Indicators
March 2002

The main fruits

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

%	Volumes	Expenditure
Apple	27	22
Orange	22	18
Banana	13	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

Apple

March 2002 / March 2001			
Price	↗	Vol.	↘

Exports slowed in March as usual, especially to northern Europe, with the presence of fruits from the southern hemisphere and competition from Italy affecting all varieties. Volumes also decreased (with the end of the season for Gala and Fuji). In spite of the decrease in exports, the local market remained buoyant and prices rose by a minimum of 15 to 20 percent.

Orange

March 2002 / March 2001			
Price	↗	Vol.	↗

The orange market was active, mainly at the beginning of the month, and prices were fairly firm. Substantial arrivals of fruits affected the dynamism of a market that devoted more of its attention to spring fruits. As a result, prices fell, stocks were formed and demand reached a steady level.

Banana

March 2002 / March 2001			
Price	↘	Vol.	↗

Supply returned to a normal level after the strong shortfall last year (the end of the season was very early). However, the average price reached a satisfactory level. Indeed, demand slowed in March — as it does every year — but remained at a decent level for the season thanks to satisfactory quality.

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

MARCH 2002

Monthly comparison: March 2002 / Feb. 2002	
Price	Volumes
= ↗ + 1%	↗ + 5%
Annual comparison: March 2002 / March 2001	
Price	Volumes
= ↘ - 15%	↘ – 4%

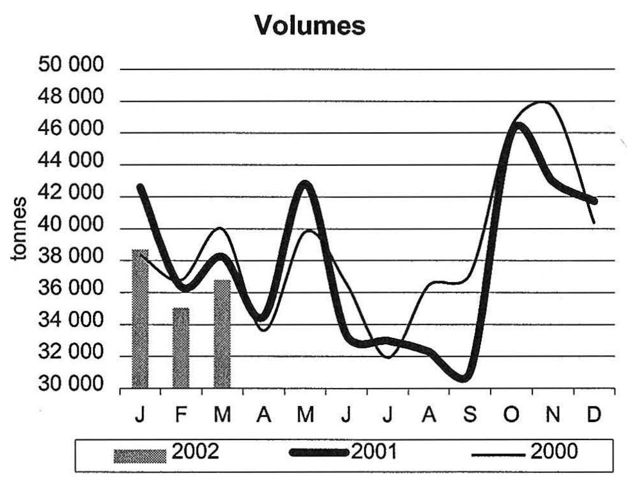
Performance was mixed in spite of smaller volumes than in the two preceding years. Indeed, the average price was distinctly lower than the (excellent) level reached in 2001 and was even slightly down on the average for the past five years. The unsatisfactory quality of a significant proportion of the fruits shipped from the West Indies and dull local demand account for the poorer performance.

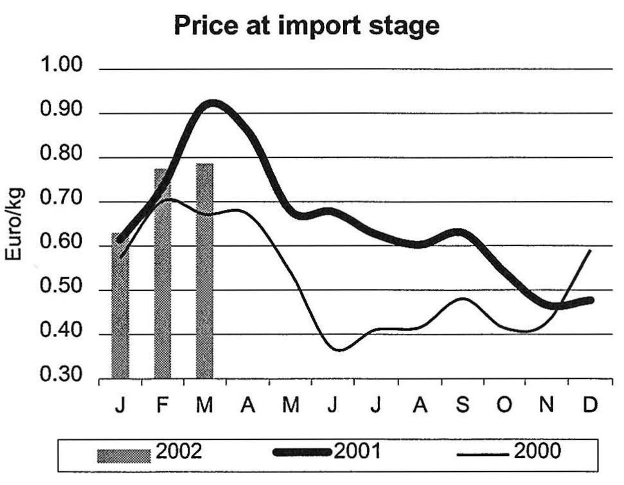
The overall supply volume was slightly smaller than that of recent years, mainly because of the very modest shipments of bananas from Cameroon.

Local demand also lacked dynamism, as is demonstrated by the 6% decrease in promotion operations in comparison with last year. An aggravating factor has been the more than 25% increase in the average price during these special offers, in spite of a fall of more than 10% in the price of green bananas.

The inadequate quality of a significant proportion of fruits from the West Indies has also had a negative effect on the market; the price difference with African fruits increased to historical proportions. Nevertheless, a brisk export flow to Germany and the United Kingdom made it possible to support the French market as the quantities of dollar bananas shipped to northern Europe were slightly smaller than last year.

Banana — Estimated market releases in France





Estimated market releases in France by origin — March 2002

Tonnes	March 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002	2002/2001	2002/2000
Côte d'Ivoire	8 279	0	- 16	22 980	- 3	- 13
Cameroon	7 832	- 18	- 25	27 565	- 10	- 8
Martinique	14 399	+ 3	+ 1	41 419	- 6	- 5
Guadeloupe	6 278	- 2	+ 16	18 564	- 3	+ 22
Total	**36 788**	**- 4**	**- 8**	**110 528**	**- 6**	**- 4**

Avocado

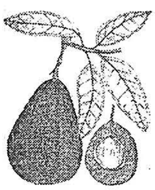
MARCH 2002

Monthly comparison: March 2002 / Feb. 2002

Price	Volumes
↗↗ + 33%	= ↗ + 3%

Annual comparison: March 2002 / March 2001

Price	Volumes
↘↘ - 24%	↗↗ + 26%



The traditional burst of activity during the Easter period helped avocado to break with the cycle of poor results in which it had been trapped since November. Volumes increased considerably in March 2002 in comparison with the average for the past five seasons although the price remained similar.

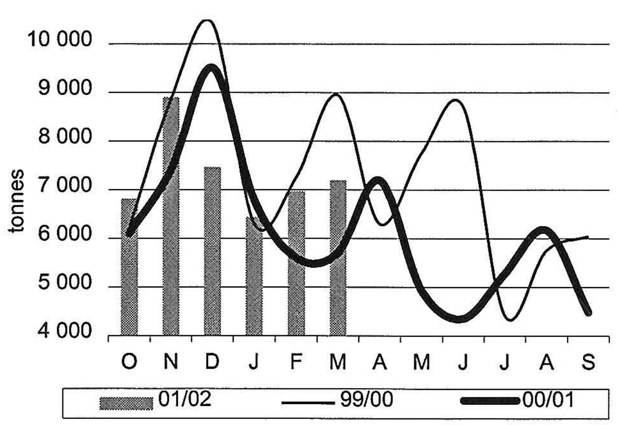
Substantial volumes were shipped, especially during the second half of the month. Fortunately, stocks were practically non-existent at the beginning of the month in contrast with the situation in February.

Supplies were also less dispersed in terms of both origins and operators. Indeed, the presence of Kenyan fruits was very low key and competition between Israeli operators quietened as a result of a different distribution of volumes between them.

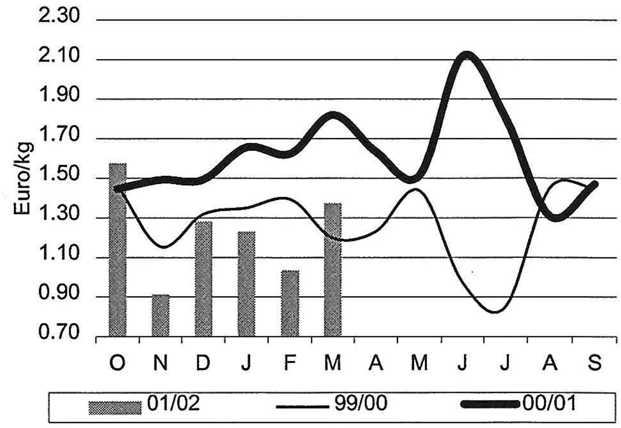
Demand had been particularly slow since the beginning of the season but livened with the start of the traditional Easter special offers. Prices thus increased throughout the first half of the month. Slight downward adjustments occurred at the end of the month because of the reduction of certain promotion campaigns and the prospect of substantial shipments from Kenya.

Avocado — Estimated market releases in France

Volumes



Price at import stage



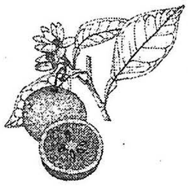
Estimated market releases in France by origin — March 2002

Tonnes	March 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2001	2002/2001	2002/2000
Israel	3 280	+ 63	+ 17	19 883	+ 25	- 1
Spain	3 374	+ 23	+ 18	18 711	+ 2	+ 7
Mexico	277	- 23	- 66	7 947	+ 12	- 31
Kenya	269	- 55	- 80	569	- 5	- 71
Total	**7 200**	**+ 26**	**- 20**	**47 110**	**+ 12**	**- 8**

Orange

MARCH 2002

Monthly comparison: March 2002 / Feb. 2002	
Price	Volumes
➚ + 29%	➚ + 7%
Annual comparison: March 2002 / March 2001	
Price	Volumes
➚ + 10%	➚ + 3%

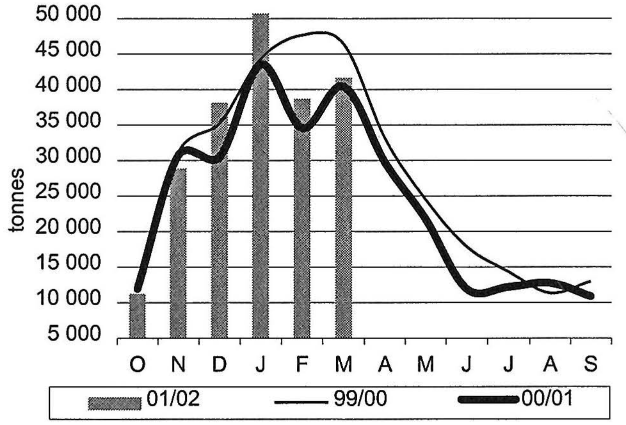


The orange market was very active in March, particularly at the beginning of the month, and prices were fairly firm. Substantial arrivals of oranges affected market dynamism, which was turning more towards spring fruits. As a result, prices fell, stocks were formed and demand reached a steady level.

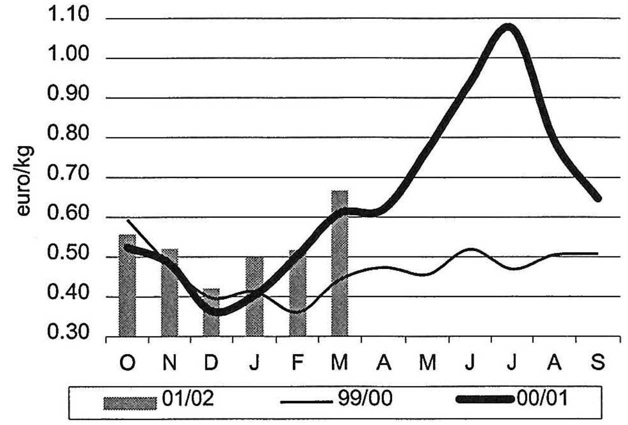
Large quantities of oranges were shipped in March. Indeed, after suffering a shortage in 2001, the Spanish orange market recovered to an average supply level. Morocco had experienced an increase in 2001 because of the Spanish deficit and has returned to a normal level this year in the face of more marked competition from Spain. After a difficult February, demand recovered solid dynamism. The fruits marketed have been of high quality and the market thus gained new impetus. The average price of oranges was still 10% higher than last year but will tend to fall as the result of the much larger volumes of Spanish oranges than in 2001. This applies to both Salustiana and Navelate or Valencia late (+ 30%).

Orange — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — March 2002

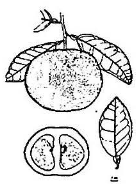
Tonnes	March 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2001	2002/2001	2002/2000
Spain	33 009	+ 35	- 10	181 992	+ 15	+ 1
Tunisia	6 154	- 13	- 11	18 860	+ 7	- 7
Morocco	2 386	- 73	- 15	5 548	- 51	- 27
Total	**41 549**	**+ 3**	**- 10**	**206 400**	**+ 10**	**- 3**

Grapefruit

MARCH 2002

Monthly comparison: March 2002 / Feb. 2002	
Price	Volumes
↗↗ + 33%	= ↗ + 3%

Annual comparison: March 2002 / March 2001	
Price	Volumes
↘↘ - 24%	↗↗ + 26%

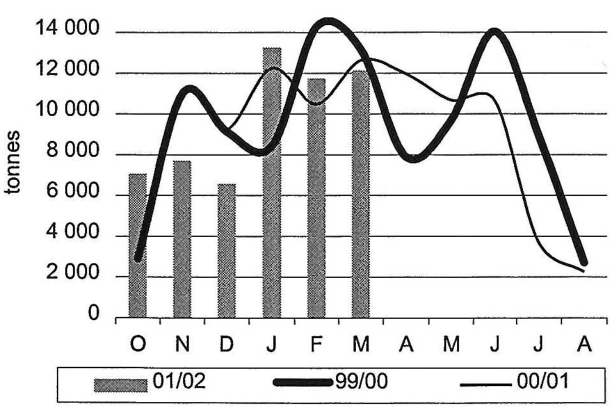


The origins present on the market benefited very unevenly from the increase in demand at the beginning of the month. Although the price of Florida fruit increased during the second fortnight, the situation remained difficult for Israel because competition from Turkey was still very strong.

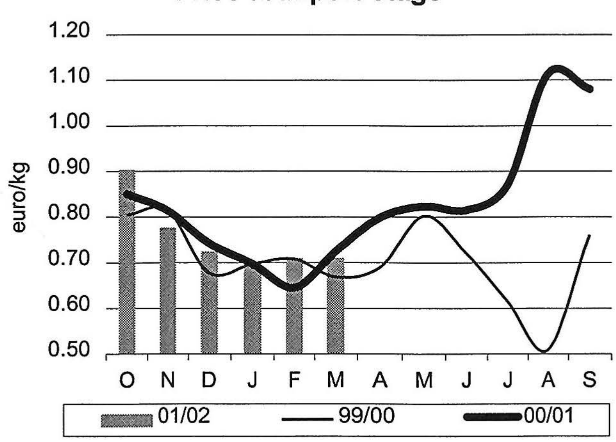
After slowing during the traditional February 'depression', demand woke up again rapidly at the beginning of March.
Nevertheless, in spite of good sales volumes, the market for fruits from Florida remained fairly delicate because shipments were particularly large during the first half of the month. A more marked increase in demand from mid-March, together with a slight decrease in shipments, enabled progress to be made, especially for grade 40. The situation remained less favourable for grade 48 as stocks were substantial, especially in northern Europe. The volumes of Turkish fruits available were distinctly down in comparison with February but continued to compete with sales of red grapefruit from Israel, shipments of which gained impetus from mid-month onwards.

Grapefruit — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — March 2002

Tonnes	March 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2001	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

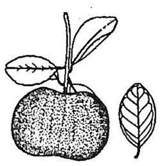
MARCH 2002

Monthly comparison: March 2002 / Feb. 2002

Price	Volumes
↗ + 12%	↘ - 55%

Annual comparison: March 2002 / March 2001

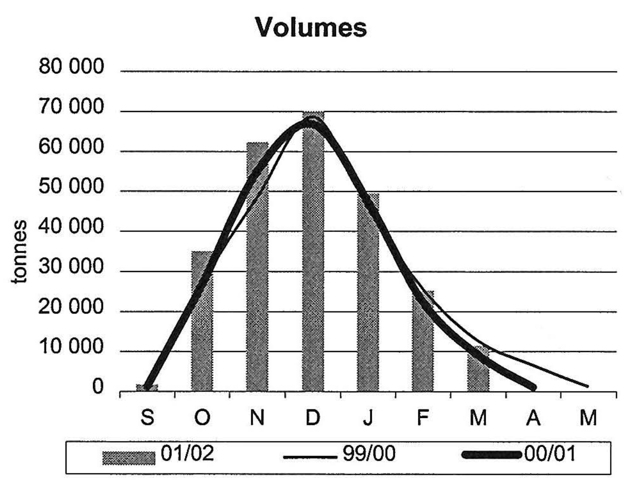
Price	Volumes
↘ - 13%	↗ + 27%

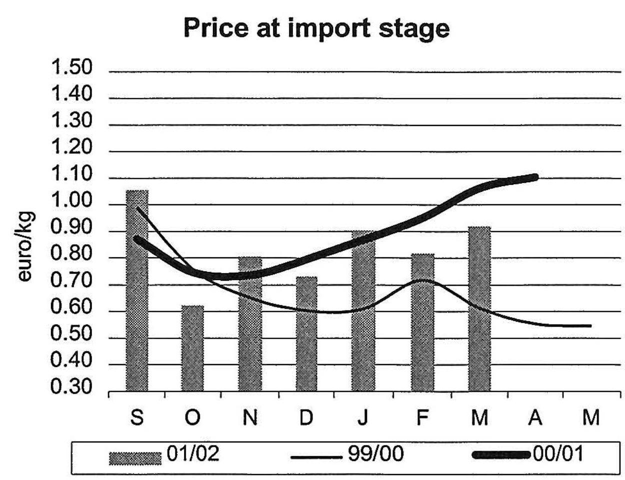


Supplies were at a normal level after the marked shortage last year (the season finished very early). However, the average price reached a satisfactory level. Indeed, demand slowed considerably as every March but remained at a decent level thanks to good fruit quality.

Spanish supplies (consisting mainly of Fortuna and the first Ortaniques) returned to an average level in comparison with the strong deficit in March 2001, when only the last batches of Ortaniques remained to be sold. Likewise, supplies from Morocco developed markedly in comparison with last year although they did not recover to the level of an average season (the potential was 'normal' for Ortaniques but the share of fruits reserved for the French market was smaller). As usual, demand slowed distinctly as retailers' displays took on a more spring-like appearance. Nevertheless, it remained at a good level for the season thanks to a return to satisfactory quality after the problems experienced in February. The average price was therefore at a good level.

Easy peelers — Estimated market releases in France



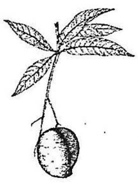


Estimated market releases in France by origin — March 2002

Tonnes	March 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2001	2002/2001	2002/2000
Spain	9 980	+ 37	+ 2	211 376	+ 10	+ 17
Corsica	0	0	0	17 192	+ 3	- 13
Morocco	1 422	+ 71	- 50	24 473	+ 44	- 7
Israel	105	- 89	-	2 458	- 22	+ 116
Total	**11 507**	**+ 27**	**- 9**	**255 499**	**+ 12**	**+ 12**

Mango
West African season

MARCH 2002	Annual comparison: March 2002 / March 2001
	Price
Mali	=
Peru	↘ - 3%
South Africa	↘ - 7%



The West African mango season is even later than last year's. The climatic conditions in the production area (Mali, Burkina Faso and Côte d'Ivoire) seem to have been unfavourable during the months leading up to the season. They tended to cause flower fall, thus limiting production.

The first batches shipped from Mali by air were received at the end of February – beginning of March. The quantities were not significant. Supplies only developed from week 11 with the arrival of 25 to 30 tonnes. Deliveries from this origin increased strongly in weeks 12 and 13 with 30 and 35 tonnes respectively and subsequently 55 tonnes. The shipments consisted mainly of the variety 'Amélie', complemented little by little by 'Valencia'. The fruits were of satisfactory quality but cases of immaturity, numerous peel defects and inadequate yellow-orange colour were observed. Prices tended to weaken in the face of competition from 'Kent' fruits shipped by air from Peru.
Limited quantities of the first mangoes (shipped by air) from Burkina Faso and Côte d'Ivoire arrived on the market (less than 10 tonnes per week). Although the quality of Burkina Faso mangoes was satisfactory (presentation, cleanliness, grading, etc.), the price fell because of fast ripening. The first 'Amélie' fruits shipped by sea from Côte d'Ivoire arrived at the end of week 12 (about 7 tonnes). An early Easter and the late start of the season meant that West African exporters could not profit from this 'atypical' market for lack of available fruits.
Most of the 'Amélie' mangoes were small (grades 10 to 12), green and often sour. They were difficult to sell in the face of competition from 'Kent' and 'Keitt' fruits from South Africa and Peru (shipped by air and sea) of larger size that still dominated the market. Fruits from the two latter origins have generally rapidly changed for the worse (spotting and anthracnose). Supplies from South Africa and Peru on the one hand and from West Africa on the other seem to be overlapping substantially this year to the detriment of both sources of supply.
It will be remembered that the 2001 South African and Peruvian export seasons finished more rapidly, leaving the market under-supplied. 'Amélie' fruits from West Africa then benefited from very favourable sales conditions for more than three weeks. The profile of the West African 'Amélie' season promises to be much less favourable this year. It is very probable that the season will be reduced as the first coloured varieties will arrive soon. Furthermore, the markets in northern Europe still seem to be fully stocked with fruits from Peru, South Africa, Ecuador and Brazil, considerably limiting scope for specialised French operators to re-ship West African mangoes.

Mango
French market supply

Tonnes	March		April	
	2001	2000	2001	2000
Intra-EU (*)	**32**	**- 73**	**- 1 124**	**- 439**
Extra-EU of which	1 461	1 145	2 500	2 328
Côte d'Ivoire	51	120	2 079	1 978
Mali	49	44	207	151
Peru	500	400	61	23
Burkina Faso	9	0	38	6
Cameroon	39	22	34	11
South Africa	805	498	24	61

(*) Intra-community trade balance: the difference between French imports from EU countries and shipments (re-exports) from France to EU countries. Source: Eurostat

Mango — Prices in euros per kg
At import stage

		March 2002		March 2001	
Air		min	max	min	max
Mali	Amélie	2.20	2.30	2.13	2.39
	Valencia			2.59	2.74
Sea		min	max	min	max
Peru	Kent/Keitt	1.20	1.40	1.22	1.45
South Africa	Kent/Keitt	1.05	1.35	1.14	1.45