

Indicators

September 2002

The main fruits	In shares by total volume and expenditure on fruits for the month in France		
	%	Volumes	Expenditure
	Grapes	23	24
	Apple	20	16
	Peach/Nectarine	13	16

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. 2002 / Sept. 2001			
Price	↗	Vol.	↘

Grapes

Supply volumes have been well down on last year because of the bad weather in south-east France. Furthermore, consumption was more sluggish since buyers were on their guard with regard to fruit quality (potential keeping time, etc.). Sales were nevertheless satisfactory. Prices were therefore higher but with a broader range.

Sept. 2002 / Sept. 2001			
Price	=	Vol.	=

Apple

The market continued to gain momentum with a broader range (from south-east France), enabling more intense commercial dynamics. Shelf displays thus lengthened significantly at the expense of peaches and nectarines. Demand was very active, especially for Golden Delicious. Prices were similar to last year's.

Sept. 2002 / Sept. 2001			
Price	↘	Vol.	↘

Peach/Nect.

The season came to a dull end. Displays shrank rapidly. Only small quantities of quality produce were available and substantial stocks of mixed quality fruits brought the average price down. The balance for the season is nevertheless satisfactory.

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

Melon

The better weather at the beginning of September enabled the crops to recover but demand was fairly mediocre. As a result, even though the quantities available were average they exceeded consumption capacity. Prices were slightly higher than last year in spite of this imbalance.

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 2002

Monthly comparison: Sept. 2002 / August 2002

Price	Volumes
↘ - 17%	↗ + 11%

Annual comparison: Sept. 2002 / Sept. 2001

Price	Volumes
↘↘ - 24%	↗ + 21%

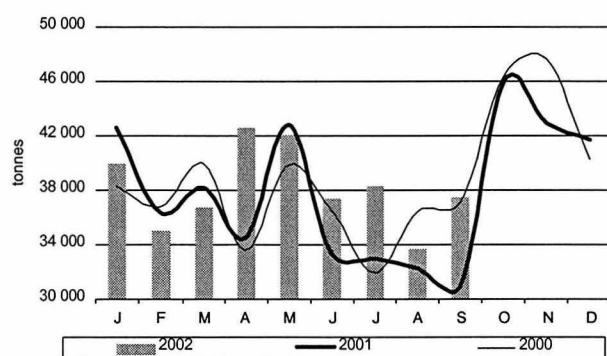
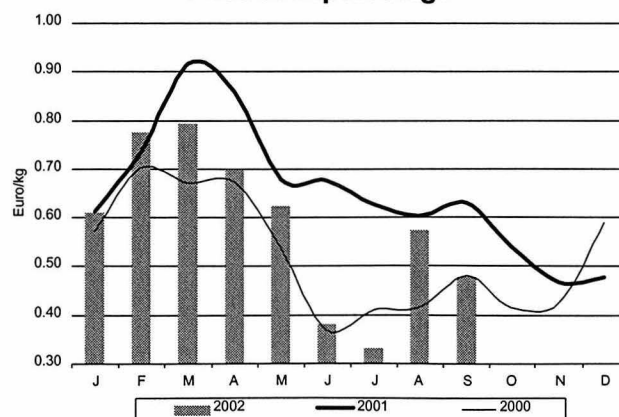


The market dipped once again after a rapid recovery in August. The traditional increase in shipments after the summer was early and sharp. In parallel, the end of the summer holidays did not have the hoped-for stimulating effect on local demand, especially as the retail prices remained high. The export markets took fair volumes but this did not result in a rise in the disappointing average price.

Particularly large quantities were available (+ 21% in comparison with 2001 and + 11% in comparison with the average). Shipments started earlier and more strongly than in the preceding seasons. Meanwhile, demand did not get under way in the same proportions in spite of

the end of the holidays and operators were disappointed once again. The average retail price decreased noticeably but remained high at a level close to that of 2001 even though the volumes were as large as in 2000. The northern European and Spanish markets were slightly under-supplied and

formed outlets for exports but at the cost of fairly flexible prices. Thus, after excellent performance in August (price + 12% and volumes - 1% less than average) the market returned to an average level (price - 12% and volume + 10%).

Banana — Estimated market releases in France
Volumes

Price at import stage

Estimated market releases in France by origin — September 2002

Tonnes	September 2002	Comparisons (%)		Season total 2002	Comparisons (%)	
		2002/2001	2002/2000		2002/2001	2002/2000
Côte d'Ivoire	7 630	+ 14	+ 20	72 923	+ 3	+ 4
Cameroon	7 040	+ 6	- 4	76 755	- 2	+ 4
Martinique	15 987	+ 29	- 5	134 196	+ 12	- 3
Guadeloupe	6 822	+ 29	+ 3	59 492	+ 8	+ 23
Total	37 479	+ 21	+ 1	343 366	+ 6	+ 4

Avocado

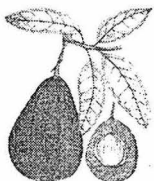
SEPTEMBER 2002

Monthly comparison: Sept. 2002 / August 2002

Price	Volumes
↗ + 41%	↘ - 10%

Annual comparison: Sept. 2002 / Sept. 2001

Price	Volumes
↗ + 50%	↗ + 2%

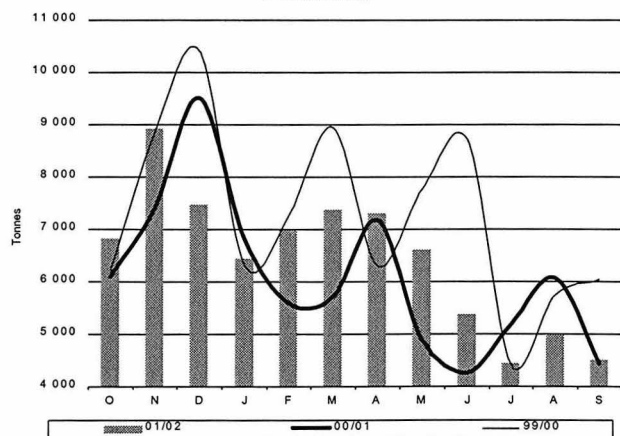
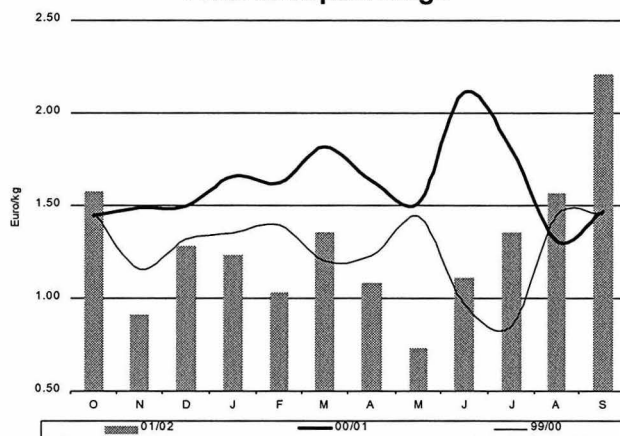


Supplies were as limited as in 2001 and more than 10% down on an average season. Demand also grew steadily and the average price reached an all-time high. But the very delicate balance resulting from retail prices approaching Euro 1 per fruit finally collapsed at the end of the month and prices entered a downward spiral.

The market was seriously under-supplied. On the one hand arrivals from Mexico were 14% down in comparison with an average season, with importers displaying great caution after the problems of the previous season. On the other, shipments from South Africa decreased by 16% in comparison

with the average as the Hass season finished early. Finally, the presence of Bacon from Spain was discreet because of a marked production shortfall. Only Kenya was better represented than usual, but without making up for the shortage of fruits of other origins. In parallel, demand coincided with

supply in spite of very high retail prices (perhaps as a result of small competition from melon?). Nevertheless, the return to more plentiful shipments at the end of the month disturbed market balance as the quay and retail stage prices were not adjusted in time. A downward spiral began.

Avocado — Estimated market releases in France
Volumes

Price at import stage

Estimated market releases in France by origin — September 2002

Tonnes	September 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000		2002/2001	2002/2000
Spain	176	- 64	- 45	479	+ 55	- 4
Mexico	1 432	+ 11	- 2	1 650	- 46	0
Kenya	758	- 31	+ 50	5 753	- 43	- 27
South Africa	2 142	+ 38	- 43	14 978	+ 17	- 22
Total	4 508	+ 2	- 13	22 860	+ 61	+ 38

Orange

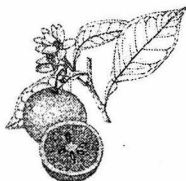
SEPTEMBER 2002

Monthly comparison: Sept. 2002 / August 2002

Price	Volumes
↘ - 2%	↘ - 12%

Annual comparison: Sept. 2002 / Sept. 2001

Price	Volumes
↘ - 9%	↗ + 47%

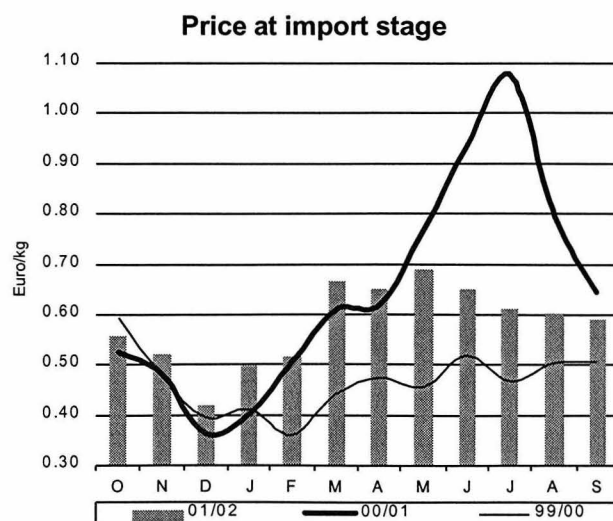
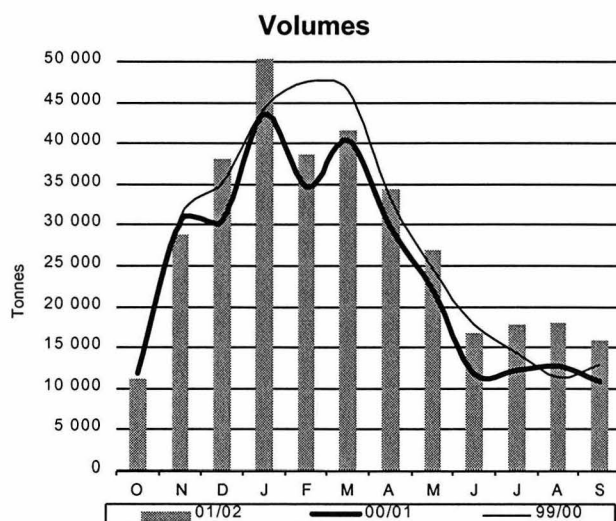


Performance in September was fairly satisfactory in spite of irregular, fickle local demand. The average price stayed at a good level even though the supplying of the French market was generous. The active export flow to northern Europe played an important role.

Volumes were distinctly greater than the average of the past three years (+ 29%). Firstly, arrivals of Valencia from Spain continued at a fair rate (the late orange orchards are still developing). Secondly, shipments from South Africa were much larger than usual for September. Finally, Valencia from Argentina displayed strong

presence, although not at last year's exceptional level. Exports were vigorous, especially to northern Europe. In contrast, local demand was very irregular (with a good level of activity at the beginning of the month and then a dip in weeks 38 and 39) and erratic. French operators were therefore extremely cautious in

their price policies, especially for small fruits (grades 72 and especially 88). The performance was satisfactory overall as the price remained at an average level (- 1% in comparison with the average) while volumes increased strongly.

Orange — Estimated market releases in France

Estimated market releases in France by origin — September 2002

Tonnes	September 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000		2002/2001	2002/2000
Spain	4 091	+ 110	+ 37	253 486	+ 25	+ 1
South Africa	11 838	+ 33	+ 18	42 871	+ 26	+ 33
Total	15 929	+ 17	+ 3	296 357	+ 17	+ 3

Mango

West African season

SEPTEMBER 2002

Import price

Euros/kg	Min	Max
Israel		
Kent/Keitt - air	3.00	3.50
Senegal		
Ken/Keitt - air	2.40	3.50
Senegal		
Kent/Keitt - sea	0.75	1.25



The mango market entered a new transition phase in September after the difficult summer period. The gradual ending of the Senegal season, the small shipments from Israel and the marked decrease in arrivals from Brazil made the market healthier. Demand was nevertheless limited and the price recovery slow.

The market 'floated' throughout the month as there were no dominant origins and demand was still limited.

The price ranges for mango from **Senegal** became broader during the first two weeks of September, showing that operators were trying to shift batches of fruits with defects at a 'good price'. In parallel, they succeeded in selling produce of satisfactory quality at higher prices. The marked disparities in the quality of fruits from Senegal resulted in buyers losing interest and turning to fruits of other origins, such as **Israel**. Supply and demand did not match in the middle of the month. Indeed, most of the supplies consisted of 'Tommy Atkins' from Brazil, that

are generally little appreciated on the French market, while the more sought-after 'Kent' were either of very uneven quality (Senegal) or an unattractive green colour (Israel).

The market improved during the second half of the month and prices tended to rise. The Senegal season finished gradually with 'Kent' and 'Keitt' fruits. Air shipments were resumed in a small way with produce that fetched better prices in the absence of real competition. At the end of the month, Brazil remained the main supplier of the European market with 'Tommy Atkins' mangoes shipped by sea and diversifying supplies with 'Haden' exported by air (Euros 2.20-2.30 per kg).

The first mangoes ('Osteen') from **Spain** reached the French market in mid-September and sold regularly at Euro 1.75 per kg. These fruits of satisfactory quality and fine colour, even in small quantities, were an alternative for buyers. Spain also shipped a few batches of 'Kent' mangoes at the end of the month (Euros 1.80-2.00 per kg). The relative shortage of air-shipped fruits encouraged several companies to continue imports from complementary origins such as **Pakistan**.

Operators are now waiting for the Brazilian export season to resume with 'Tommy Atkins' and then 'Kent' in October.

Mango — Prices in euros per kg — At import stage

Weeks 2002		36	37	38	39
By air					
Israel					
	Kent/Keitt	3.00 - 3.30	3.00 - 3.50	3.00 - 3.50	3.00 - 3.50
Senegal					
	Kent/Keitt	2.40 - 3.30	2.45 - 2.80	2.80 - 3.20	2.80 - 3.50
By truck					
Spain					
	Osteen			1.75	1.75
By sea					
Brazil					
	Tommy Atkins	0.62 - 0.87	0.75 - 1.00	0.75 - 1.00	1.00 - 1.12
Israel					
	Kent/Keitt	0.87 - 7.00	1.25 - 1.50	1.25 - 1.37	1.25 - 1.37
Senegal					
	Kent/Keitt	0.75 - 1.50	1.00 - 1.25	1.00 - 1.25	1.12 - 1.25