

Indicators

September 2001

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

The main fruits	%	Volumes	Expenditure
Grapes		23	24
Apple		20	16
Peach/Nect.		14	16

Pages

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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Sept. 2001 / Sept. 2000			
Price	=	Vol.	=

Grapes

French production has been very similar to last year's. However, Italian production has been greater, especially in the supermarket sector, in spite of the substantially smaller crop in southern Italy. The prices are the same as those of the difficult 2000 season.

Sept. 2001 / Sept. 2000			
Price	↗	Vol.	=↘

Apple

The volumes available are probably slightly smaller than last year's (similar harvested production at the end of September, but the potential is down by 6 percent). Prices are firming distinctly, even for Gala which is nevertheless available in larger quantities this season.

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

Peach/Nect.

Unlike the case of the other varieties, the volumes of late fruits have been 15 to 20 percent greater than last year. The price at shipping is substantially lower than it was in August but is still slightly higher than it was in 2000.

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

SEPTEMBER 2001

Monthly comparison: Sept. 2001 / August 2001

Price

↗ + 4 %

Volumes

↘ - 4 %

Annual comparison: Sept. 2001 / Sept. 2000

Price

↗ + 31 %

Volumes

↘ - 16 %



The results are positive. Indeed, a price increase of over 30 percent in comparison with last year more than makes up for the distinct decrease in the quantities from the West Indies and Africa sold in France. However, local demand is more sluggish than usual and operators are puzzled.

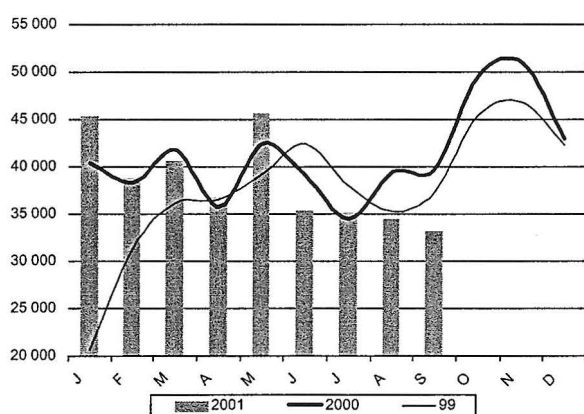
Local demand was particularly lack-lustre in September and the number of supermarket promotion operations for bananas has decreased in comparison with last year. It would also seem that these operations have not had the stimulating effect expected, probably because of the restrictions concerning the

specifying of prices in catalogues (French law of 15 May 2001). Nevertheless, prices stood firm until the middle of the month thanks to the still modest direct shipments in France and an active export flow to northern Europe, which is still short of dollar bananas. The increase in supplies of the latter from week 38 onwards

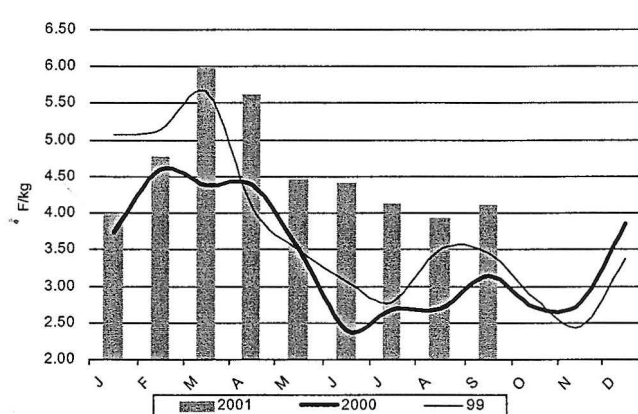
and the subsequent decrease in German demand upset the balance of the French market even though it was markedly under-supplied with West Indian fruits. Prices are weakening.

Banana — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — September 2001

Tonnes	September 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999		2001/2000	2001/1999
Côte d'Ivoire	6 704	5	9	70 847	1	5
Cameroon	6 615	- 10	4	78 588	6	18
Martinique	13 909	- 25	- 24	134 211	- 14	- 1
Guadeloupe	5 944	- 20	- 8	61 664	18	32
Total	33 172	- 16	- 11	345 310	- 2	9

Avocado

SEPTEMBER 2001

Monthly comparison: Sept. 2001 / August 2001

Price

= 0 %

Volumes

↘ - 28 %

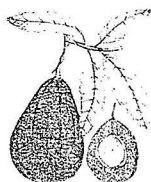
Annual comparison: Sept. 2001 / Sept. 2000

Price

↘ - 25 %

Volumes

↘ - 10 %



September is traditionally one of the best months of the year for avocado (average price greater than FrF10.50 per kg over the past five years). September 2001 was mediocre even though shipments returned to a modest level. Substantial problems of quality and weak demand slowed the price recovery that started at the end of August.

The market seemed to improve at the beginning of the month as the early slowing of South African shipments was confirmed. Thus, shipments totalled less than the average for recent years in spite of the very early start of Mexican shipments and continued increase in the quantities of Fuerte from

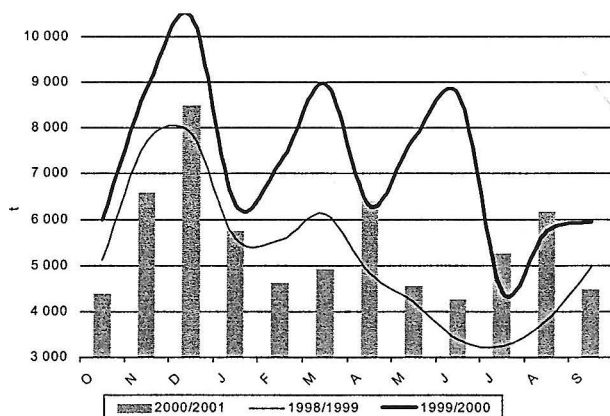
Kenya in September.

Nevertheless, large stocks and frequently uneven quality (with stock rotation problems in August) were still noticeable at the beginning of the month for both Fuerte and Hass. In addition, the quality of a significant proportion of the fresh fruits arriving from

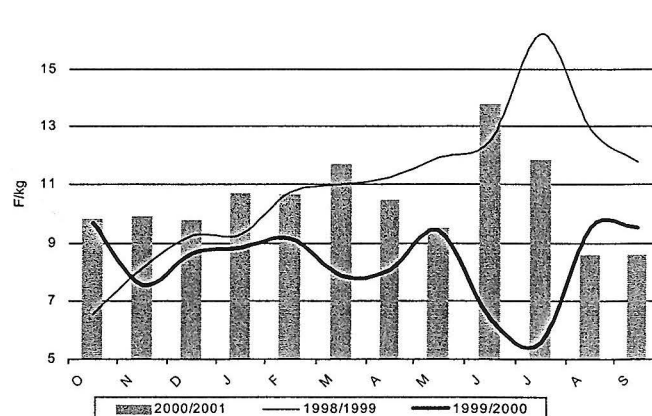
Mexico was fragile. Demand was therefore hesitant, especially as the legal restrictions on promotion operations in France (law of 15 May 2001) seemed to aggravate the sluggishness observed. Price recovery was only modest in comparison with the decrease in the arrival of shipments.

Avocado — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — September 2001

Tonnes	September 2001	Comparisons (%)		Season total 2000/2001	Comparisons (%)	
		2001/2000	2001/1999		2001/2000	2001/1999
Kenya	1 099	118	0	10 018	26	75
RSA	1 600	- 57	- 31	13 178	- 32	9
Spain	491	117	- 4	491	117	- 4
Mexico	1 293	- 11	- 40	3 056	86	7
Total	4 483	- 25	- 10	26 743	- 23	7

Orange

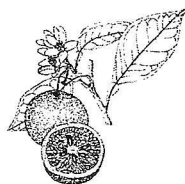
SEPTEMBER 2001

Monthly comparison: Sept. 2001 / August 2001

Price	Volumes
↘ - 26 %	↘ - 22 %

Annual comparison: Sept. 2001 / Sept. 2000

Price	Volumes
↗ + 4 %	↘ - 11 %



Prices returned to average levels in September after the euphoria of the summer. Although arrivals have decreased, supplies remained ample with large stocks available, especially of small grades.

Supply pressure remained strong. Although shipments of Valencia from South Africa started to decrease at an early date, the stocks available kept the market under pressure, especially with regard to small fruits (88/105). Furthermore, shipments from Argentina were still substantial

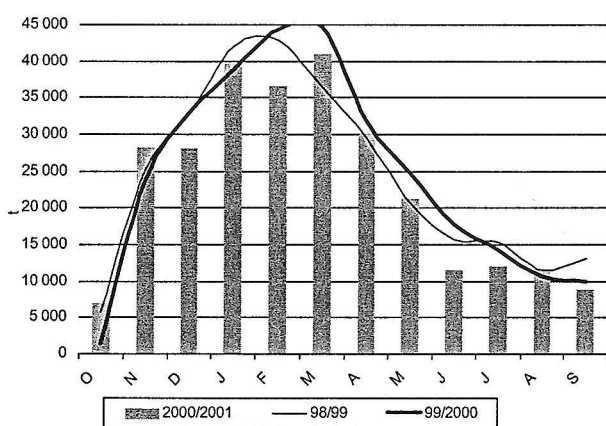
whereas large stocks were already held with a cumulated figure in the EU of more than 89 000 tonnes at the end of September, five times the amount held in an average year.

As a result, even though demand was more active than at the beginning of the month, in

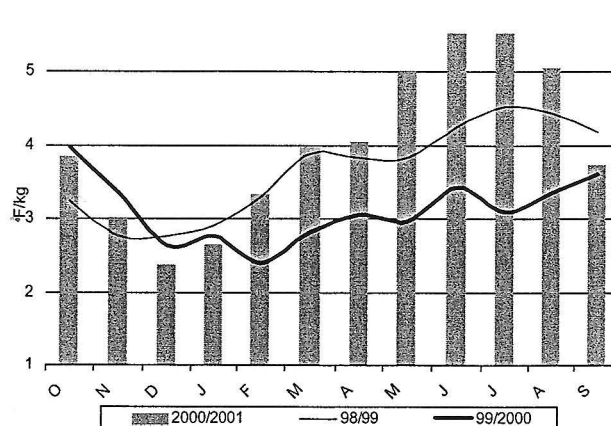
particular with the start of promotion operations, prices continued to fall. The average price for the month was very similar to last year's.

Orange — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — September 2001

Tonnes	September 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999		2001/2000	2001/1999
RSA	8 899	- 11	- 32	34 111	6	- 12

Grapefruit

SEPTEMBER 2001

Monthly comparison: Sept. 2001 / August 2001

Price



Volumes

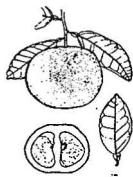


Annual comparison: Sept. 2001 / Sept. 2000

Price



Volumes



The grapefruit market was very distinctly under-supplied in September. Although prices were lower than in August they were noticeably higher than last year.

The market was practically deserted during the first fortnight in September. Only the last batches from Argentina and the very first batches from Honduras were available.

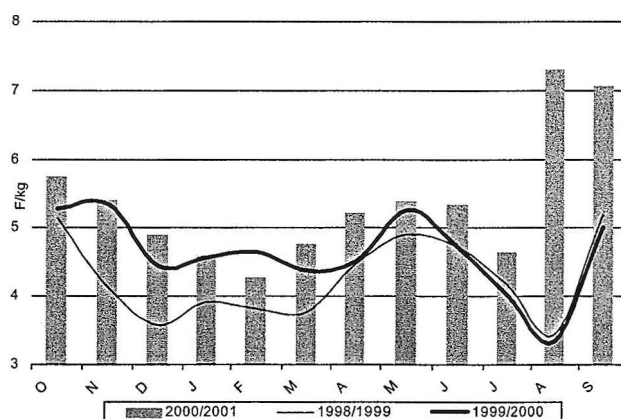
Supplies filled out in week 38 with the start of shipments from Honduras, the main operator, and the first arrivals from Cuba and then from the Bahamas in week 39.

The modest demand was amply sufficient to handle these volumes. Price adjustments were only minor.

Grapefruit — Estimated market releases in France

We are unable to provide information about the sales in France in September as we do not possess information about shipments from Honduras and Cuba.

Price at import stage



Lemon

SEPTEMBER 2001

Monthly comparison: Sept. 2001 / August 2001

Price

↓ - 5 %

Volumes

↓ - 40 %

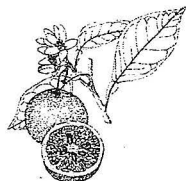
Annual comparison: Sept. 2001 / Sept. 2000

Price

↑ +10 %

Volumes

↑ + 64 %



The large shipments from Argentina combined with the traditional decrease in demand at the end of the holiday season meant that the market was unable to conserve its balance. Nevertheless, performances were satisfactory in comparison with the very special 2000 season (early end and low prices because of quality problems).

As usual, demand slowed considerably after the end of the summer holidays.

In parallel, supplies from Argentina were more plentiful than the average of recent seasons and than in 2000, when the season

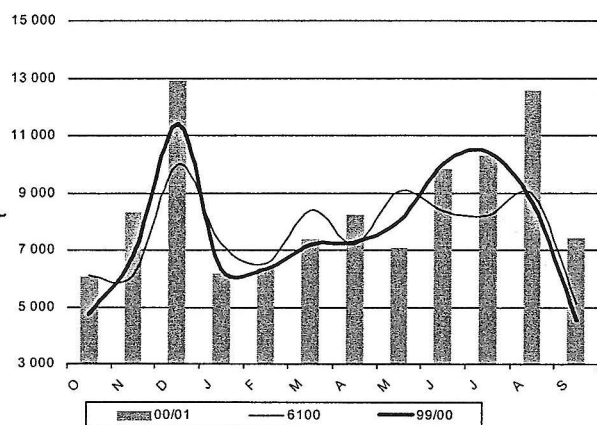
ended prematurely (with problems of quality).

Furthermore, the large harvest of Interdonato in Turkey encouraged importers to finish their Argentinian Eureka season rapidly.

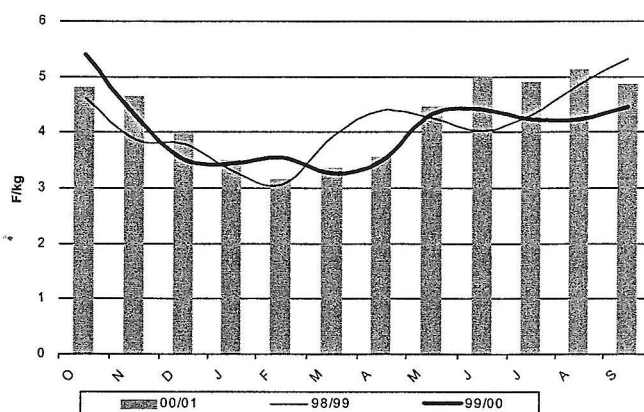
Prices therefore decreased throughout the month, especially for 80/88 grades.

Lemon — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — September 2001

Tonnes	September 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999		2001/2000	2001/1999
Spain	3 457	- 8	93	82 577	5	
Argentina	3 988	405	20	19 997	55	22
Total	7 445	64	45	102 574	12	