Indicators
May 2001

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

The main fruits

%	Volumes	Expenditure
Apple	24	17
Banana	15	10
Orange	14	9
Strawberry	12	24

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

Apple

May 2001 / May 2000			
Price	↗↗	Vol.	↗

The market were still livelier than last year (estimated sales up by 6%) in spite of a distinct slowing of exports. Prices remain distinctly higher than last season's (+ 20%).

Banana

May 2001 / May 2000			
Price	↗↗	Vol.	↗

Supplies were substantially larger than in April and larger than last year's. However, prices were much smoother although the market was much disturbed by erratic arrivals from the West Indies.

Orange

May 2001 / May 2000			
Price	↗↗	Vol.	↘

Marked under-supply in spite of only medium consumer interest. Supplies were in fact well down on last year's levels. Prices attained record levels.

Strawberry

May 2001 / May 2000			
Price	↗	Vol.	↘

Total supplies were substantially down on last year in spite of nearly three times the amount of Spanish fruits. Indeed, the deficit in French production was marked, especially with regard to 'Gariguette' (yields and quality have been affected by unfavourable weather conditions). Prices were up by nearly 30%.

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

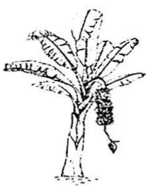
MAY 2001

Monthly comparison: May 2001 / April 2001

Price	Volumes
↘ – 20%	↗ + 25%

Annual comparison: May 2001 / May 2000

Price	Volumes
↗ + 28%	↗ + 7%



May sales were satisfactory as both prices and volumes were distinctly higher than in 2000. Operators were nevertheless frustrated as the balance could have been much better. The erratic arrivals of West Indian bananas as a result of an industrial dispute in Guadeloupe had serious consequences for the market.

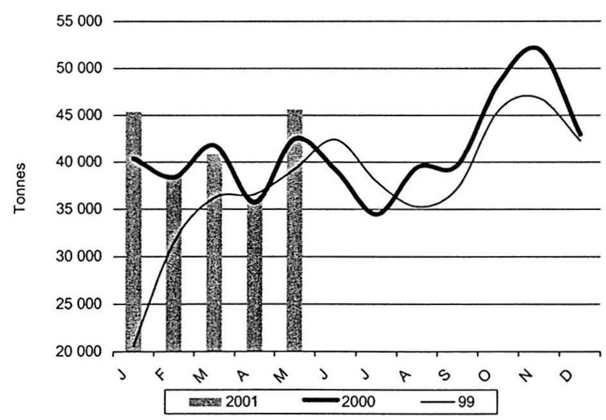
In spite of a substantial decrease in arrivals from Africa (the traditional decrease in production at this time of year was aggravated by gales in Cameroon), supplies increased steadily. The delays in loading in Guadeloupe caused by strikes resulted in the arrival of fruits expected in April in two batches in weeks 18 and 20.

In addition, local demand which had been strong in the first half of the month then slowed (heat wave and retail prices 15% higher than in 2000). Likewise, exports to the UK and Germany suffered from more marked competition by dollar bananas, whereas the markets in the Iberian peninsula were still affected by large volumes from the Canaries.

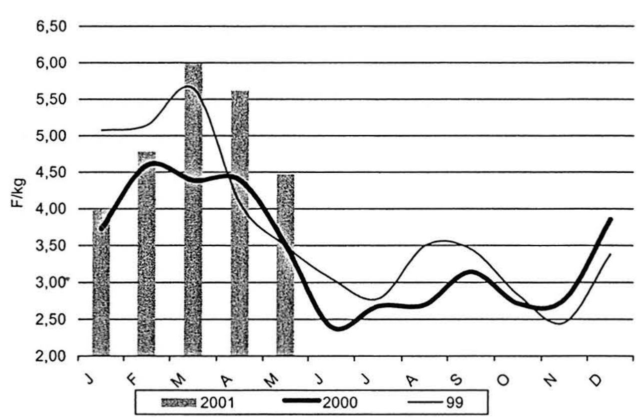
As a result, prices steadily fell during the month.

Banana – Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin – May 2001

Tonnes	May 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Côte d'Ivoire	9 978	3	14	43 141	-2	7
Cameroon	8 995	3	18	48 460	5	21
Martinique	17 975	-1	4	79 398	1	20
Guadeloupe	8 686	48	55	36 181	44	143
Total	**45 634**	**24**	**22**	**207 180**	**7**	**32**

Avocado

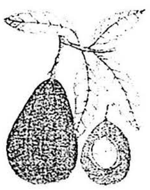
MAY 2001

Monthly comparison: May 2001 / April 2001

Price	Volumes
↘ – 1%	↘ – 41%

Annual comparison: May 2001 / May 2000

Price	Volumes
↘ – 9%	↘ – 29%

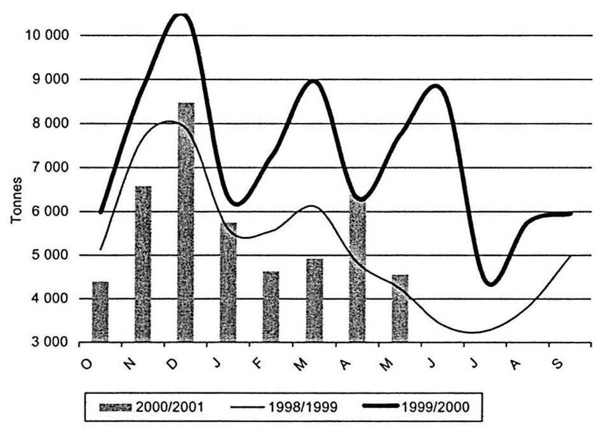


The May performance of the avocado market was the worst since the beginning of the season. In spite of moderate overall supplies, prices plummeted in comparison with those of April and returned to 1999 levels. Strong pressure from Kenya and a large number of operators and origins prevented the market from regaining its balance.

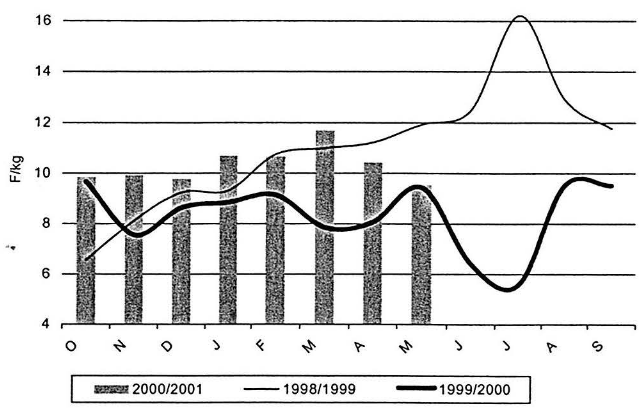
The **green avocado** market was extremely difficult for most of May because of over-supply resulting from extremely large shipments from Kenya. Fruits from South Africa were nevertheless available in limited quantities (deficit of 'Fuerte' and concentration of flows to northern Europe) and the season for 'Reed' from Israel finished early. The quality problem resulting from the stocks of 'Fuerte' from Kenya and the large number of operators working continued to worsen the situation. Prices did not recover until the end of the month when a gap occurred in arrivals from both Kenya and South Africa. In contrast, the market for **'Hass'** recovered much more quickly. Indeed, Spain was practically alone on the market from week 19 onwards and, in addition, shipped end-of-season volumes. Prices increased and reached historic levels at the end of the month.

Avocado – Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin – May 2001

Tonnes	May 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Kenya	1 627	44	25	4 535	0	9
South Africa	1 640	-26	42	2 235	-3	43
Spain	923	-74	-48	16 103	-31	-34
Israel	372	-42	-	17 393	-24	55
Mexico	0	-100	-	7 325	-40	-16
Total	**4 562**	**-45**	**-19**	**47 591**	**-26**	**-3**

Orange

MAY 2001

Monthly comparison: May 2001 / April 2001

Price	Volumes
↗ + 25%	↘ – 30%

Annual comparison: May 2001 / May 2000

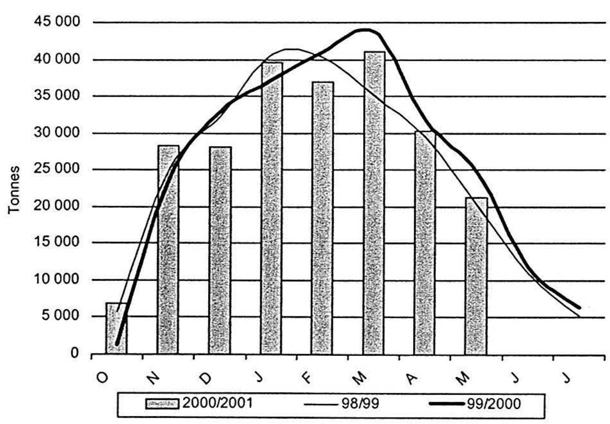
Price	Volumes
↗↗ + 71%	↘ – 14%

Under-supply worsened in comparison with April as the increase in the volume of late fruits did not make up for the shortage of semi-lates. Prices continued to rise to record levels at the end of the month (+ 71% in comparison with 2000), in spite of only mediocre demand.

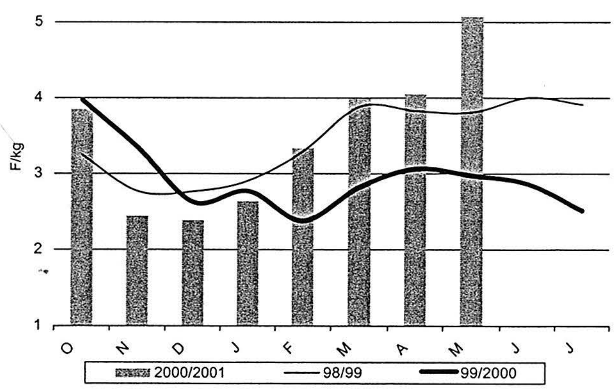
The net increase in the volume of late oranges of all origins (Spain, Morocco and complementary sources such as Israel, Greece and Egypt) did not counter-balance the early end of Navelate from Spain. Demand was only average in the first half of the month and decreased from week 20 onwards because of increased demand for summer fruits and the speculative purchases in the previous weeks. However, this did not hinder the increase in the price of quality fruits. The latter reached very high levels at the end of the month. Arrivals of South African Navels were only substantial at the end of the month and did not affect the market.

Orange – Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin – May 2001

Tonnes	May 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Spain	12 554	-39	-8	185 610	-2	-8
Morocco*	8 273	135	27	25 250	187	31
Tunisia	372	-30	128	21 560	-14	2
Total	**21 199**	**-14**	**5**	**232 420**	**-2**	**2**

* Maroc late only

Grapefruit

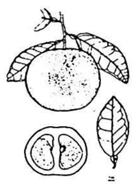
MAY 2001

Monthly comparison: May 2001 / April 2001

Price	Volumes
↗ + 5%	↘ – 10%

Annual comparison: May 2001 / May 2000

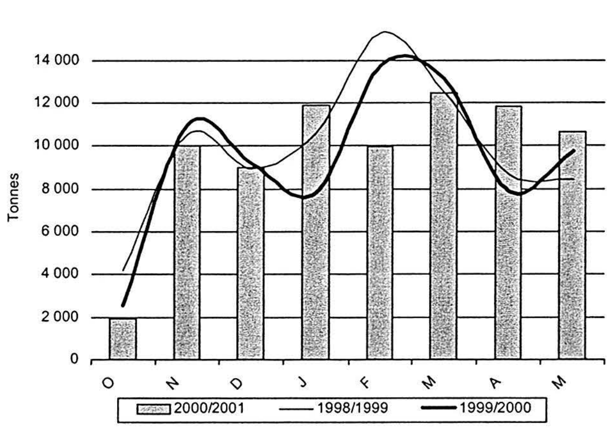
Price	Volumes
↗ + 11%	↗ + 10%

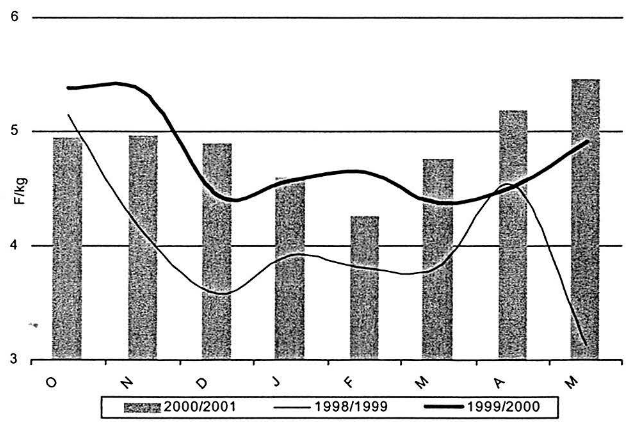


Grapefruit continued to do well on a market where price and volume were up by about 10% in comparison with May 2000. Particularly dynamic demand and exemplary successions of origins account for this new excellent performance.

Substantial volumes were available (+10% in comparison with last year) in spite of a distinct decrease in winter origins. Demand was nevertheless particularly dynamic throughout the month (marked deficit in supplies of fresh fruits and especially oranges).
In addition, competition between origins is very slight as there is little overlapping of origins. Indeed, the small volumes from Florida in week 18 allowed Israel to take control of the market under good conditions. Israeli operators sold the last significant volumes in week 21 when supplies of summer origins was developing well. Prices were therefore particularly firm throughout the month.

Grapefruit – Estimated market releases in France





Estimated market releases in France by origin – May 2001

Tonnes	May 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Florida	3 046	-37	512	57 419	3	0
Argentina	2 911	412	30	2 911	412	30
Israel	2 494	-22	-34	9 833	-18	-29
South Africa	2 208	111	16	2 208	111	16
Turkey	0	-100	-	5 298	-7	42
Total	**10 659**	**10**	**26**	**77 669**	**4**	**-2**