Indicators
April 2001

The main fruits

In shares by total volume and expenditure on fruits for the month in France

%	Volume	Expenditure
Apple	26	20
Orange	18	14
Banana	14	12
Strawberry	10	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 2001 / April 2000			
Price	↗	Vol.	↗

Apple

Active market (releases estimated to be up by 15 percent on last year). Local demand is still active. Export volumes are distinctly higher than last year. Prices were higher than in March and still rising in comparison with 2000.

April 2001 / April 2000			
Price	↗↗	Vol.	=

Orange

The market was still sluggish. However, releases returned to a level similar to that of 2000 after poor performance in March. The difference in price in comparison with last year became more marked.

April 2001 / April 2000			
Price	↗↗	Vol.	=↗

Banana

Local demand slowed at the beginning of the month and then recovered its dynamism after two weeks of price adjustment. In contrast, export demand slowed markedly. Prices remained much higher than in 2000 but the difference with March prices closed.

April 2001 / April 2000			
Price	↘	Vol.	↗

Strawberry

Spanish supplies were more plentiful than last year (production peak shifted into April as a result of delay in March). Demand has been modest as weather conditions have not been favourable for consumption. Prices down in comparison with last year. The French crop was little-represented until the end of the month.

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

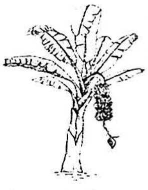
APRIL 2001

Monthly comparison: April 2001 / March 2001

Price	Volumes
↘ – 6 %	↘ – 10 %

Annual comparison: April 2001 / April 2000

Price	Volumes
↗ + 28 %	↗ + 4 %



The market was slowed by retail prices at the end of March and worsened slightly during the first fortnight in April. The position stabilised in the middle of the month thanks to the prospect of a gap in arrivals from the French West Indies and the positive impact of the price decrease on local demand. Prices were stable until week 17 and then decreased right at the end of the month after the arrival of two vessels from the French West Indies.

Local demand was slowed by high retail prices at the beginning of the month and failed to cover the marked increase in arrivals in week 14.

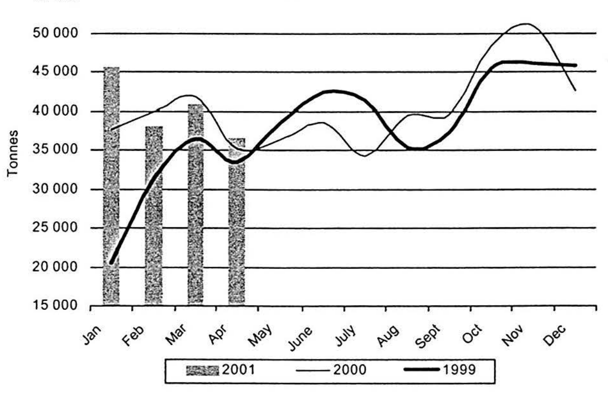
The passing on of the lower prices to the retail stage in the middle of the month led to regained activity in France.

In addition, the prospect of a gap in arrivals from Martinique in week 17 (the main vessel was delayed by a strike) encouraged the maintaining of price levels.

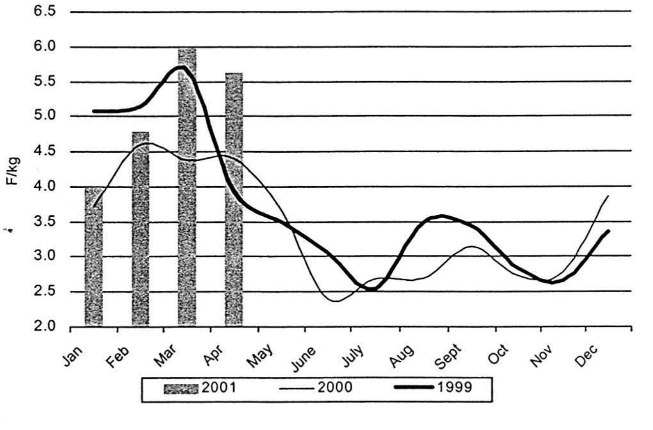
The character of the market changed right at the end of the month. On the one hand the rhythm of arrivals changed (two boats arrived from the West Indies at the same time). On the other, export demand decreased distinctly as a result of the break in supply in week 17 and increased competition from dollar bananas (prices dipped strongly in northern Europe). Prices decreased substantially in week 18.

Banana – Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin – April 2001

Tonnes	April 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Côte d'Ivoire	9 528	19	11	33 162	-4	8
Cameroon	8 885	5	47	39 465	3	25
Martinique	12 284	-14	-22	61 424	-3	23
Guadeloupe	5 862	34	88	27 107	48	179
Total	**36 559**	**4**	**9**	**161 158**	**4**	**32**

Avocado

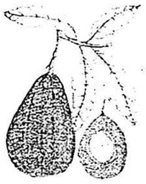
APRIL 2001

Monthly comparison: April 2001 / March 2001

Price	Volumes
↘ – 11 %	↗ + 30 %

Annual comparison: April 2001 / April 2000

Price	Volumes
↗ + 30 %	= ↗ + 1 %



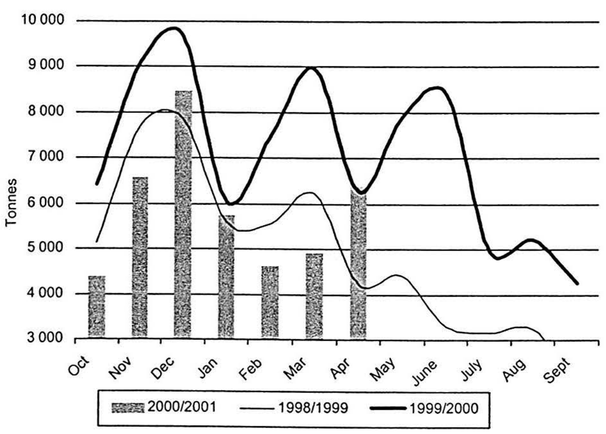
The increase in supplies from Kenya meant that the avocado market returned to levels similar to those of last year after two months of marked shortage. Although prices fell considerably they remained firm.

The green avocado market deteriorated in April. In spite of a lasting shortfall of arrivals from Israel, supplies were plentiful as a whole following substantial arrivals from Kenya. Moreover, demand continued to lack dynamism, especially during the traditional high period at Easter (small size and relatively high prices of Kenyan fruits). As a result, prices fell steadily throughout the month. In this highly competitive context, the first 'Fuerte' from South Africa arriving in week 14 tended to be sent on to northern Europe.

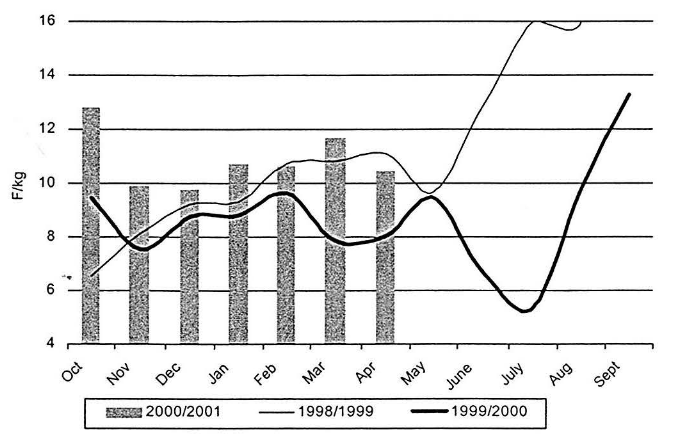
The deterioration affected the market for 'Hass' from mid-April onwards, particularly affecting the origins where the volumes available were no longer such as to interest hypermarket buyers (Israel and Mexico).

Avocado – Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin – April 2001

Tonnes	April 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Kenya	2 311	58	11	2 908	-65	-48
Spain	2 042	-5	22	15 180	-23	-33
Israel	1 172	-46	709	17 020	-24	53
South Africa	595	760	138	595	760	138
Mexico	260	0	0	7 325	-39	-16
Total	**6 380**	**1**	**51**	**43 028**	**-25**	**2**

Orange

APRIL 2001

Monthly comparison: April 2001 / March 2001

Price	Volumes
↗ + 1 %	↘ – 24 %

Annual comparison: April 2001 / April 2000

Price	Volumes
↗ + 32 %	↘ – 1 %

The orange market displayed no particular movements during the first half of the month and then changed profoundly. In spite of a continued strong increase in shipments from Morocco, overall supplies decreased considerably as a result of the very early end of the Spanish 'Navelate' season and a very modest crop of 'Valencia Late'. Prices began to rise steadily in spite of continued sluggish demand.

The market moved little during the first half of the month. Much larger shipments than last year from Morocco compensated markedly short supplies from Spain. Prices were stable in a market that continued to lack atmosphere.

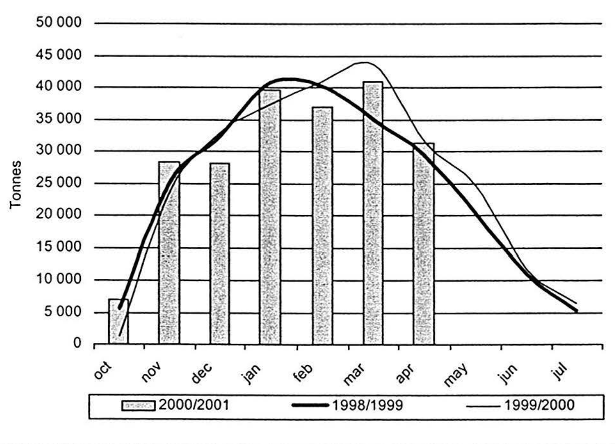
Supplies then decreased considerably in week 16. Indeed, 'Navelate' volumes became marginal whereas supplies of 'Valencia Late' had not gained momentum, the result of strong speculation at production (small harvest). The shortage on overall supplies thus increased considerably, causing an upward price movement in spite of the continuing modest demand.

The 'Maltese' market displayed the same trend. The abundance of small grade fruits and the appearance of quality problems at the end of the season nevertheless restrained the rise in prices until the end of the month.

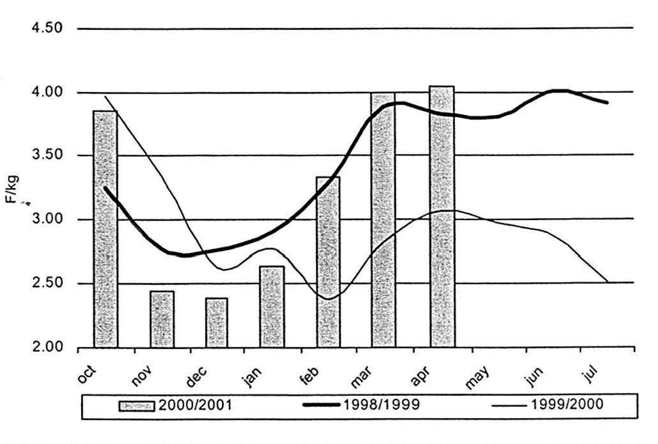
Supplies were completed by a few batches from Greece and Egypt.

Orange – Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin – April 2001

Tonnes	April 2001	Comparisons (%) 2001/2000	Comparisons (%) 2001/1999	Season total 2000/2001	Comparisons (%) 2001/2000	Comparisons (%) 2001/1999
Spain	19 210	-20	3	173 056	-5	-1
Morocco*	8 845	160	5	18 056	242	42
Tunisia	3 250	-26	27	21 189	-14	1
Total	**31 305**	**-1**	**6**	**212 301**	**0**	**2**

* Maroc Late only

Easy Peelers

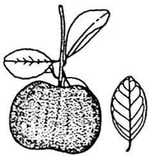
2000 / 2001 season

Comparison with the preceding season

Price	Volumes
↗ + 25 %	↘ - 3 %

Annual comparison: March 2001 / March 2000

Price	Volumes
↗ + 8 %	↘ - 10 %

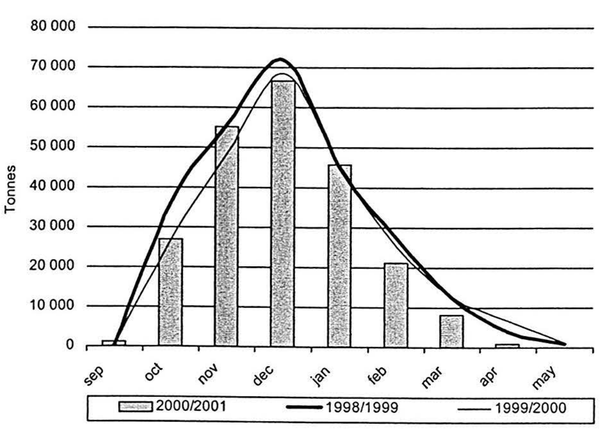


The balance for the 2000/2001 season is extremely positive. The total volumes marketed were only a little down and prices rose significantly. This paradox is explained by a marked shortage of Spanish season clementines accentuated by a simultaneous decrease in the volumes from Corsica and Morocco.

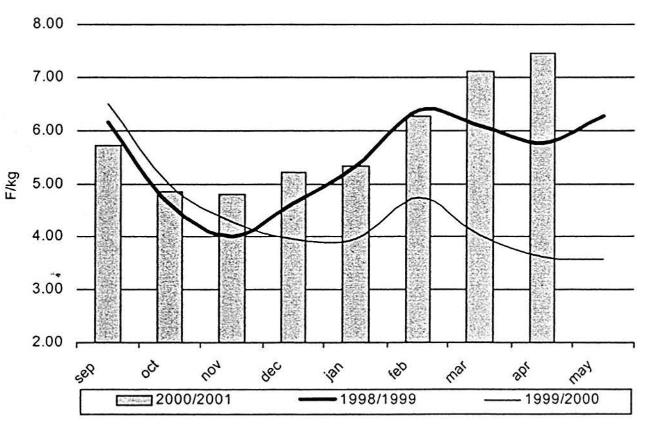
After a fairly plentiful supplies of 'Marisol' at the beginning of the season, Spanish shipments of clementines displayed a distinct shortfall (especially for 'Oroval' and 'Nules'). The decrease was aggravated by the limited arrivals from Corsica and Morocco. Indeed, production was markedly down on last year in both the latter countries. Prices then swung upwards from mid-November and remained firm in spite of the compensation offered by the early development of Spanish hybrids ('Clémenvilla', followed by 'Fortuna'). Indeed, these two varieties enabled overall supplies to reach levels similar to the preceding season until January, in spite of a Moroccan shortfall that was even more marked in hybrids than in clementines. The deficit became truly significant in February and worsened in March and April, leading to the rocketing of prices.

Easy peelers– Estimated market releases in France

Volumes



Price at import stage



Estimated French figures for marketing of the main origins — 2000 / 2001 season

Tonnes	2000/2001 season	Comparisons (%)	
		Preceding season	S-2 season
Spain	192 455	2	-8
Morocco	16 952	-36	-35
Corsica	16 691	-15	-3
Total	**226 098**	**-3**	**-10**

Grapefruit

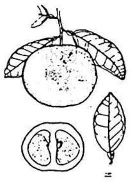
APRIL 2001

Monthly comparison: April 2001 / March 2001

Price	Volumes
➚ + 9 %	➘ – 4 %

Annual comparison: April 2001 / April 2000

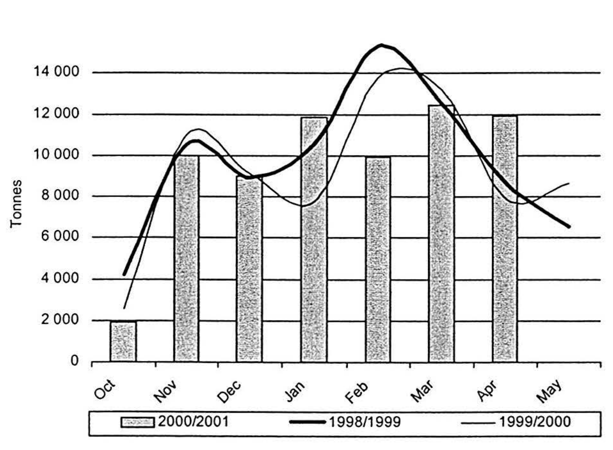
Price	Volumes
➚ + 14 %	➚➚ + 51 %

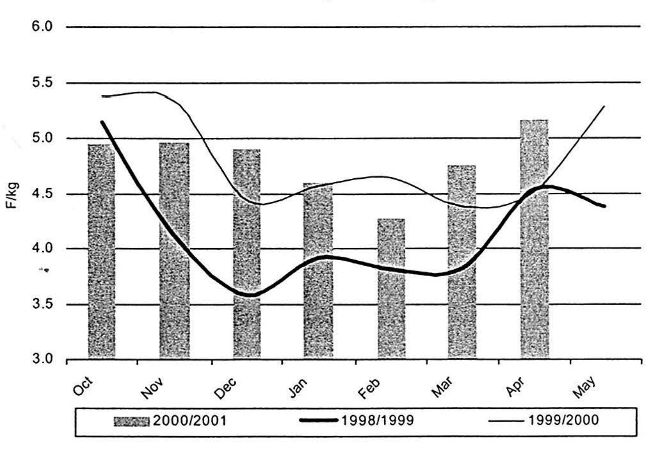


The market displayed unusual dynamism in April. The volumes sold were little down on March levels, whereas the decrease had been 30 to 40% during the two previous seasons. Poor performance in February was certainly not unrelated to this spectacular increase. In parallel, the average price increased markedly, reaching the highest level of the year.

The March recovery enabled operators to regain confidence in the market after the strong decrease in sales in February.
As a result, orders for fruits from Florida were considerable in April even though the dollar is still strong and production prices were still high. Arrivals in the EU reached nearly a million cases.
Israeli releases increased in parallel, enabling operators working with this origin to catch up a little, although the lag remained significant.
Demand was particularly active, in particular thanks to a wave of hypermarket special offers (after the postponing of certain operations that were not run in February?).
Prices rose steadily throughout the month.

Grapefruit – Estimated market releases in France





Estimated market releases in France by origin – April 2001

Tonnes	April 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Florida	9 435	81	59	54 461	7	-4
Israel	2 389	19	-7	7 359	-16	-27
Turkey	117	-82	0	5 298	-7	42
Total	**11 941**	**51**	**38**	**67 118**	**3**	**0**