Indicators
December 2002

The main fruits — In shares by total volume and expenditure on fruits for the month in France		
%	Volumes	Expenditure
Easy peelers	25	26
Apple	20	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.

Easy peelers

Dec. 2002 / Dec. 2001	
Price	↗
Vol.	↗

Good performance, with quantities and prices up on previous seasons. The balance was extremely positive for Spain as a result of good quality even though it is late in the season. Competing origins therefore found things difficult, especially Morocco—penalised by a late start to sales and sometimes uneven quality.

Apple

Dec. 2002 / Dec. 2001	
Price	↗
Vol.	↘

The usual slowing of the national apple market in December was more marked this year because of the pressure on small grades of Golden Delicious, whose quality was sometimes at the limit. In contrast, large grades of Gala and Granny Smith in particular benefited from a positive context.

Orange

Dec. 2002 / Dec. 2001	
Price	↘
Vol.	↘

As usual, orange prices fell at the end of the year. Nevertheless, although performance was much poorer than in 2001, both price and volumes were average. Shipments of Spanish fruits were particular small in the second half of the month. Demand also increased a little.

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 2002

Monthly comparison: Dec. 2002 / Nov. 2002

Price	Volumes
↗↗ + 74%	= ↗ + 7%

Annual comparison: Dec. 2002 / Dec. 2001

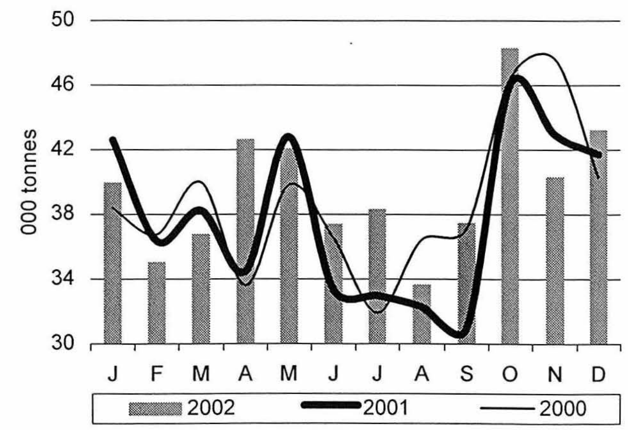
Price	Volumes
↗↗ + 29%	= ↗ + 4%

Although the worst was feared, the market finally behaved very well. Shipments from Africa and the West Indies were fairly abundant, as forecast. Nevertheless, export flows were particularly active because of a shortage of dollar bananas, especially in the north of the European Union (production losses in Costa Rica). Local demand was also lively thanks to a large number of promotion operations.

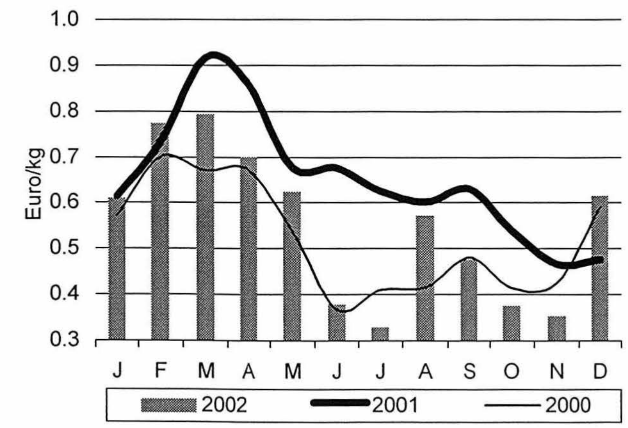
The quantities of African and West Indian bananas have been markedly larger than in recent seasons. However, export movements have remained particularly lively, especially to northern Europe and the United Kingdom. The shortage of arrivals of dollar bananas had been very marked in November and then eased in December (with a return to 'average' supplies in week 50). The German market nevertheless remained at a good level thanks to particularly competitive retail prices. Furthermore, local demand remained at a very good level. More promotion operations were run than in the two preceding years and with more competitive prices. Performance in December was thus particularly satisfactory, with prices 17% higher than the average for the three preceding years even though volumes were 7% up.

Estimated market releases in France

Volumes



Price at import stage



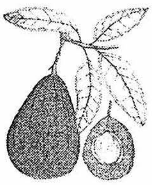
Estimated market releases in France by origin

Tonnes	December 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002	2002/2001	2002/2000
Côte d'Ivoire	10 453	+ 4	+ 45	102 016	- 1	+ 5
Cameroon	11 319	+ 7	- 2	107 662	- 4	0
Martinique	15 035	- 3	+ 1	185 397	+ 12	- 2
Guadeloupe	6 441	+ 14	- 4	80 202	+ 9	+ 14
Total	**43 248**	**+ 4**	**+ 7**	**475 277**	**+ 5**	**+ 2**

Avocado

DECEMBER 2002

Monthly comparison: Dec. 2002 / Nov. 2002	
Price	Volumes
↗↗ + 45%	↗↗ + 51%
Annual comparison: Dec. 2002 / Dec. 2001	
Price	Volumes
↗↗ + 76%	= ↗ + 2%

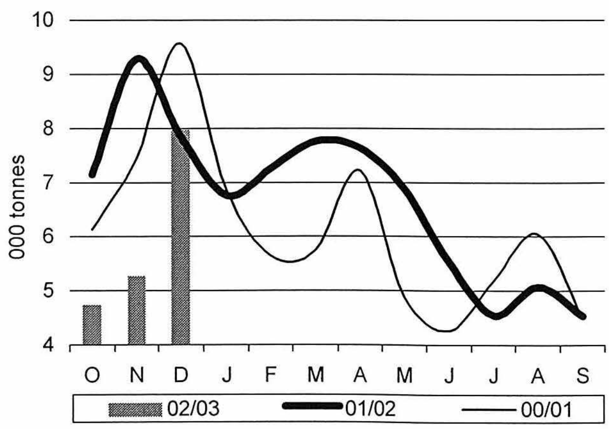


The market behaved particularly well. Demand was supported by the always excellent promotion operations run during this period of the year and record prices were paid for volumes strongly up on the preceding months, and only 10% down on an average season.

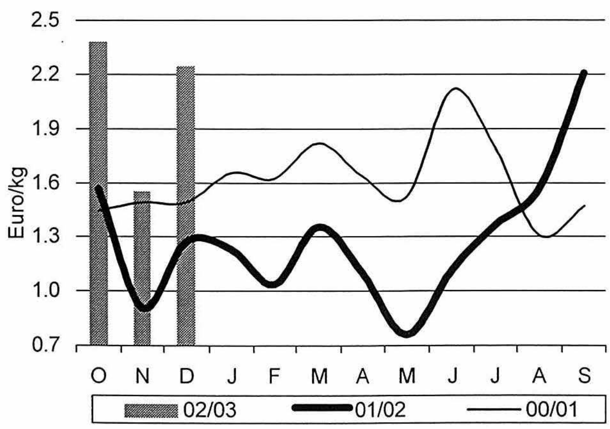
The shipment shortfall from basic market origins (Israel and Spain) was distinctly less marked than in preceding months. Growers in these countries reserved a large proportion of this season's meagre production for Christmas business. The start of Hass contributed to supply. Furthermore, Mexico was still very present even though it normally ships only a small complement to supplies in December. However, the volumes were easily handled by demand encouraged by promotion operations that are always at their peak at this time of the year. Prices therefore started to rise strongly in week 48 and peaked at a historical level for the whole of the month.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	December 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2003	2002/2001	2002/2000
Israel	3 093	- 14	- 32	7 630	- 16	- 14
Mexico	1 854	+ 297	+ 39	6 587	- 9	- 3
Spain	3 024	- 20	- 18	6 166	- 45	- 29
Total	**7 971**	**+ 2**	**- 17**	**20 383**	**- 17**	**- 20**

Orange

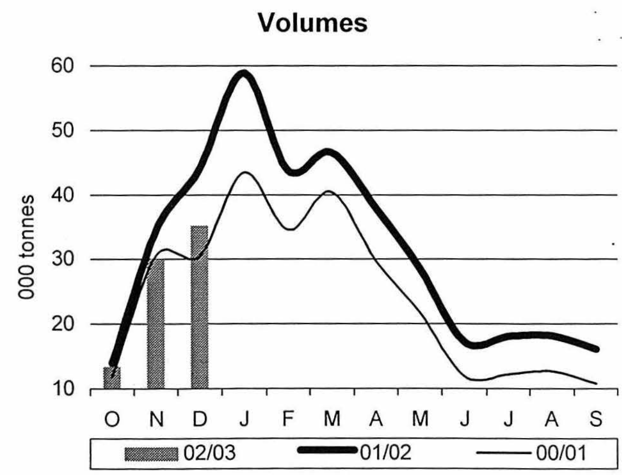
DECEMBER 2002

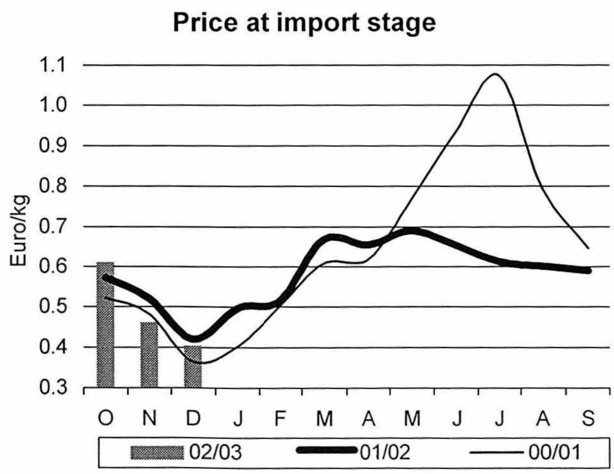
Monthly comparison: Dec. 2002 / Nov. 2002	
Price	Volumes
↘ - 12%	↗ + 18%
Annual comparison: Dec. 2002 / Dec. 2001	
Price	Volumes
↘ - 11%	↘ - 13%

Orange prices displayed their usual end-of-year dip. However, although performance was much poorer than last year, the level was average in terms of both price and volume. The supply of Spanish fruits was particularly weak during the second half of the month. Demand also recovered slightly.

Spanish Naveline remained abundant and increased in quantity during the first part of December, in spite of shippers' desire to regulate supplies. Demand for orange tended to decrease as the result of competition from ample supplies of high-quality easy peelers. The situation differed markedly from that in December 2001 when quality problems in easy peelers had encouraged consumers to go for oranges. However, volumes were smaller in the second half of the month, reducing the downward trend of the market. Prices returned to average levels. Supplies of Salustiana were nevertheless marginal as releases were much smaller than in an average season (- 31%).

Estimated market releases in France





Estimated market releases in France by origin

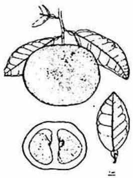
Tonnes	December 2002	Comparisons (%) 2002/2001	Comparisons (%) 2002/2000	Season total 2002/2003	Comparisons (%) 2002/2001	Comparisons (%) 2002/2000
Spain	35 287	- 20	+ 16	73 999	- 16	+ 8
Total	**35 287**	**- 20**	**+ 16**	**78 647**	**- 15**	**+ 8**

Grapefruit

DECEMBER 2002

Monthly comparison: Dec. 2002 / Nov. 2002	
Price	Volumes
= - 1 %	↘↘ - 20 %

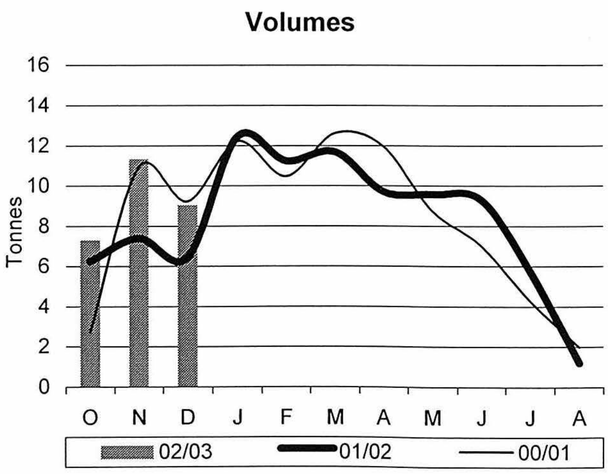
Annual comparison: Dec. 2002 / Dec. 2001	
Price	Volumes
= - 1 %	↗↗ + 40 %

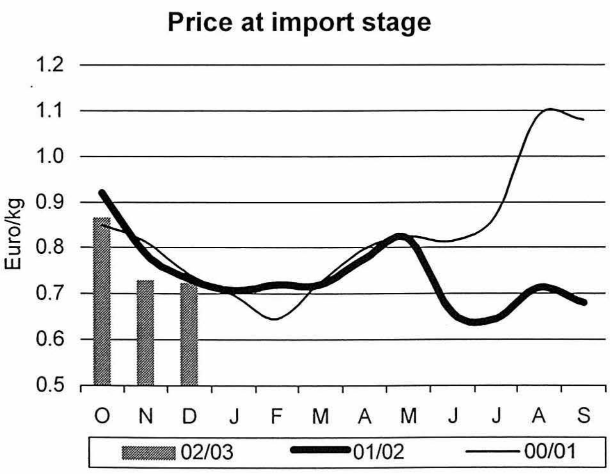


The grapefruit market held no surprises for operators. As every year, the slowing of business started in mid-November and the switch to exotic fruits continued at the beginning of December. Performance was nevertheless average in terms of both price and volume and distinctly better than in 2001.

Releases continued to dwindle at the beginning of December and became very limited for all the supplier countries from week 50 onwards. This traditional decrease is explained by the change in range to the benefit of exotic fruits at this time of the year. The market nevertheless held up well as overall supplies were only average, in spite of the more marked presence of Turkey and Israel than in preceding years (but the levels were still modest). Arrivals from Florida had been substantial in November and slowed considerably, while remaining above the particularly low 2001 level. Prices were therefore similar to those of November. The preparation of New Year operations was early this year and even led to a slight increase in week 52.

Estimated market releases in France





Estimated market releases in France by origin

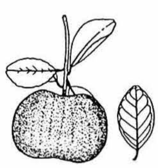
Tonnes	December 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2003	2002/2001	2002/2000
Florida	7 581	+ 34	- 6	22 084	+ 42	+ 35
Israel	491	+ 6	+ 19	1 897	+ 12	+ 21
Turkey	962	+ 220	+ 24	3 681	+ 30	- 25
Total	**9 034**	**+ 40**	**- 2**	**27 662**	**+ 38**	**+ 21**

Easy peelers

DECEMBER 2002

Monthly comparison: Dec. 2002 / Nov. 2002	
Price	Volumes
↗ + 2 %	↗ + 25 %

Annual comparison: Dec. 2002 / Dec. 2001	
Price	Volumes
↗ + 17 %	↗ + 7 %

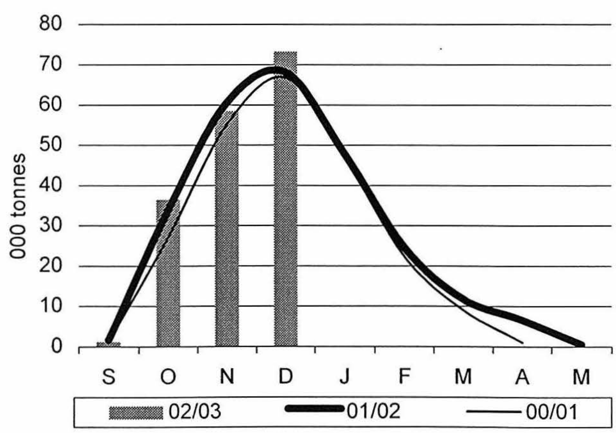


Overall performance was very good with both volumes and prices up in comparison with the preceding seasons. The balance is particularly positive for Spain because of the high level of quality even though the season is well advanced. In this context, competing origins found it difficult to hold a position. This was especially true for Morocco, penalised by a late entry to the market and sometimes uneven quality.

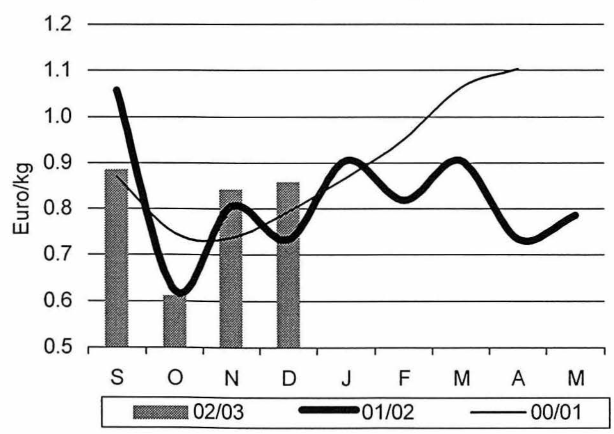
The easy peeler market maintained its balance remarkably. Prices increased strongly in spite of slightly more abundant supplies than in 2001. Small Spanish fruits and Corsican fruit to a lesser degree were more plentiful on the French market (+ 16% and + 6% in comparison with an average season). Consumers showed particular interest in Nules and then switched slowly to Clemenvilla. The end of the month was difficult for Corsica as a result of irregular volumes because of rain and a shipping line strike. The releases of Moroccan fruits decreased in contrast (- 44%). Heavy rainfall had a negative effect on certain batches of clementines, encouraging exporters to start Nour early. Prices were nevertheless comparable to those of an average season for Morocco and Corsica while the prices paid for Spanish fruits increased by 25%.

Estimated market releases in France

Volumes



Price at import stage



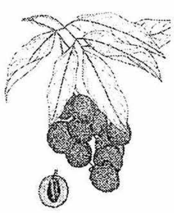
Estimated market releases in France by origin

Tonnes	December 2002	Comparisons (%)		Season total	Comparisons (%)	
		2002/2001	2002/2000	2002/2003	2002/2001	2002/2000
Spain	59 277	+ 16	+ 14	145 412	+ 9	+ 14
Morocco	4 397	- 44	- 28	7 218	+ 2	+155
Corsica	9 526	+ 6	+ 10	16 587	+ 21	+26
Total	**73 200**	**+ 7**	**+ 10**	**169 217**	**+ 3**	**+ 13**

Litchi

DECEMBER 2002

Import price		
Euros/kg	Min	Max
Mauritius		
sulphur treated - by air	5.5	7.0
Madagascar		
sulphur treated - by air	6.0	6.5
sulphur treated - by sea	1.8	2.5
Réunion		
fresh on the branch - by air	7.0	8.0



The litchi import season gathered momentum in December with the first arrivals by sea from Madagascar. The considerable availability of 'sea' fruits sold at lower prices soon led to the end of imports by air from Mauritius, South Africa and Madagascar. Only Réunion continued its shipments of fresh litchis on the branch for the top end of the market.

Conventional ships from Madagascar docked on 6, 11 and 22 December in several European ports, unloading a total of about 10 150 tonnes of fruits. These arrivals were slightly down (by about 5%) in comparison with the previous season. The *Polar Chile* and the *Wild Jasmine* docked at Marseilles (6 and 11/12), the *Cap Triumpho* at Vado (11/12) and finally the *Southern Harvest* put in at Vlissigen-Flushing (22/12). These volumes were completed by the cargoes (about 2 000 tonnes) of the first container ships that arrived just before Christmas for marketing later. The commercial quality of the fruits from Madagascar was satisfactory overall. However, considerable grading heterogeneity, uneven colour and sorting defects (burns, stalks torn off, etc) indicating lack of rigour in fruit selection were observed. The litchis carried by the second conventional vessel probably showed the better quality of the shipments from Madagascar. The shipments unloaded at Vado and Vlissigen were in worse condition, even with moulds developing on certain batches, leading to a downward price movement between Christmas and New Year's Day. Two distinct prices formed during this period, one for goods of satisfactory quality imported in containers and a lower price for fruits of mediocre quality. The quality defects of the goods transported by the *Southern Harvest* encouraged operators to perform clearance sales at the end of the year for the rapid shifting of fruits that were deteriorating rapidly and requiring systematic resorting. The decrease in the quality of the last arrivals in conventional vessels will certainly adversely affect the final results of the season that had begun on a good price base. The prices of Madagascan litchis were higher this year as a result of the smaller volumes overall and also the increase in the cost price. The 'air' litchi niche closed rapidly when sale of fruits imported by sea began. The price of the last batches from Mauritius and South Africa gradually approached that of 'sea' litchi. Only fruits on the branch from Réunion found a position on the market by supplying specialised retailers. Shipments from this origin totalled 15-20 tonnes per week with a peak at 45 tonnes in the week before Christmas. The selling price of litchis from Réunion remained stable and fairly high throughout the month for goods of fine quality. Stored batches were sold at distinctly lower prices.

The Madagascan litchi season was monitored by Pierre Gerbaud for CTHT thanks to European Union funding (STABEX resources).

CTHT MADAGASCAR UNION EUROPEENNE
www.ctht.org

Litchi — Price in euros per kg — Import stage in France

Week	49		50		51		52	
Season	2001/2002	2002/2003	2001/2002	2002/2003	2001/2002	2002/2003	2001/2002	2002/2003
By air								
Mauritius								
on the branch		7.0						
sulphur treated		6.5 - 7.0		5.5				
Madagascar								
sulphur treated		6.0 - 6.5						
Réunion								
fresh on the branch		7.0 - 8.0		7.5 - 8.0		7.5 - 8.0	4.57	7.5 - 8.0
South Africa								
sulphur treated		7.0 - 7.5		6.5 - 7.0		5.0		
By sea								
Madagascar								
sulphur treated	1.98 - 2.13	2.3 - 2.5	1.68 - 1.83	2.0 - 2.3	1.52 - 1.68	1.9 - 2.2	1.37 - 1.52	1.8 - 2.1