

Indicators

April 2002

The main fruits	In shares by total volume and expenditure on fruits for the month in France		
	%	Volumes	Expenditure
	Apple	26	21
	Orange	18	14
	Banana	15	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.

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April 2002 / April 2001			
Price	↗↗	Vol.	↗

Apple

The April balance was very satisfactory. Indeed, business was noticeably more sustained than in 2001, with much greater withdrawals from stocks. Prices firmed earlier than last year, rising by nearly 30%.

April 2002 / April 2001			
Price	=↗	Vol.	↗↗

Orange

The succession of good performances since the beginning of the season contrasts with upsets of the previous seasons. Both prices and the volumes marketed are distinctly higher than last year.

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

Banana

Good market behaviour in spite of substantial arrivals of West Indian fruits that have often been of irregular quality. Demand was dynamic both on the local market and from certain major export destinations. Prices thus decreased distinctly in comparison with 2001 but were at a satisfactory level.

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

Monthly comparison: April 2002 / March 2002

Price

↘ - 12%

Volumes

↗ + 16%

Annual comparison: April 2002 / April 2001

Price

↘ - 19%

Volumes

↗ + 24%



Fairly good market behaviour in spite of substantial arrivals from the West Indies and often mixed quality. Demand was dynamic on both the local market and for certain major export destinations. Prices therefore decreased considerably in comparison with 2001, but remained at a satisfactory level.

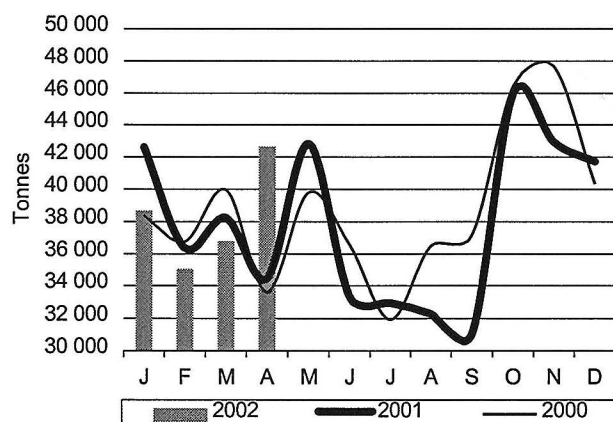
Overall supplies were particularly strong (+ 20% in comparison with the average for the past three years), mainly as a result of a strong increase in shipments from the West Indies (+ 30% in comparison with the same period in 2001). The increase in shipments from Africa was more

modest but marked (+ 10%). The market nevertheless stood up well thanks to active demand. On the one hand, exports to Germany were dynamic and flows to southern Europe recovered, although this was often thanks to serious price concessions. On the other hand, releases for the local

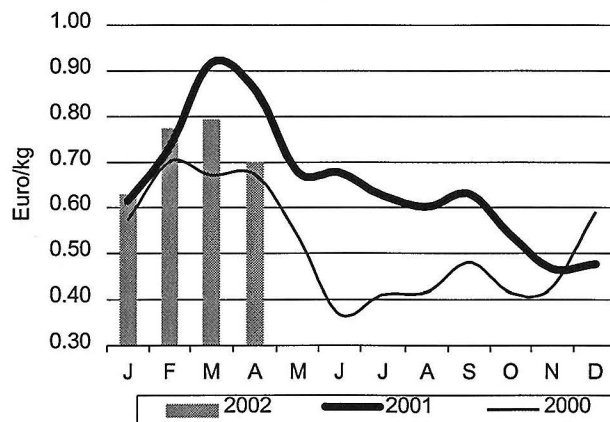
market attained good levels as there were numerous promotion operations (+ 36% in comparison with last year). It should be noted that the gradual improvement of the quality of West Indian fruits encouraged buyers (presence in shops up by 5% in comparison with March).

Banana — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — April 2002

Tonnes	April 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000		2002/2001	2002/2000
Côte d'Ivoire	10 100	+ 6	+ 26	33 080	+ 0	- 4
Cameroon	8 618	- 3	+ 2	36 182	- 8	- 6
Martinique	16 311	+ 51	+ 28	57 729	+ 6	+ 3
Guadeloupe	7 624	+ 45	+ 73	26 188	+ 7	+ 34
Total	42 653	+ 24	+ 27	153 179	+ 1	+ 4

Avocado

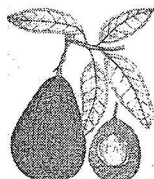
Monthly comparison: April 2002 / March 2002

Price	Volumes
↘ - 22%	↗ + 5%

Annual comparison: April 2002 / April 2001

Price	Volumes
↘ - 35%	↗ + 5%

APRIL 2002



The good performance of March was just a flash in the pan. The average price sank again, reaching depths rarely observed in April. It is true that quantities were very high as a result of the prolonging of the Israeli season and the whirlwind start to the South African season. In addition, demand was particularly disappointing.

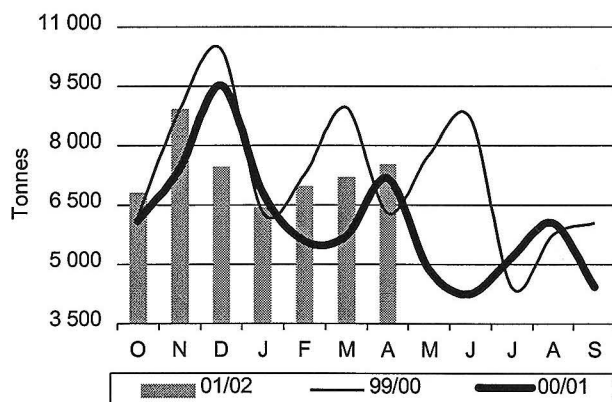
The end of the Easter special offer resulted in a sudden decrease in trade at the beginning of April. Supplies—especially of green varieties—were simultaneously very ample. Arrivals of Fuerte from South Africa gained speed very early and the cumulated monthly figure was double that of the

average for the past three years. Furthermore, shipments from Israel, which are generally modest after Easter, remained significant until the middle of the month. Finally, pressure from Kenyan shipments was particularly strong during the first half of the month (substantial supplies spread

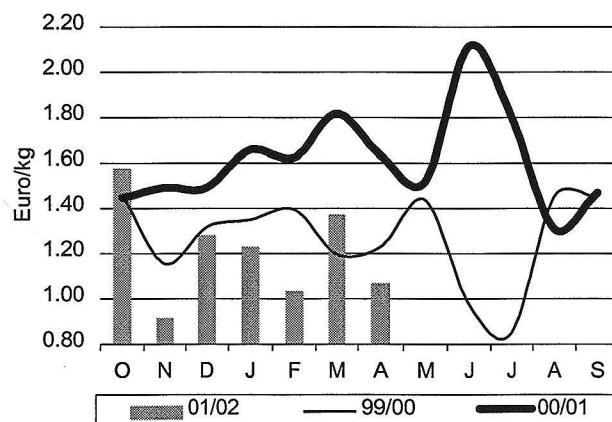
among a very large number of operators). The price of green varieties was therefore at rock bottom for the whole month. The market for Hass resisted better thanks to more modest arrivals, except for small fruits (grades 20, 22 and 24).

Avocado — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — April 2002

Tonnes	April 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000		2002/2001	2002/2000
Israel	2 162	+ 84	- 1	22 045	+ 30	- 1
Spain	2 876	+ 1	+ 33	21 587	+ 2	+ 10
Mexico	44	- 83	- 90	7 991	+ 9	- 33
Kenya	1 318	- 43	- 10	1 887	- 35	- 44
Total	6 400	+ 5	+ 20	53 510	+ 10	- 7

Orange

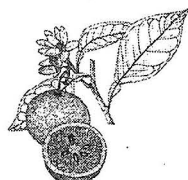
APRIL 2002

Monthly comparison: April 2002 / March 2002

Price = \downarrow - 3% Volumes \downarrow - 17%

Annual comparison: April 2002 / April 2001

Price = \uparrow + 5% Volumes \uparrow + 16%



A series of good performances throughout the season on a market more used to upsets in recent seasons. Both prices and the volumes marketed are distinctly higher than last year.

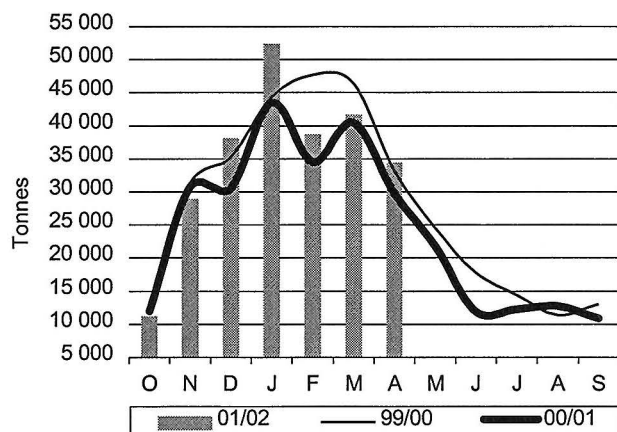
Spanish releases reached an excellent level (increase of nearly 30% in comparison with the average of the past three seasons). Demand for Navelate was particularly dynamic. In contrast, sales of Valencia Late were strongly down in comparison with preceding seasons because of the substantial potential of

Navelate this season and strong competition from Maroc Late during the first part of the month. Stocks of the latter variety were plentiful at the beginning of the month as large shipments had been received in the second half of March. The return to more modest arrivals from week 15 onwards enabled the market for

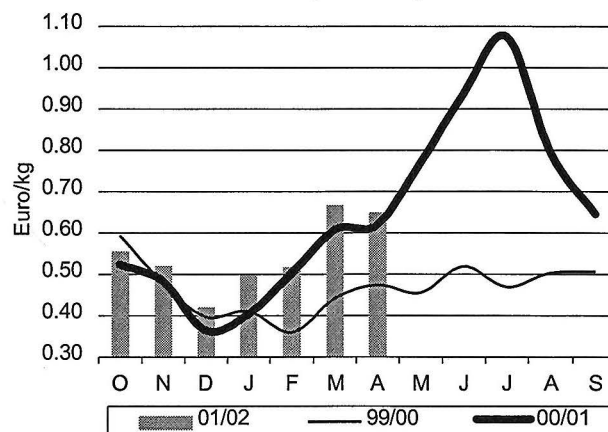
the variety to gain a new balance. The finish to the Maltese season at the end of the month was lacklustre, as the fruits were fragile. However, the balance for the season was average (the prices and volumes sold were very close to the average for the last three years).

Orange — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — April 2002

Tonnes	April 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000		2002/2001	2002/2000
Spain	26 840	+ 43	+ 6	208 832	+ 18	+ 1
Tunisia	2 898	- 11	- 34	21 758	+ 4	- 11
Morocco	4 756	- 39	+ 37	10 443	- 45	- 5
Total	34 494	+ 16	+ 4	241 033	+ 11	- 2

Grapefruit

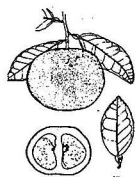
APRIL 2002

Monthly comparison: April 2002 / March 2002

Price $\uparrow + 8\%$ Volumes $\downarrow - 28\%$

Annual comparison: April 2002 / April 2001

Price $\downarrow - 4\%$ Volumes $\downarrow - 17\%$



Although not as good as in 2001, performance in April was decent. The volumes marketed were very closer to the average for the last three seasons and prices rose by about 7%. Nevertheless, the prolonging of the Turkish season weighed on the sales of fruits from Israel.

As in the preceding months, demand remained at an excellent level throughout April.

Overall supplies were medium (slightly less than last year and very similar to the average for the past three seasons) in spite of the prolonging of the Turkish season.

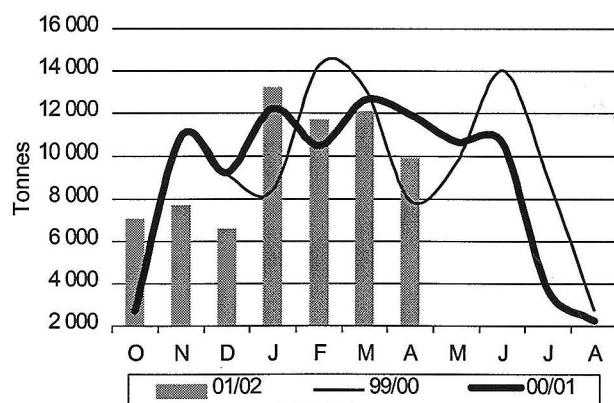
Indeed, pressure from the latter origin continued to compete strongly with Israel, whose sales were significantly down in comparison with preceding years. Arrivals of Florida fruits in the European Union were modest (22% down on last year and 8%

down on the average of the last three seasons).

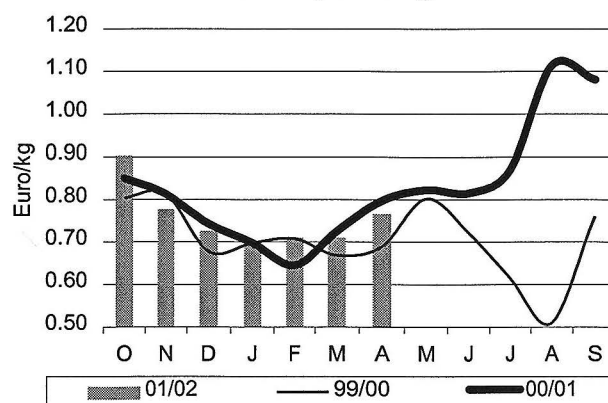
As a result, the average price did not reach the excellent 2000/2001 level but was nevertheless 7% higher than the average for the last three seasons.

Grapefruit — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — April 2002

Tonnes	April 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000		2002/2001	2002/2000
Florida	9 854	- 6	- 9	53 024	- 2	+ 2
Israel	999	- 41	- 18	4 983	- 32	- 43
Turkey	1 259	+ 154	+ 11	10 428	+ 25	+ 68
Total	12 112	- 4	- 8	68 435	- 2	+ 3

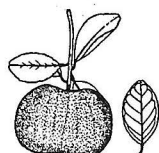
Easy Peelers

Monthly comparison: April 2002 / March 2002

Price	Volumes
↘ - 19%	↘ - 44%

Annual comparison: April 2002 / April 2001

Price	Volumes
↘ - 33%	↗ + 558%



End of season volumes of easy peelers were much larger than in 2001, an exceptionally weak year. Demand was steady but moderate throughout the month, with preference going to spring products. Prices became varied because of quality problems in certain varieties and fell significantly.

April sales were much higher than the average for the past three years (2001 was a particularly small year), returning to the satisfactory level observed in 1999/2000. Demand was steady but moderate with preference

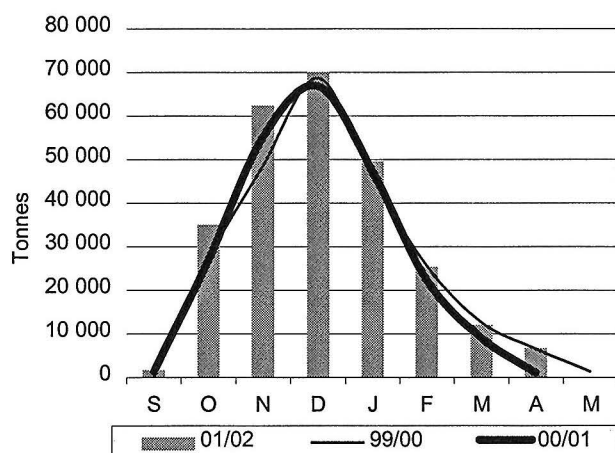
going to spring products. The multiples therefore narrowed the range of easy peelers and some wholesalers stopped carrying them. Fruit quality was more varied in the last ortaniques from Morocco at the beginning of the

month and in the last batches from Spain.

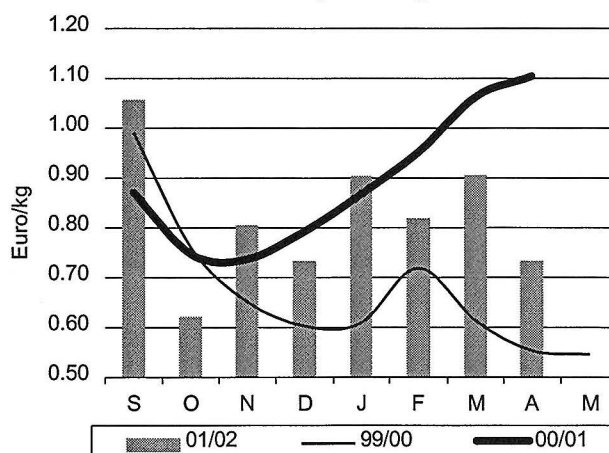
Prices were higher than the average for the past three years but substantially lower than last year's exceptional level.

Easy peelers — Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin — April 2002

Tonnes	April 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000		2002/2001	2002/2000
Spain	5 520	+ 546	- 13	217 372	+ 13	+ 16
Morocco	1 279	+ 2 565	+ 521	25 752	+ 51	- 3
Israel	0	- 100	-	2 626	- 20	+ 131
Corsica	0	-	-	17 192	+ 3	- 13
Total	6 799	+ 558	+ 4	262 942	+ 15	+ 12

Mango

West African season



The switch in the source of supply from South Africa and Peru to West Africa has been difficult. Whereas the first finished rapidly in 2001, shipments continued until the second half of April this year. The presence of these origins considerably hindered the start of the West African season with the variety Amélie, whose marketing is called into question once again.

The combination of a lengthened season in South Africa and Peru on the one hand and the slow start of shipments from West Africa on the other have been detrimental for the latter. The market was dominated until mid-April by Kent and Keitt mangoes from South Africa and Peru. The quality of the fruits was very varied. With excellent appearance on reception, they developed poorly and rapidly. Numerous fruits displayed severe attacks of anthracnose and other fungal diseases. Nevertheless, in spite of these quality problems, sales were steady at EUR 1.00 to 1.25 per kg (at the export release stage) for goods transported by sea. Buyers showed preference for coloured varieties.

In this context, Amélie mangoes from Côte d'Ivoire shipped by sea found it difficult to gain a position. This first phase of the West African

season has been difficult. Most of the fruits from Côte d'Ivoire were small, green in colour and displayed poor keeping quality. Operators also ran up against poor national market demand and lack of interest of re-export markets for Amélie. This season seems to be the negative version of the 2001 season when Amélie mangoes sold at high prices on an under-supplied market. Prices lost ground throughout the month and fell below EUR 1 per kg at the end of April. This price will probably decrease because of fruits withdrawn for reasons of quality. Exporters in Côte d'Ivoire also shipped the coloured mango varieties Zill and Kent by air (about a hundred tonnes). These fruits were well-received by the wholesale market and sold at high prices: EUR 3.00 to 3.30 per kg for Kent and around EUR 2.50 to 2.60 per kg for Zill.

The quality of the fruits from Mali was fairly mediocre as a whole. The strictness of fruit selection was much less marked than in the preceding season. Furthermore, it seems that the climatological conditions were not favourable for the production of high quality fruits this year. Mali shipped approximately 200 tonnes of mango by air in April.

Supplies were completed by small arrivals by air from Burkina Faso. Amélie, Kent and Valencia fruits were of fine quality (about fifty tonnes). Guinea also shipped several tonnes of the variety Irwin, which were found to be of poor quality.

A very small quantity of mangoes of the Colombian local variety Bocado, sold at about EUR 2 per kg for those of saleable quality. Indeed, many very ripe and often stained fruits were sold at lower prices.

AVRIL 2002	Import prices		
	Euro/kg	Min	Max
	Mali		
	Amélie - air	2.13	2.45
	Côte d'Ivoire		
	Kent - air	2.80	3.60
	Côte d'Ivoire		
	Amélie - sea	0.50	1.35

Mango — Prices in euros per kg — At import stage

Weeks 2002	13	14	15	16	17	18
By air						
Côte d'Ivoire						
Kent		3.05	3.00-3.60	3.00-3.35	3.00-3.30	2.80-3.20
Zill			2.6	2.59		
Mali						
Amélie	2.20-2.30	2.13	2.20-2.30	2.45	2.30-2.40	2.13-2.29
Kent		2.74-3.05	2.74	2.74-2.90	2.65-2.70	2.13-2.44
Valencia		2.74-3.05	2.74-3.05	2.44-2.60	1.83-2.44	
Burkina Faso						
Amélie				2.44	2.30-2.40	2.14-2.15
Kent					2.65-2.70	2.55-2.60
Valencia					2.7	2.6
By sea						
Côte d'Ivoire						
Amélie		1.00-1.35	1.00-1.25	1.00-1.12	0.87-1.12	0.50-0.87
Kent						1.50-1.60

Estimated market releases in France from Côte d'Ivoire (mango by sea)

