Indicators
September 2003

The main fruits — In shares by total volume and expenditure on fruits for the month in France		
%	Volumes	Expenditure
Grape	23	24
Apple	20	16
Peach/Nectarine	16	17

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
Banana ... *19*
Avocado ... *21*
Orange ... *22*
Grapefruit ... *23*
Mango ... *24*
Litchi ... *25*

Grape

Sept. 2003 / Sept. 2002			
Price	➚	Vol.	➘

The first table grapes were available earlier than usual this year but total supplies were smaller as a result of the summer drought. Sales were nevertheless disappointing throughout the month in spite of the efforts made by supermarket chains. Prices were only slightly up on those of 2002.

Apple

Sept. 2003 / Sept. 2002			
Price	=	Vol.	➘

Sales of apples were satisfactory, especially at the end of the month, thanks to the usual September retail promotion operations. However, the uneven quality of some fruits caused by April frosts weighed on prices.

Peach/Nect.

Sept. 2003 / Sept. 2002			
Price	➚	Vol.	➘

As expected, the quantities available at the end of the season were smaller than those of previous years as a result of the drought. In parallel, sales were brisk throughout the month as quality was still satisfactory. Prices were thus distinctly higher than those of last year.

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 2003

Monthly comparison: Sept. 2003 / August 2003	
Price	Volumes
↗↗ + 64%	↗ + 9%

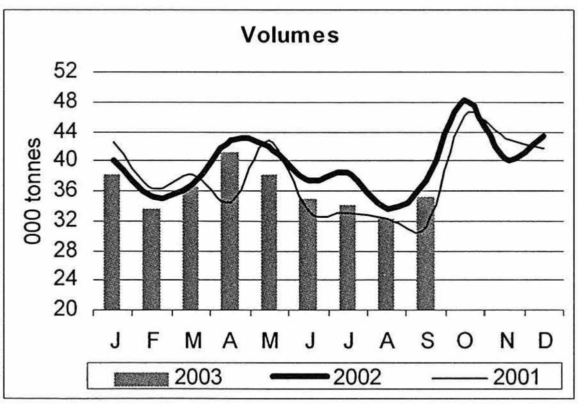
Annual comparison: Sept. 2003 / Sept. 2002	
Price	Volumes
↗ + 4%	↘ – 6%

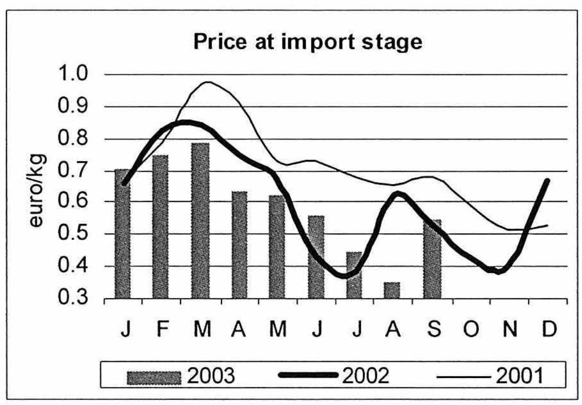
The market emerged from the serious difficulties experienced in August. Performance was nonetheless distinctly worse than average. On the one hand, cumulated shipments from the main origins supplying the French market were substantial and the quality of fruits from Martinique was very uneven. On the other, demand was slack on both the domestic and export markets.

The quantities of bananas shipped from the West Indies and Africa were similar to last year's but substantially higher than the average of recent years, especially during the second half of the month. Furthermore, industrial disputes in Martinique related to the opening of a new port had a very negative effect on the rate of arrivals and on quality. Domestic demand lacked vigour for lack of promotion operations during the second half of the month (promotion was 15% down on the average for the past few years). Exports suffered from some 10% more shipments of dollar bananas than average and substantial quantities of Canary Island bananas in Spain. After a fine gain in week 36, prices dwindled for the rest of the month.

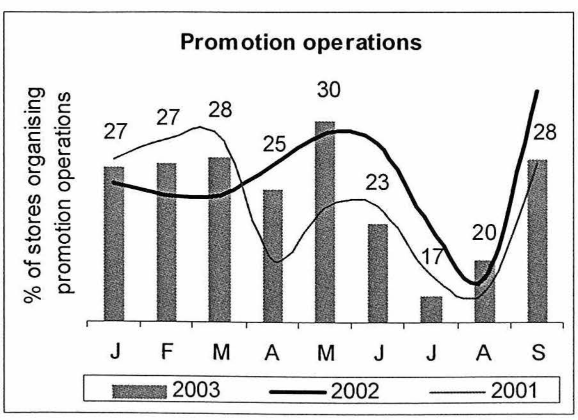
Estimated market releases in France

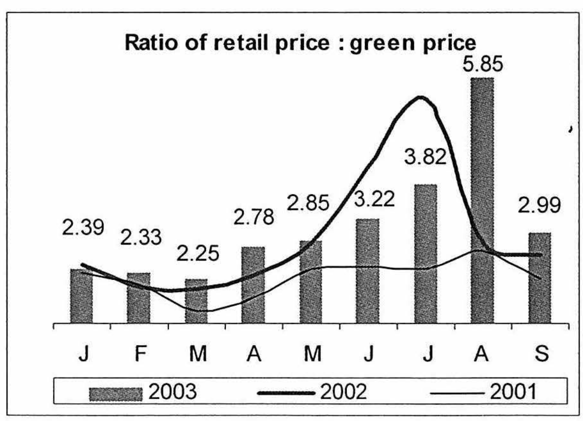
Tonnes	September 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2003	2003/2002	2003/2001
Côte d'Ivoire	7 192	- 6	+ 7	65 909	- 10	- 7
Cameroon	8 879	+ 26	+ 34	82 141	+ 7	+ 5
Martinique	13 202	- 17	+ 7	123 304	- 8	+ 3
Guadeloupe	5 800	- 15	+ 10	52 663	- 11	- 4
Total	**35 073**	**- 6**	**+ 13**	**324 017**	**- 6**	**0**





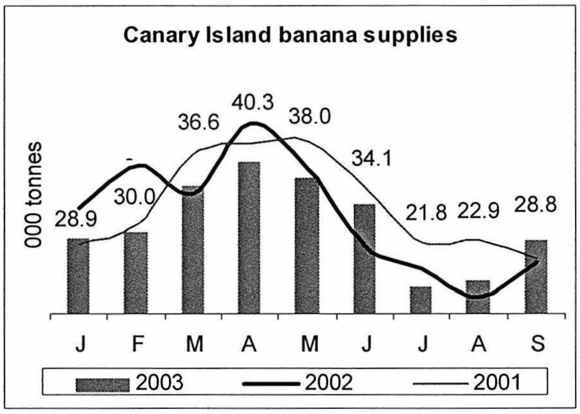
Retail market in France

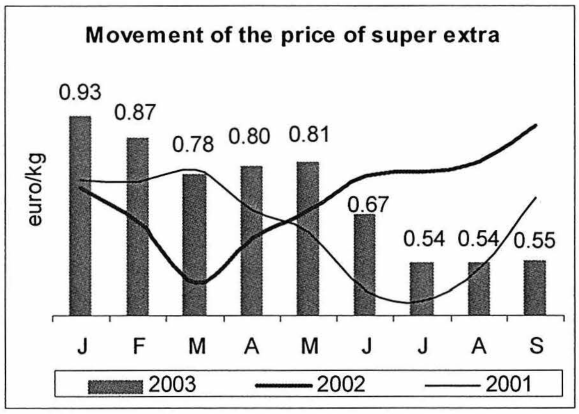




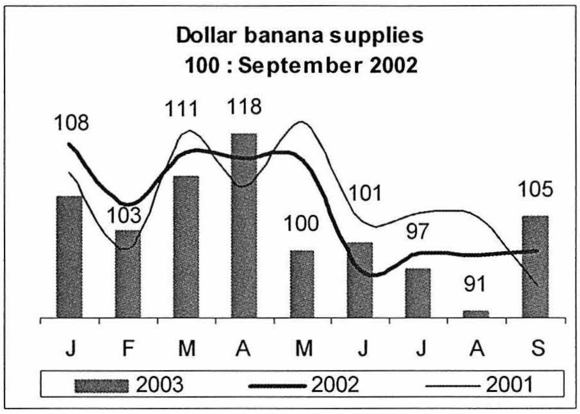
Banana — Indicators for French export markets

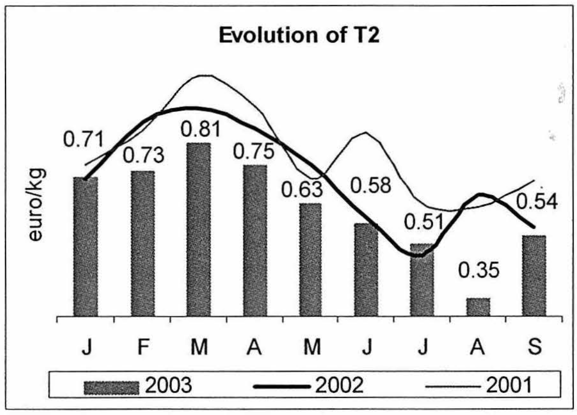
Spain



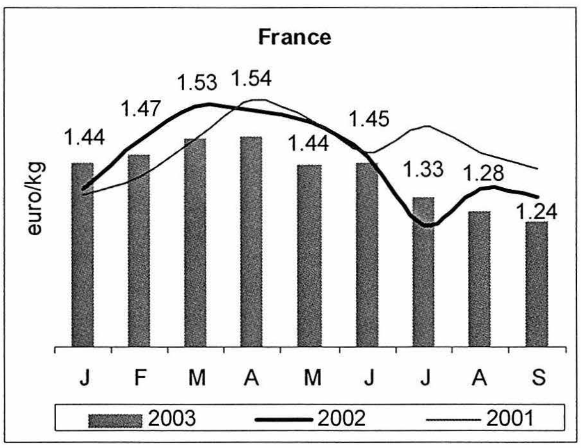


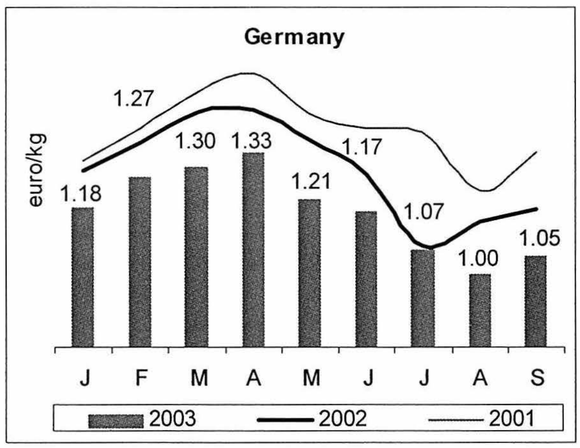
Northern Europe

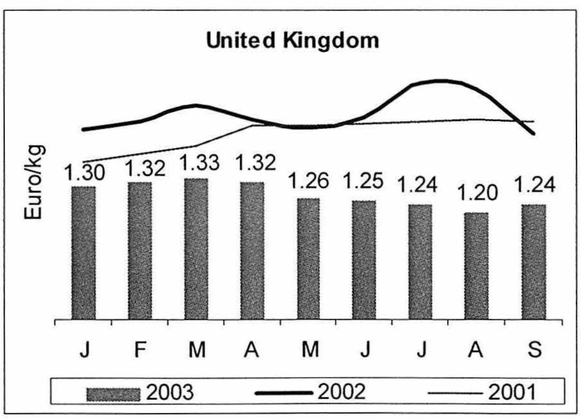


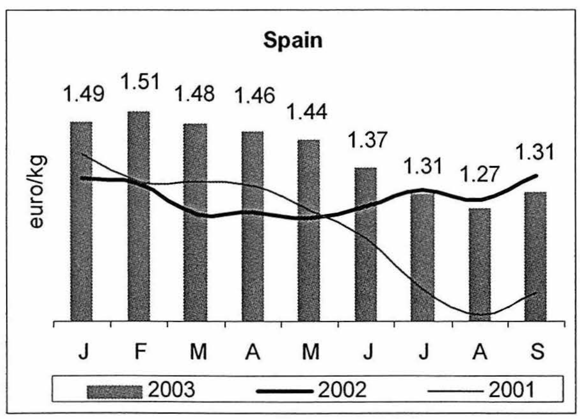


Retail price in Europe









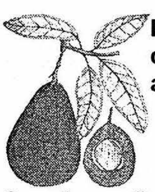
Sources: CIRAD-FLHOR, SNM, TW Marketing Consulting

Avocado

SEPTEMBER 2003

Monthly comparison: Sept. 2003 / August 2003	
Price	Volumes
↗ + 25%	↘ – 3%

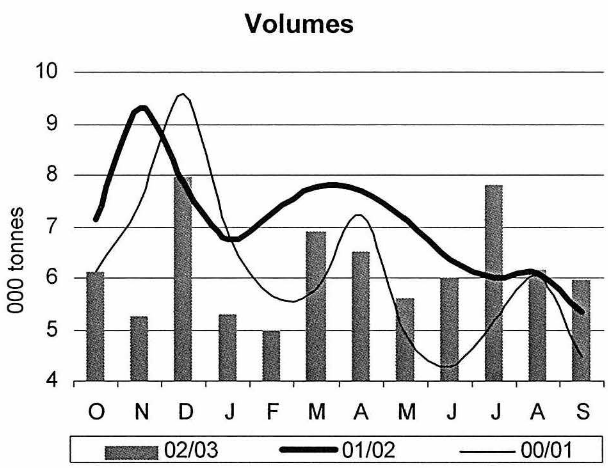
Annual comparison: Sept. 2003 / Sept. 2002	
Price	Volumes
↘ – 15%	↗ + 12%

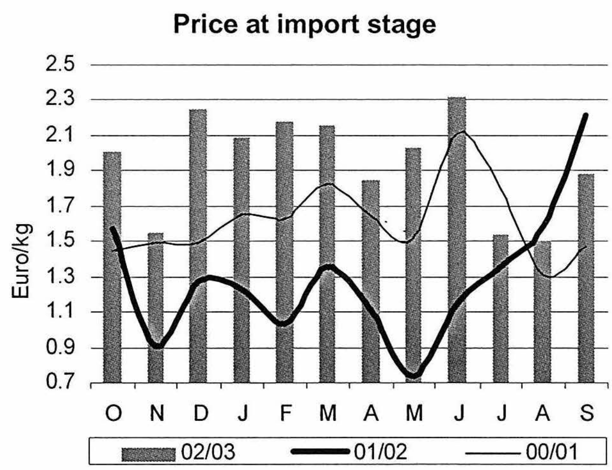


Performance was satisfactory. The average price did not reach last year's excellent level but was distinctly above average even though the volumes sold were larger than in 2002 and higher than the average for the last few years.

Supplies distinctly exceeded the average for the last three years. The marked decrease in shipments from South Africa in comparison with last year was more than compensated by increases from the other origins. Indeed, supplies from Mexico were distinctly larger than in previous years. Kenya maintained greater pressure than before, especially in Hass fruits. Furthermore, Chilean exporters who had hitherto concentrated their exports on the United States are now establishing a position in the EU. The usual September promotion operations made it possible to develop releases but not as strongly as expected as retail prices were high. The price of Hass thus decreased throughout the month, but remained at a satisfactory level. Prices of green varieties displayed the opposite trend because supplies decreased as the month went by.

Estimated market releases in France





Estimated market releases in France by origin

Tonnes	September 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2003/2004	03-04/02-03	03-04/01-02
Spain	409	+ 104	- 25	409	- 45	- 25
Mexico	1 983	+ 39	+ 53	2 983	+ 81	- 2
Peru	352	+ 95	-	4 955	+ 154	-
Kenya	600	+ 79	+ 55	9 648	+ 68	- 4
South Africa	2 170	- 18	+ 40	14 606	- 15	+ 15
Chile	463	+ 266	-	463	+ 266	-
Total	**5 977**	**+ 12**	**+ 33**	**33 064**	**+ 20**	**+ 26**

Orange

SEPTEMBER 2003

Monthly comparison: Sept. 2003 / August 2003

Price	Volumes
↘ – 4%	↘ – 18%

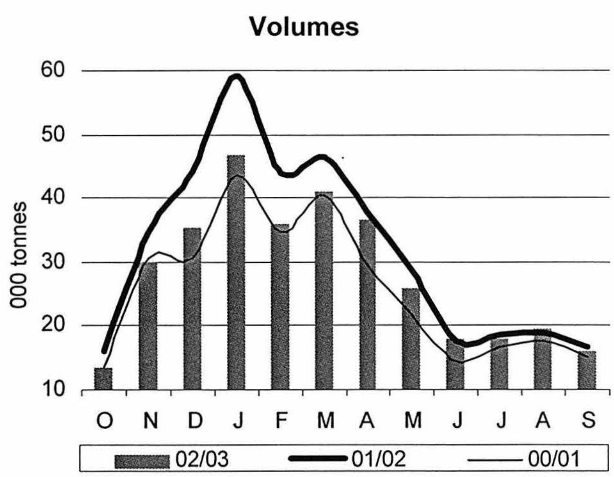
Annual comparison: Sept. 2003 / Sept. 2002

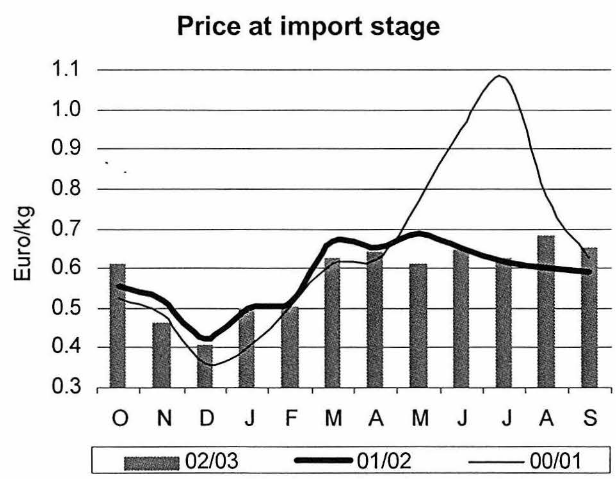
Price	Volumes
↗ + 11%	↘ – 4%

Performance was satisfactory in September. Although supplies were plentiful at the beginning of the month, they decreased considerably in the second half of the month in particular as a result of the early end to South African shipments. In parallel, demand was lively throughout the month thanks to numerous store promotion operations and partly because Spanish clementines were slightly late.

Arrivals of Valencia oranges were substantial during the first part of the month because of more plentiful shipments from Argentina and South Africa. The complement supplied by Spain was larger than in previous years. Nevertheless, as stocks were modest, overall supplies were not excessive. Furthermore, supplies decreased in the second half of the month. Indeed, although shipments from South Africa continued, they were smaller than in preceding years. Sales were satisfactory throughout the month thanks to the agreements with the various retail chains. Similarly, competition from clementine at the end of the month was weaker than last year. The prices of fruits from the main origins continued to increase from week 38 in spite of the pressure of certain marketing operations at astonishingly low prices.

Estimated market releases in France





Estimated market releases in France by origin

Tonnes	September 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2003/2004	03-04/02-03	03-04/01-02
Spain	3 759	- 11	+ 93	252 356	- 13	+ 24
South Africa	12 139	- 1	- 7	45 580	+ 2	- 9
Total	**15 898**	**- 4**	**+ 6**	**297 936**	**- 11**	**+ 18**

Grapefruit

SEPTEMBER 2003

Monthly comparison: Sept. 2003 / August 2003

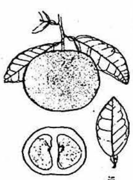
Price

↗ + 17%

Annual comparison: Sept. 2003 / Sept. 2002

Price

↗↗ + 77%

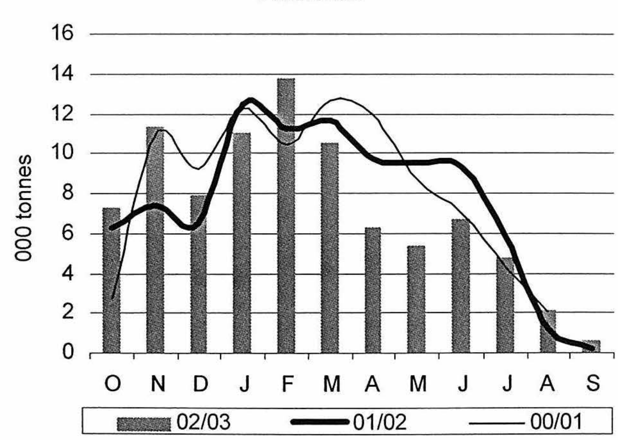


Market performance was excellent in September once again. The small volumes available and the good promotion visibility enabled Honduras to sell markedly larger quantities than last year at very satisfactory prices.

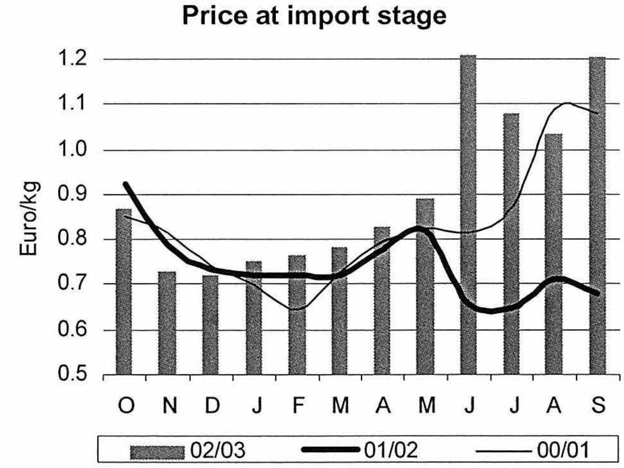
The market was significantly under-supplied in September. Although the season was extended, supplies from South Africa were modest because of the small stocks available. As usual, the quantities of Argentinian fruits were marginal. So Honduras clearly dominated the market throughout the month and was well-presented in retail promotion operations. Prices remained firm even though the quantities were substantially higher than last year, when weather problems caused serious production loss. The late arrival of Cuban fruits at the very end of the month did not change the physiognomy of the market.

Estimated market releases in France

Volumes



Price at import stage



Note: this table does not include quantities from Cuba and Honduras

Estimated market releases in France by origin						
Tonnes	**September 2003**	**Comparisons (%)**		**Season total**	**Season comparisons (%)**	
		2003/2002	**2003/2001**	**2002/2003**	**02-03/01-02**	**02-03/00-01**
Argentina	26	- 86	- 94	7 025	+ 13	+ 17
South Africa	531	+ 1 196	-	11 088	- 11	+ 1
Total	**557**	**+ 149**	**-**	**18 113**	**- 3**	**+ 7**

Mango

West African season

SEPTEMBER 2003	Import price			
	Euros/kg		Min	Max
	By air			
	Senegal	Kent	2.20	3.80
	Israel	Kent	2.80	4.00
	By sea			
	Israel	Keitt	0.62	1.25
	Brazil	Tommy Atkins	0.62	1.12

September was another transition period in mango supply, with a gradual decrease in arrivals from Senegal and the restarting of shipments from Brazil. Israel supplied the major part of the tonnage during the period, complemented by exports from Spain. The traditional September gap in European market supply did not really affect prices as demand was comparatively sluggish.

Steady supplies from Israel formed the main axis of mango supply in September. Senegal was marginalised by a rapid decrease in shipments although it managed to sell produce because it was the only origin to supply the Kent variety. Brazil was an important origin during this period but arrivals were fairly irregular and more particularly targeted northern European countries. Spain appeared as a complementary supplier, with the varieties Osteen and Lippens that are little known by distributors. Frequently considered as a low period for supply, September 2003 seemed to be well-supplied with goods in relation to the level of demand.

The **air** mango market was covered by Israel with three or four varieties during the period. Produce quality was satisfactory, but the less well known varieties Shelly and Kasturi found it difficult to gain a market foothold. Sale of these varieties was hindered by irregular colour and ripeness and so they generally fetched lower prices than Kent, the star variety. Shipments of Keitt developed rapidly from mid-September onwards but the frequent lack of colour made them less attractive for buyers. In this context, the small quantities of Senegalese mangoes available fetched rising prices.

The **sea** mango market was duller throughout the month. It was dominated by fruits from Israel, with a gradual change from the varieties Kent, Tommy Atkins and Lilli to Keitt, which dominated supplies during the second half of the month. Supplies from Brazil were irregular as shipments were more broadly aimed at North American markets. Supplies were completed by Spain in the form of Lippens and particularly Osteen fruits transported by road. Sea mangoes were characterised by fairly mediocre fruit quality: insufficient colour of produce from Israel and inadequate ripeness of Spanish fruits. Arrivals also ran up against destocking operations (Israel) for blemished fruits that brought prices down, especially during the first half of the month. The market cleared somewhat with the decrease in the volumes available.

Mango — Price in euros per kilo — Import stage

Weeks 2003		36	37	38	39	40
By air						
Senegal	Kent	2.20-2.80	2.80-3.00	3.00-3.30	3.00-3.30	3.50-3.80
Israel	Kent	2.80-3.00	3.00	3.50-4.00	-	-
Israel	Shelly/Kasturi	2.60-2.90	3.00	2.80-3.00	2.80-3.00	
Israel	Keitt	-	-	3.50	3.00-3.50	3.00-3.50
By sea						
Brazil	Tommy Atkins	0.62-1.00	0.69-1.12	0.75-1.12	0.87-1.12	0.75-1.12
Senegal	Kent	1.12-1.25	1.12-1.25	1.12-1.25	1.25	-
Israel	Tommy Atkins/Lilli		0.62-0.87	0.87-1.00	-	-
Israel	Kent	1.00-1.12	0.75-1.25	1.00-1.12	1.00-1.12	0.75-1.00
Israel	Keitt	-	-	1.12-1.25	1.00-1.25	0.62-1.00
By truck						
Spain	Osteen			1.75-2.00	1.75	1.25-1.75

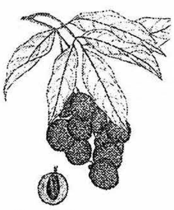
Mango
Estimated market releases

Tonnes	September				
By air					
Senegal	5 to 10 tonnes by week				
Israel	20 to 30 tonnes by week				
By sea					
Weeks	**36**	**37**	**38**	**39**	**40**
Senegal	50	25	20	10	0

Litchi

SEPTEMBER 2003

European import price		
Euros/kg	Min	Max
Spain	6.00	7.50
Israel	3.00	4.75



September was a period of recovery after the summer holidays. Demand was not very lively overall. Supplies of fruit and vegetables were fairly reduced, explaining the high selling prices. Tropical fruits did not really profit from these sales conditions as demand for this type of produce is limited.

The European market was supplied mainly by Israeli produce and, to a lesser extent, Spanish fruits during this period. These two origins mark the end of the litchi sales period on European markets. It will start again with fruits from the Indian Ocean (Mauritius, Madagascar, South Africa and Reunion). Mauritius will probably start the coming season at the end of October/beginning of November.

Netherlands

The Netherlands remained one of the main receiving markets for goods from Israel throughout September. Israeli produce was generally shipped by sea but also occasionally by air. The largest quantities were delivered during the first half of the month but stocks enabled marketing to continue until the end of September. The modest demand for this type of produce during the first fortnight of the month and the availability of substantial quantities weighed on prices. Sales were very irregular during the period. At the beginning of the month, the last batches of litchis from Thailand—of very mediocre quality—sent prices down. The scarcity of goods during the second half of the month stimulated a price recovery that lasted until the end of the season. A few batches of Spanish litchis were also sold on the Dutch market, but very sporadically. The price of these fruits was high but justified by their fine appearance.

Belgium

Transactions in Israeli litchis were marginal. Given the small quantities handled, prices were very stable throughout the month and operators generally obtained supplies on the French or Dutch markets. The purchase of goods from neighbouring markets allowed the adjustment of supplies to retailers' demand.

France

The market was sluggish in September and shipments from Israel seem to have been modest. Demand was very limited and several operators stopped purchasing supplies. Israeli litchis were also in competition with well-coloured fruits from Spain sold at a distinctly higher price. However, quality decreased rapidly after a few days of storage and attacks of mould occurred in particular. Litchi shipments from Spain were irregular in quantity and were spread over a short period of time.

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

MADAGASCAR
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Litchi — Price in euros per kilo — Import stage

Weeks 2003	36	37	38	39	40
Netherlands					
Israel	3.50	3.50	3.50-4.75	3.50-4.75	4.50
Spain			6.00		
Belgium					
Israel	3.00	3.50	3.00-3.50	3.00-3.50	-
France					
Israel	3.00-3.50	3.00-3.50	3.00-3.50	3.00-4.00	-
Spain	7.00	6.00-7.50	6.00-7.00	7.00	-