Indicators
February 2003

The main fruits		
In shares by total volume and expenditure on fruits for the month in France		
%	Volumes	Expenditure
Apple	27	24
Orange	27	21
Banana	13	13

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

Feb. 2003 / Feb. 2002			
Price	↘	Vol.	↘

Apple

The apple market confirmed its usual February slowing. Sales were more difficult this year, especially for 70-75 Golden Delicious and for Braeburn. Exports were also exposed to strong competition from the beginning of the season in the southern hemisphere. Prices were therefore lower than in 2002.

Feb. 2003 / Feb. 2002			
Price	↘	Vol.	↘

Orange

The market was disappointing. The volumes available were similar to those of 2000/2001, with abundant quantities of Spanish Navelate making up for the decrease in supplies from Morocco and Tunisia. However, prices were distinctly lower as a result of weak interest in oranges and the pressure resulting from the fragility of the last batches of Naveline and Navel.

Feb. 2003 / Feb. 2002			
Price	↘	Vol.	↘

Banana

Performance left much to be desired. Prices were down significantly as a whole in spite of supplies down overall in comparison with last year. Although exports were satisfactory, local demand did not display particular interest in banana, partly because the school holidays were staggered over the entire month.

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

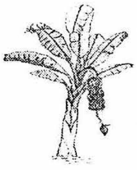
FEBRUARY 2003

Monthly comparison: Feb. 2003 / Jan. 2003

Price	Volumes
↗ + 6%	↘ - 12%

Annual comparison: Feb. 2003 / Feb. 2002

Price	Volumes
↘ - 10%	↘ - 4%

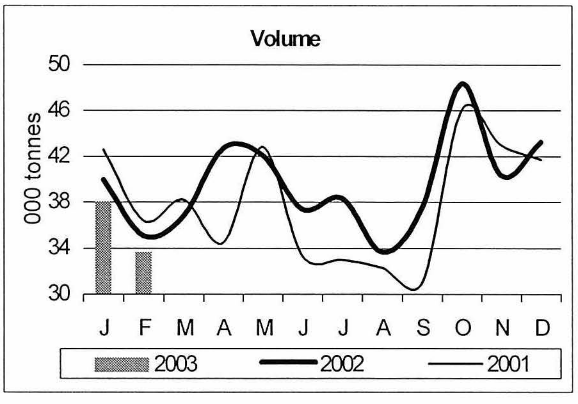


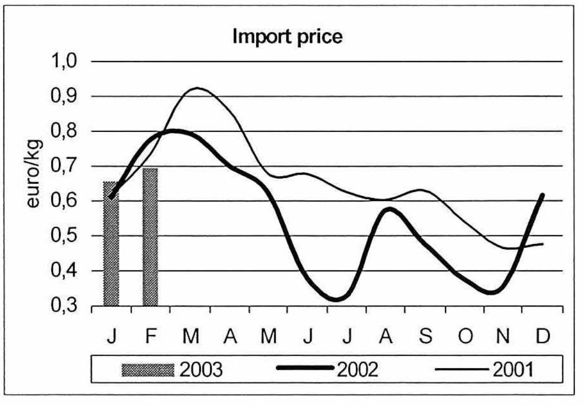
Performance left much to be desired. Prices were down significantly as a whole in spite of supplies down overall in comparison with last year. Although exports were satisfactory, local demand did not display particular interest in banana, partly because the school holidays were staggered over the entire month.

The volumes shipped were distinctly lower than those of an average year (- 7%), especially for bananas from Africa. Export demand was fairly satisfactory as northern countries were slightly under-supplied with dollar bananas (- 4%) and Germany benefited from lively demand thanks to attractive retail prices. The Spanish market was also uncongested because of the very modest shipments from the Canary Islands (- 13%). However, local demand had been hesitant in January and remained moderate in February. The school holidays considerably slowed business in both green and yellow bananas. The indicators were poor and the usual increase in prices in February concerned only African origins as the quality of certain West Indian brands was still uneven.

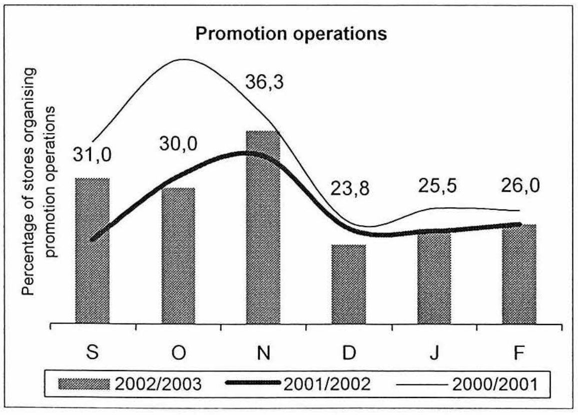
Estimated market releases in France

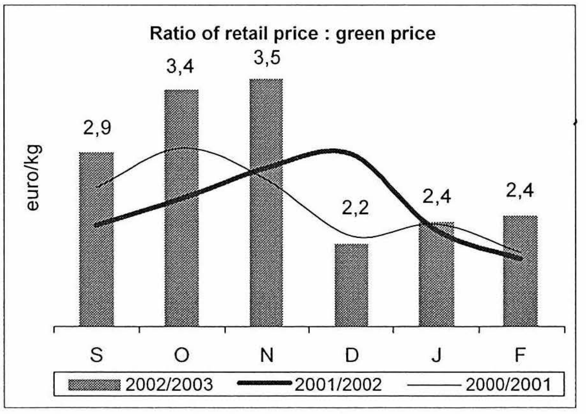
Tonnes	February 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2003	2003/2002	2003/2001
Côte d'Ivoire	6 780	- 6	- 7	15 134	- 5	- 1
Cameroon	8 718	+ 1	- 9	19 392	- 2	- 8
Martinique	12 472	- 4	- 8	25 632	- 5	- 14
Guadeloupe	5 704	- 8	- 3	11 582	- 6	- 9
Total	**33 674**	**- 4**	**- 7**	**71 740**	**- 4**	**- 9**





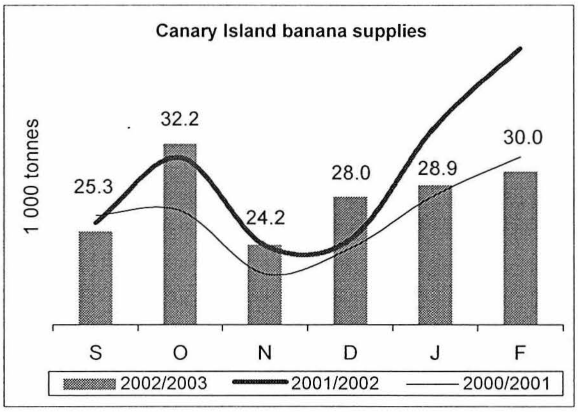
Retail market in France

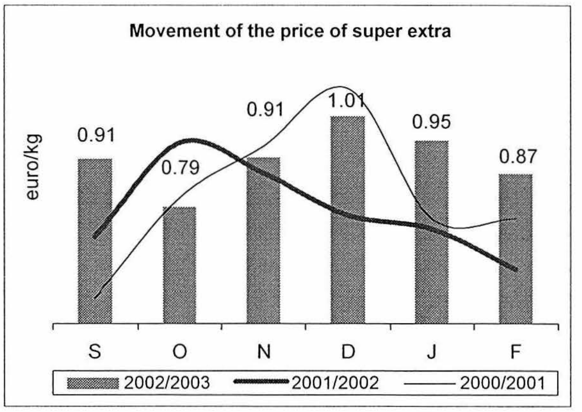




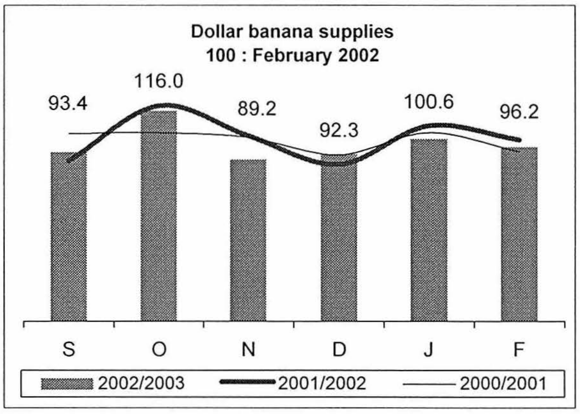
Banana — Indicators for French export markets

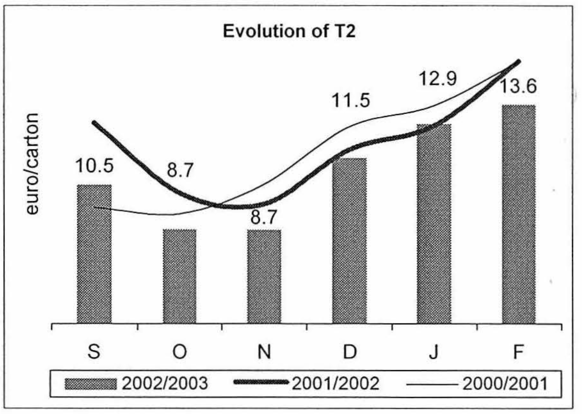
Spain



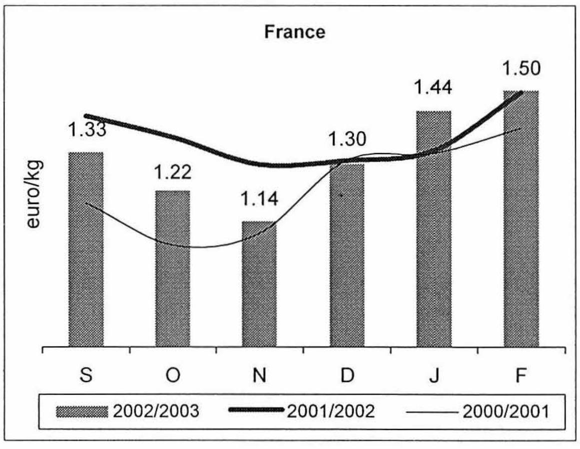


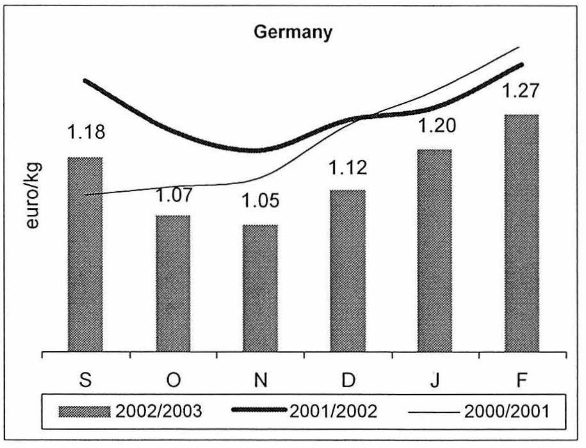
Northern Europe

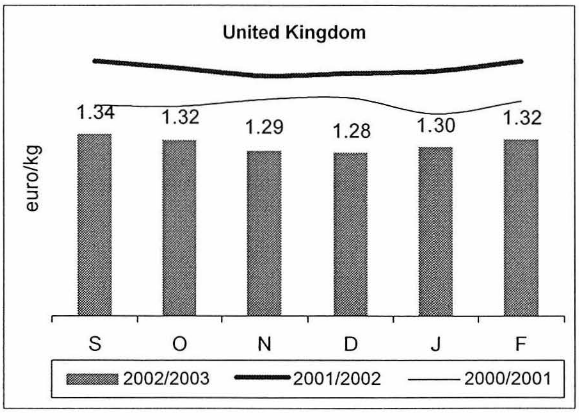


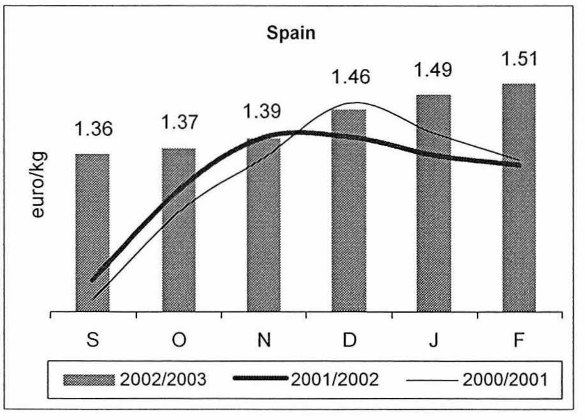


Retail price in Europe









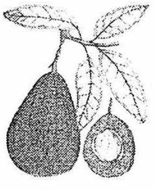
Sources: CIRAD-FLHOR, SNM, TW Marketing Consulting

Avocado

FEBRUARY 2003

Monthly comparison: Feb. 2003 / Jan. 2003	
Price	Volumes
↗ + 5%	↘ - 6%

Annual comparison: Feb. 2003 / Feb. 2002	
Price	Volumes
↗↗ + 110%	↘↘ - 31%

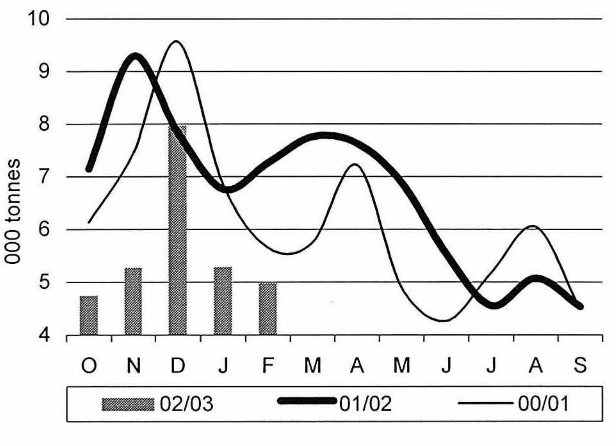


Performance was most satisfactory as a whole in February. Under-supply became slightly more marked in spite of increasing quantities from Mexico and the arrival of the first Fuerte from Kenya. The average price thus beat the record level attained in January.

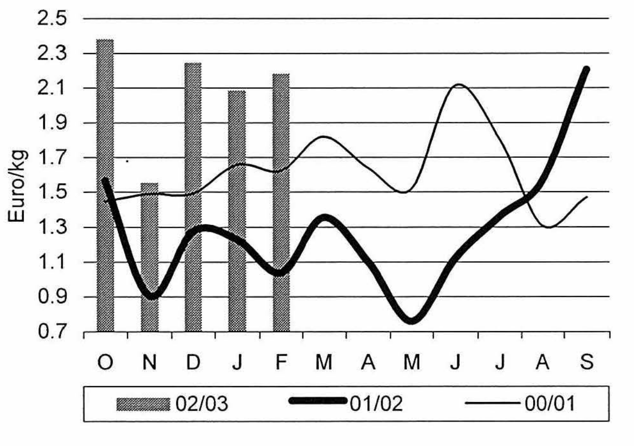
The quantities available remained very modest in spite of larger shipments from Mexico than in past years. The shortfall of Israeli fruits was serious in January and even more marked in February as the crop was small and rainfall disturbed the harvest. Volumes from Spain were also very modest. Kenyan operators played a minor role even though the season started early—at the very beginning of the month. Demand was only average but was more than enough in the light of the small volumes available. The average price thus increased, breaking the record set in January. The performance should nevertheless be viewed in relative terms as total business was not great for the origins with a production shortfall.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	February 2003	Comparisons (%) 2003/2002	Comparisons (%) 2003/2001	Season total 2002/2003	Season comparisons (%) 02-03/01-02	Season comparisons (%) 02-03/00-01
Israel	1 536	- 61	- 20	11 035	- 34	- 20
Mexico	1 149	+ 434	+ 311	8 969	+ 17	+ 32
Spain	2 093	- 25	- 39	10 438	- 27	- 16
Kenya	199	+ 73	-	199	+ 67	-
Total	**4 977**	**- 31**	**- 12**	**30 641**	**- 10**	**- 14**

Orange

FEBRUARY 2003

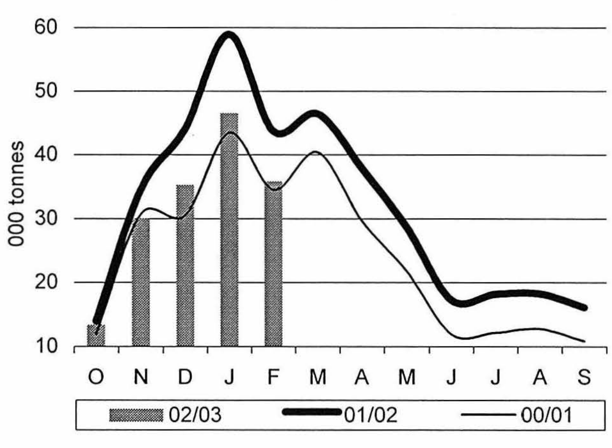
Monthly comparison: Feb. 2003 / Jan. 2003	
Price	Volumes
↘ - 9%	↘ - 24%
Annual comparison: Feb. 2003 / Feb. 2002	
Price	Volumes
↘ - 12%	↘ - 19%

The market was disappointing. The volumes available were similar to those of 2000/2001, with abundant quantities of Spanish Navelate making up for the decrease in supplies from Morocco and Tunisia. However, prices were distinctly lower as a result of weak interest in oranges and the pressure resulting from the fragility of the last batches of Naveline and Navel.

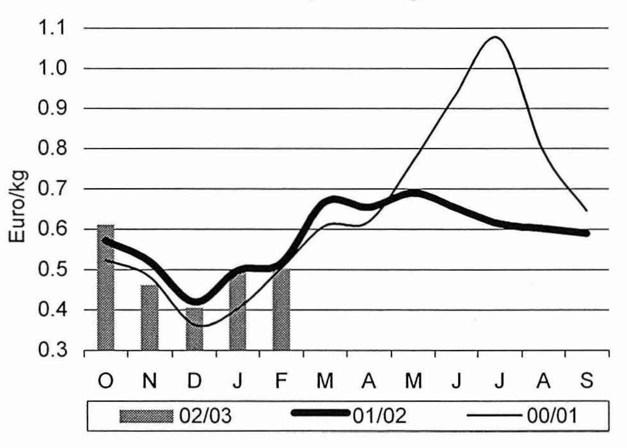
Spanish supplies were well down on the magnificent levels attained in 2001/2002 but distinctly greater (+ 14%) than those of 2000/2001, considered as an average season. The Navelate season got off to a brisker start as a result of the increase in the area devoted to this variety. The volumes from the other origins were much more modest. Moroccan exporters favoured sales on a contract basis and the northern European countries, considered as being more attractive. Shipments of 'Maltese' fruits were more modest after the January crisis. Demand slowed because of the school holidays. Sales of Navelate increased nevertheless, thanks to the interest aroused by the start of the season for this variety. Salustiana also benefited from good shelf positioning in supermarkets. However, Spanish operators found it difficult to increase prices because of competition from the last batches of Navel, whose quality was fragile.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

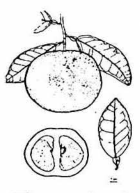
Tonnes	February 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2002/2003	02-03/01-02	02-03/00-01
Spain	31 314	- 18	+ 14	144 664	- 17	+ 9
Morocco	782	- 20	- 11	919	- 71	- 63
Tunisia	3 400	- 23	- 30	10 426	- 16	- 1
Total	**35 496**	**- 19**	**+ 3**	**156 009**	**- 18**	**+ 6**

Grapefruit

FEBRUARY 2003

Monthly comparison: Feb. 2003 / Jan. 2003	
Price	Volumes
= +1%	↗ + 5%

Annual comparison: Feb. 2003 / Feb. 2002	
Price	Volumes
↗ + 5%	= ↗ +2%

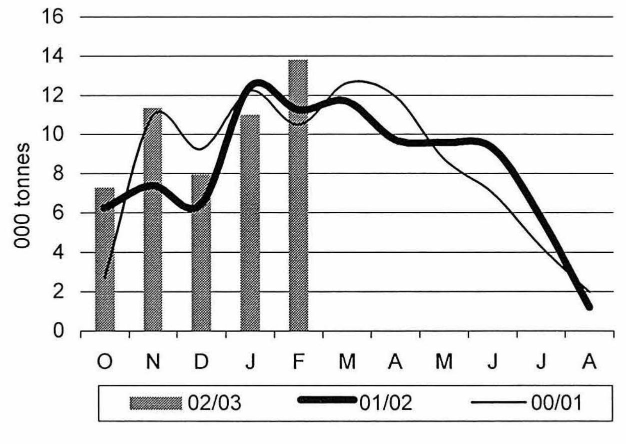


The half-term holidays caused the usual decrease in activity. But although it varied according to supply country, performance remained at a very good level thanks to the dynamism of Florida grapefruit sales.

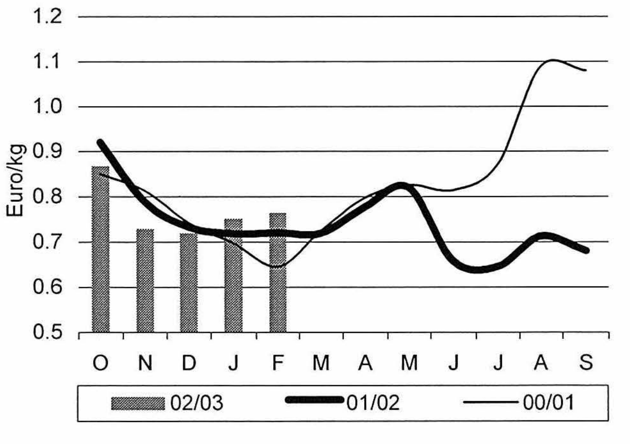
The closing of school canteens during the holidays caused a distinct decrease in releases of grapefruit from Turkey and, to a lesser extent, from Israel. However, the prices of fruits from both of these origins decreased only slightly as quantities were very measured. Indeed, the celebration of Eid Al-Addha affected the activity of Turkish exporters. The Israeli harvest was disturbed by frequent rainfall. Florida operators benefited from steadier, solid demand thanks to numerous supermarket promotion operations. Several operators even succeeded in raising the prices of top-of-the-range fruits.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

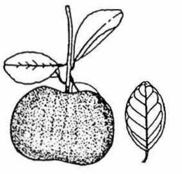
Tonnes	February 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2002/2003	02-03/01-02	02-03/00-01
Florida	9 771	0	+ 24	40 038	+ 13	+ 16
Israel	803	+ 63	- 14	3 163	+ 17	- 4
Turkey	946	- 6	- 43	5 877	+ 5	- 24
Total	**11 520**	**+ 2**	**+ 10**	**49 078**	**+ 12**	**+ 8**

Easy peelers

FEBRUARY 2003

Monthly comparison: Feb. 2003 / Jan. 2003	
Price	Volumes
↗ + 6%	↘ - 52%

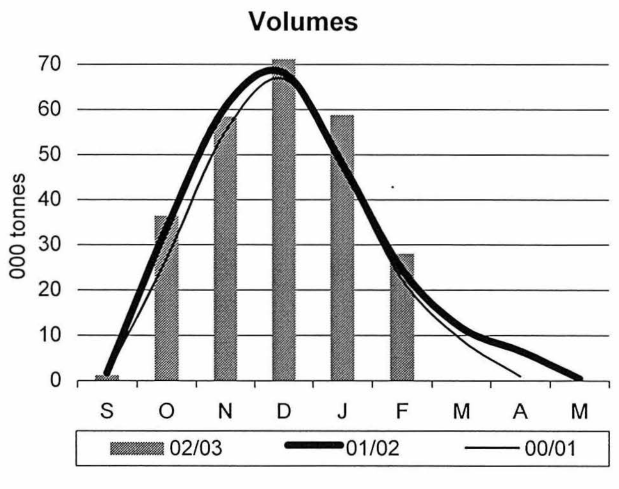
Annual comparison: Feb. 2003 / Feb. 2002	
Price	Volumes
↗ + 16%	↗ + 15%

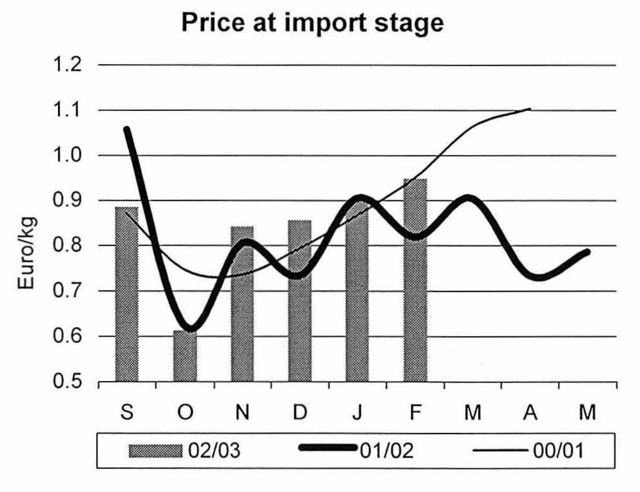


Market performance was remarkable once again, with price and volume increasing in the same proportions. The rate of sales was stimulated by the increase in quality resulting from the switch to Fortuna and ortaniques, stars of the end of the season.

Arrivals of fruits from Morocco decreased considerably. The Nour season finished early and only limited quantities of ortaniques and Afourer were available on the French market. Spanish supplies were nevertheless more abundant than in recent seasons. The fragile Clemenvilla and clementine were finally replaced by large quantities of better keeping late varieties such as Fortuna, Hernandine and ortaniques. Arrivals from Israel were more substantial than last year but were still marginal. Sales were still satisfactory in spite of these plentiful supplies thanks to a considerable promotion effort in supermarkets. Overall quality also returned to a satisfactory level. In spite of the presence of a few batches of Hernandine and Fortuna of uneven quality sold at competitive prices, performance equalled the very good 2001 level.

Estimated market releases in France





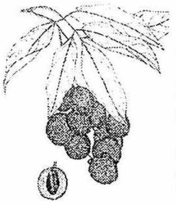
Estimated market releases in France by origin

Tonnes	February 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2002/2001	2002/2000	2002/2003	02-03/01-02	02-03/00-01
Spain	26 271	+ 23	+ 42	219 110	+ 13	+ 19
Morocco	1 484	- 49	- 48	16 270	- 29	0
Israel	304	+ 22	- 64	1 316	- 44	- 40
Corsica	0	-	-	20 902	- 29	+ 25
Total	**28 059**	**+ 15**	**+ 26**	**257 598**	**+ 9**	**+ 17**

Litchi

FEBRUARY 2003

Import price		
Euros/kg	Min	Max
South Africa sulphur treated - by sea	1.20	1.50
Madagascar sulphur treated - by sea	0.30	0.50



The marketing of Madagascan litchis was already difficult in mid-January and worsened in February. The end of the season will probably be remembered as one of the worst for Madagascar in recent years, even though overall volumes were down. The general context was morose and the stocks accumulated sold very slowly because of lack of interest from distributors and consumers. Although distinctly affected by the poor sales of Madagascan fruits, South African litchis nevertheless did better on the market.

In February, the marketing of Madagascan litchis became caught in a downward spiral featuring extremely weak demand and large quantities of goods available. Extended storage time resulted in gradual worsening of quality, in turn causing a downturn in demand. Although the quality of some batches was still satisfactory, the proportion of soft, dry, blemished or mouldy fruit increased as time went past. This led to the disintegration of the litchi market, with transactions performed on a one-off basis and for the best price offered. Supermarkets clearly switched from litchis to concentrate on other produce, the wholesale market reduced its orders for litchi from Madagascar, preferring those from South Africa that were generally of better quality. Re-export markets also tended to focus on South African fruits. Only discount supermarkets formed a regular outlet because of the low retail prices applied. In this situation, the main parameter in transactions was no longer just the selling price but also a maximum volume of goods shifted. The worsening of quality also resulted in operators discarding increasing amounts of inedible fruits. The operators that had based their strategy on a good end to the season because of the announced decreased production in Madagascar will probably suffer most. The South African season also continued with fairly regular tonnages in February. The fruits were fresher than those from Madagascar and sold at higher prices. South African fruits were sold in particular on wholesale markets finding them to be an alternative to Madagascan production. Nevertheless, the quality of the South African fruits received on the French market was not homogeneous. It worsened, with the emergence of considerable disparity between commercial brands. Some had large fruits with fine colour and good taste quality while other brands supplied over-large fruits with very uneven colour, unattractive appearance and mould spots. Slow sales resulting from poor market conditions was also an important factor in the deterioration in the quality of South African fruits. The arrival of little appreciated McLean variety contributed market sluggishness. The first litchis shipped by air from Australia arrived at the end of February, with disappointing appearance and taste and available in very small quantities. They sold for about 10 euros per kg.

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

MADAGASCAR CTHT UNION EUROPEENNE www.ctht.org

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

Week	6		7		8		9	
Season	2001/02	2002/03	2001/02	2002/03	2001/02	2002/03	2001/02	2002/03
By sea								
Madagascar								
Sulphur treated	0.99-1.30	0.30-0.50	0.99-1.52	0.30-0.50		0.30-0.50		0.30-0.50
South Africa								
Sulphur treated		1.50-2.00		1.40-2.00		1.20-1.50		1.20-1.50