

# Indicators

## July-August 2003

The main fruits	In shares by total volume and expenditure on fruits for the month in France		
	%	Volumes	Expenditure
	Peach/Nectarine	25	25
	Melon	23	23
	Apricot	9	10

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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### July-Aug. 03/July-Aug. 02

Price	↗↗	Vol.	↘↘
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Peach/Nect.

Overall supplies were more than 20% down as a result of spring frosts and, to a lesser extent, the heat wave. So, in spite of a relatively difficult period during the second half of August, average prices have been distinctly higher than in 2002.

### July-Aug. 03/July-Aug. 02

Price		Vol.	= ↘
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Melon

Production volume has been similar to last year's. Nevertheless, disturbances caused by the heat wave affected quality. The volumes marketed seem to be slightly down on last year. Prices have been very irregular as a result of the fits and starts of production.

### July-Aug. 03/July-Aug. 02

Price	↗↗	Vol.	↘↘
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Apricot

Spring frosts reduced potential by at least 30% in comparison with last year. Prices therefore remained very strong throughout the season, which finished early.

### 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

JULY/AUGUST 2003

## Monthly comparison: August 2003 / July 2003

Price  
 ↓↓ - 25%  
 Volumes  
 ↓ - 5%

## Annual comparison: July-Aug. 03/July-Aug. 02

Price  
 ↓↓ - 21%  
 Volumes  
 ↓ - 8%



The balance for the two-month period is very disappointing, especially after the optimism generated by the small European stone fruit harvest. Demand was crushed by the heat wave throughout Europe and was too small to handle supplies that were nevertheless smaller than usual because of the comparatively modest shipments of West Indian and dollar bananas.

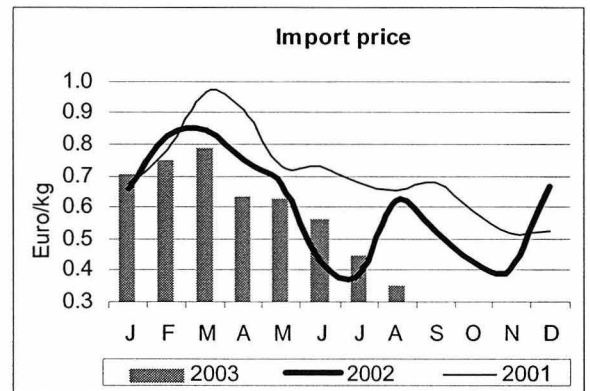
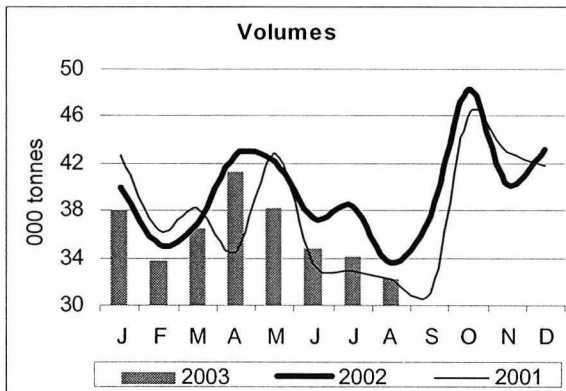
The quantities available were distinctly lower than average as a result of a marked decrease in shipments of West Indian bananas and, outside France, of Canary Island and dollar fruits. Only the presence of African ACP bananas intensified, but without making up for the decrease in bananas of other

origins. It was hoped that demand would be high as a result of the marked shortfall of European production of summer fruits, but it was distinctly lower than forecasts. Indeed, the heat wave that affected the whole of Europe to varying degrees considerably reduced consumer

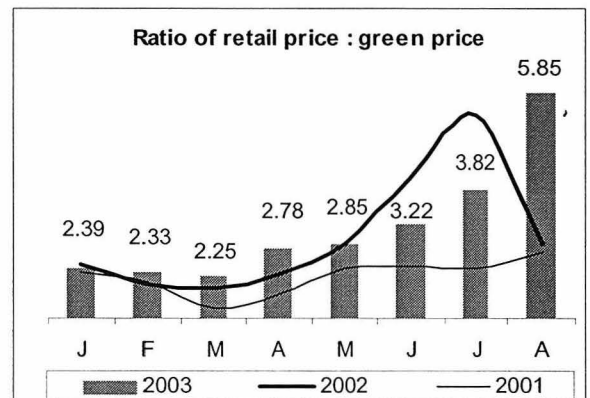
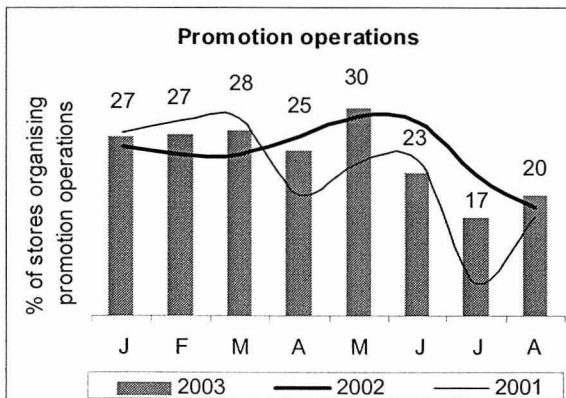
interest in banana. Prices were still satisfactory for the season in the first part of July and then decreased strongly at the end of the month. They remained extremely low for most of August and only began to rise in week 35. The average price in August was the lowest for the past five seasons.

Estimated market releases in France

Tonnes	July 2003	August 2003	Comparisons (%)				Season Total 2003	Season comparisons	
			2003/2002		2003/2001			2003/2002	2003/2001
			July	August	July	August			
Côte d'Ivoire	6 350	5 709	0	- 4	- 6	- 16	58 717	- 10	- 8
Cameroon	8 515	7 875	- 7	+ 23	+ 4	+ 3	73 263	+ 6	+ 4
Martinique	13 567	13 057	- 14	- 13	+ 11	+ 8	110 102	- 7	+ 3
Guadeloupe	5 728	5 647	- 19	- 11	- 1	- 1	46 863	- 11	- 5
Total	34 160	32 288	- 11	- 4	+ 4	0	288 945	- 6	- 1

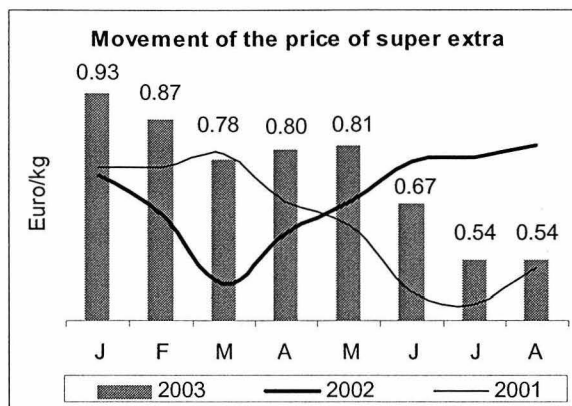
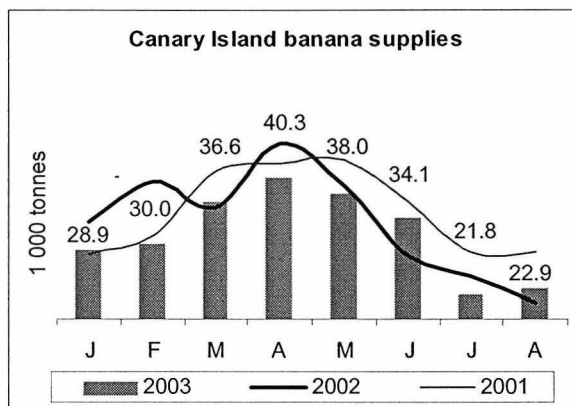


Retail market in France

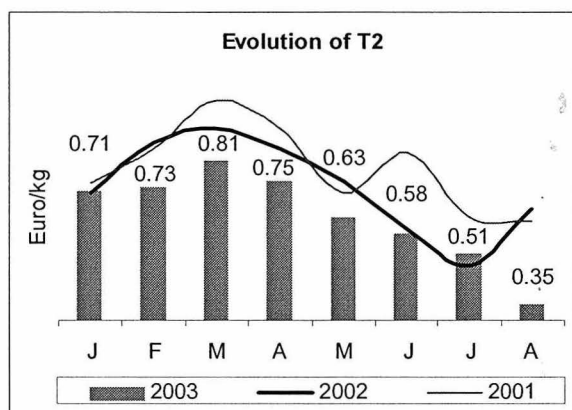
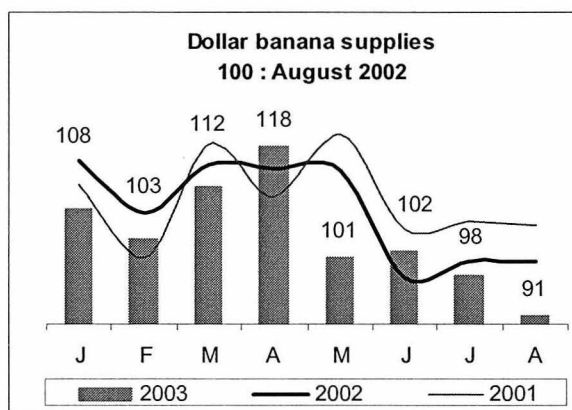


Banana — Indicators for French export markets

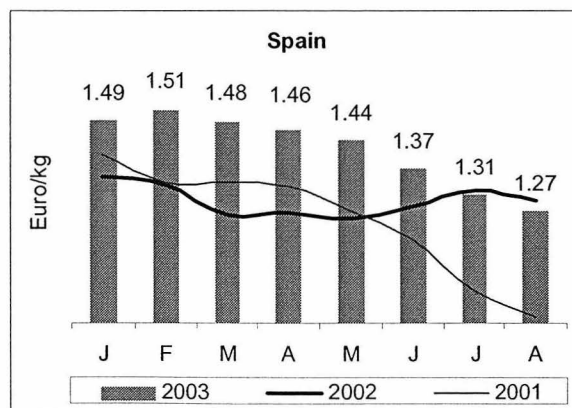
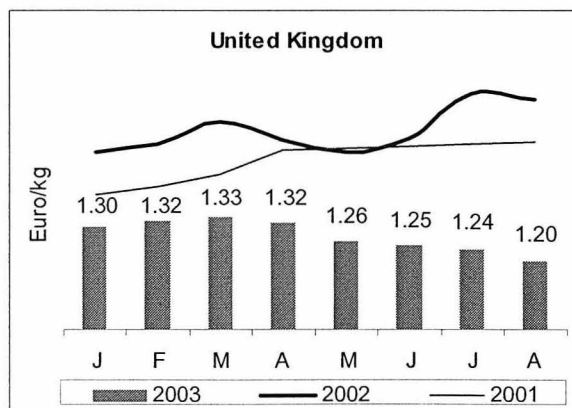
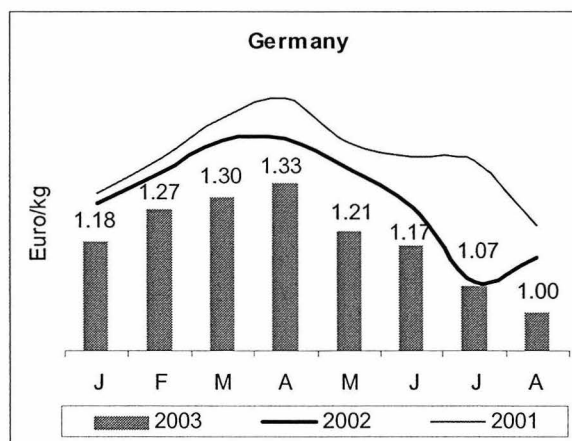
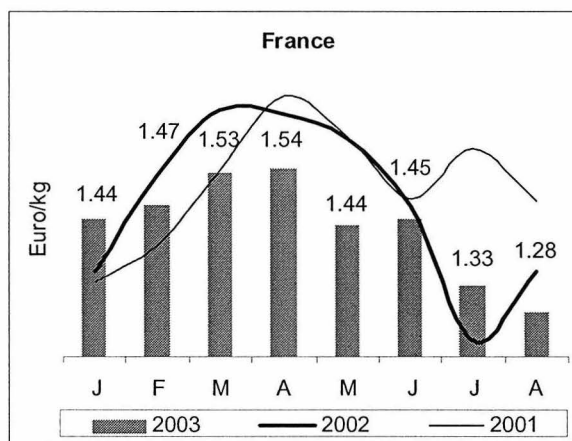
Spain



Northern Europe



Retail price in Europe



Sources: CIRAD-FLHOR, SNM, TW Marketing Consulting

# Avocado

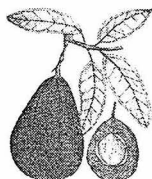
JULY/AUGUST 2003

## Monthly comparison: August 2003 / July 2003

Price =  $\searrow$  - 2%      Volumes  $\searrow\searrow$  - 65%

## Annual comparison: July-Aug. 03/July-Aug. 02

Price =  $\nearrow$  + 3%      Volumes  $\nearrow\nearrow$  + 29%



Supplies were particularly strong in July and August. Shipments from Kenya and to a lesser degree from Mexico, were much higher than average. Furthermore, Peru emerged from its marginal status. The market for green varieties was thus over-supplied. Balance with that of Hass was less disturbed, except with regard to small fruits.

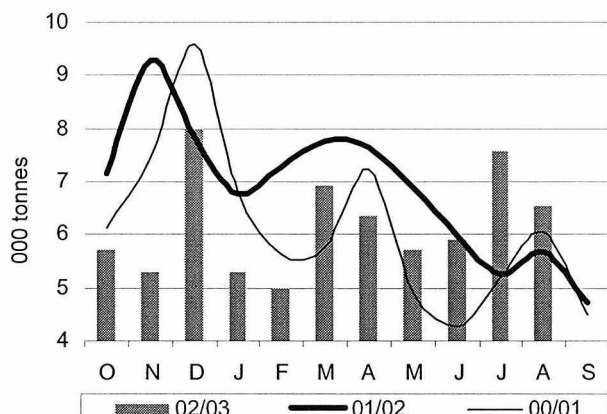
After being limited for several months, supplies were particularly ample in July and August. The high prices of the first half of the year combined with the prospect of a poor South African season resulted in increased shipments. Kenyan shipments were larger than ever. In parallel, the

presence of Peru—still a minor player in 2002—developed strongly. Finally, Mexican operators extended their 2002/2003 season and started the following one early. Demand returned to a summer level, with no nice surprise for operators. In this context, Hass prices fell but remained at a

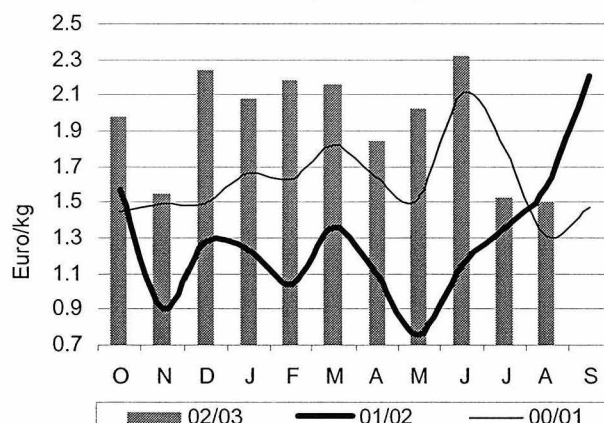
satisfactory level for the time of year (except for the over-abundant small fruits). In contrast, the market soon became extremely difficult for the green varieties and in particular for Kenyan fruits, whose quality was often irregular.

## Estimated market releases in France

Volumes



Price at import stage



## Estimated market releases in France by origin

Tonnes	July 2003	August 2003	Comparisons (%)				Season total 02-03	Season comparisons	
			2003/2002		2003/2001			02-03/01-02	02-03/00-01
			July	August	July	August			
Spain	153	-	- 83	- 100	+ 2 059	0	-	-	-
Mexico	282	718	-	+ 230	- 40	- 45	1 000	+ 359	- 43
Peru	1 958	1 291	+ 174	+ 117	-	-	4 603	+ 160	-
Kenya	1 911	1 090	+ 287	+ 93	+ 104	+ 84	9 048	+ 181	+ 101
South Africa	3 252	3 433	+ 9	+ 9	+ 13	- 1	12 373	- 4	+ 10
Total	7 556	6 532	+ 44	+ 15	+ 46	+ 8	27 024	+ 33	+ 23



# Orange

JULY/AUGUST 2003

**Monthly comparison: August 2003 / July 2003**

Price

↗ + 9%

## Volumes

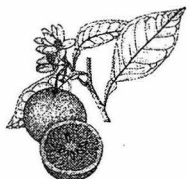
↗ + 8%

**Annual comparison: July-Aug. 03/July-Aug. 02**

Price

↗ + 8%

## Volumes

$$=$$


Large volumes were sold and the average price was only slightly down on average. The small supplies of summer fruits probably accounts for this good performance.

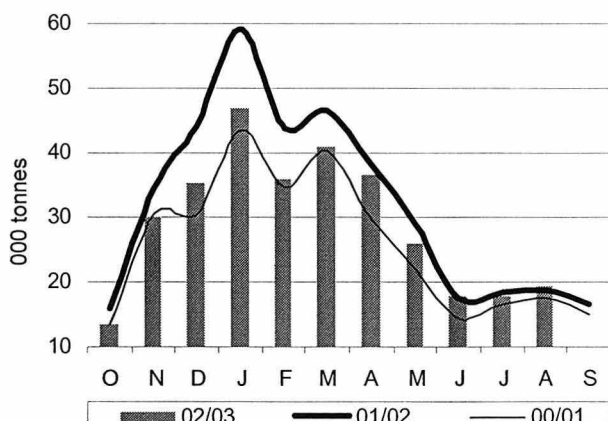
Slightly larger quantities than average were available in July with the marked presence of Spanish fruits, as in 2002. Spain's potential in late fruits is increasing, with the increased production of the two plantations of Navelate slowing the start of Valencia. In contrast, arrivals in the EU of Navel

from South Africa were very similar to those of last year. The increase in supplies was even more marked in August, in spite of more modest shipments from Spain than in 2002. Arrivals of Valencia from South Africa were distinctly larger than last year while those from Argentina were

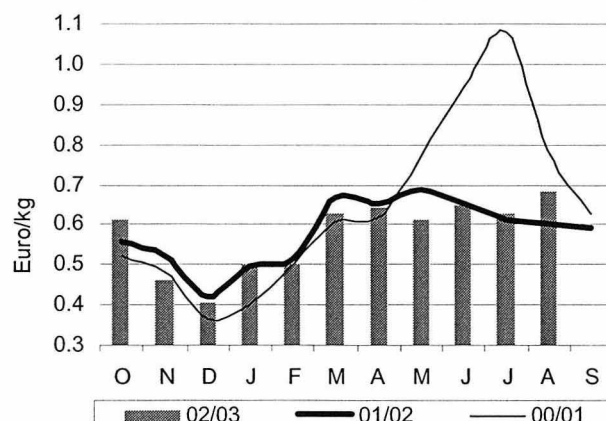
similar to those of 2002. Nevertheless, although it was not particularly active, demand was lively, probably because of the small supplies of the European stone fruits. Thus the average price was only slightly lower than average and higher than last year's.

### Estimated market releases in France

## Volumes



### Price at import stage



### Estimated market releases in France by origin

Tonnes	July 2003	August 2003	Comparisons (%)				Season total 02-03	Season comparisons	
			2003/2002		2003/2001			02-03/01-02	02-03/00-01 (%)
			July	August	July	August			
Spain	5 875	2 918	- 6	- 28	+ 105	+ 22	248 597	- 13	+ 24
Morocco	82	-	- 88	-	-	-	17 915	- 2	- 35
South Africa	11 903	16 426	+ 2	+ 12	- 13	+ 9	33 440	+ 4	- 9
<b>Total</b>	<b>17 860</b>	<b>19 344</b>	<b>- 4</b>	<b>+ 3</b>	<b>+ 8</b>	<b>+ 10</b>	<b>299 952</b>	<b>- 11</b>	<b>+ 13</b>

# Grapefruit

JULY/AUGUST 2003

## Monthly comparison: August 2003 / July 2003

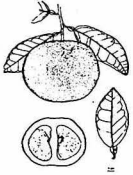
Price  
= ▼ - 4%

Volumes  
▼▼ - 56%

## Annual comparison: July-Aug. 03/July-Aug. 02

Price  
▲▲ + 62%

Volumes  
= ▼ - 1%



Performance has been excellent. Although shipments were distinctly up on preceding seasons, availability was limited because of the small stocks held (as a result of import dips in May and June). Prices therefore continued to peak at rarely equalled levels.

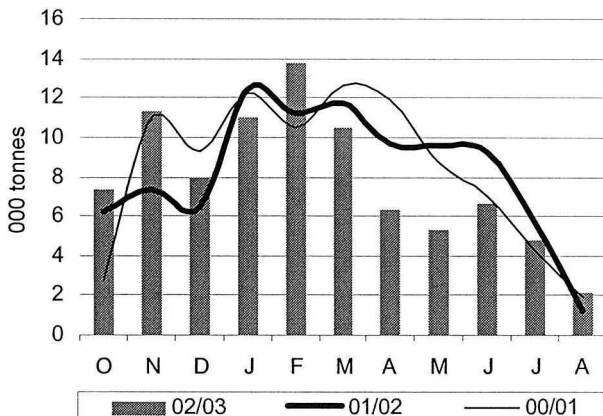
Shipments were larger than in preceding seasons as market conditions were very favourable. Indeed, the South African exporters who had strongly developed shipments to diversification markets (the Far East, etc.) in the first part of the season, regained positions in the

EU. Furthermore, the season started very early in Honduras. Finally, the cumulated total of shipments from Argentina in July and August was similar to last year's and distinctly higher than that of 2001. Nevertheless, operating stocks—generally substantial at the beginning

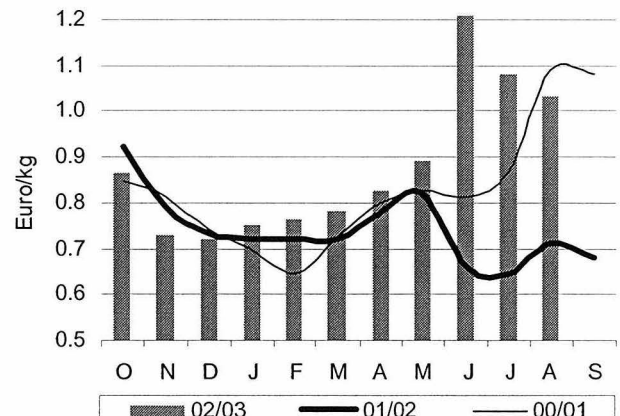
of July—were practically nonexistent as a result of the small amounts imported in May and June. Prices thus remained at very high levels even though demand was normal for the season.

## Estimated market releases in France

### Volumes



### Price at import stage



## Estimated market releases in France by origin

Tonnes	July 2003	August 2003	Comparisons (%)				Season total 02-03	Season comparisons	
			2003/2002		2003/2001			02-03/01-02	02-03/00-01
			July	August	July	August			
Argentina	1 381	468	- 29	+ 117	+ 63	- 34	6 993	+ 15	+ 26
South Africa	3 371	1 639	- 11	+ 67	- 2	+ 29	10 557	- 15	- 4
<b>Total</b>	<b>4 752</b>	<b>2 107</b>	<b>- 17</b>	<b>+ 76</b>	<b>+ 11</b>	<b>+ 6</b>	<b>17 550</b>	<b>- 5</b>	<b>+ 6</b>

# Mango

West African season



July is a transition period in mango supplies. Mali, Côte d'Ivoire and Burkina Faso gradually gave way to Mexico, Senegal and Israel. The August market was characterised by limited demand because of holidays, the heat wave and the greater attraction of summer fruits in spite of their high prices. The curtailed Mexican season and shipments from Israel, Senegal and Brazil resulted in substantial supplies and soon led to the forming of large stocks.

## July

The rapid decrease in arrivals from Côte d'Ivoire at the end of June stimulated a price recovery at the beginning of July. Operators compensated for the shortage of produce by purchasing mangoes from Brazil and Guinea and, on the northern European markets fruits from Puerto Rico, Colombia or Venezuela, to bridge the gap between West Africa and Mexico and Senegal and Israel. The first half of July was chaotic, with no truly dominant origin. Quality was often uneven and the numerous origins and varieties made it difficult to set coherent, steady prices. The market weakened again in the second half of the month as a result of a marked decrease in demand as increasing numbers of people went on holiday.

The **sea mango** market was supplied regularly with the variety Tommy Atkins from Brazil. Although less popular on the French market, the variety was an alternative to often mediocre end-of-season produce from Côte d'Ivoire. Tommy Atkins from

Mexico took over in mid-July, soon followed by Kent. The Senegalese season started slowly and gained momentum in the second half of the month with fruits of satisfactory quality but whose colour was little marked, in a poorer market context.

The dip in supplies of **air mangoes** was not as marked. Mexico gradually replaced Mali and Burkina Faso and was then rapidly followed by Senegal from the second week onwards. The first 'ready-to-eat' Maya from Israel were sold in week 31. Fruit quality was satisfactory throughout the month although the first shipments from Senegal were only just ripe enough for fruits shipped by air. Their dull appearance and dark red colour encouraged buyers to prefer the brighter, shinier fruits from Mexico, whose air export season ended in the last week of the month.

## August

Supplies stabilised, with shipments from Senegal, Mexico and Brazil. The Israeli season started at the end of July with shipments by air. Deliveries

**by sea** started in the second week of August with a very rapid increase in quantities. The cumulated arrival of fruits from Israel and other origins resulted in the accumulation of large stocks. In spite of the early end to Mexican exports in mid-August and a decrease in shipments from Brazil, stocks were too large for the small demand. The deterioration of the quality of stocks caused a decrease in prices in the second half of the month; this was more marked for Tommy Atkins.

The **air mango** market behaved better, with the gradual decrease of shipments from several origins. The early halting of Mexican exports and the small volumes from Senegal resulted in fairly even prices. The price of Maya from Israel fell markedly in the second half of the month as a result of lack of interest in the variety, the large quantities available and the decrease in quality. During this period, Senegal benefited from the absence of Kent of other origins. Nevertheless, the quality of these fruits deteriorated little by little and had to be sold quickly.

JULY/AUGUST 2003

Mango — Estimated market releases										
Tonnes	By air									
	July					August				
Mali	10									
Burkina	3									
Mexico	80									
Senegal	120					100				
Israel						20 to 30 by week				
By sea										
Weeks	27	28	29	30	31	32	33	34	35	
Senegal	16	10	70	150	200	170	250	90	150	

Mango — Price in euros per kilo — Import stage										
2003 weeks		27	28	29	30	31	32	33	34	35
By air										
Mali	Kent	2.30-2.80								
Burkina Faso	Kent		2.80-3.00							
Mexico	Kent	4.00-5.50	3.50-4.00	3.50-4.00	3.80-4.50	3.80-4.50	3.80			
Senegal	Kent		3.10-3.80	2.80-3.50	2.50-3.10	2.50-2.80	2.50-2.80	2.50-2.80	2.00-2.70	2.50-3.00
Senegal	Valencia					2.30-2.80				
Israel	Maya					3.50-4.00	2.50-3.00	2.50-3.00	1.50-3.00	2.70-3.00
By sea										
Brazil	Tommy Atkins	1.00-1.25	1.12-1.25	1.00-1.25	0.87-1.20	1.00-1.25	0.87-1.00		0.75-0.87	0.75-0.87
Côte d'Ivoire	Kent/Keitt	1.25-1.37	1.25-1.37	1.25-1.37						
Guinea	Kent/Keitt	1.25-1.37	1.37-1.50	1.37-1.50	1.12-1.37					
Senegal	Kent	1.37-1.50	1.50	1.12-1.62	1.25-1.62	0.75-1.50	1.25-1.37	1.20-1.25	1.12-1.25	1.12-1.25
Mexico	Tommy Atkins			1.25-1.50	1.25	1.12-1.25	0.87-1.12			
Mexico	Kent			1.50-1.75	1.50	1.37-1.50	1.12-1.37	1.12-1.37	1.00-1.12	1.00-1.12
Israel	Tommy Atkins/Lilli					1.00-1.12	0.87-1.00	0.87-1.00	0.75-0.87	0.62-0.75
Israel	Kent							1.12-1.25	1.12	0.75-1.12

The prices mentioned above are for goods of 'saleable' quality and do not take blemished produce into account.



# Litchi

JULY/AUGUST 2003

## European import price

Euros/kg	Min	Max
Thailand	1.50	3.50
Israel	3.00	4.50



Already limited in June, the European litchi market was even quieter in July and August. The shortage of stone fruits caused by the heat wave did not result in a transfer of attention to exotic fruits. The high prices of temperate fruits caused a distinct decrease in fruit and vegetable consumption. Litchi sales were occasional and irregular in this difficult context.

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



## July

Thailand, providing most of supplies for northern European countries and, to a lesser extent, France, finished its season during the second half of the month, leaving room for the first arrivals from Israel. Announced as modest, the Israeli litchi season started in mid-July with shipments to Holland and then to Belgium and France successively in the following weeks.

The **Dutch** market was increasingly difficult from the second half of July, with a slump in demand. Substantial shipments arrived from Thailand, given the market capacity at this time of year. The shortage of the season's fruits did not have a beneficial effect on tropical produce. The price of Thai litchis fell throughout the month. The first litchis from Israel were sold in the second week of July (EUR 3.50-3.75 per kg), in limited quantities. The highest prices were paid for the best-coloured fruits.

The **Belgian** market was very quiet. Operators were cautious in purchasing supplies because demand was limited. Thai litchis sold at EUR 2.25-2.75 per kg in the first half of the month and at EUR 2.25 per kg in the second half. The first batches from Israel arrived at the end of July (EUR 3.50 per /kg).

Thailand dominated supplies in **France** with very modest quantities enabling comparative stability of prices (EUR 2.00-3.00 per kg according to quality). The price fell at the end of the month (to around EUR 1.75 per kg) because of weak demand and mediocre quality. In mid-July, Indian litchis shipped by sea encountered an unfavourable market and competition from better-established Thai produce. They sold at the same price as Thai fruits and sales finished rapidly because of the poor condition of the batches. At the end of the month, the first litchis from Israel sold at EUR 3.00-4.00 per kg for fruits of uneven quality.

## August

European supplies were covered by Thailand, which continued the season started in May, and Israel, whose shipments increased from the end of July onwards. Thailand is the main litchi supplier to Europe in the summer, with a season lasting for nearly four months.

**Netherlands** seems to take delivery of the greater part of EU supplies during this period of the year. Shipments from Thailand exceeded market absorption capacity in early August and favoured the accumulation of

stocks. Litchi sales remained sluggish in the face of competition from the season's fruits. Prices crumbled in the second half of the month for lack of demand and the gradual decrease in quality. The market recovered slightly at the end of August with the end of the Thai season. Israel gradually took over with very fresh, more attractive fruits whose price tended to fall in the second half of the month but nevertheless remained fairly high. The low ranges were for the variety Mauritius and the high prices for the large variety Floridian, which nevertheless formed a small proportion of shipments from Israel.

The **Belgian** market was fairly stable, handling limited quantities.

Demand for litchi in **France** is not very strong in the summer. The volumes shipped from Israel were large in comparison with demand and sold slowly at relatively stable prices. The quantities marketed remained very limited throughout the month. The high price range was for the variety Floridian. The first, well-coloured batches from Spain arrived at the end of the month in small quantities and sold at high prices at the wholesale stage. However, their quality deteriorated rapidly, resulting in a rapid fall in prices.

## Litchi — Price in euros per kilo — Import stage

2003 weeks	27	28	29	30	31	32	33	34	35
<b>Netherlands</b>									
Thailand	2.50-2.75	2.00-2.25	2.00	1.75-2.25	1.75-2.00	2.00	1.50-2.00	1.50-2.00	1.50
Israel		3.50	3.75	3.50	3.50	3.50-4.50	3.50	3.00-3.25	3.00-3.25
<b>Belgium</b>									
Thailand	2.25-2.75	2.50	2.25	2.25					
Israel					3.50	3.50	3.00-3.50	3.00-3.50	3.00-3.50
<b>France</b>									
Thailand	2.00-3.50	2.00-3.00	2.00-3.00	2.00-3.00		1.75-2.00			
Israel					3.50	3.75-4.00	3.50-4.00	3.50-4.50	3.25-3.50