Indicators
December 2001

The main fruits

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

%	Volumes	Expenditure
Clementine	25	26
Apple	19	16
Orange	16	12

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

Clementine

Dec. 2001 / Dec. 2000	
Price	↘
Vol.	↗

Overall performance has been relatively satisfactory, with marketing and prices slightly up on the average for the last three seasons. However, serious quality problems mean very different results from one varietal group to another and from one origin to another.

Apple

Dec. 2001 / Dec. 2000	
Price	↗
Vol.	↗

Demand was lively at the beginning of the month and then slowed as usual in the run-up to Christmas. The marketing of fresh fruits was nevertheless 5% up on last year even though the price was still very high (+ 34%). Stocks at the end of 2001 were 11% down on the level of the end of 2000.

Orange

Dec. 2001 / Dec. 2000	
Price	↗
Vol.	↗

The overall balance is satisfactory as marketing (+ 25%) and prices (+ 16%) increased considerably in spite of demand focused mainly on easy peelers.

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

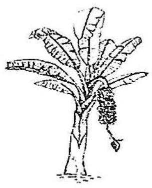
DECEMBER 2001

Monthly comparison: Dec. 2001 / Nov. 2001

Price	Volumes
= ↗ + 3%	= ↘ – 3%

Annual comparison: Dec. 2001 / Dec. 2000

Price	Volumes
↘ – 19%	= ↗ + 3%



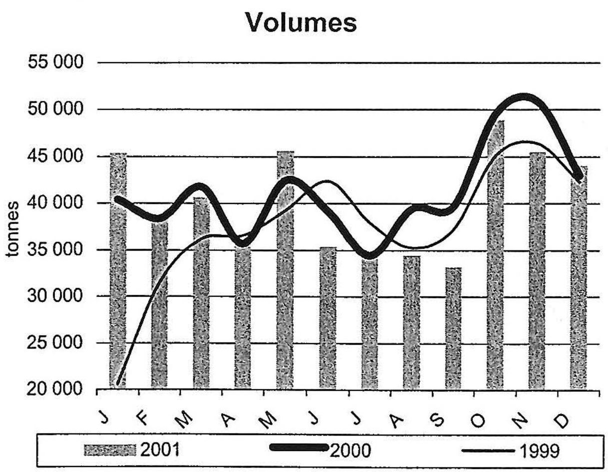
December was the only month out of step in a year, 2001, that was satisfactory overall. The monthly average price was well down on the preceding seasons in spite of similar stock availability in France and active export flow to Germany. Indeed, local demand was particularly sluggish.

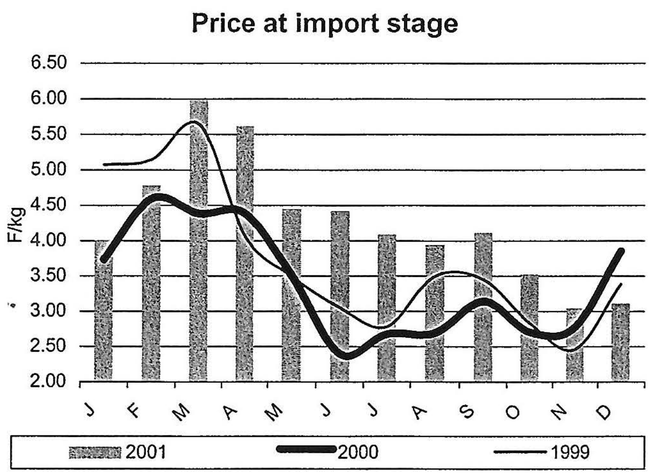
Supplies were overall at an average level similar to that of the two preceding seasons. The slight increase of fruits from African origins made up for the slight shortfall from the West Indies.

Exports were comparatively active in spite of a substantial decrease in shipments to Great Britain. Indeed, Germany took large volumes and North African buyers remained strongly present in buying.

However, the traditional mid-December decrease in business, together with the retail switch to a more festive range of goods, was particularly strong in 2001. A slightly higher retail price than in 2000, in spite of a 'green' price down by 20%, probably explains this decrease in sales.

Banana — Estimated market releases in France





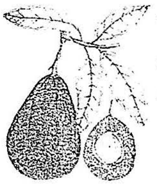
Estimated market releases in France by origin — December 2001

Tonnes	December 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Côte d'Ivoire	10 008	+ 39	- 15	102 916	+ 6	+ 4
Cameroon	10 543	- 9	+ 2	111 999	+ 4	+ 18
Martinique	17 423	+ 5	+ 12	186 389	- 12	- 3
Guadeloupe	6 106	- 19	+ 32	82 468	+ 7	+ 29
Total	**44 080**	**+ 3**	**+ 4**	**483 772**	**- 2**	**+ 7**

Avocado

DECEMBER 2001

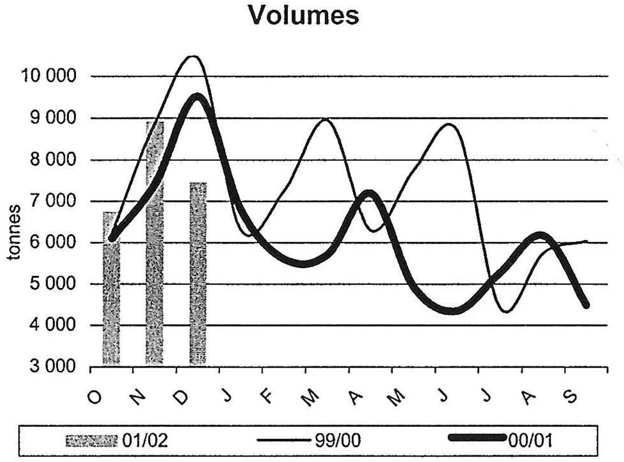
Monthly comparison: Dec. 2001 / Nov. 2001	
Price	Volumes
↗↗ + 40%	↘ – 16%
Annual comparison: Dec. 2001 / Dec. 2000	
Price	Volumes
↘ – 14%	↘ – 22%

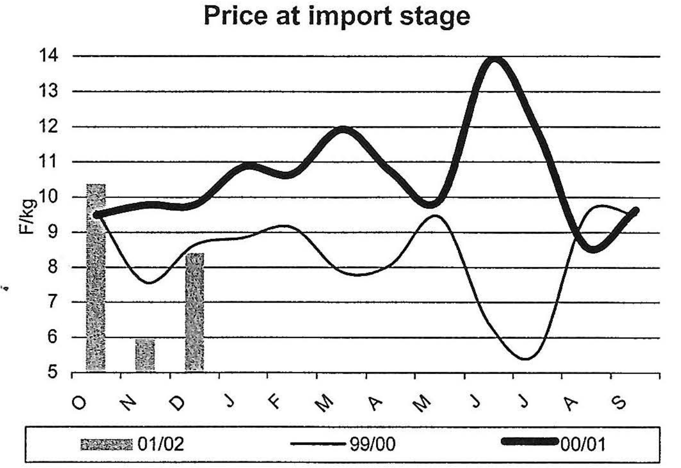


The market recovered rapidly after the extremely difficult situation in November and in spite of distinctly more sluggish demand than in previous seasons. Supplies from the main origins—especially Israel—were limited.

Demand remained slower than in previous seasons. In particular, the traditional special offers for the Christmas period did not shine as brightly as usual. The limited supplies nevertheless allowed a gradual market recovery. Weather problems slowed the harvest in Israel and hindered shipping. Furthermore, Fuerte, a variety forming a large proportion of avocado in December, displayed smaller potential than in 2000. Likewise, rain hit the Málaga region, disturbing the shipment of Fuerte and Hass from Spain. The upward price movement was very gradual at the beginning of the month because of the still marked presence of fruits of heterogeneous quality (stocks carried over from November). The increase was much more marked during the second half of the month as the market became distinctly under-supplied.

Avocado — Estimated market releases in France





Estimated market releases in France by origin — December 2001

Tonnes	December 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Israel	4 175	- 21	- 28	9 077	+ 2	- 9
Mexico	467	- 65	- 68	7 277	+ 15	- 20
Spain	3 397	- 6	- 4	10 060	+ 17	+ 6
Total	**8 039**	**- 22**	**- 28**	**26 414**	**+ 11**	**- 8**

Orange

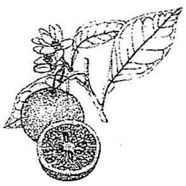
DECEMBER 2001

Monthly comparison: Dec. 2001 / Nov. 2001

Price	Volumes
↘ - 19%	↗ + 32%

Annual comparison: Dec. 2001 / Dec. 2000

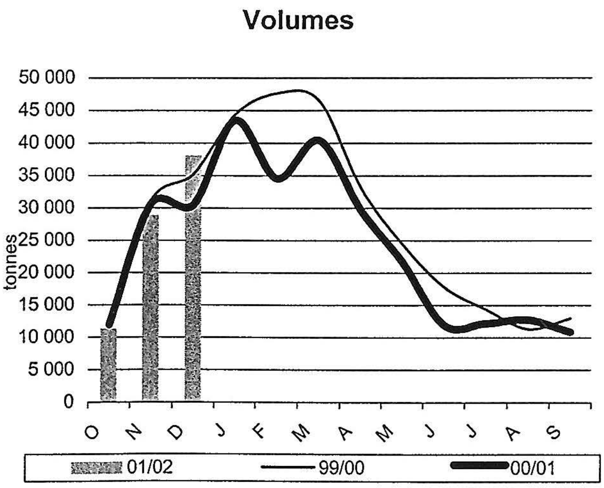
Price	Volumes
↗ + 16%	↗ + 25%

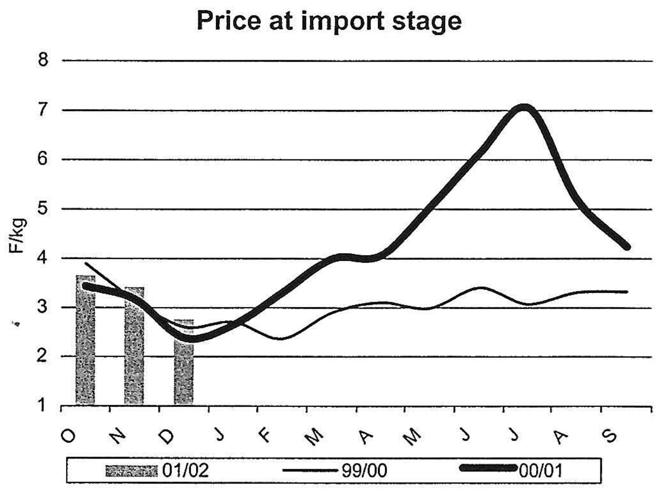


The overall balance is satisfactory as both releases on to the market and prices increased considerably in spite of demand turned mainly towards easy peelers.

Spain was practically alone on the orange market in December.
Exporters had to speed up Naveline shipments because of the ripening fruits—which also gained in taste quality. As a result, although demand at this time of year is concentrated on easy peelers, that for oranges responded fairly well even though prices were higher than in the preceding year.
Supplies of Salustiana were insignificant.

Orange — Estimated market releases in France





Estimated market releases in France by origin — December 2001

Tonnes	December 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Spain	38 091	+ 25	+ 8	73 672	+ 8	+ 5

Grapefruit

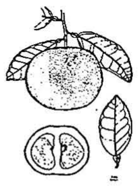
DECEMBER 2001

Monthly comparison: Dec. 2001 / Nov. 2001

Price	Volumes
↘ – 7%	↘ – 21%

Annual comparison: Dec. 2001 / Dec. 2000

Price	Volumes
= ↘ – 3%	↘↘ – 34%

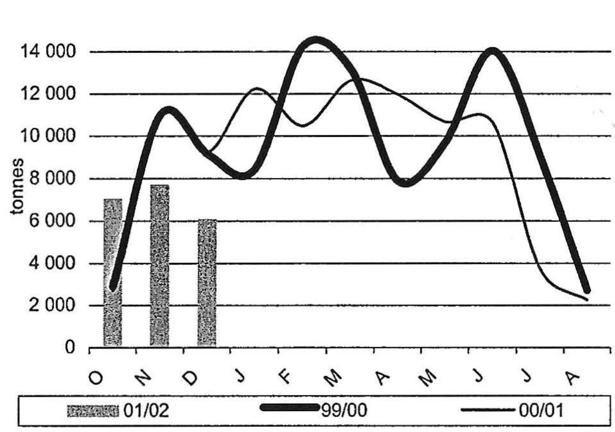


The grapefruit market weathered the traditional December depression without a marked adjustment in prices, which remained firm. Indeed, pressure from supply was particularly modest in 2001.

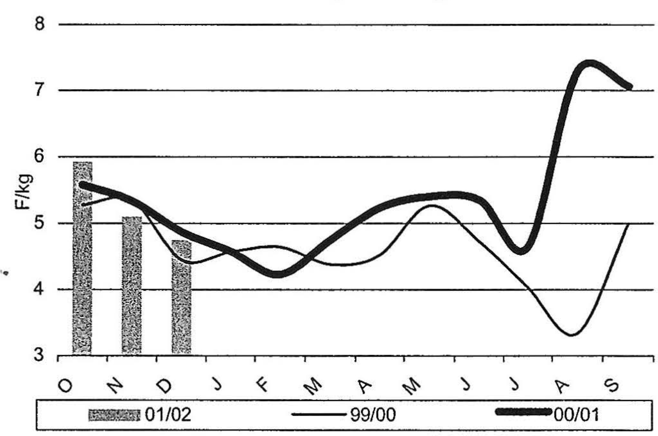
As usual, the change in range in favour of exotic fruits resulted in a sharp decrease in the quantities put on the market from the end of November onwards.
Nevertheless, the amounts shipped from the main origins were much smaller than last year—especially fruits from Florida (-35%). Likewise, Turkish operators anticipated the slowing of demand and exported 40% less by volume to the EU than in the preceding year. Only Israeli importers marketed larger volumes.
The prices of fruits from the main origins thus stood up fairly well. In contrast, the prices of the last fruits from Cuba and Mexico remained very flexible.

Grapefruit — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — December 2001

Tonnes	December 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Florida	5 190	- 35	- 35	15 057	-8	- 11
Israel	466	+ 12	- 29	1 693	+ 8	- 53
Turkey	450	- 42	- 6	4 134	- 16	+ 62
Total	**6 106**	**- 34**	**- 33**	**20 884**	**- 9**	**- 9**

Easy peelers

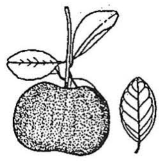
DECEMBER 2001

Monthly comparison: Dec. 2001 / Nov. 2001

Price	Volumes
↘ - 9%	↗ + 13%

Annual comparison: Dec. 2001 / Dec. 2000

Price	Volumes
↘ - 8%	↗ + 5%

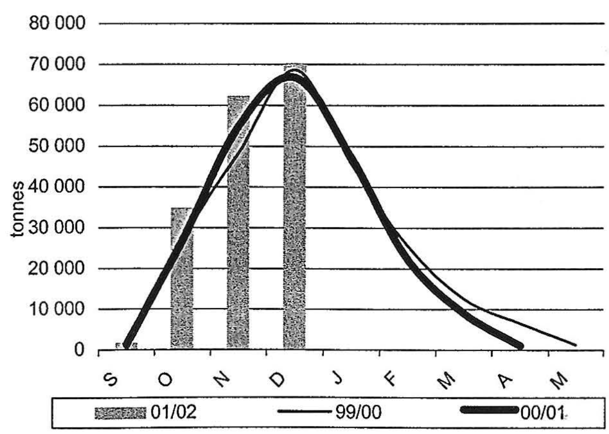


Overall performance was comparatively satisfactory, with quantities released and prices slightly up on the average for the past three seasons. Serious quality problems nonetheless made the results very different from one varietal group to another and from one origin to another.

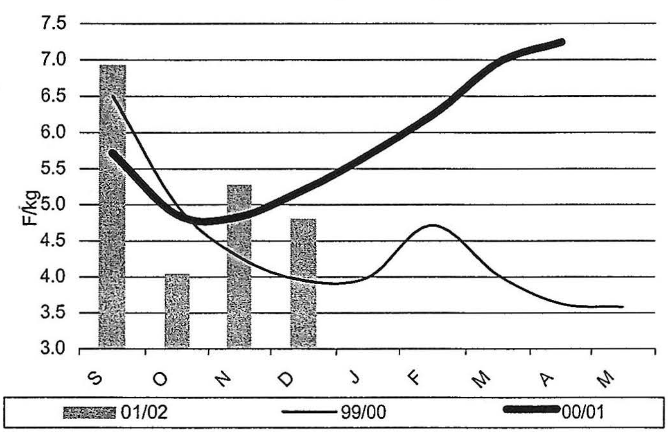
Market balance was fragile as a result of the large shipments from the end of November onwards and was upset suddenly in the first week of the month. Indeed, warm weather rendered fragile the quality of a large proportion of the Nules from Spain. Furthermore, the rumour of the return of large volumes of Spanish fruits shipped to the United States (editorial, ***Fruitrop*** 86) increased operators' concern. Two very distinct price trends then emerged. Most buyers abandoned the low and mid-range Nules and concentrated on the best grades, on Communes from Corsica and Morocco (this origin made an excellent entry to hypermarkets and supermarkets) and Clemenvilla from Spain, the volumes of which grew as early as they had done in 2000. Spanish performance was therefore poor for clementines (stable volumes and prices down by 20%) and satisfactory for Clemenvilla (volumes up by 6% and prices by 2%). The results were average for Morocco (volumes up by 33% but prices down by 19%). Corsica had the best results (volumes up by 4% and prices by 41%).

Easy peelers — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — December 2001

Tonnes	December 2001	Comparisons (%)		Season total	Comparisons (%)	
		2001/2000	2001/1999	2000/2001	2001/2000	2001/1999
Spain	52 943	+ 2	+ 5	138 743	+ 9	+ 16
Morocco	8 113	+ 33	- 4	14 076	+ 57	+ 47
Corsica	8 976	+ 4	- 7	16 302	+ 24	+ 6
Israel	276	+ 108	non available	276	+ 108	non available
Total	**70 308**	**+ 14**	**+ 30**	**169 127**	**+ 20**	**+ 32**