Indicators
July-August 2004

The main fruits		
In shares by total volume and expenditure on fruits for the month in France		
%	Volumes	Expenditure
Peach/Nectarine	26	29
Apple	16	12
Apricot	7	8

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.

Pages

Peach/Nect.

July-Aug 04/July-Aug 03			
Price	↘	Vol.	↗

Supplies remained comparatively modest until the end of July. Prices held at a firm level in spite of weak demand resulting from the poor weather. Production increased strongly at the beginning of August whereas demand remained very slow (rainy weather and high retail prices). The market slumped for the whole month.

Apple

July-Aug 04/July-Aug 03			
Price	=↘	Vol.	=↗

The 2003/2004 season finished well in July. The harvest promises to be slightly larger in 2004/2005 both in France and elsewhere in Europe. Supplies were short, however. The first releases went well in August. Prices are slightly down in comparison with last year's.

Apricot

July-Aug 04/July-Aug 03			
Price	=↘	Vol.	=↗

Limited supplies made it possible to maintain very firm prices until mid-July. The strong increase in supplies then, with a large Bergeron crop in the Rhône-Alpes region turned the market round for two weeks. The return to a more modest supply level at the beginning of August made it possible to complete the season under good conditions.

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

JULY-AUGUST 2004

Monthly comparison: August 2004 / July 2004

Price	Volumes
↘↘ – 20%	↗ + 8%

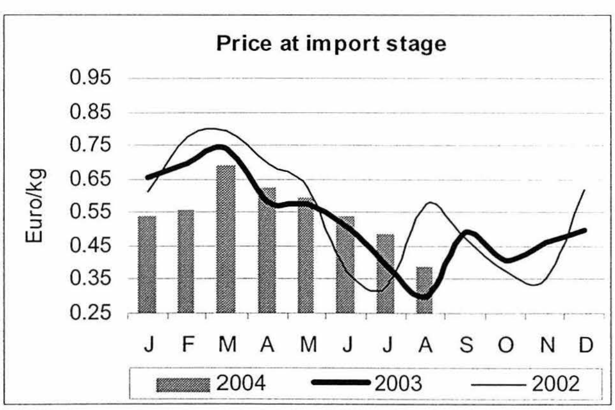
Annual comparison: July-Aug 04 / July-Aug 03

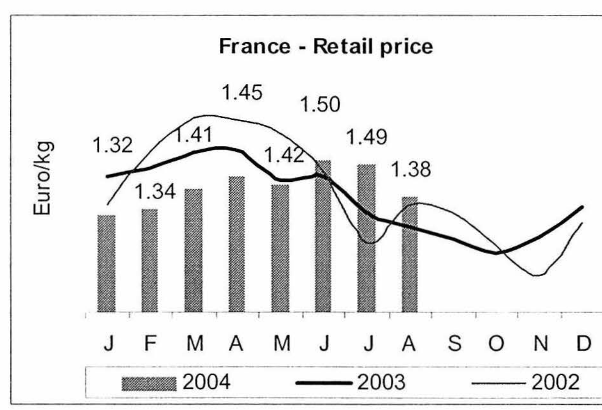
Price	Volumes
↗↗ + 24%	=↗ + 2%

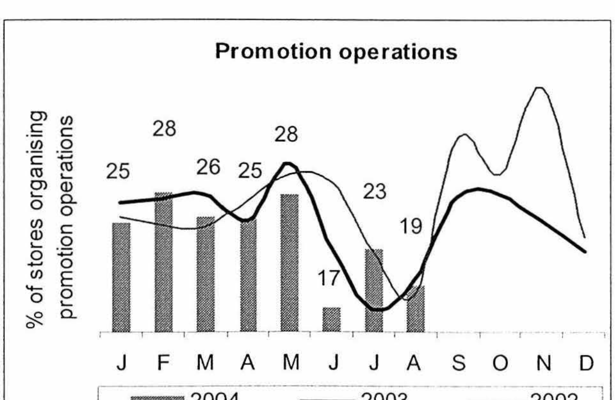
In contrast with the two preceding years, there was no major crisis this year. However, the fairly satisfactory July market was much more difficult in August as supplies were relatively plentiful. But prices remained under control with the exception of those of a few clearance operations at the end of the month.

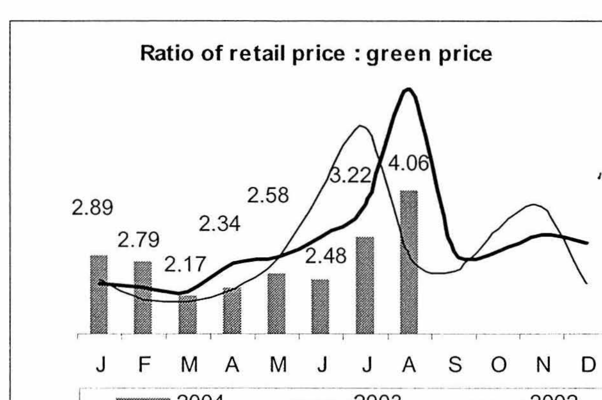
The market was comparatively well-behaved in July. The supplies available in France seemed distinctly short because of the marked decrease in shipments from Cameroon. Local demand remained fairly satisfactory for the season (shortage of the season's fruits, weather conditions favourable for eating bananas). In addition, the normal arrivals of dollar bananas enabled the maintaining of an active export flow, especially to Germany. The market configuration changed completely in August. Supplies increased considerably. Shipments from Cameroon returned to normal while those from Martinique and Côte d'Ivoire were relatively substantial for the season. In parallel, local demand slowed very significantly because of strong competition from the season's fruits. Increasing shipments of dollar bananas also slowed export sales. Prices fell considerably but the market remained under control thanks to a number of sporadic clearance operations.

French banana market — Indicators







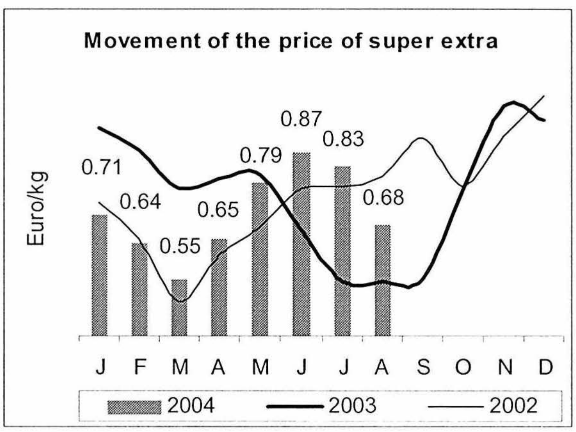


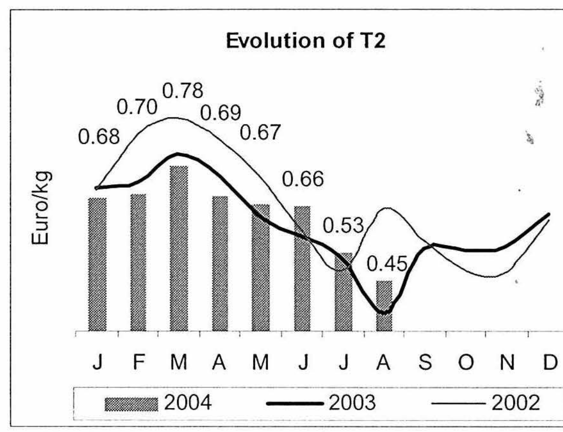
European banana market — Indicators

Main origins in Europe

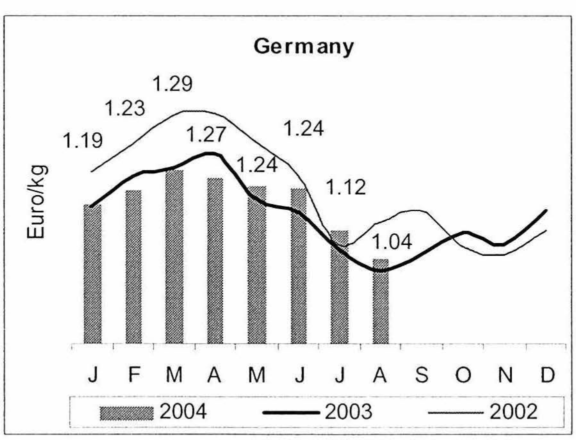
Tonnes	July 2004	August 2004	Comparisons (%) 2004/2003 July	Comparisons (%) 2004/2003 August	Comparisons (%) 2004/2002 July	Comparisons (%) 2004/2002 August	Total season 2004	Season comparisons 2004/2003 (%)	Season comparisons 2004/2002 (%)
Martinique	20 698	22 248	+ 7	+ 19	- 8	+ 4	165 467	+ 5	- 2
Guadeloupe	6 339	6 222	- 12	- 12	- 26	- 22	50 634	- 14	- 22
Canaries	25 712	25 972	+ 15	+ 14	+ 4	+ 27	265 351	+ 5	0
Côte d'Ivoire	14 496	14 178	- 2	+ 8	+ 7	+ 6	140 474	+ 2	- 1
Cameroon	16 992	20 733	- 23	+ 3	- 18	+ 33	177 153	- 2	+ 14
Index (base 100 in August 2003)									
Dollar	136	130	+ 21	+ 30	+ 22	+ 19	NA	+ 10	+ 9

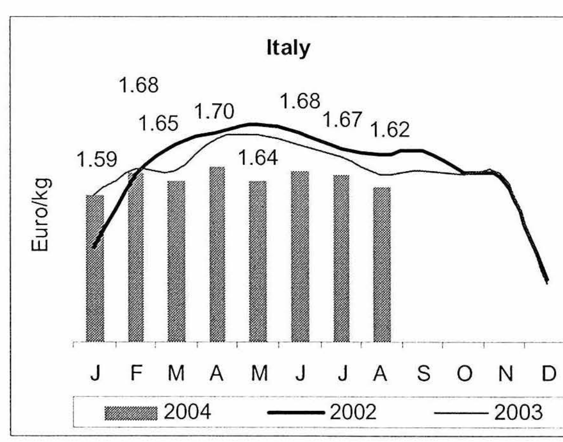
Green price in Europe

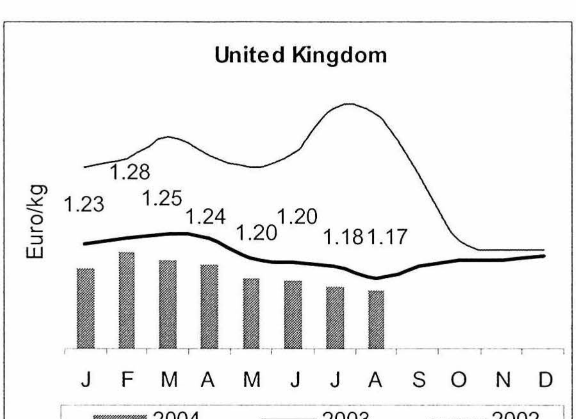


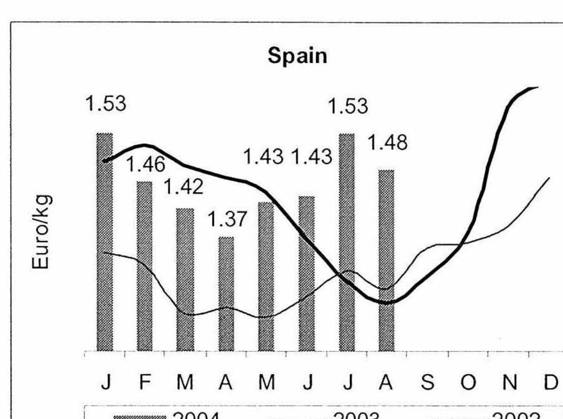


Retail price in Europe









Sources: CIRAD-FLHOR, SNM, TW Marketing Consulting

Avocado

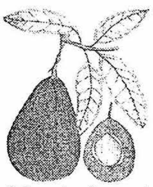
JULY-AUGUST 2004

Monthly comparison: August 2004 / July 2004

Price	Volumes
↗↗ + 39%	↗ + 10%

Annual comparison: July-Aug 04 / July-Aug 03

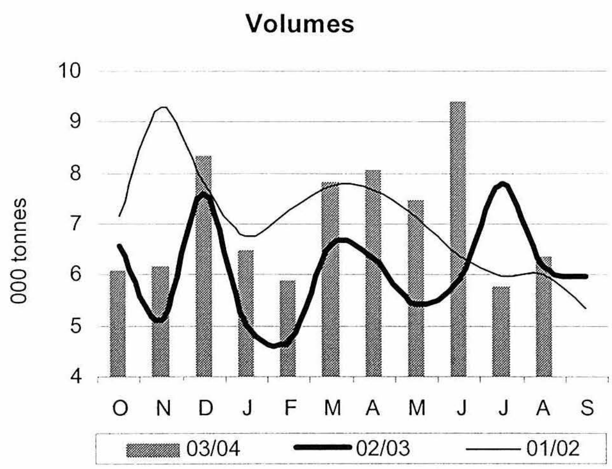
Price	Volumes
↗ + 13%	↘ – 13%

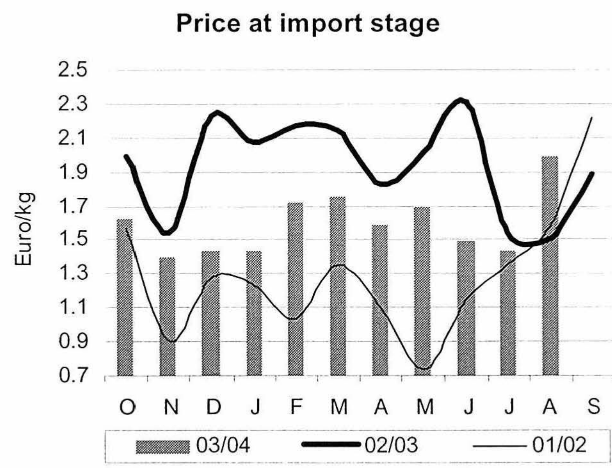


A month with small inflow took the market out of the serious situation that started in June. Although demand was sluggish throughout the summer, the small quantities arriving in July resulted in gradual market recovery right at the end of the month. The market swung from one extreme to the other yet again. Maintaining a medium flow of supplies during the first two-thirds of the month sent the average price rocketing to nearly 2 euros per kg in August.

After being at the point of death at the end of June, the market gradually recovered even through demand was comparatively slow. Supplies were some 10% down on average in spite of the prolonging of the Spanish season. Observing the deplorable market conditions, operators considerably reduced their orders, in particular for fruits from Kenya and, to a lesser degree, from Peru and South Africa. The market really only cleared at the end of July as substantial stocks remained to be shifted at the beginning of the month. Prices rose sharply, a trend that continued throughout August because of the medium tonnage of shipments. They reached record levels at the end of the month.

Estimated market releases in France





Estimated market releases in France by origin

Tonnes	July 2004	August 2004	Comparisons (%)				Season total 03-04	Season comparisons	
			2004/2003		2004/2002			03-04/02-03	03-04/01-02
			July	August	July	August		(%)	
Spain	1 592	713	+ 1 083	-	+ 76	0	713	-	+ 47
Mexico	174	929	- 36	+ 29	-	+ 326	1 104	+ 11	+ 406
Peru	1 145	1 217	0	0	+ 60	+ 104	4 951	+ 8	+ 180
Kenya	244	866	- 87	- 21	- 63	- 26	6 768	- 25	+ 35
South Africa	2 622	2 643	- 25	- 14	- 29	- 25	11 237	- 10	- 23
Total	5 777	6 368	- 26	+ 3	- 4	+ 6	24 773	- 9	+ 12

Orange

JULY-AUGUST 2004

Monthly comparison: August 2004 / July 2004

Price	Volumes
↘ – 6%	= 0%

Annual comparison: July-Aug 04 / July-Aug 03

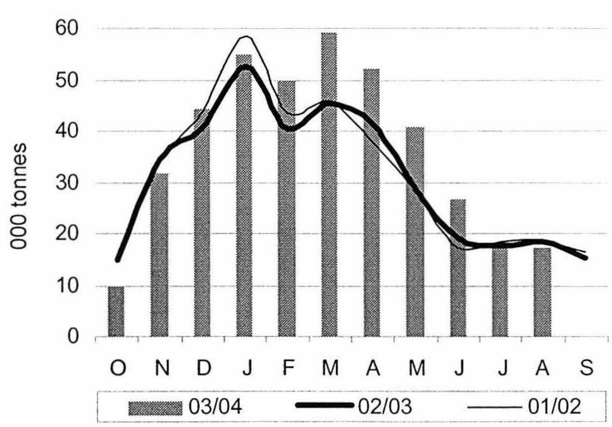
Price	Volumes
↗ + 17%	↘ – 4%

The first part of the summer season for oranges was as satisfactory as the winter one. Vigorous demand in July—probably because competition from the season's fruits was limited, resulted in the market taking distinctly more fruits than average. The situation was balanced in August in spite of a marked slowing of business (slump on the peach/nectarine market) as shipments decreased. The average price for the two months was nearly 15% higher than average.

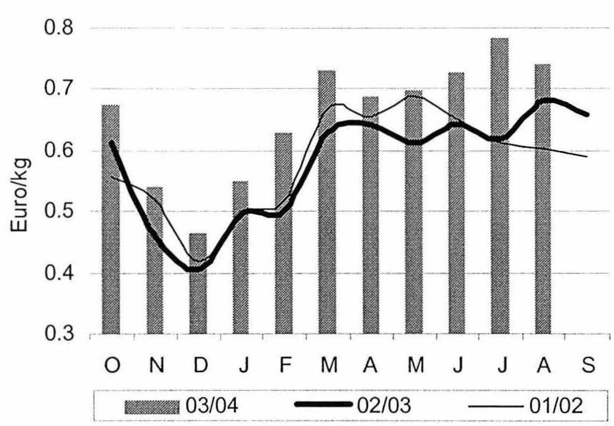
Supplies were distinctly more plentiful than in July 2003. Valencia from Spain were still very much present and shipments from the southern hemisphere were larger than in preceding years, even though South African Navel shipments were down (10% less during the season than last year). The season for Valencia from Argentina started very early and substantial quantities arrived in July. Demand was strong, however, as summer fruits were in short supply during the first part of the season. The strong increase in the quantities of peaches and nectarines at the beginning of August resulted in a distinct slowing of releases. The market nevertheless remained balanced. The Spanish Valencia season finished earlier than in 2003. Supplies from South Africa remained reduced in spite of the prolonging of the Navel season, and shipments from Argentina returned to normal. Prices remained firm during the two-month period but the difference between those paid for large and small fruits increased in August.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	July 2004	August 2004	Comparisons (%) 2004/2003 July	2004/2003 August	2004/2002 July	2004/2002 August	Season total 03-04	Season comparisons (%) 03-04/02-03	03-04/01-02
Spain	7 188	2 320	+ 7	- 30	+ 17	- 42	324 327	+ 14	+ 15
Morocco	263	-	+ 220	-	-	-	31 737	+ 77	+ 72
South Africa	9 918	15 010	- 9	0	- 15	+ 2	28 872	- 5	- 10
Total	**17 369**	**17 330**	**- 2**	**- 5**	**- 6**	**- 7**	**384 936**	**+ 15**	**+ 35**

Grapefruit

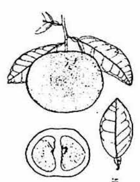
JULY-AUGUST 2004

Monthly comparison: August 2004 / July 2004

Price	Volumes
↘ – 4%	↘↘ – 70%

Annual comparison: July-Aug 04 / July-Aug 03

Price	Volumes
↘↘ – 35%	↘↘ – 40%

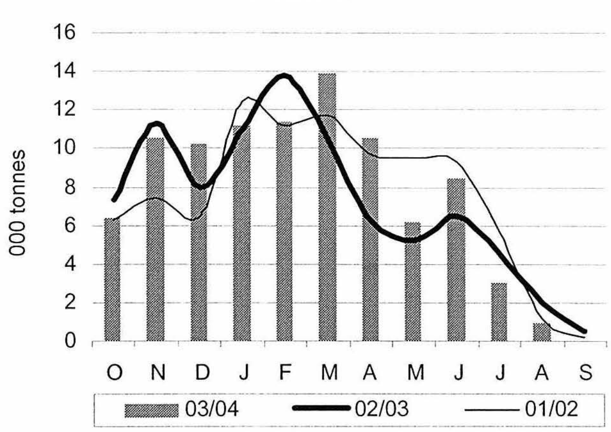


Supplies were more ample than the extremely limited shipments seemed to indicate. Indeed, stocks were substantial at the beginning of July after the continuation of the winter season into June. Demand was comparatively slow as is usual in summer. The average price decreased markedly in comparison with the exceptional 2003 level and was close to that of 2002.

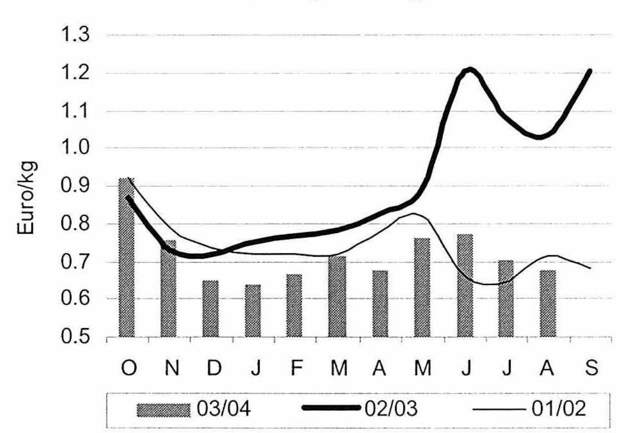
Substantially smaller quantities were received from both South Africa and Argentina in July and August 2004 than during the same period in 2003. Nevertheless, these comparatively small quantities did not reflect the level of supplies as this probably reached that of 2003. On the one hand shipments from both South Africa and Argentina had been massive in June. On the other, sales of southern hemisphere grapefruit had been comparatively slow during the first part of the season because of the prolonging of the winter shipments. Stocks were thus large at the beginning of July. The quantities shipped from Honduras were very limited until the beginning of August and then increased considerably, exceeding those of 2003. Demand was comparatively slow in July and during the first two-thirds of August. Prices decreased markedly in comparison with June levels and approached those of 2002.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	July 2004	August 2004	Comparisons (%) 2004/2003 July	Comparisons (%) 2004/2003 August	Comparisons (%) 2004/2002 July	Comparisons (%) 2004/2002 August	Season total 03-04	Season comparisons 03-04/02-03 (%)	Season comparisons 03-04/01-02 (%)
Argentina	992	236	- 28	- 50	- 49	+ 9	7 020	0	+ 16
South Africa	2 055	667	- 36	- 57	- 46	- 32	8 687	+ 2	- 24
Total	3 047	903	- 33	- 55	- 47	- 25	15 707	+ 1	- 10

Litchi

JULY-AUGUST 2004

Litchi by sea — Import price — in euros/kg	July		August	
	Min	Max	Min	Max
Netherlands				
Thailand	2.00	2.50		
Israel	2.25	3.00	2.00	2.50
Belgium				
Thailand	2.00	2.50	2.00	2.25
Israel	2.00	3.00	2.00	2.50
France				
Thailand	3.50	3.50		
Israel	2.50	4.00	2.00	3.00

The European market imported and sold less tropical fruits in July and August. The availability of numerous summer fruits and the holiday period is not favourable for imported fruits. Litchi sales were marginal in this context. Litchis from Israel dominated supplies in Europe in August and sold slowly. The quantities shipped amply covered demand especially as shipments from China complemented them, especially in northern European countries.

While exports had continued throughout July in 2003, Thailand ceased shipments in the first half of the month when the Israeli season started. The reason is probably the poor results in the second half of July and in August in 2003. The first batches arrived in Europe from Israel at the beginning of July, two or three weeks earlier than in 2003.

France

A rapid switch from Thai to Israeli fruits took place at the beginning of the month with fruits generally of a good size but whose taste qualities were often only average. Shipments were regular and the keeping quality of the fruits made it possible to release them gradually. Sales remained slow, especially in the second half of July and in August. The quantities available were sold to wholesalers and to the specialised and ethnic retailers who form the bulk of outlets at this time of year. Prices fell gradually as poor demand favoured storage and hence the deterioration of quality. Some batches contained old, increasingly soft fruits at the end of August. The prices mentioned do not allow for fruits rejected as unsaleable. They should therefore be reduced somewhat to give an average price that is closer to reality.

Belgium

Prices of litchi from Thailand decreased gradually with the last arrivals in early July. The fall in price was all the more marked as Israeli competition rapidly gathered strength. The prices of litchi from Israel crumbled in the subsequent weeks as customer attention was more focused on summer fruits.
Thai litchis were still to be found until mid-August at prices slightly lower than those from Israel, which formed practically all supplies. Very large fruits sold at about 3 euros per kg at the beginning of the month. Even though there was no competition, the price of Israeli litchis fell because of worsening quality in the second half of August.

The Netherlands

The price of Thai litchis held with difficulty in the first half of July because of dwindling demand and decreasing quality following storage. The early start of the Israeli season increased commercial pressure even more. A price level of 3 euros per kg for Israeli fruits became more an objective to be obtained than a rigid rule. The price weakened fairly rapidly in fact because of the commercial context.
The market was not very dynamic in August. Litchis from Israel sold fairly steadily. Worsening quality sent prices down in the second half of the month. Some prices variations were noted at the beginning of the month according to the colour, as some brands mastered this aspect of visual quality better than others. Large, satisfactory quality litchis from China sold at about 2 euros per kg. However, their quality then deteriorated markedly and operators were forced to sell them at 'open' prices.

United Kingdom

The market was amply supplied by Thailand in the first half of July and the quantities decreased in the second half of the month (3.00-3.75 euros per kg). The end of the Thai litchi season was marked by a distinct decrease in quality (shell oxidation). The first fruits from Israel and China appeared in the second half of the month. Trade professionals considered that those from Israel had good taste qualities and they changed hands at from 2.60 to 3.00 euros per kg (4 euros per kg for the best). Fruits from China were sold on the same basis. A few trials of imports from Taiwan were noted (Black Leaf variety) in 6 kg boxes that sold with difficulty at 2.50 euros per kg. Consumption remained limited in July.
The trend was the same in August with a very slow market. Supplies were dominated by Israel with fruits of good quality fetching an average of 3.00-3.40 euros per kg. A few batches of stoneless litchis from Taiwan were noted at the beginning of the month (6.05 to 6.80 euros per kg) and other with stones but of poor quality (condensation problems) which led operators to cease purchasing. Only Israeli litchis were still available on the market at the end of the month, with prices weakening (from 2.70 euros per kg).

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

MADAGASCAR
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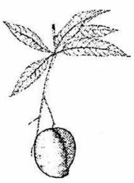
Mango

West African Season

JULY-AUGUST 2004

Mango — Imported volumes Estimates in tonnes									
Weeks	27	28	29	30	31	32	33	34	35
By air									
Mali	55	20	15	10	1	1	-	2	1
Burkina	10	3	2	1	-	-	-	-	-
Mexico	10	8	10	-	15		8	-	-
Senegal	3	12	25	20	15	8	15	5	-
By sea									
Côte d'Iv.	225	100	-	-	-	-	-	-	-
Senegal	35	145	145	110	210	180	142	152	100
Israel	1	26	530	990	1 040	800	622	670	722



The mango market was very difficult in July and August. July started well because of a fresh period of under-supply but market conditions worsened suddenly in mid-month. It entered a long slump and did not recover until the end of August.

At the end of June, the marked decreased in arrivals **by sea** from Côte d'Ivoire indicated a rapid end to the season and the start of a new interim period with limited supplies. The comparative shortage of produce kept prices up in spite of great heterogeneity of origin, variety and quality. The shortage was felt more strongly at the beginning of July, sending prices up and enabling the sale of the last batches from Côte d'Ivoire and a few from Mali under very good conditions. The market worsened suddenly in mid-July under the combined effect of a new wave of shipments from Senegal and Mexico and then from Israel and a distinct slowing of demand. Departures for holidays resulted in a transfer to the season's fruits in spite of their high prices. This situation continued throughout August with substantial shipments from Senegal, Mexico and Israel. Fruits from Mexico—first Tommy Atkins and then Kent very soon afterwards—displayed satisfactory quality overall and good colour. In contrast, Israel mangoes displayed chronic lack of colour, as in the preceding season. The fruits from Senegal were of medium quality, slightly unripe at the beginning of the season but subsequently displayed good taste characteristics. As in 2003, they were affcted by spreading dark spots after fairly long storage because of poor sales. The phenomenon accelerated in the second half of August, causing a decrease in deliveries of fruits of this origin. A slight recovery was noted at the end of the month with the decrease in shipments as a result of the end of the season in Mexico and Senegal and the end of the main holiday period.

The market for mango shipped **by air** worsened rapidly in mid-July with cumulated arrivals from Mexico, Senegal and Israel. The Mexican season turned out to be very disappointing, with quality not at all up to the that observed in 2003. Spotting appeared shortly after the start of the season and then a number of immature fruits led to disappointment among importers and buyers. In contrast, the Israeli season with the Maya variety went well, with high quality, well-coloured fruits. The quality of mangoes from Senegal was more uneven, with numerous batches lacking ripeness and colour, especially at the beginning of the season. The poor trend in the fruits from August onwards was not good for the image of this origin, which is nevertheless firmly present on the mango market every year.

Mango — Price in euros — Import stage										
Weeks 2004		27	28	29	30	31	32	33	34	35
By air (kg)										
Mali	Kent	2.50	2.50	-	-					
Burkina Faso		2.30-2.50	2.50							
Mexico	Kent	4.00-5.00	3.00-4.50	3.00-3.50	3.00	2.50-3.00	2.50-3.00	2.00-2.50	2.50-3.00	-
Senegal	Kent		2.50-3.50	2.50-3.00	2.50	2.50	2.00	2.00-2.30	2.00	
Israel	Maya			3.00	2.80-3.00	2.50-3.00	2.50-3.00	2.50	2.00-2.50	2.00-2.50
Israel	Kent								2.50-3.00	2.50-3.00
By sea (box)										
Côte d'Ivoire	Kent	4.50-5.50	5.50-6.00							
Guinea	Keitt	4.00								
Mali	Kent/Keitt	4.00-5.00	5.50-6.00	5.00-5.50	4.00-5.00	4.00-4.50				
Mexico	Kent/Tommy Atk.	5.00-6.00	5.00-6.50	5.00-5.50	5.00	4.50-5.00	4.00-4.50	4.00	3.00-4.00	
Senegal	Kent		6.00	5.50-6.00	4.00-5.00	4.00-4.50	3.50-4.50	3.50-4.00	3.00-4.00	3.50-4.50
Israel	Tommy Atkins						3.00-4.00	3.00-4.00	3.00	2.50-3.00
Brazil	Tommy Atkins						2.50-3.50	2.50-3.00	2.50-3.00	2.50-3.50