ 104
<b>Total</b>	<b>7 530</b>	<b>+ 39</b>	<b>+ 5</b>	<b>57 903</b>	<b>+ 21</b>	<b>- 9</b>



# Orange

MAY 2004

## Monthly comparison: May 2004 / April 2004

Price	Volumes
↗ +2%	↘ -22%

## Annual comparison: May 2004 / May 2003

Price	Volumes
↗ +14%	↗ +41%



The orange market remained as buoyant as in the three preceding months. The quantities sold and average prices increased markedly again. It is true that the context was very favourable as competition from the season's fruits was limited. Nevertheless, Navelate undeniably had a very positive impact on demand for the fourth month running.

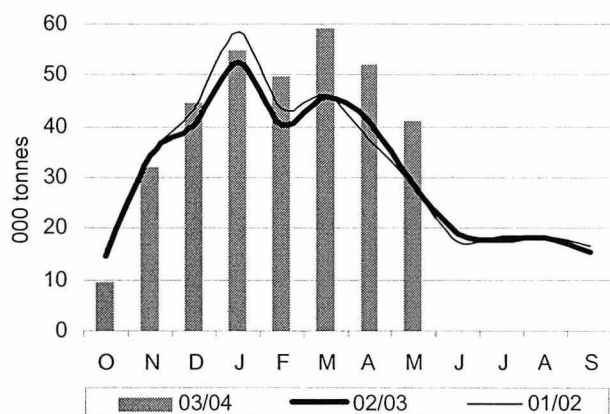
Demand was extremely dynamic for the entire month. Competition from the season's fruits—both strawberries and stone fruits—was much less marked than usual but does not seem to have been the only factor in the satisfactory orange market. Indeed, Navelate continued to draw increased interest

from distributors. Quantities were still substantial during the first third of the month and then weakened noticeably, but supplies remained significant throughout the month. The lengthening of the Navelate season did not hamper the sale of Valencia. Volumes even increased noticeably from both

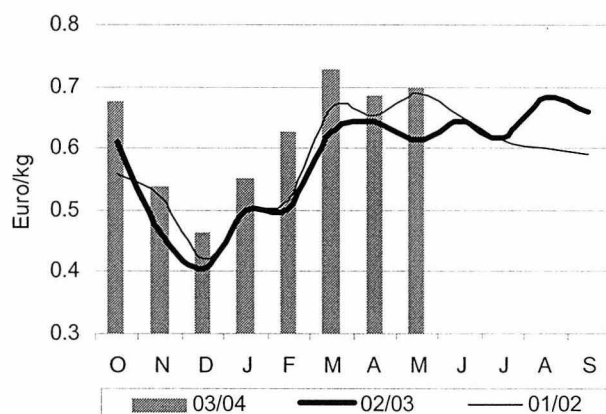
Morocco and Spain. The variety seems to have benefited from the strong sales trend of Navelate and above all from the late start (about 10 days) to the South African Navel season as a result of late ripening and smaller production in certain regions, such as central Transvaal.

## Estimated market releases in France

Volumes



Price at import stage



## Estimated market releases in France by origin

Tonnes	May 2004	Comparisons (%)		Season total	Season comparisons (%)	
		2004/2003	2004/2002		03-04/02-03	03-04/01-02
Spain	27 845	+ 21	+ 28	298 135	+ 14	+ 14
South Africa	235	- 60	- 51	235	- 60	- 51
Morocco	12 824	+ 125	+ 114	25 220	+ 67	+ 53
<b>Total</b>	<b>40 904</b>	<b>+ 41</b>	<b>+ 43</b>	<b>323 590</b>	<b>+ 17</b>	<b>+ 16</b>

# Grapefruit

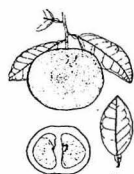
## Monthly comparison: May 2004 / April 2004

Price	Volumes
↗ +13%	↘ -41%

## Annual comparison: May 2004 / May 2003

Price	Volumes
↘ -14%	↗ +18%

MAY 2004



Operators will have drunk the cup to the lees. As was already felt in April, the end of the 2003/2004 season was disappointing, especially in the light of the excellent prices reached last year and importers' expectations. In spite of the relatively late start of arrivals from the southern hemisphere, supplies were much more varied than expected as a result of the stocks available in Florida, Turkey and Israel. In addition, demand was not at all dynamic.

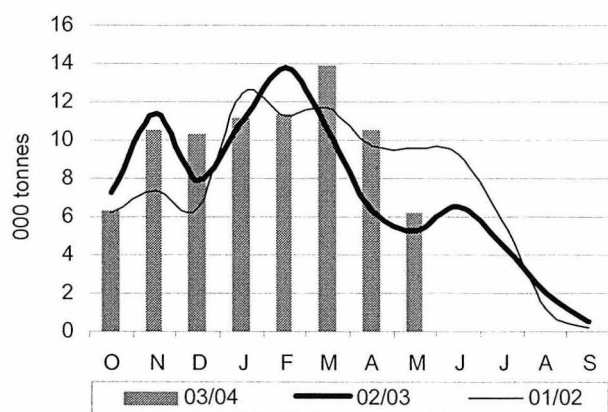
Importers were hoping that the end of the winter season would be light in terms of quantities. They were wrong. Firstly, the stocks remaining to be shifted at the beginning of the month were comparatively large because of the quantities received in March and April (+25% in comparison with the average for recent seasons). In

addition, fruits continued to arrive from Florida and Turkey. In this context, and with pressure from the starting of the seasons in Argentina and South Africa, importers were cautious with regard to their price policy. Supplies from origins in the southern hemisphere got under way according to the usual calendar but the quantities were markedly down

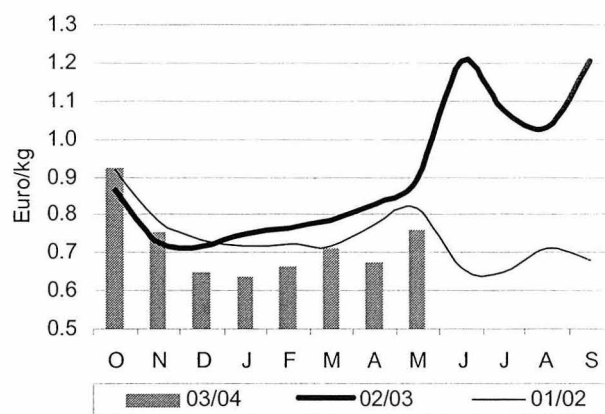
on last year's. However, the prolongation of the winter season weighed on the referencing of the summer origins and particularly on fruits from Argentina, which were very present during the second half of the month. Prices sagged distinctly in comparison with the average for recent seasons.

## Estimated market releases in France

### Volumes



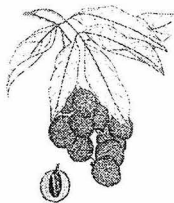
### Price at import stage



## Estimated market releases in France by origin

Tonnes	May 2004	Comparisons (%)		Season total	Season comparisons (%)	
		2004/2003	2004/2002		03-04/02-03	03-04/01-02
Florida	1 320	+ 2 081	- 69	61 089	+ 11	+ 6
Argentina	1 636	- 22	+ 67	1 720	- 76	- 72
Turkey	532	+ 646	+ 122	8 380	+ 23	+ 15
Israel	1 080	- 19	- 45	7 411	- 4	+ 6
South Africa	1 633	- 7	- 22	1 633	- 7	- 22
<b>Total</b>	<b>6 201</b>	<b>+ 18</b>	<b>- 35</b>	<b>80 233</b>	<b>+ 9</b>	<b>+ 7</b>

# Litchi



The European market was supplied almost only by Thailand throughout May. Deliveries were regular. Most of the goods from this origin were shipped in sea containers, except for the French and British markets where air shipments were dominant in the first half of the month. Although it is difficult to estimate the quantities received, they remained modest and probably smaller than those shipped during the same period in 2003. The limiting of tonnage help to maintain stable, firm prices.

## France

Deliveries of longan and rambutan from Thailand continued throughout May. Although the price of rambutans remained comparatively stable at around EUR 6.00-6.50 per kg for produce shipped by air, that of longans exported by sea slid from EUR 2.00 per kg in the second half of April to EUR 1.50 per kg in May. One of the main reasons was doubtless the increase in deliveries by sea. The fruit is mainly eaten by Asian populations and demand does not change. Thus an increase in the volumes sold can easily create a situation of over-supply, causing a rapid decrease in price. Rambutans from Thailand were occasionally completed by a few deliveries from Malaysia, with the prices set at the same level as Thai fruits. In parallel, the French market received litchis from Thailand by air, thus continuing the season that started in April. Deliveries by air continued until the second week of the month, when reefer transport took over. The fruits shipped by air commonly sold at EUR 6.00 to 6.50 per kg, whereas those exported by sea were sold at EUR 4.50 to 5.00 per kg, with a weakening at the end of the month, when prices started at EUR 3.00 per kg. Quality was visually satisfactory, with fruits well-coloured although small. In contrast, many operators found their organoleptic quality to be distinctly inadequate. The French

market also received a few batches from China in the second half of the month. Packaged in 1 kg plastic punnets, these sold at EUR 12 to 14 per kg on the wholesale market. Destemmed and not treated, the visual aspect was mediocre, as the fruits were mainly greenish in colour. In contrast, they were distinctly larger than the Thai fruits and their taste quality was much better, with a high sugar content and more marked smell. The 1 kg punnets were packed in batches of 15 in polystyrene containers in which bottles of frozen water had been placed.

## Belgium

Supplies from Thailand by sea were regular. The produce was of fine quality and sold on the basis of EUR 3.50 to 4.00 per kg, with a few peaks at EUR 4.50 per kg for small quantities.

## Netherlands

Fruits from Thailand sold steadily throughout the month on a comparatively quiet market. Prices were stable throughout the period at between EUR 3.40 and 4.00 per kg for produce shipped by sea. Sales were limited to a few thousand boxes per week on both the domestic and European export markets. The fruits were well-coloured and fairly small. The ratio of edible part to waste was not very favourable, especially in the

## Thailand — Litchi by sea Import price

MAY 2004

	Min	Max
France	3.00	5.00
Belgium	3.50	4.50
Netherlands	3.40	4.00
UK	4.80	5.00

light of the price. The limited quantities enabled steady sales. Supplies from Thailand should increase in the coming weeks with the change in production zone. The fruits shipped so far were from southern Thailand. The quantities should soon increase as the larger northern production starts.

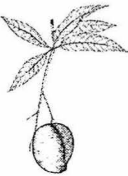
## United Kingdom

Supply of the British market was dominated by Thailand throughout the month. The limited quantities marketed made it possible to maintain prices at a fairly high EUR 5.50-6.00 per kg for produce shipped by air. The arrival of fruits from India and China was announced in the middle of the month and that should have caused a dip on the market with cost prices lower than for Thai fruits (EUR 3.60 per kg). But the deliveries from these new origins were so small that they did not disturb the sale of Thai fruits at all. The marketing of Thai litchis shipped by sea in containers started in the second half of May, with prices of about EUR 4.80-5.00 per kg. Litchi sales decreased at the end of the month as those of the season's fruits developed.

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



Mango  
West African Season



The increase in supplies from Côte d'Ivoire in May enabled the return to a balanced market situation. In the absence of true competition from Latin American origins, mangoes from West African countries sold steadily on the various markets in Europe. Sales became more difficult in the second half of May as a result of the combined effect of strong supplies and a marked decrease in demand for tropical fruits.

After a period of under-supply in April, the development of supplies from Côte d'Ivoire gave the market fresh balance. The price of **sea mangoes** tended to decrease in parallel with the increased rate of deliveries. Market conditions remained fairly stable in the first half of May. The prices of the variety Amélie weakened while Kent rapidly took over in shipments. Prices were too high to interest the northern European markets and fell substantially in the middle of the month under the pressure of quantity. The worsening of fruit quality and in particular the stage of maturity accelerated the trend. The strong fall in prices at the end of the month is difficult to explain insofar as absence of competition left the market dependent on deliveries from Côte d'Ivoire. The fragility of some of the produce, the increasing supply of the

season's fruits and the conditions for access to certain distribution channels are doubtless explanations but are not always convincing in the light of the capacity of the European market. The first arrivals of mangoes from Guinea were recorded in the third week of May. Shipped by sea in containers, these Kent and Keitt variety fruits sold at EUR 4.00-5.00 per box, especially on the northern European markets. Forecasts for this origin total some 450-500 tonnes shipped by sea.

The market for **air mango** was much more tense in May. The cumulated tonnages from Burkina Faso, Côte d'Ivoire and above all Mali soon saturated the market. This section of the market was made all the more difficult by the large quantities of mangoes arriving by sea and the loss

of a proportion of the clientele to these as the prices were more attractive. The quality of the fruits shipped by air was also very uneven and this also tended to work against them. As every year, exporters tended to ship fruits that were not very ripe in order to reduce the risks of interception, a trend fuelled by the presence of fruitfly larvae. The goods received thus no longer matched customer expectations in terms of colour and ripeness. The reception of batches of very ripe mangoes at the end of the month obliged operators to conduct clearance sales at prices much lower than those mentioned below. In the last week of the month, the first batches of mangoes from Pakistan reached the market and sold at EUR 2.30-2.40 per kg (Sindhri variety).

Mango — Imported volumes Estimates in tonnes				
Weeks 2004	19	20	21	22
By air				
Mali	90	65	45	25
Burkina Faso	25	25	15	15
Côte d'Ivoire	30	10-15	10-15	10
By sea				
Côte d'Ivoire	600	1 400- 1 600	1 000	750
Guinea			200	

Mango — Price in euros — Import stage					
Weeks 2004		19	20	21	22
By air (kg)					
Mali	Amélie	2.10-2.20	2.00-2.10	-	2.00-2.10
Mali	Valencia	2.20-3.00	2.00-3.00	2.00-2.80	1.80-2.00
Mali	Kent	2.50-3.50	2.00-3.00	2.00-3.00	1.80-2.20
Burkina Faso	Amélie	2.10-2.20	2.00-2.10		
Burkina Faso	Kent	2.50-3.80	2.00-3.00	2.00-2.50	1.80-2.50
Côte d'Ivoire	Kent	3.80-4.50	3.00-4.00	3.00-4.00	3.00-3.50
By sea (box)					
Côte d'Ivoire	Amélie	3.50-4.50	-	-	-
Côte d'Ivoire	Kent	5.00-7.00	5.00-6.00	4.50-5.00	3.50-4.00