Indicators
January 2002

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

The main fruits

%	Volumes	Expenditure
Apple	24	20
Orange	22	17
Clementine	20	23

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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Apple

Jan. 2002 / Jan. 2001			
Price	↗	Vol.	↘

The re-supplying of purchase centres by packing stations reactivated the apple market at the beginning of the month. Demand then subsided and exports were more moderate but the prices had been driven upwards and remained firm. The market was stagnant at the end of the month with prices 30 percent higher than those of last year.

Orange

Jan. 2002 / Jan. 2001			
Price	↗	Vol.	↘

The orange market performed well for the third month running. Indeed, the average prices and the amounts consumed increased very significantly. Nevertheless, the market displayed a sudden break at the end of the month as a result of a distinct slowing of business (quality problems, the appearance of competing varieties and origins, etc.).

Clementine

Jan. 2002 / Jan. 2001			
Price	↗	Vol.	↗

The volume of easy peelers was slightly greater than that of the last three years and significantly down on December figures (- 32 percent). Demand was focused more on hybrids and slowed at the end of the month as a result of quality problems a temperatures little suited to citrus consumption. Prices firmed and were slightly higher than last year's.

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

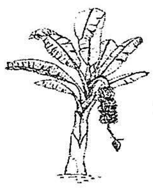
JANUARY 2002

Monthly comparison: Jan. 2002 / Dec. 2001

Price	Volumes
↗↗ + 31%	↘ – 7%

Annual comparison: Jan. 2002 / Jan. 2001

Price	Volumes
= ↗ + 2%	↘ – 9%



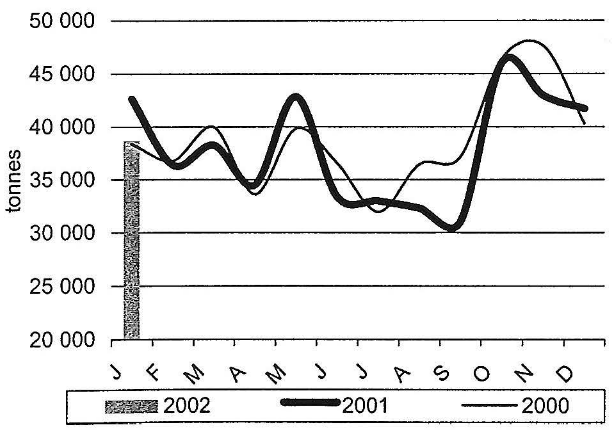
The market recovered after a very difficult December. Indeed, supplies were at only average levels while demand woke up markedly on both the domestic and export markets. Although the average price increased distinctly, an increase in the difference between West Indian and African fruits was observed as a result of the mixed quality of a significant proportion of supplies from Martinique and Guadeloupe.

The quantities available were distinctly smaller than last year as supplies from the West Indies were significantly smaller.

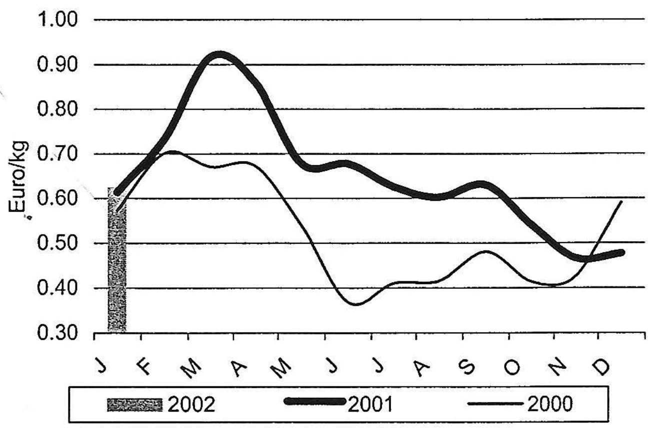
Domestic demand became more dynamic after a very dull December (promotion operations had collapsed at the end of December and then recovered, but without reaching last year's level). Export movements have also increased. Indeed, demand from British operators increased to a good level (supplies from the Windward Islands were still well down) and German clients continued to import substantial volumes even though more dollar bananas were imported than in 2001. The average price therefore rose steadily as the month went by. However, the difference between the prices of African and West Indian fruits increased between of the heterogeneous quality of a significant volume of fruits from Martinique and Guadeloupe.

Banana — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — January 2002

Tonnes	January 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002	2002/2001	2002/2000
Côte d'Ivoire	7 494	- 6	- 7	7 494	- 6	- 7
Cameroon	11 137	- 2	+ 20	11 137	- 2	+ 20
Martinique	13 961	- 15	- 13	13 961	- 15	- 13
Guadeloupe	6 094	- 11	+ 22	6 094	- 11	+ 22
Total	**38 686**	**- 9**	**+ 1**	**38 686**	**- 9**	**+ 1**

Avocado

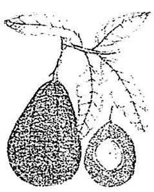
JANUARY 2002

Monthly comparison: Jan. 2002 / Dec. 2001

Price	Volumes
↘ – 4%	↘ – 14%

Annual comparison: Jan. 2002 / Jan. 2001

Price	Volumes
↘ – 26%	↘ – 5%



The average price decreased further even though supply volumes were slightly down on the average of the last five seasons. Recurrent weak demand (especially from the large-scale distributor segment) since the beginning of the season goes a large way towards accounting for this new poor performance. As in November, increased competition between Israeli operators aggravated the downwards movement in prices.

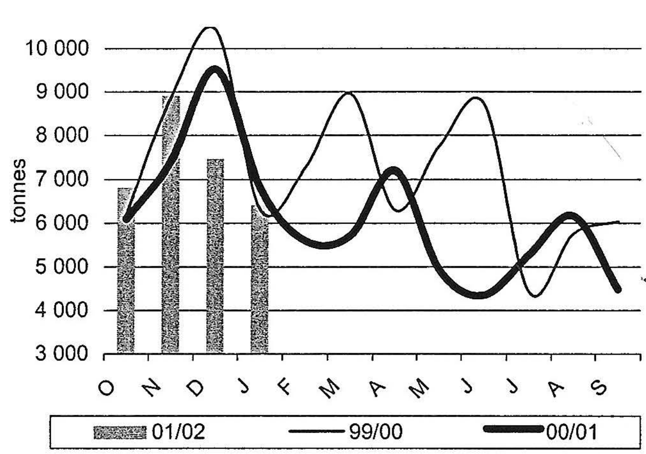
After a slight increase in business in December, demand slowed distinctly in January and was very disappointing once again, especially in the large-scale distributor client segment.

December's very pronounced supply scarcity improved in January. Supplies were even large during the first third of the month both from Israel (the volumes planned for operations at the end of 2001 could not be shipped because of bad weather) and from Spain (Fuerte ripened very early and had to be shipped rapidly).

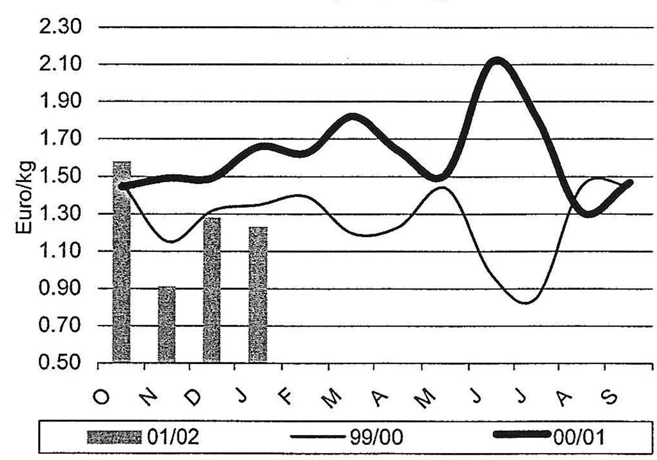
Prices—particularly for green varieties—therefore began fall in the second week of January. Increased competition between Israeli operators helped to make the fall faster and more marked for the rest of the month.

Avocado — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — January 2002

Tonnes	January 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2001	2002/2001	2002/2000
Israel	3 563	+ 18	+ 3	12 641	+ 6	- 6
Spain	2 687	- 27	+ 37	12 813	+ 5	+ 11
Mexico	178	+ 45	- 80	7 455	+ 16	- 25
Total	**6 428**	**- 5**	**+ 2**	**32 909**	**+ 8**	**- 6**

Orange

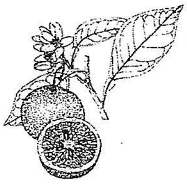
JANUARY 2002

Monthly comparison: Jan. 2002 / Dec. 2001

Price	Volumes
↗ + 18%	↗ + 37%

Annual comparison: Jan. 2002 / Jan. 2001

Price	Volumes
↗ + 23%	↗ + 20%

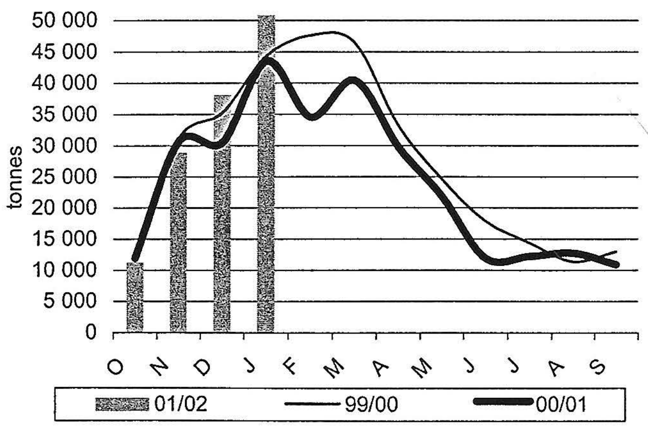


After poor performances in previous seasons, oranges scored well for the third month running, with very significant increases in average price and sales volume. However, although performance was positive overall, the balance was suddenly upset at the end of the month as a result of a marked slowing (quality problems and the appearance of competing varieties and origins, etc.).

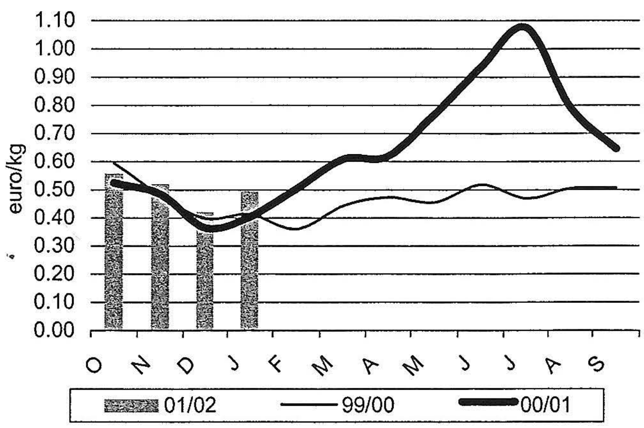
Demand was initially steady and distinctly more lively than last year in spite of firmer prices. Market balance was then suddenly upset in the middle of the month. The worsening of the quality of Naveline had a twin effect on the market. Firstly, demand slackened distinctly and secondly, the rate of shipments increased. Furthermore, other factors had an effect during the same period and aggravated the fall in prices. Indeed, the warm weather was less favourable for the consumption of citrus fruits. And then other varieties were available, and especially Maltese, with particularly plentiful supplies from week 3 onwards.

Orange — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — January 2002

Tonnes	January 2002	Comparisons (%) 2002/2001	Comparisons (%) 2002/2000	Season total 2001/2002	Comparisons (%) 2002/2001	Comparisons (%) 2002/2000
Spain	42 140	+ 12	+ 16	115 811	+ 10	+ 9
Tunisia	8 183	+ 44	+ 24	8 183	- 44	- 67
Morocco	1 908	+ 587	+ 29	1 942	+ 600	+ 31
Total	**52 231**	**+ 20**	**+ 18**	**125 936**	**+ 12**	**+ 7**

Grapefruit

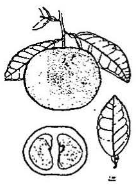
JANUARY 2002

Monthly comparison: Jan. 2002 / Dec. 2001

Price	Volumes
= ↘ – 4%	↗↗ + 101%

Annual comparison: Jan. 2002 / Jan. 2001

Price	Volumes
= 0%	↗ + 9%



The grapefruit market came out of the Christmas doldrums early and was particularly active in January. The volumes sold considerably exceeded the levels of preceding seasons in spite of a firm average price close to that of last year. The transfer of demand for easy peelers to grapefruit may have been the cause of this fine performance.

Demand was very slow as usual over Christmas and the New Year and them picked up in early January. Demand from the large-scale distribution sector was strong from week 2 onwards and continued until the end of the month (with numerous important promotion operations). This amply made up for the small than normal wholesaler business.

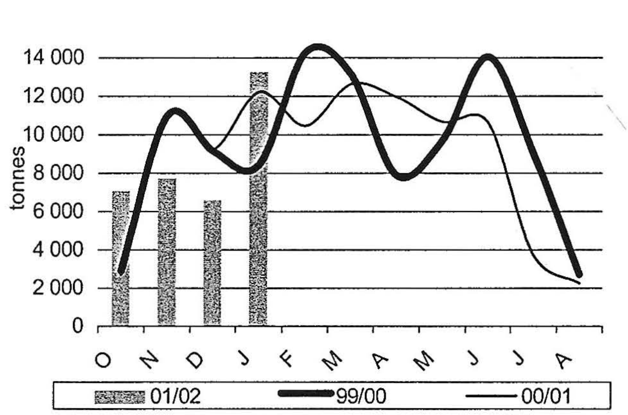
These good sales handled shipments from Florida that were more plentiful than average and very large quantities from Turkey (fruit fragility and difficult weather conditions in December led exporters to increase the rate of shipment).

However, Israeli exports remained very discreet.

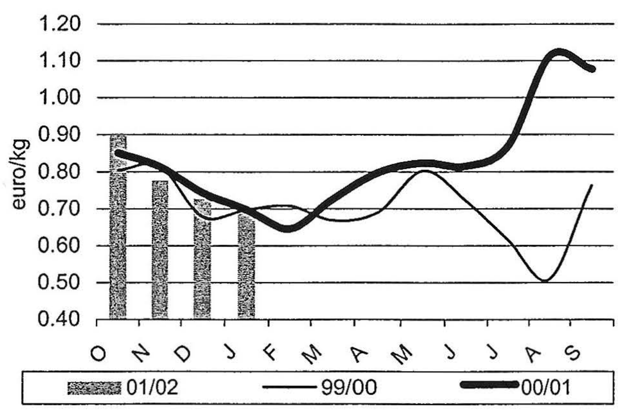
Prices remained at the strong December levels.

Grapefruit — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — January 2002

Tonnes	January 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2001/2002	2002/2001	2002/2000
Florida	10 210	- 1	+ 52	25 721	- 4	+ 9
Israel	489	- 38	- 59	2 182	- 7	- 54
Turkey	2 570	+ 129	+ 436	6 704	+ 11	+ 121
Total	**13 269**	**+ 9**	**+ 58**	**34 607**	**- 1**	**+ 10**

Easy Peelers

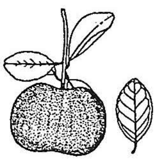
JANUARY 2002

Monthly comparison: Jan. 2002 / Dec. 2001

Price	Volumes
↗ + 23%	↘ - 32%

Annual comparison: Jan. 2002 / Jan. 2001

Price	Volumes
↗ + 4%	↗ + 1%

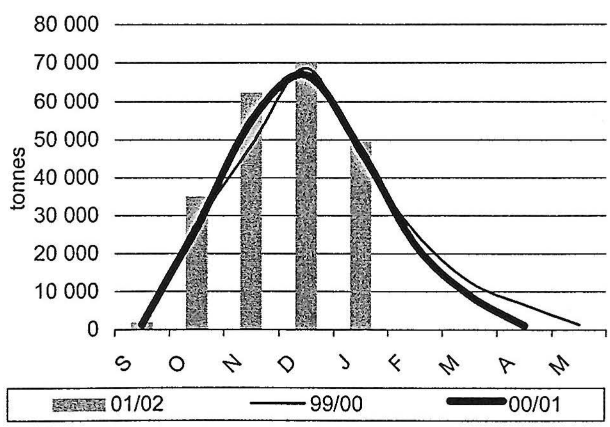


Performance was satisfactory in January, with prices reaching the excellent level of January 2001 for similar levels. Like last year, this is explained by the early ending of Spanish clementines.

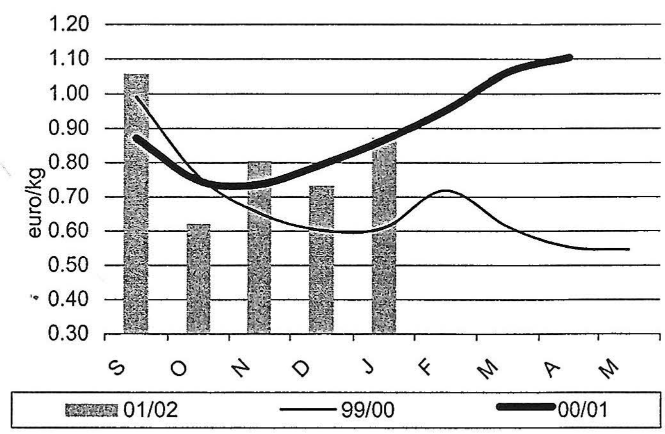
January prices and volumes were similar to those of the very good 2000/2001 season. Sales consisted mainly of hybrids from week 2 onwards because of the early end of the clementine season. Demand was selective and centred on the top of the range, but business was lively nevertheless. In contrast, serious quality problems in most varieties and origins at the end of the month caused a sudden slowing of demand and especially that of hypermarkets. The price range broadened.

Easy peelers — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — January 2002

Tonnes	January 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2001/2002	2002/2001	2002/2000
Spain	40 464	+ 7	+ 22	179 206	+ 8	+ 17
Morocco	6 300	+ 44	- 8	20 153	+ 51	+ 22
Corsica	890	- 75	- 80	17 192	+ 3	- 13
Israel	1 784	+ 47	+ 57	2 060	+ 53	-
Total	**49 438**	**+ 5**	**+ 8**	**218 611**	**+ 11**	**+ 15**