# Indicators

## June 2001

**The main fruits**

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

| % | Volumes | Expenditure |
|---|---|---|
| **Peach/Nect.** | 19 | 20 |
| **Apple** | 16 | 11 |
| **Banana** | 13 | 8 |
| **Apricot** | 12 | 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.*



**Peach/Nect.**

| June 2001 / June 2000 | | | |
|---|---|---|---|
| Price | ↗ | Vol. | ↘ |

Supplies were substantially down on last year's levels. Indeed, white peach harvest figures are well down and the nectarine season started late. Prices were up markedly.

**Apple**

| June 2001 / June 2000 | | | |
|---|---|---|---|
| Price | ↗↗ | Vol. | ↘ |

Availability of French production was more limited than in 2000 (only the last Golden Delicious and certain late varieties were still available). Further, arrivals of imported apples were much smaller. Prices remained much higher than last year's.

**Banana**

| June 2001 / June 2000 | | | |
|---|---|---|---|
| Price | ↗↗ | Vol. | ↘ |

Supply volumes in France were only average whereas export flows were particularly active as a result of a shortage of dollar bananas, especially in northern Europe. Prices were considerably higher than last year.

**Apricot**

| June 2001 / June 2000 | | | |
|---|---|---|---|
| Price | ↗↗ | Vol. | ↘↘ |

French production is down considerably and the season started late. Prices were markedly high.

### 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

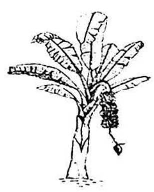
JUNE 2001

**Monthly comparison: June 2001 / May 2001**

| Price | Volumes |
|---|---|
| =↘ – 1% | ↘ – 22% |

**Annual comparison: June 2001 / June 2000**

| Price | Volumes |
|---|---|
| ↗↗ + 85% | ↘ – 10% |

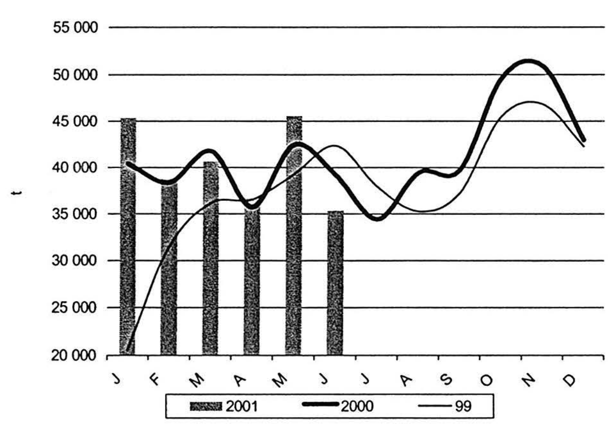


**Summer 2001 started well. Indeed, June prices have not been as strong for three years. This good performance is explained mainly by the recovery of export movements and the modest volumes of fruits arriving from the West Indies and Africa.**

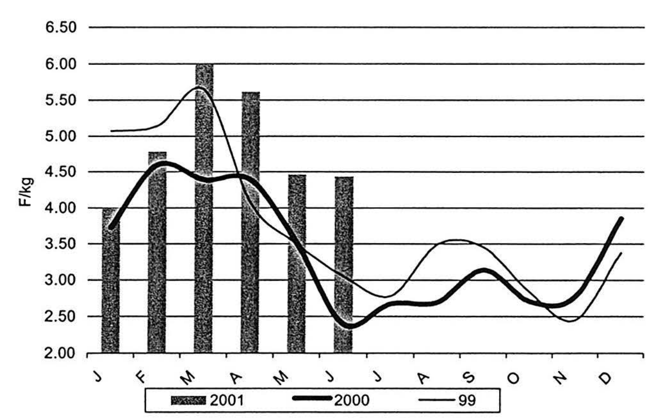
The market was still difficult at the end of May and then improved rapidly at the beginning of June. The price decrease decided in week 23 had a positive effect in spite of its probably excessive scale. It made it possible to market the volumes still available from the previous shipping arrivals and stimulate sales on both the local and export markets. Prices thus firmed again in week 24 and increased for the rest of the month. Although arrivals were irregular (as a result of an industrial dispute in Guadeloupe), the total was slightly lower than in the two previous seasons. Furthermore, demand was increasingly active in spite of a slow local market. The export flows to Germany, the United Kingdom and Italy increased because of the limited arrivals of dollar bananas (20% down on June 2000) and a shortage of licences.

## Banana – Estimated market releases in France

**Volumes**




**Price at import stage**




## Estimated market releases in France by origin – June 2001

| Tonnes | June 2001 | Comparisons (%) | | Season total | Comparisons (%) | |
|---|---|---|---|---|---|---|
| | | 2001/2000 | 2001/1999 | 2000/2001 | 2001/2000 | 2001/1999 |
| Côte d'Ivoire | 7 453 | -9 | -13 | 50 594 | -3 | 3 |
| Cameroon | 7 648 | 3 | 19 | 56 107 | 3 | 21 |
| Martinique | 13 604 | -23 | -26 | 93 002 | -6 | 7 |
| Guadeloupe | 6 659 | 15 | -26 | 42 912 | 35 | 75 |
| **Total** | **35 364** | **-10** | **-17** | **242 615** | **2** | **18** |

# Avocado

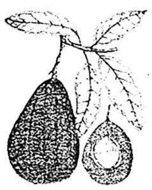
JUNE 2001

**Monthly comparison: June 2001 / May 2001**

| Price | Volumes |
|---|---|
| ↗ + 10% | ↘ – 28% |

**Annual comparison: June 2001 / June 2000**

| Price | Volumes |
|---|---|
| ↗ + 109% | ↘ – 62% |

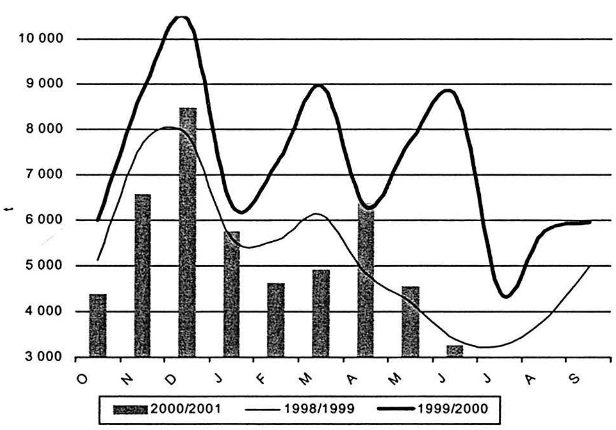


**After more active arrivals in April and May, the avocado market was again under-supplied in June. Winter origins were almost completely absent and South African fruits were particularly discreet. Prices increased spectacularly and regained the levels of the 1999/2000 season.**

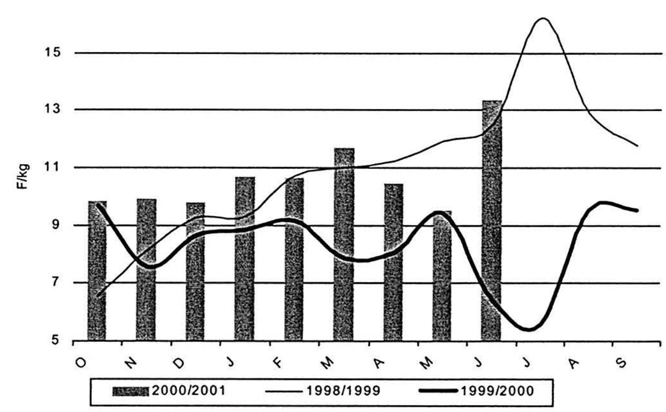
The supply of green varieties was about 30% down on last year's level. Indeed, arrivals from Kenya were plentiful in week 23 and then decreased very rapidly because the difficult market conditions at the end of May encouraged importers to reduce their orders. Furthermore, the South African Fuerte season began a very early decline in week 22 (cumulated arrivals for the month were down by 80% for this variety in comparison with last year).
The situation was identical for Hass. The South African season started early and total monthly arrivals were up on last year. However, this did not make up for the almost total absence of Spanish fruits, especially as importers of South African avocados focused less than usual on the French market.

## Avocado – Estimated market releases in France

**Volumes**




**Price at import stage**




## Estimated market releases in France by origin – June 2001

| Tonnes | June 2001 | Comparisons (%) | | Season total | Comparisons (%) | |
|---|---|---|---|---|---|---|
| | | 2001/2000 | 2001/1999 | 2000/2001 | 2001/2000 | 2001/1999 |
| Kenya | 1 259 | -30 | 2 | 5 794 | -8 | 8 |
| South Africa | 1 805 | -62 | 17 | 4 040 | -43 | 8 |
| Spain | 202 | -90 | - | 16 305 | -35 | -34 |
| Israel | 8 | -94 | - | 17 400 | -25 | 55 |
| Mexico | 0 | -100 | - | 7 325 | -40 | -16 |
| **Total** | **3 274** | **-62** | **-4** | **50 864** | **-31** | **-3** |

# Orange

**JUNE 2001**

| Monthly comparison: June 2001 / May 2001 | |
|---|---|
| Price | Volumes |
| ↗ + 21% | ↘↘ – 48% |

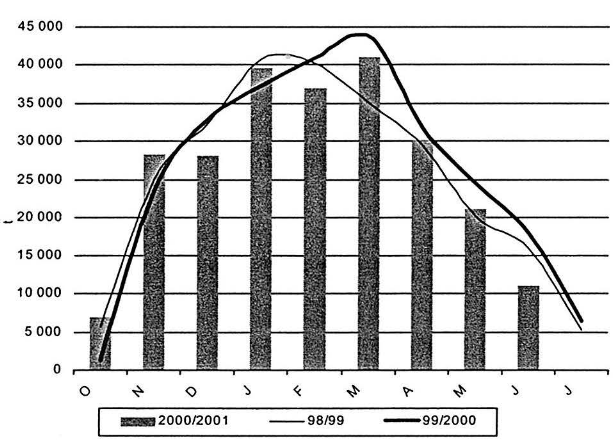
| Annual comparison: June 2001 / June 2000 | |
|---|---|
| Price | Volumes |
| ↗↗ + 80% | ↘↘ – 38% |

**The shortage of supplies was particularly marked. The winter seasons finished very early and the volumes of Navel from South Africa were well down on last year. Prices increased strongly and reached a historical level.**

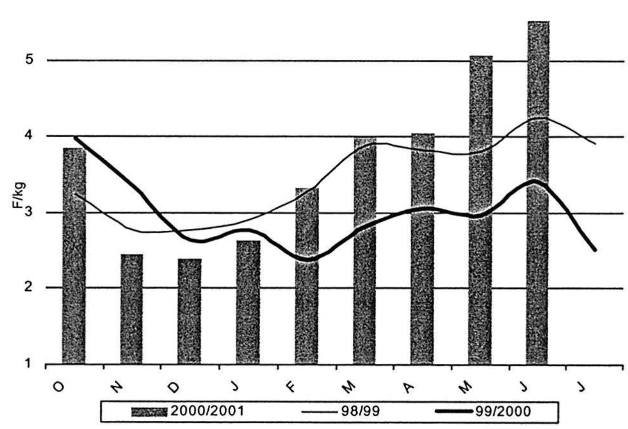
The volumes of late fruits were much smaller than last year. Indeed, although the Moroccan season finished at the end of May as usual, this was not true for Valencia from Spain. Supplies of this variety decreased by 35% as a result of a marked production deficit. This shortage of late fruits was also aggravated by a distinct decrease in arrivals of Navel from South Africa as the export potential is smaller than last year as a result of problems of black spot disease. In addition, a larger proportion of the volumes was reserved for customers in North America and the Middle East (the prices fetched are very attractive). The shortage of supplies in France therefore approached 40%, justifying the historic price level.

## Orange – Estimated market releases in France

Volumes




Price at import stage




## Estimated market releases in France by origin – June 2001

| Tonnes | June 2001 | Comparisons (%) | | Season total | Comparisons (%) | |
|---|---|---|---|---|---|---|
| | | 2001/2000 | 2001/1999 | 2000/2001 | 2001/2000 | 2001/1999 |
| Spain | 5 757 | -50 | -35 | 191 366 | -11 | -3 |
| South Africa | 5 346 | -12 | 10 | 5 346 | -12 | 10 |
| Tunisia | 0 | - | - | 21 560 | -14 | 2 |
| Morocco | 0 | -100 | -100 | 25 250 | 178 | 55 |
| **Total** | **11 103** | **-38** | **-30** | **243 522** | **-4** | **0** |

# Grapefruit

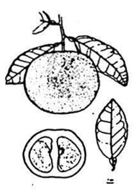
JUNE 2001

**Monthly comparison: June 2001 / May 2001**

| Price | Volumes |
|---|---|
| = ↘ – 1% | = |

**Annual comparison: June 2001 / June 2000**

| Price | Volumes |
|---|---|
| ↗ + 13% | ↘ – 25% |



**The quantities available reached only an average level as a result of the measured arrival of summer origins and the very early disappearance of fruits from Florida and Israel. Demand was meanwhile very active in June. As a result, prices did not decrease in comparison with May and the stocks available at the beginning of July are very limited.**

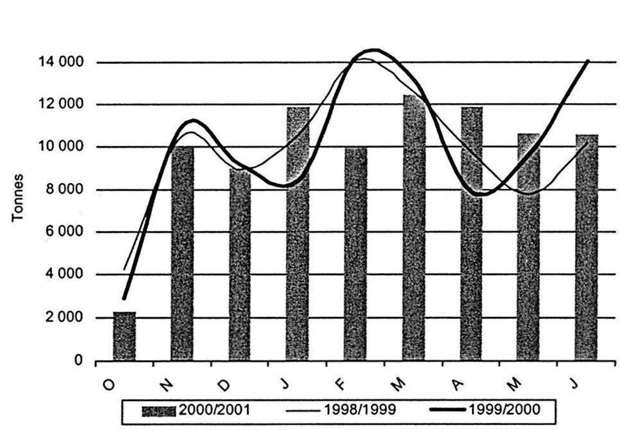
Arrivals from South Africa were much smaller than last year. Cumulated shipments to all destinations in June were down by about 10% in comparison with last year. It also seems that a smaller proportion of the potential was shipped to the EU market, a trend common to the other citrus fruits. The decrease in supplies from Argentina was even more marked. The early end of fruits from Florida and particularly from Israel accentuated the decrease in quantities available.

Demand was still supported by numerous promotion operations and has been particularly strong (with grapefruit replacing oranges, which have been particularly scarce this season).

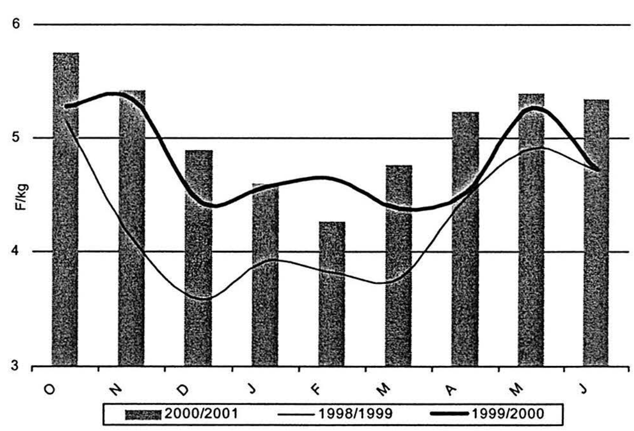
Prices therefore fell only slightly in comparison with May and remained particularly firm.

## Grapefruit – Estimated market releases in France

**Volumes**




**Price at import stage**




## Estimated market releases in France by origin – June 2001

| Tonnes | June 2001 | Comparisons (%) | | Season total | Comparisons (%) | |
|---|---|---|---|---|---|---|
| | | 2001/2000 | 2001/1999 | 2000/2001 | 2001/2000 | 2001/1999 |
| South Africa | 6 315 | -7 | 9 | 8 523 | 11 | 20 |
| Argentina | 4 214 | -12 | 24 | 7 190 | 32 | 28 |
| Israel | 42 | -98 | -96 | 9 875 | -28 | -33 |
| Florida | 14 | -98 | - | 57 432 | 0 | 0 |
| Turkey | - | - | - | 5 670 | -9 | 50 |
| **Total** | **10 585** | **-25** | **37** | **88 690** | **-2** | **0** |

# Lemon

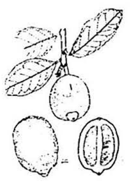
**JUNE 2001**

**Monthly comparison: June 2001 / May 2001**

| Price | Volumes |
|---|---|
| ↗ + 12% | ↗ + 39% |

**Annual comparison: June 2001 / June 2000**

| Price | Volumes |
|---|---|
| ↗ + 13% | = ↘ – 2% |



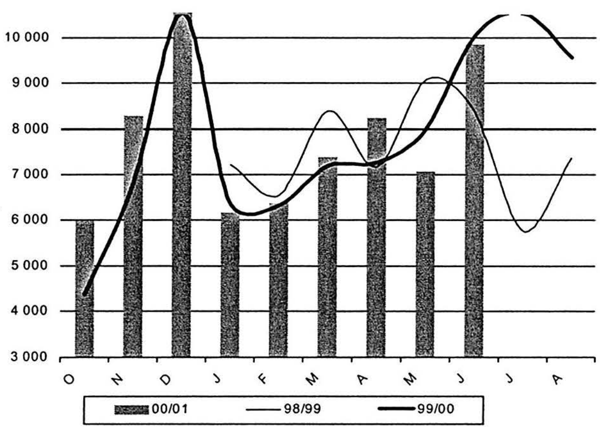
**The average price was distinctly higher even though the volumes available were much the same as last year's. Indeed, although Spain has conserved a clear position as leader, more shipments arrived from Argentina than in 2000, resulting in higher prices.**

Spain conserved a quasi-monopoly for most of the month with volumes 13% down on last year. Argentina started its season later than expected because the loading of the first ships was delayed by rain. As a result, the volumes were limited and only increased significantly in week 26. Outlets for Eureka were limited, remaining mainly the business of specialists until the end of the month when the first supermarket referencing began and the quality of Verna became more varied.

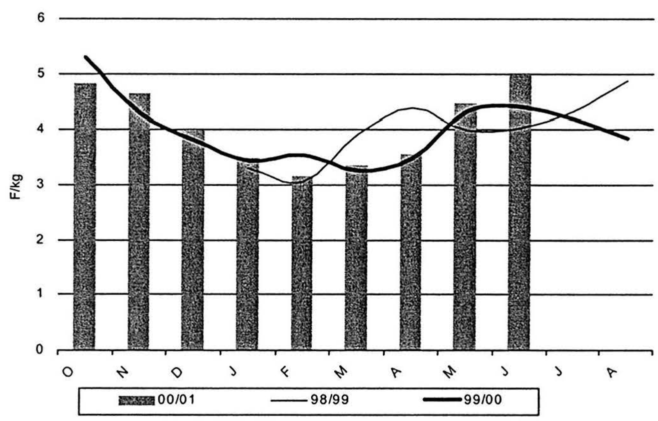
The average price was distinctly higher than last year for fruits from both Argentina and Spain.

## Lemon – Estimated market releases in France

**Volumes**




**Price at import stage**




## Estimated market releases in France by origin – June 2001

| Tonnes | June 2001 | Comparisons (%) | | Season total | Comparisons (%) | |
|---|---|---|---|---|---|---|
| | | 2001/2000 | 2001/1999 | 2000/2001 | 2001/2000 | 2001/1999 |
| Spain | 6 240 | -13 | 11 | 68 668 | 7 | 60 |
| Argentina | 3 593 | 26 | 31 | 3 593 | 24 | -4 |
| **Total** | **9 833** | **-2** | **18** | **72 261** | **8** | **55** |