Indicators
May 2003

The main fruits

In shares by total volume and expenditure on fruits for the month in France

%	Volumes	Expenditure
Strawberry	23	11
Apple	18	24
Banana	10	14

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

Strawberry

May 2003 / May 2002			
Price	↗	Vol.	↘

Supplies of strawberries were plentiful at the beginning of the month and the market recovered its balance during the second half of May. The quantities sold were much smaller because of the frosts that had affected a large proportion of the European crop. Prices were therefore markedly higher than in 2002.

Apple

May 2003 / May 2002			
Price	↘	Vol.	=

Activity was normal for the season. However, sales were not sufficient to clear the stocks that had accumulated for several months (26% more than in 2002). Releases of Golden Delicious were still as difficult, and quality was somewhat mediocre. Prices were lower than those of 2002 as a whole.

Banana

May 2003 / May 2002			
Price	↘	Vol.	↘

The market recovered from the difficulties experienced in April. Indeed, total arrivals in the EU were substantially smaller than average. Demand also perked up, probably because of a marked shortage of the season's fruits. Performance was nonetheless satisfactory given the very low prices in April for the fourth month running.

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

MAY 2003

Monthly comparison: May 2003 / April 2003	
Price	Volumes
= ↘ – 2%	↘ – 7%

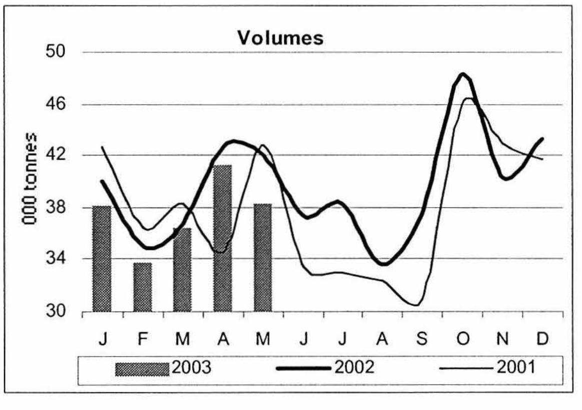
Annual comparison: May 2003 / May 2002	
Price	Volumes
↘ – 8%	↘ – 9%

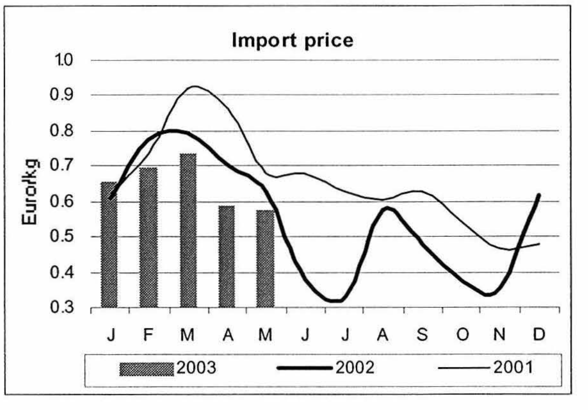
The market recovered from the difficulties experienced in April. Indeed, total arrivals in the EU were substantially smaller than average. Demand also perked up, probably because of a marked shortage of the season's fruits. Performance was nonetheless satisfactory given the very low prices in April for the fourth month running.

After a congested April, supplies were markedly below average in France even though arrivals from Cameroon were strong. Shipments from the Caribbean and Côte d'Ivoire were modest. Arrivals from the dollar zone had been substantial in April but now decreased (gradual increase in production in Costa Rica but recurrent drought in Colombia and industrial disputes in Ecuador). Supplies from the Canary Islands were smaller than in preceding years. Demand increased as on the one hand the quantities of the season's fruits were markedly down (weather problems resulted in lateness and production losses). On the other hand, retail prices were distinctly more attractive than in April in both France and Germany. Numerous special offers were run in France.

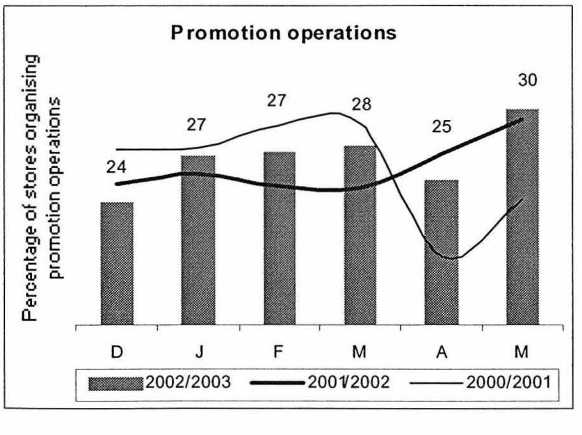
Estimated market releases in France

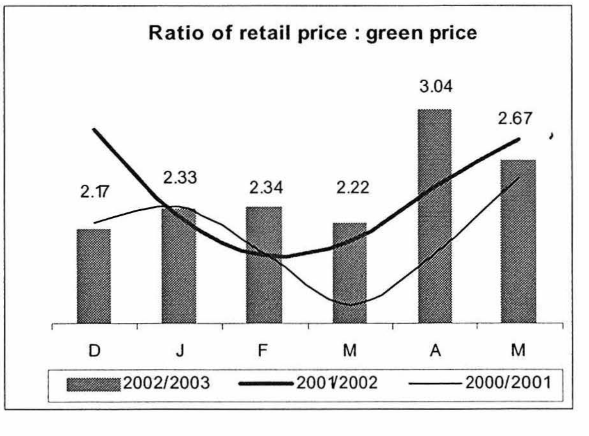
Tonnes	May 2003	Comparisons (%) 2003/2002	Comparisons (%) 2003/2001	Season total 2003	Season comparisons (%) 2003/2002	Season comparisons (%) 2003/2001
Côte d'Ivoire	7 999	- 24	- 20	38 925	- 13	- 10
Cameroon	9 749	+ 11	+ 8	49 513	+ 10	+ 2
Martinique	14 616	- 10	0	69 558	- 6	- 2
Guadeloupe	5 886	- 12	- 24	29 720	- 10	- 7
Total	**38 250**	**- 9**	**- 11**	**187 716**	**- 4**	**- 3**





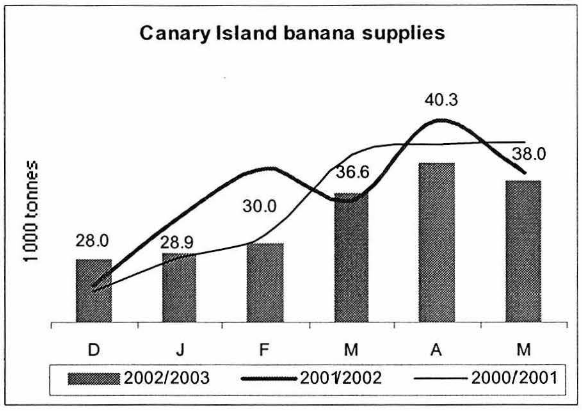
Retail market in France

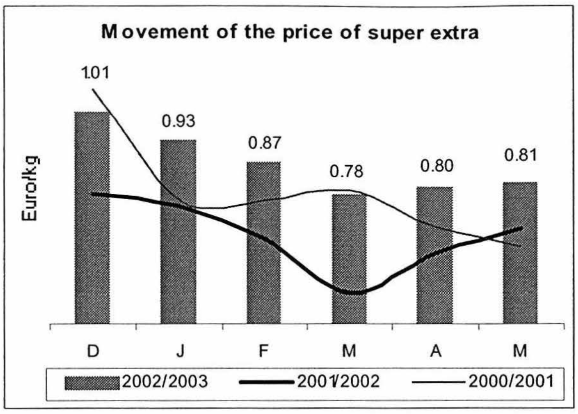




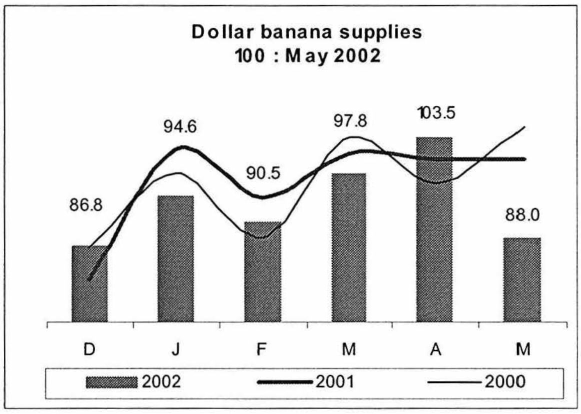
Banana — Indicators for French export markets

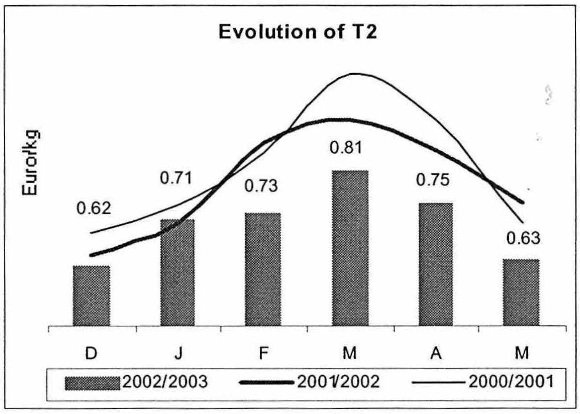
Spain



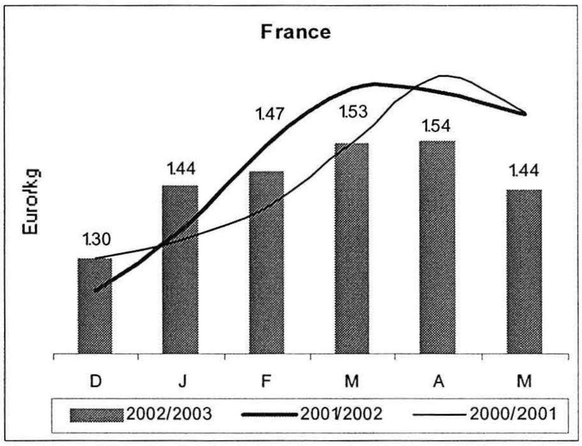


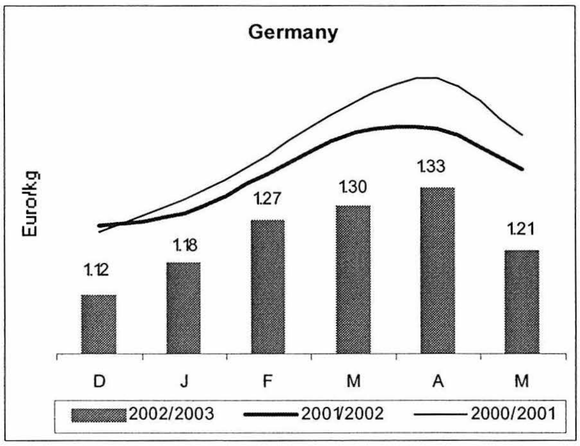
Northern Europe

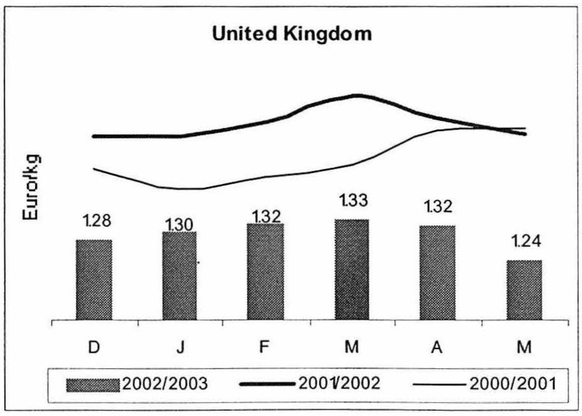


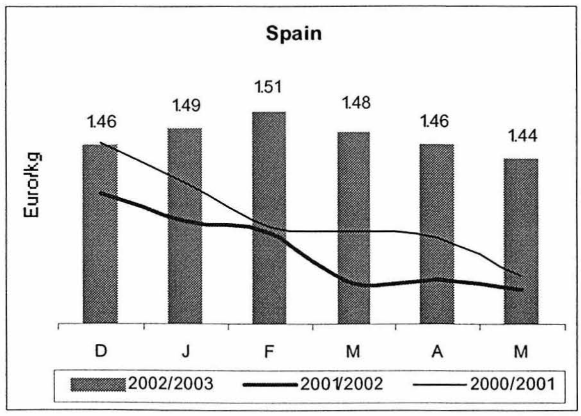


Retail price in Europe









Sources: CIRAD-FLHOR, SNM, TW Marketing Consulting

Avocado

MAY 2003

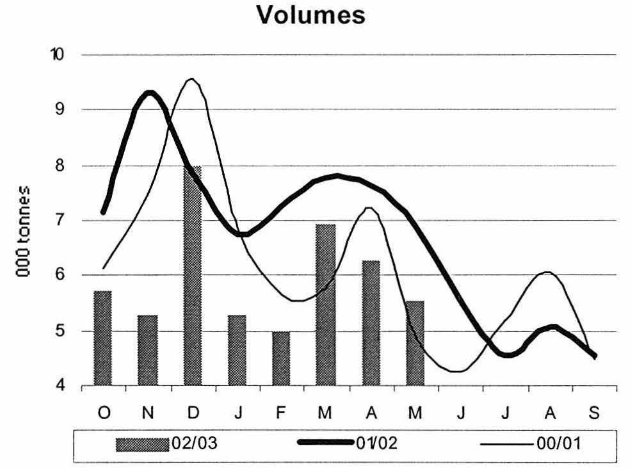
Monthly comparison: May 2003 / April 2003	
Price	Volumes
↘ – 8%	↘ – 12%

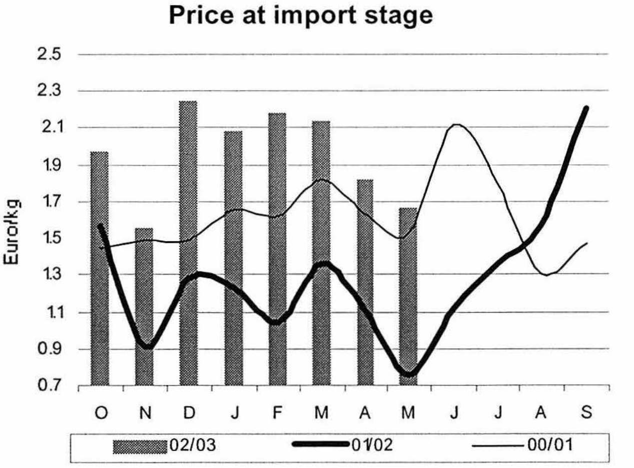
Annual comparison: May 2003 / May 2002	
Price	Volumes
↗↗ + 119%	↘↘ – 20%

The two-speed market remained. Hass continued to be under-supplied and so prices continued to peak. In contrast, the situation was critical for the green varieties, especially as supplies further increased with the true beginning of the South African season. Nevertheless, the overall average price remained at a very good level.

The shortage of supplies of Hass became more acute in May with the considerable decrease in the quantities of fruits from Mexico that had dominated supply in April. Some importers decided to reduce their programmes because of the advanced stage of ripeness of the fruits and so the price of this variety increased even more. In contrast, the situation for Fuerte continued to worsen during the first fortnight in May. On the one hand arrivals from Kenya remained substantial and of frequently uneven quality, and on the other the South African season got fully under way after being held up by rainfall in April. Demand was not sufficient to handle these quantities and stocks were formed. Recovery began at the end of the month. as demand swung back up and supplies from Kenya decreased.

Estimated market releases in France





Estimated market releases in France by origin

Tonnes	May 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2002/2003	02-03/01-02	02-03/00-01
Israel	-	-	-	11 728	- 49	- 33
Mexico	533	-	-	13 669	+ 71	+ 84
Spain	1 534	- 44	+ 17	16 084	- 40	- 30
Kenya	1 358	+ 207	+ 83	5 215	+ 286	+ 179
South Africa	2 116	- 19	+ 33	2 662	- 29	+ 23
Total	**5 541**	**- 20**	**+ 13**	**49 358**	**- 22**	**- 6**

Orange

MAY 2003

Monthly comparison: May 2003 / April 2003	
Price	Volumes
↘ – 5%	↘ – 29%

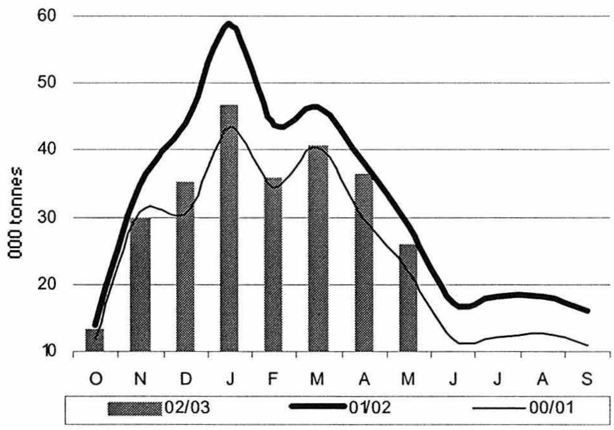
Annual comparison: May 2003 / May 2002	
Price	Volumes
↘ – 11%	↘ – 10%

Performance was satisfactory even though it was clearly short of the excellent 2001/2002 season. The quantities sold were larger than average and the price rose slightly. However, although Spain succeeded in performing satisfactorily the situation was more difficult for Morocco.

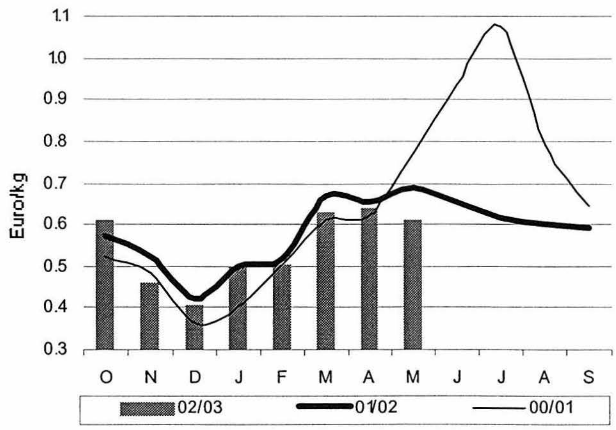
Demand was good overall, probably as a result of smaller quantities than usual of the season's fruits. But it was nonetheless very selective. Releases of Valencia from Spain were strong and even exceeded the excellent 2002 level. Sales of Navelate were good but did not reach the 2002 level. The last significant quantities of this variety were sold in mid-May. Releases of Maroc Late suffered from this strong Spanish pressure and from uneven fruit quality. Supermarket outlets were very limited this season. In spite of a sales recovery at the beginning of the month, cumulated monthly sales were strongly down in the preceding seasons. The average price was also down in spite of satisfactory sales of good quality fruits.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	May 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2002/2003	02-03/01-02	02-03/00-01
Spain	20 159	- 9	+ 53	229 108	- 14	+ 21
Morocco	5 698	- 5	- 14	15 063	- 8	- 45
Total	**25 857**	**- 10**	**+ 19**	**244 171**	**- 14**	**+ 9**

Grapefruit

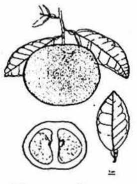
MAY 2003

Monthly comparison: May 2003 / April 2003

Price	Volumes
↗ + 8%	↘ – 15%

Annual comparison: May 2003 / May 2002

Price	Volumes
↗ + 15%	↘↘ – 45%

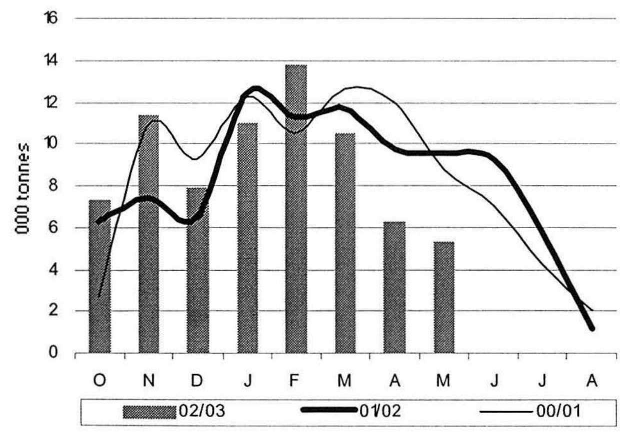


The market was considerably under-supplied. The early end of the winter origin seasons (Florida, Turkey and Israel) was only partially compensated by the quantities shipped from the southern hemisphere. Although the Argentinian season gained momentum more rapidly than in previous years, South African supplies to the EU were very limited this year. Prices therefore remained distinctly higher than in previous years.

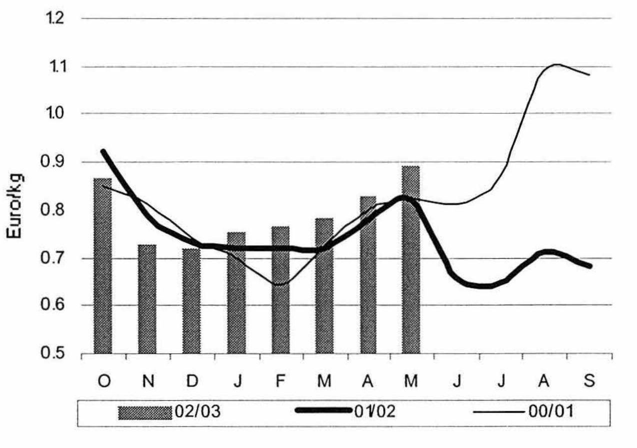
Overall supplies in the northern hemisphere were down markedly this year. Florida generally dominates supplies in May but finished the season at a historically early date. Furthermore, Israel accounts for a large proportion of May supplies but had only limited quantities because of small production. Finally, South Africa was less present than in preceding years as drought reduced the export potential and delayed the harvest. An unfavourable rand:euro exchange rate and strong demand from Asian markets limited shipments to the EU. Thus, in spite of the early start and rapid development of the Argentinian season, overall supplies were distinctly smaller than in preceding years. Finally the average price was markedly up on that of 2002.

Estimated market releases in France

Volumes



Price at import stage



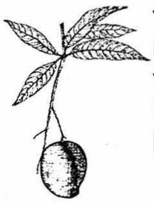
Estimated market releases in France by origin

Tonnes	May 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2002/2003	02-03/01-02	02-03/00-01
Florida	61	- 99	- 98	54 841	- 4	- 4
Israel	1 328	- 33	- 47	7 709	+ 11	- 22
Turkey	-	- 100	-	6 835	- 6	- 18
Argentina	2 096	+ 114	+ 36	2 265	-	+ 36
South Africa	1 857	- 11	+ 15	1 857	- 11	+ 15
Total	**5 342**	**- 44**	**- 39**	**73 507**	**- 2**	**- 7**

Mango

West African season

MAY 2003	Import price		
Euros/kg		Min	Max
By air			
Côte d'Ivoire	Kent	3.00	4.50
Mali	Amélie	1.90	2.20
By sea			
Côte d'Ivoire	Kent	0.75	2.00
Brazil	Tommy Atkins	1.00	1.50



The mango market started with good trading conditions and then gradually deteriorated in May. Exports from Côte d'Ivoire were initially uncertain and then proved to be substantial. The volumes received and the absence of scheduling considerably hindered traders. Demand was limited throughout the month and competition from the season's fruits caused a decrease in price, with the level decreasing to that recorded in March.

The market was still under-supplied with 'sea' mangoes at the very beginning of May, in spite of the increase in supplies from Côte d'Ivoire and the presence of fruits from Brazil. Origins such as Guatemala and Nicaragua soon disappeared after contributing to filling the gap left by Côte d'Ivoire at the beginning of the season. Prices remained stable. The market worsened rapidly from week 19 onwards as a result of the increase in arrivals from Côte d'Ivoire, limited demand and strong competition from the season's fruits. The substantial deliveries during the subsequent weeks put the market out of balance. Prices of fruits from Côte d'Ivoire then moved to match those of the other origins on the market (mainly Brazil). Furthermore, the lack of legibility of arrivals from Côte d'Ivoire did not make operators' pre-sales easier. The increase in supplies from Côte d'Ivoire soon created competition with Latin American mangoes shipped to northern Europe, the main destinations for fruits of this origin. The frequently uneven quality of the fruits sold (irregular ripeness) strongly increased the downward price trend. The fragility of certain batches increased trade pressure on the markets and made re-shipment to other markets more difficult. This market situation favoured the accumulation of substantial stocks, obliging operators to make price concessions to shift the fruits as quickly as possible. In addition to supplies from Côte d'Ivoire, batches of Tommy Atkins from Brazil and Costa Rica were recorded, together with a few batches from Mexico. The appearance of these fruits was generally mediocre and they were difficult to sell. The 'air' mango market worsened more quickly as a result of substantial deliveries. The efforts made by exporters in Mali and Burkina Faso to make up for the shortfall from Côte d'Ivoire was justified in April but inappropriate in May. The continuation of substantial export flows from these origins together with the fruits shipped from Côte d'Ivoire soon saturated the market. Furthermore, the quality of the mangoes shipped by air was very uneven and not really different to that of the fruits arriving by sea and selling at lower prices. Shippers' determination to avoid risks of seizure of goods because of fruitfly often results in the delivery of fruits that are not ripe enough and that do not meet the ripeness criteria expected for this type of high-quality produce. The Plant Protection Service intercepted several batches of mangoes shipped by air from Mali, Burkina Faso and Côte d'Ivoire and by sea from Côte d'Ivoire.

Mango — Prices in Euros per kilo — Import stage

Weeks		19	20	21	22
By air					
Mali	Kent	2.60-3.20	2.00-2.80	2.20-2.50	1.60-2.20
Mali	Amélie	2.00-2.20	1.90	1.90-2.00	-
Mali	Valencia	2.30-2.80	2.00-3.00	1.70-2.20	1.50-2.20
Burkina Faso	Amélie	2.20			
Burkina Faso	Kent	2.60-3.00	2.20-3.00	2.00-2.50	1.50-2.20
Côte d'Ivoire	Kent	3.50-4.50	3.00-4.00	3.00-3.50	3.00
By sea					
Brazil	Tommy Atkins	1.25-1.50	1.25-1.35	1.00-1.25	1.00-1.12
Côte d'Ivoire	Kent	1.75-2.00	1.50-1.75	0.75-1.25	0.75-1.12
Mexico	Tommy Atkins			0.87-1.00	0.75-1.00

Mango — Estimated market releases in tonnes — May

By air				
Mali	280			
Côte d'Ivoire	220			
Burkina	105			
By sea				
Weeks	19	20	21	22
Côte d'Ivoire	110	920	510	600

Litchi

MAY 2003

Europe — Import price		
Euros/kg	Min	Max
Thailand sulfur treated litchi - by air	3	7
Thailand sulfur treated litchi - by sea	3.25	4.25
Thailand rambutan - by air	6.5	7

May was mainly characterised by a limited market for litchi and related fruits (rambutan and longan). Litchi remains part of the range of available 'exotic' fruits but is not eaten as often as during the European winter coinciding with the export season in the Indian Ocean region (Madagascar, South Africa, Mauritius and Réunion).

At this time of the year litchis are sold via traditional distribution channels—specialised wholesalers—to retailers specialised in exotic fruits. Litchis are no longer found in supermarkets, which prefer to concentrate their publicity efforts on temperate climate seasonal fruits (cherries, strawberries, peaches, melons, etc.).

The Netherlands

The first batches of litchi from Thailand reached the Dutch market at the beginning of May. They were sulphur-treated fruits packed in 2-kg boxes and shipped by air. The goods were sold in limited quantities at 5 to 6 euro per kg. These air shipments started the Thai export season before the arrival of the first sea containers. The latter were unloaded in northern European ports starting in the third week of May. The high prices of 3.75 to 4.25 euro per kg fetched by the first batches fell during the following week. This trend is explained by the arrival of sufficient quantities on a market with weak demand. Arrivals should increase during the coming weeks and operators forecast another price decrease.

France

Several French market operators continued sales of Thai rambutan shipped by air (6.50-7.00 euro per kg) and longans transported by ship from the same origin (2.30 euro per kg). The first batches of litchis imported from Thailand by air were put on sale in the second week of the month, selling at about 6.50-7.00 euro per kg. The price then fell because of the sometimes poor quality of the goods and limited demand. May was overall a difficult month for the fruit and vegetable sector, with capricious demand and varying prices. Tropical produce suffered the same market uncertainty. In this context, the price of Thai litchis oscillated between 3.00 and 6.50 euro per kg. The first arrivals from Thailand by sea (and unloaded in northern European ports) are expected in the second week of June. A few small batches of litchi transported by air from China and Mexicoa were also unloaded in France in the third week of May. Most of the litchis from China were packed in traditional woven baskets holding two kilos of fruits. The baskets were packed in polystyrene containers chilled by blocks of ice. The destemmed fruits were packed in the baskets and covered with leaves. The price was about 12-13 euro per kg at the wholesale stage. Other shipments from China were packed in plastic crates holding two kilos of fruit. Fruit quality was satisfactory but defects such as stalks too long and shell spotting were observed. Colour was satisfactory. The fruits from Mexico were packed in the same type of box as for the export of other fruits (mangoes, limes, etc.). These closed boxes were lined with paper to protect the fruits. The fruits had good taste qualities but with frequent dark spots on the shells and some mould in the stalk area. These litchis were sold at about 7.00 euro per kg.

NB: The prices mentioned in this note are those at import stage unless otherwise specified.

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