Indicators
February 2004

The main fruits

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

%	Volumes	Expenditure
Apple	26	23
Orange	24	19
Easy peelers	14	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

Apple

Feb. 2004 / Feb. 2003			
Price	↗	Vol.	↗

After a remarkable start to the year, business has slowed although sales have still been satisfactory. The half-term holidays caused demand to mark time in France. In addition, the star varieties have been succeeded by fruits whose quality and size are less suited to market requirements, considerably reducing export outlets. However, stocks are smaller than in 2003 and prices are higher.

Orange

Feb. 2004 / Feb. 2003			
Price	↗	Vol.	↗

Performance has been good. Releases and average price are considerably up on the preceding seasons. The increase in the range of varieties available following the strong increase in supplies of Navelate seems to have generated greater interest from the distribution sector.

Easy peelers

Feb. 2004 / Feb. 2003			
Price	↗	Vol.	=↘

Performance was satisfactory. Prices remained at a very good level even though the shortage of supplies was much less marked than in January. Demand was healthy, probably as a result of better quality, as this had often been uneven in the preceding months because of rain at the end of 2003.

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

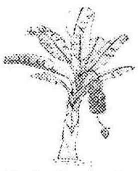
FEBRUARY 2004

Monthly comparison: Feb. 2004 / Jan. 2004

Price	Volumes
↗ + 3%	= – 1%

Annual comparison: Feb. 2004 / Feb. 2003

Price	Volumes
↘↘ – 20%	↗ + 5%

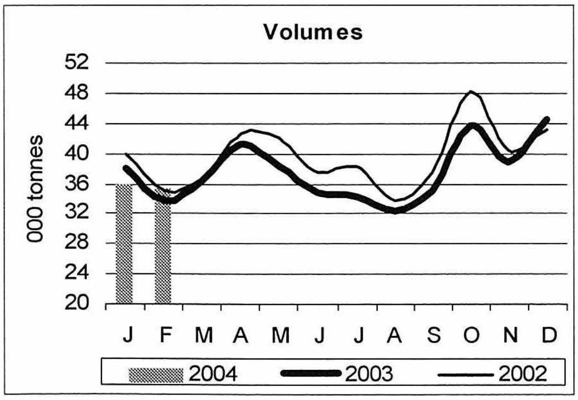


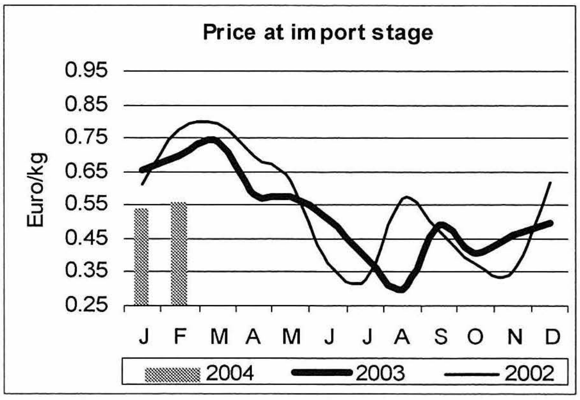
Performance was even worse than in January. The average price was down by 25 percent in France and by nearly 15 percent in Germany in comparison with average levels. Shipments from the main production zones had been small in January and then recovered to a point slightly above average. However, weak demand—a recurrent feature since the beginning of the year—once again seems to be the main cause of poor performance.

Retail prices were comparatively attractive in France in spite of the minimum passing on of the fall in the price of green fruits (high retail price:green price ratio). In contrast, there were few special offers, with the exception of the wave of large promotion operations at the end of the month. This contributed to further slowing of demand that was already very moderate as a result of the half-term holidays. Business was also disappointing in the north of the EU. In parallel, after being only moderate in January, supplies from all origins increased noticeably. Arrivals from the West Indies and Africa were about 5 percent greater than average and dollar bananas recovered to normal levels. Prices did not therefore display the usual February upward trend. Continued quality problems in a significant proportion of supplies from the West Indies continued to weight on the position of fruits of this origin.

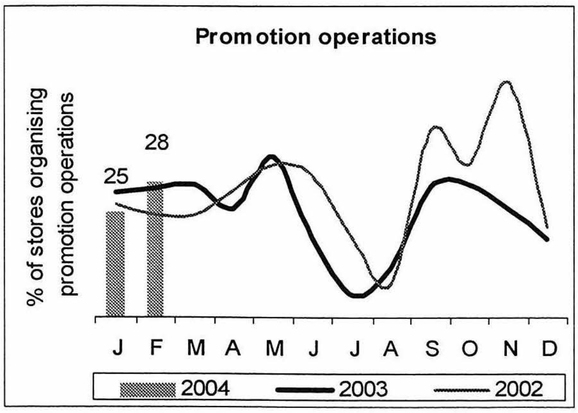
Estimated market releases in France

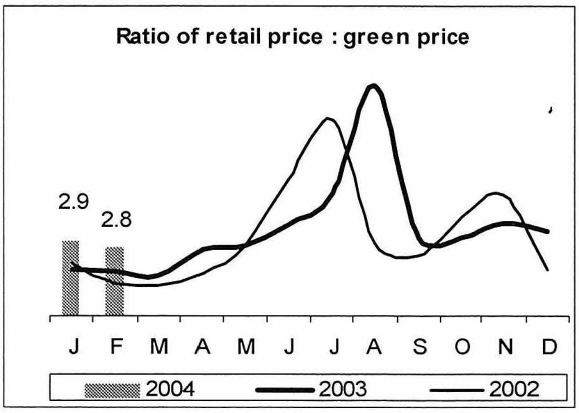
Tonnes	February 2004	Comparisons (%)		Season total	Season comparisons (%)	
		2004/2003	2004/2002	2004	2004/2003	2004/2002
Côte d'Ivoire	7 748	+ 14	+ 8	14 913	- 1	- 7
Cameroon	8 436	- 3	- 2	18 066	- 7	- 8
Martinique	14 080	+ 13	+ 8	27 864	+ 9	+ 3
Guadeloupe	5 119	- 10	- 17	10 350	- 11	- 16
Total	**35 383**	**+ 5**	**+ 1**	**71 193**	**- 1**	**- 5**





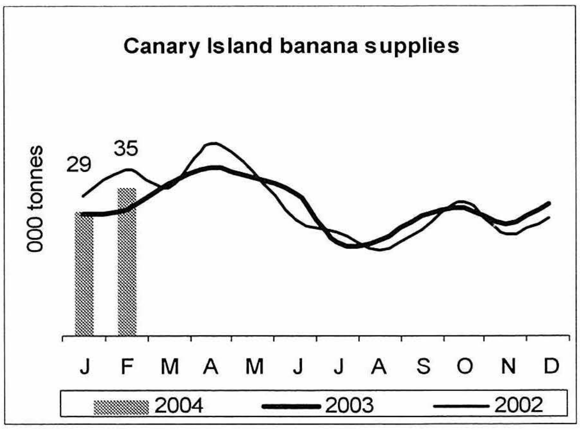
Retail market in France

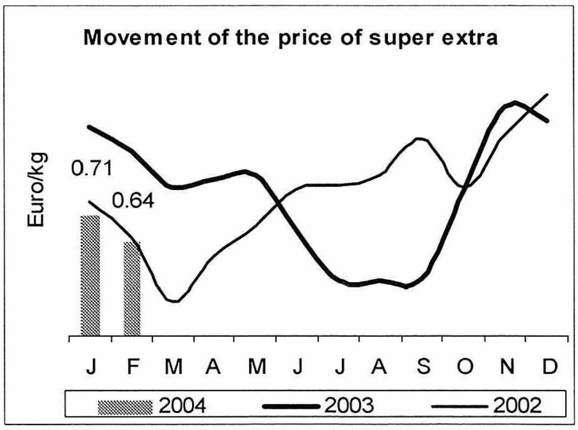




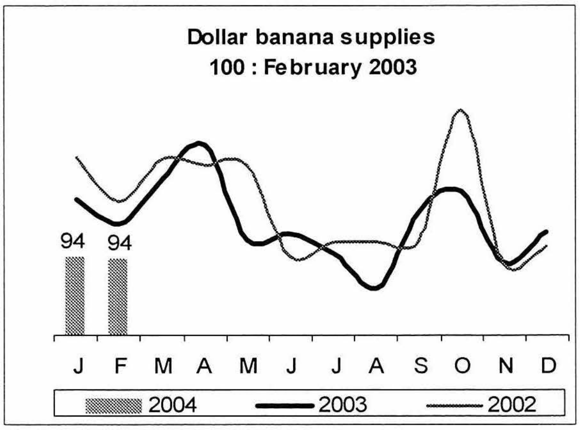
Banana — Indicators for French export markets

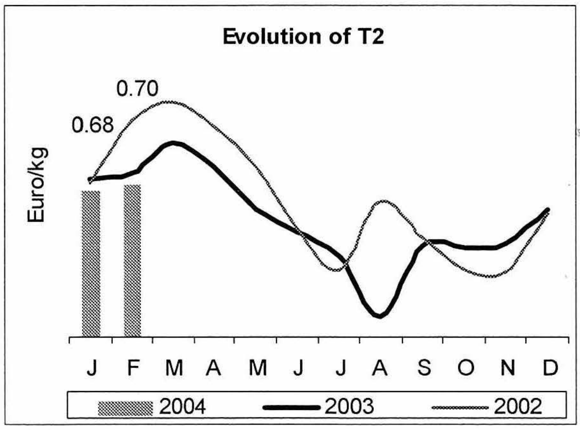
Spain



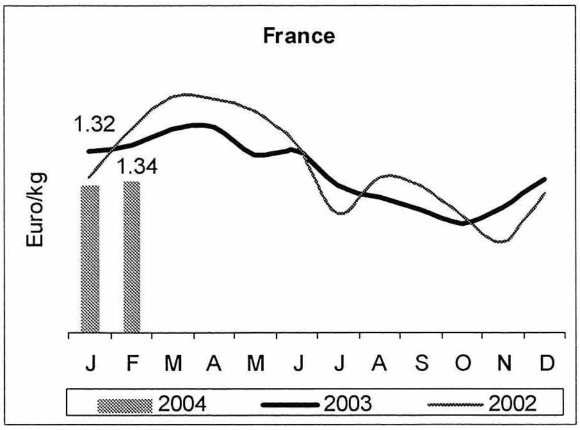


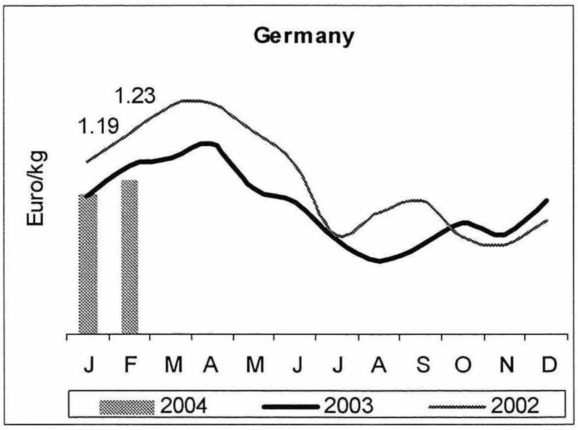
Northern Europe

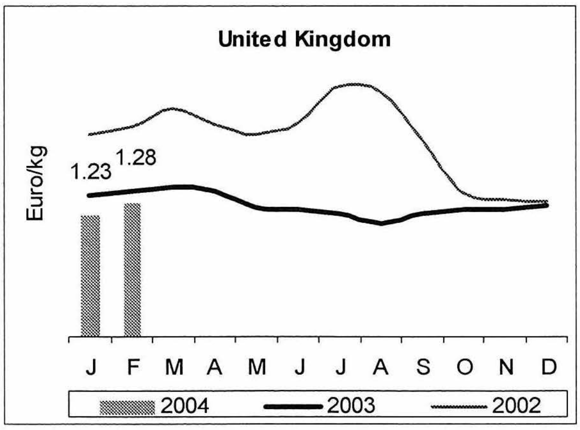


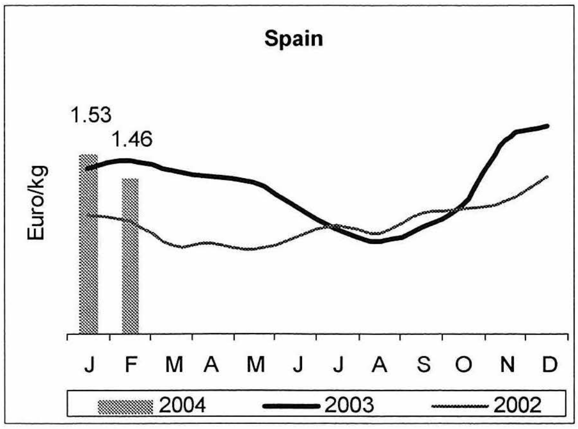


Retail price in Europe







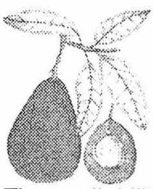


Sources: CIRAD-FLHOR, SNM, TW Marketing Consulting

Avocado

FEBRUARY 2004

Monthly comparison: Feb. 2004 / Jan. 2004	
Price	Volumes
↗↗ + 20%	↘ – 11%
Annual comparison: Feb. 2004 / Feb. 2003	
Price	Volumes
↘↘ – 20%	↗↗ + 22%

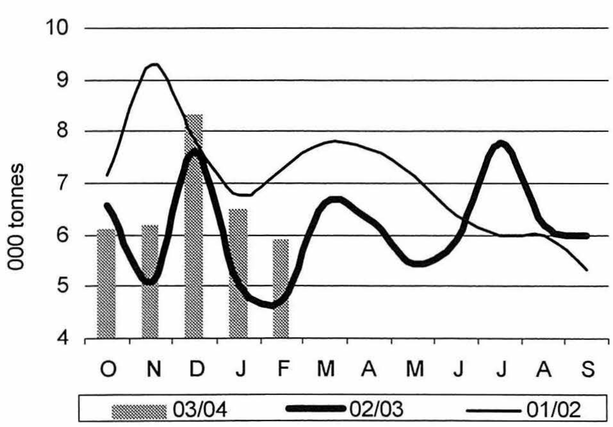


Supplies remained markedly short in both green varieties and medium grade Hass. As a result in spite of comparatively sluggish demand, prices remained comparatively firm and distinctly above the average for goods of this type in recent seasons. The situation remained fairly difficult for small fruits.

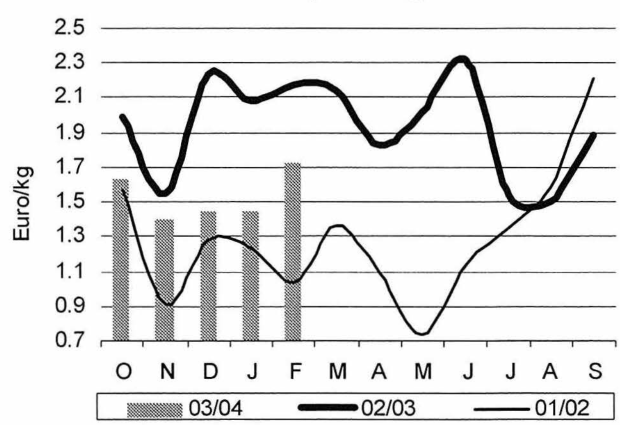
The availability of medium grade Hass remained limited. Mexico continued to ship the greater part of the supplies sold by the large retail distributors. Israeli operators concentrated their potential—limited this season—on the domestic market and northern Europe. Small fruits continued to dominate in Spanish supplies. Prices therefore remained very firm for this variety even though demand lacked vigour. The supply of green varieties was also limited even though the Kenyan Fuerte season started early, as in 2003. Indeed, the Spanish Fuerte season finished rapidly while the volumes from Israel were considerably down in comparison with a normal season. In spite of continued dull demand for this varietal group since the beginning of the season, prices remained considerably higher than average.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	February 2004	Comparisons (%)		Season total	Season comparisons (%)	
		2004/2003	2004/2002	2003/2004	03-04/02-03	03-04/01-02
Spain	2 964	+ 61	+ 6	13 242	+ 44	- 22
Mexico	826	0	0	11 201	+ 25	+ 46
Israel	1 575	+ 3	- 60	9 398	- 15	- 43
Kenya	398	+ 100	+ 47	398	+ 100	+ 34
Total	**5 763**	**+ 22**	**- 21**	**34 239**	**+ 17**	**- 18**

Orange

FEBRUARY 2004

Monthly comparison: Feb. 2004 / Jan. 2004

Price	Volumes
↗ + 13%	↘ – 10%

Annual comparison: Feb. 2004 / Feb. 2003

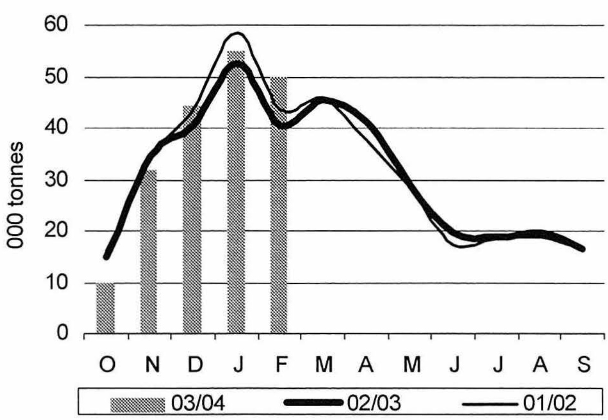
Price	Volumes
↗↗ + 24%	↗↗ + 23%

Performance has been good. Releases and average price are considerably up on the preceding seasons. The increase in the range of varieties available following the strong increase in supplies of Navelate seems to have generated greater interest from the distribution sector.

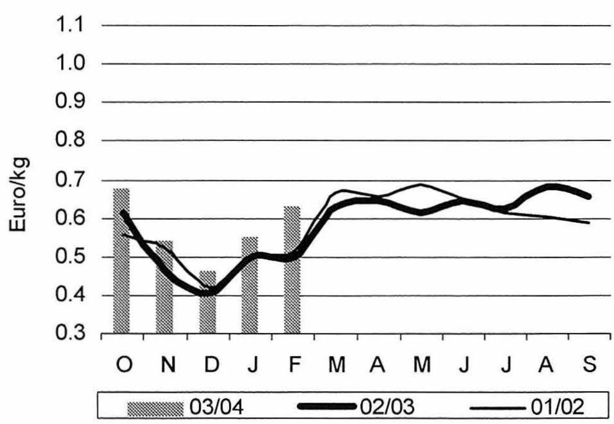
Considerably larger volumes were taken by the market than in preceding seasons. The high quality of the fruits available seems to have stimulated demand. Firstly, the keeping qualities of the last Navel/Naveline were satisfactory even though it was the end of the season. Secondly, the including of a large quantity of Navelate in the varietal range seems to have generated genuine interest among distributors. This variety was responsible for the significant increase in the volumes of Spanish fruits sold in February; production is increasing rapidly thanks to the many new orchards in the Valencia region. The market for Maltese oranges recovered at the beginning of the month after the halting of exports for a week and firmer price requirements upstream as the Tunisian domestic market was active. Morocco shipped a limited complement consisting mainly of Washington blood oranges. The serious production losses of late fruits in Greece as a result of frosts in January resulted in a dip in supplies on the Balkan markets.

Estimated market releases in France

Volumes



Price at import stage



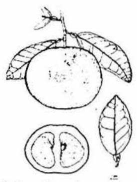
Estimated market releases in France by origin

Tonnes	February 2004	Comparisons (%)		Season total	Season comparisons (%)	
		2004/2003	2004/2002	2003/2004	03-04/02-03	03-04/01-02
Spain	44 844	+ 25	+ 18	176 856	+ 7	+ 2
Tunisia	3 780	+ 11	- 15	8 365	- 20	- 33
Morocco	1 001	- 15	- 3	1 655	+ 8	- 49
Total	**49 625**	**+ 23**	**+ 14**	**186 876**	**+ 5**	**- 1**

Grapefruit

FEBRUARY 2004

Monthly comparison: Feb. 2004 / Jan. 2004	
Price	Volumes
↗ + 4%	↗ + 2%
Annual comparison: Feb. 2004 / Feb. 2003	
Price	Volumes
↘ – 13%	↘ – 18%

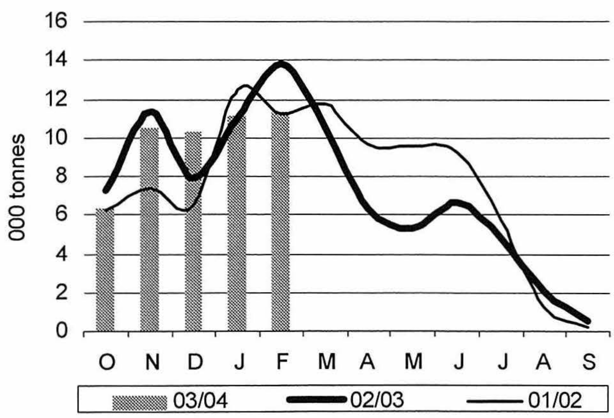


After being very difficult in December and January, the market perked up in February. Arrivals were comparatively small, especially from Florida. Demand also proved fairly satisfactory during the first half of the month. As a result, the mean monthly price rose distinctly in comparison with that of January but nevertheless remained slightly lower than average.

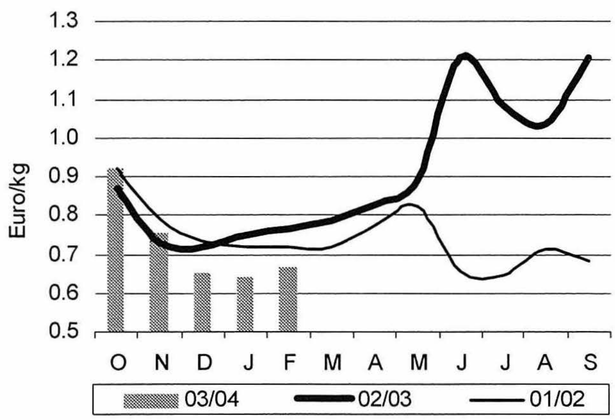
Limited volumes were received in the EU, mainly because of a substantial decrease in shipments from Florida. Although the euro:dollar exchange rate was still very stimulating, importers displayed caution in ordering in the light of the market situation in January. Furthermore, Israeli exporters preferred to hold on to the volumes still available—down on last year's—for the last part of the season that promises to be favourable. Finally, arrivals from Turkey were very limited until the very end of the month when trade increased distinctly, especially in England. At the same time, after the lethargy of January, demand gained muscle in the first half of the month. Operators were thus able to raise prices markedly to close to average levels for the season. The usual slowing of demand resulting from school holidays meant that prices could not be raised further in the second half of the month.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

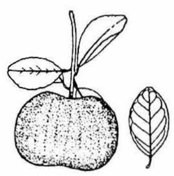
Tonnes	February 2004	Comparisons (%) 2004/2003	Comparisons (%) 2004/2002	Season total 2003/2004	Season comparisons (%) 03-04/02-03	Season comparisons (%) 03-04/01-02
Florida	9 578	- 21	- 2	40 853	- 3	+ 15
Turkey	1 125	+ 19	+ 11	4 843	- 18	- 13
Israel	653	- 19	+ 33	3 941	+ 25	+ 46
Total	**11 356**	**- 18**	**+ 1**	**49 637**	**- 3**	**+ 13**

Easy peelers

FEBRUARY 2004

Monthly comparison: Feb. 2004 / Jan. 2004	
Price	Volumes
↗ + 5%	↘↘ – 46%

Annual comparison: Feb. 2004 / Feb. 2003	
Price	Volumes
↗ + 4%	↘ – 2%

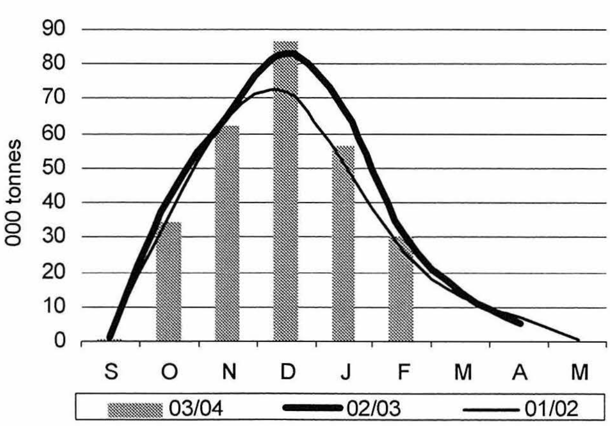


Performance was satisfactory. Prices remained at a very good level even though the shortage of supplies was much less marked than in January. Demand was healthy, probably as a result of better quality, as this had often been uneven in the preceding months because of rain at the end of 2003.

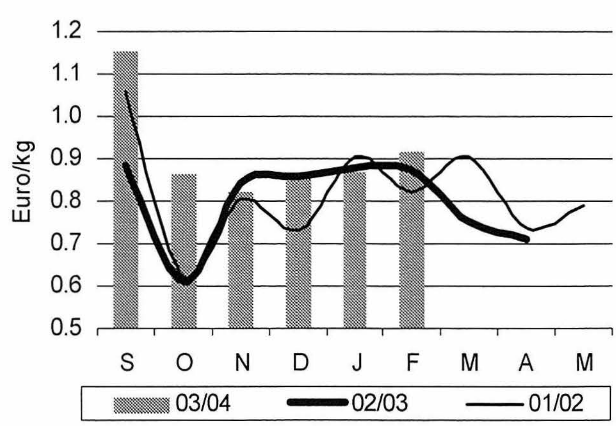
The shortage of fruits from Spain that had been very marked in January eased considerably thanks to the switch to varieties whose potential is close to normal this year (Hernandina, ortanique) and a return to weather conditions that are better for keeping fruits. Only shipments of Fortuna, a variety whose area is decreasing because of its great susceptibility to *Alternaria* rot, were down. In spite of the confirmed decline of ortanique (less than 7 000 tonnes exported), supplies from Morocco were more substantial than last season as the Nour harvest was better than expected (although 36 000 t was exported against 46 000 t in 2002/2003). Shipments of Afourer were stable (at approximately 7 500 t). Turkey, Cyprus and Israel complemented supplies, with mainly ortaniques. The volumes of the promising new Israeli varieties Or and Mor were very limited. In spite of a decrease in business, demand was satisfactory overall, even if the recurrent problems in the marketing of Hernandina were aggravated by inadequate keeping qualities in the second half of the month.

Estimated market releases in France

Volumes



Price at import stage

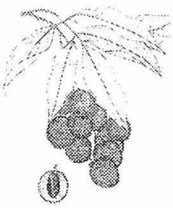


Estimated market releases in France by origin

Tonnes	February 2004	Comparisons (%)		Season total	Season comparisons (%)	
		2004/2003	2004/2002	2003/2004	03-04/02-03	03-04/01-02
Spain	28 321	- 4	+ 23	223 409	- 9	+ 7
Morocco	1 714	+ 43	- 41	28 410	+ 59	+ 23
Corsica	0	0	0	17 475	- 24	+ 2
Israel	318	+ 5	+ 28	920	- 9	- 56
Total	**30 353**	**- 2**	**+ 16**	**270 214**	**- 6**	**+ 7**

Litchi

FEBRUARY 2004	Volumes imported in France by sea (estimates in tonnes)	
	Weeks 2004	**6 to 9**
	Madagascar	Stocks received in January; no arrivals in February
	South Africa	1 810 tonnes This figure is for Europe



The litchi market was very difficult in February because of the uneven quality of fruits from Madagascar and dwindling demand from the retail chains and foreign markets, the main channels for litchi sales. In this context, South African supplies fetched better prices in spite of a gradual decrease in quality.

The litchi market was dominated by fruits from **Madagascar** until the middle of the month. In the second half of the month, fruits from South Africa gradually gained on those from Madagascar that had been stocked in January. The French market displayed little enthusiasm for the fruit and sales were in two categories. First, fruits of satisfactory quality and that kept well sold slowly as consumer demand was sluggish and little stimulated by supermarkets. Secondly, ageing fruits of increasingly irregular quality sold in batches and at open prices. Faced with weak demand and unfavourable market conditions, operators were forced to make price concessions to clear their cumbersome stocks of fruits. With no real market for litchi, holders of stocks were forced to shift their produce in all possible ways.

Clearance opportunities became rarer as time passed as distributors and re-export market lost interest. The wholesale market reduced its orders, preferring South African produce whose quality—even when irregular—had a better image among buyers. However, strict selection of goods resulted in good prices from time to time. These efforts limited the downward slide although prices remained lower than cost. The lack of cohesion in the release of Madagascan litchis during the season continued and was felt painfully in February. The 2003/2004 export season will go down as a black year for litchi from Madagascar. It is hoped that the lessons learned by operators from this season will make it possible to start the next season on a new framework more suited to European market requirements.

Supplies of the Mauritius variety from **South Africa** gradually dwindled and were replaced by MacLean in the first fortnight of January. Both varieties were available on the market and consumers' preference for the Mauritius variety affected prices, with a difference of nearly EUR 0.50 per kg. Numerous operators stopped buying litchi when the variety changed. In spite of worsening quality, South African fruits fetched better prices than those from Madagascar. It is true that they were favoured for their greater freshness and better defined grading, especially as only limited quantities remained available.

At the end of February-beginning of March, the residual presence of litchi marked the end of the seasons of the Indian Ocean origins. Substitutes such as rambutan from Madagascar and Thailand fill the gap before the start of the season in Thailand in May, but with markedly smaller volumes.

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 kg — Import stage in France				
Weeks 2004	**6**	**7**	**8**	**9**
Sea				
Madagascar	0.50-0.90	0.50-0.90	0.50-0.70	0.50-0.60
South Africa	1.30-2.00	1.30-2.00	1.30-1.75	1.30-1.80