Indicators
April 2004

The main fruits

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

%	Volumes	Expenditure
Apple	28	23
Orange	19	14
Banana	14	12
Strawberry	8	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.

Apple

April 2004 / April 2003			
Price	↗	Vol.	↘

The market remained well-oriented even though export sales were extremely limited (with the increase in shipments from the southern hemisphere). Local demand was steady and supplies were markedly smaller than average. Prices continued to rise slightly.

Orange

April 2004 / April 2003			
Price	↗	Vol.	↗

Market performance was excellent for the third month running. The volumes sold and average prices were distinctly higher than the average for the recent seasons. The recovery of interest in dessert oranges stimulated by Lanelate/Navelate from Spain lasted until the end of the season for the variety. Demand returned to an average level after the switch to Valencia Late in the last part of the month. The month's performance was patchy for Maroc Late.

Banana

April 2004 / April 2003			
Price	↗	Vol.	↘

Market recovery continued. The average monthly price remained lower than average but the tremendous difference with preceding years observed in the first quarter diminished. Demand recovered after the usual Easter slump, with comparatively attractive retail prices, medium supplies and limited competition from the season's fruits.

Strawberry

April 2004 / April 2003			
Price	↗	Vol.	↘

Supplies were markedly down in comparison with preceding years. Shipments from Spain displayed a marked shortfall because of serious problems of the keeping quality of a significant proportion of production. The quantities of French strawberries were also limited as abnormally low temperatures for the season slowed the development of production. Prices were distinctly higher than in preceding years.

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

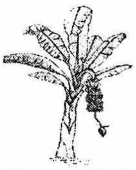
APRIL 2004

Monthly comparison: April 2004 / March 2004

Price	Volumes
↘ – 9%	↘ – 8%

Annual comparison: April 2004 / April 2003

Price	Volumes
↗ + 8%	↘ – 8%

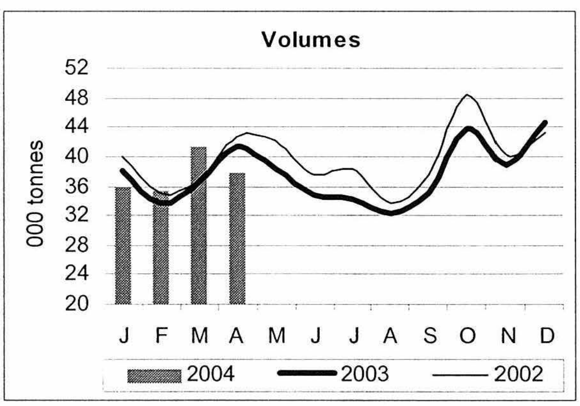


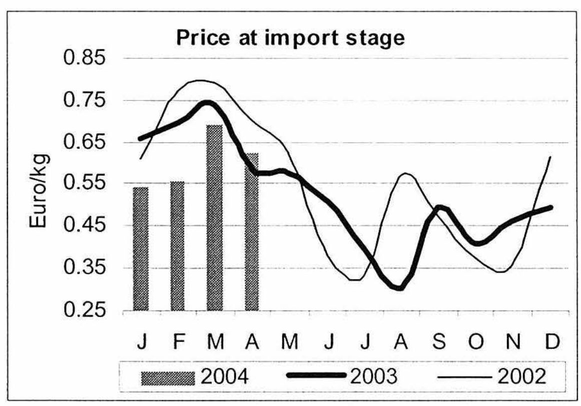
Market recovery continued. The average monthly price remained lower than average but the tremendous difference with preceding years observed in the first quarter diminished. Demand recovered after the usual Easter slump, with comparatively attractive retail prices, medium supplies and limited competition from the season's fruits.

The market did not escape the usual slump in business in the first part of the month during the Easter period. However, in contrast with preceding years, local demand recovered distinctly during the second half of the month. Although promotion operations were only average, retail prices were attractive as on-quay prices were still low. Furthermore, the weather was distinctly colder than average, stimulating consumer demand for bananas and slowing the development of production of competing fruits. In parallel, export business remained at a good level. Northern European markets continued to display demand because arrivals of dollar bananas were measured and supplies increased to the countries joining the EU on 1 May. Shipments to Italy also increased. The usual April decrease in prices was thus less marked than in previous years and the monthly price approached average.

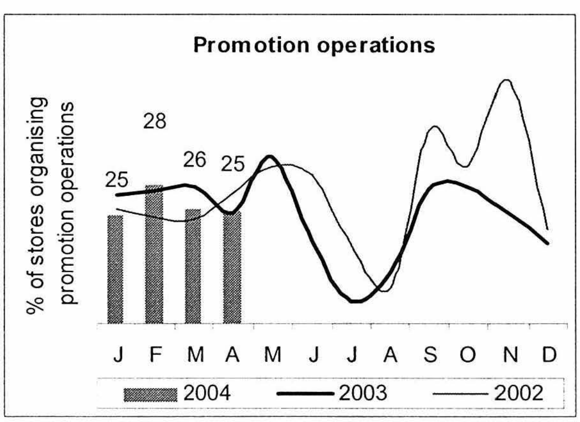
Estimated market releases in France

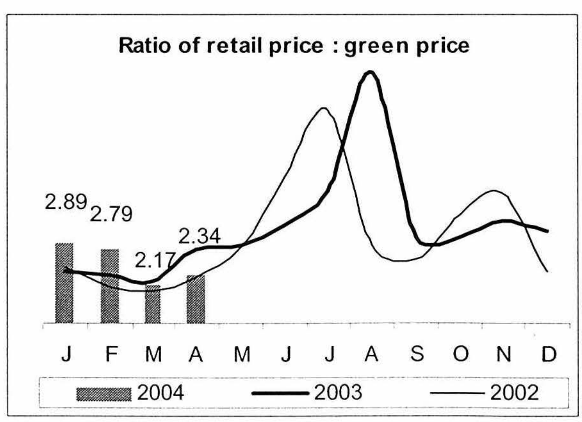
Tonnes	April 2004	Comparisons (%) 2004/2003	Comparisons (%) 2004/2002	Total season 2004	Season comparisons (%) 2004/2003	Season comparisons (%) 2004/2002
Côte d'Ivoire	9 378	+ 14	- 7	33 685	+ 9	- 2
Cameroon	10 782	- 3	+ 25	40 082	+ 1	+ 11
Martinique	12 669	- 20	- 22	55 893	+ 2	- 3
Guadeloupe	5 001	- 18	- 34	20 626	- 13	- 21
Total	**37 830**	**- 8**	**- 11**	**150 286**	**+ 1**	**- 3**





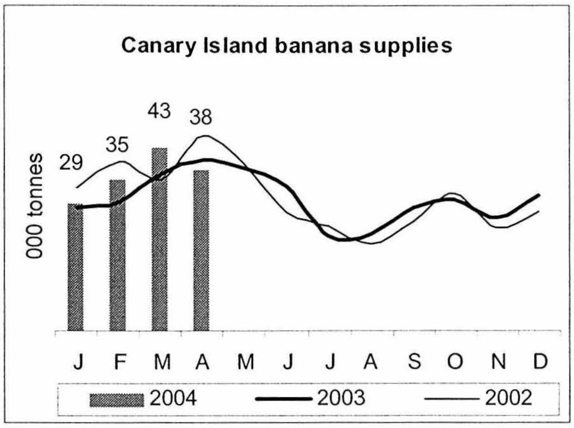
Retail market in France

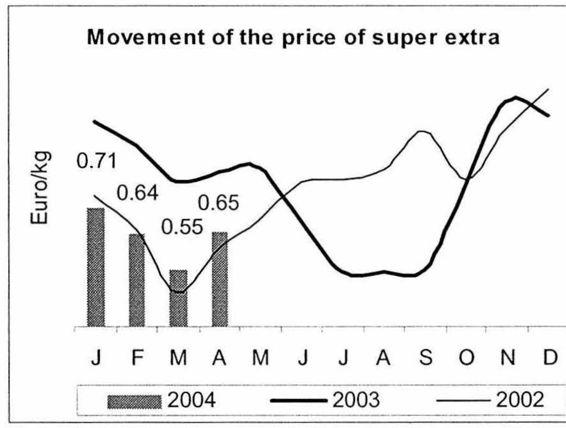




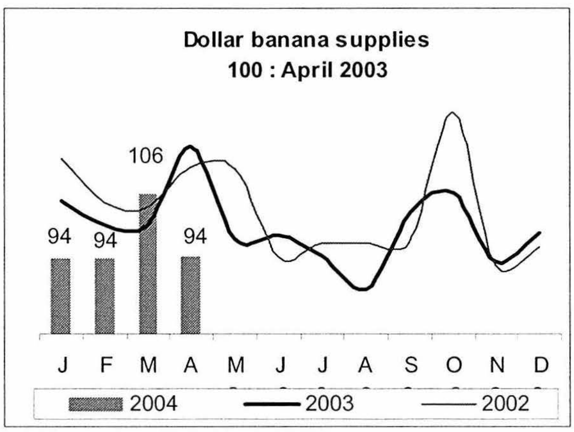
Banana — Indicators for French export markets

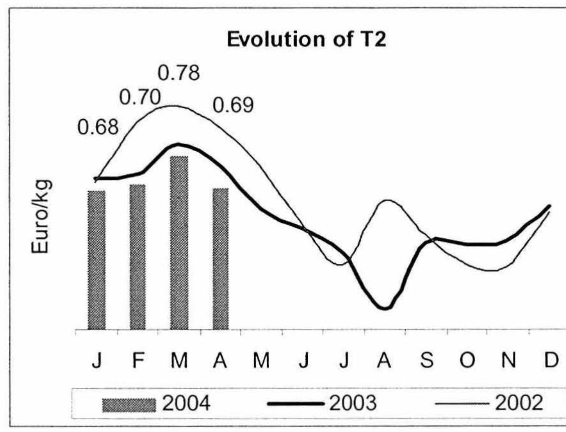
Spain



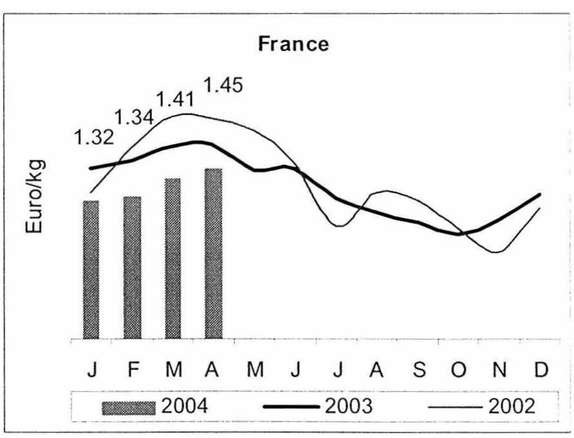


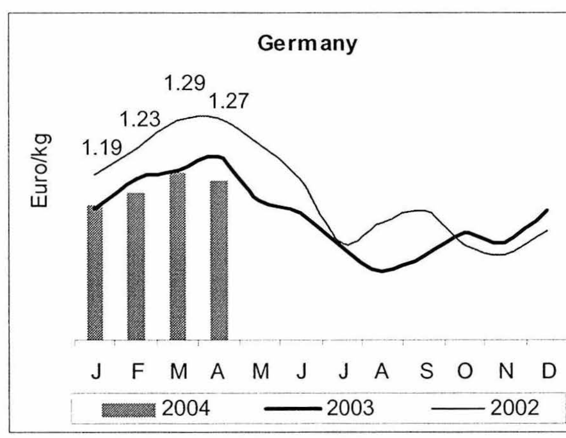
Northern Europe

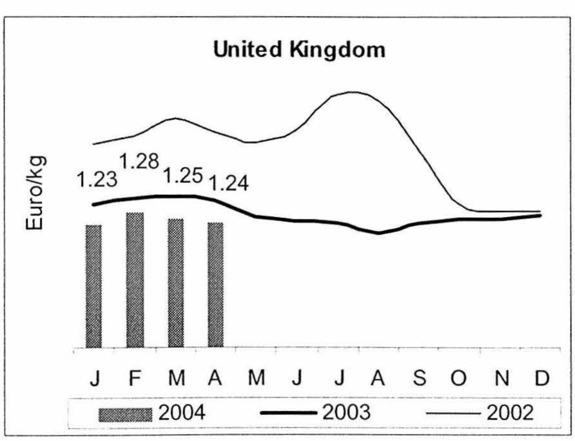


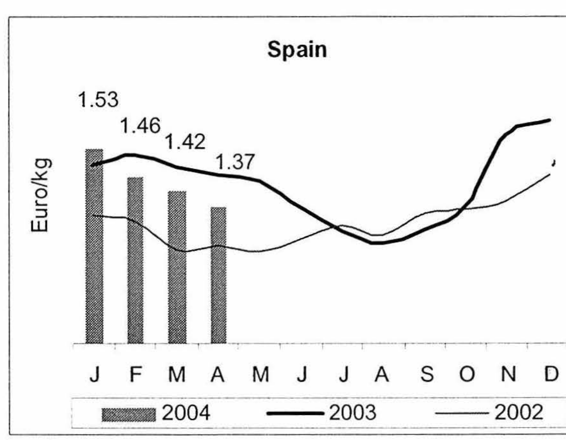


Retail price in Europe









Sources: CIRAD-FLHOR, SNM, TW Marketing Consulting

Avocado

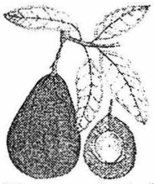
APRIL 2004

Monthly comparison: April 2004 / March 2004

Price	Volumes
↘ – 10%	↗ + 4%

Annual comparison: April 2004 / April 2003

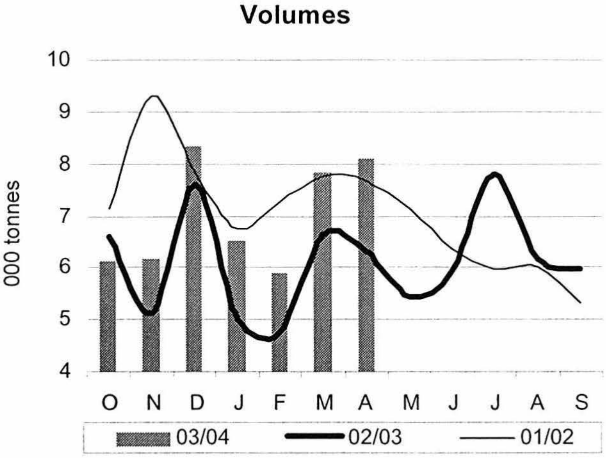
Price	Volumes
↘ – 13%	↗↗ + 28%

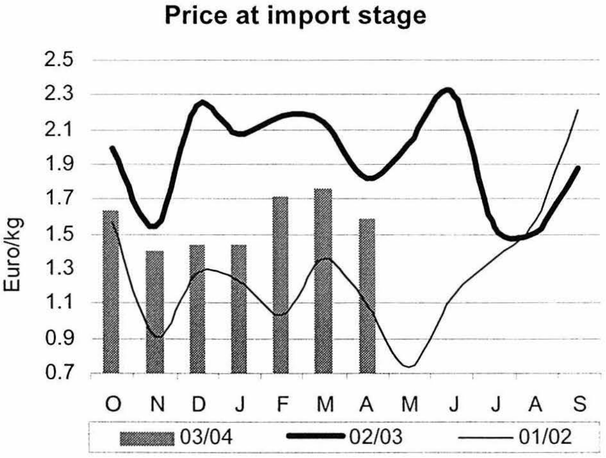


The average price was quite firm in spite of comparatively plentiful supplies. However, this fairly satisfactory overall performance hides considerable differences between the varietal groups. Although the situation remained satisfactory for Hass, history seemed to repeat itself for Fuerte from Kenya. The excessively large shipments—in spite of the well known problem of the positioning of the variety with regard to supermarkets—sent the market for green varieties plunging to a historically low level.

The market for Hass remained well-oriented. The increasingly marked position of large and medium-sized supermarkets in favour of the variety meant that price levels were stable and firm, in spite of the strong presence of Spanish produce and large quantities of avocados from Mexico (although shipments were down on last year). In contrast, the worsening of the market for green varieties that was perceptible in March reached its worst point in the middle of the month. Arrivals of Fuerte from Kenya were extremely substantial even though supermarket chains lost interest in the variety and despite the recurrent problems in the gaining of a market position for this origin. In this leaden context, the start of the South African season was very difficult, even though the crop was smaller than usual in the earliest zones.

Estimated market releases in France





Estimated market releases in France by origin

Tonnes	April 2004	Comparisons (%)		Season total	Season comparisons (%)	
		2004/2003	2004/2002	2003/2004	03-04/02-03	03-04/01-02
Spain	4 166	+ 180	+ 30	21 220	+ 66	- 12
Mexico	1 077	- 47	+ 1 531	14 002	+ 7	+ 75
South Africa	508	- 28	- 57	508	- 28	- 57
Israel	165	+ 23	- 92	10 380	- 11	- 53
Kenya	2 190	+ 18	+ 104	4 183	+ 8	+ 130
Total	**8 106**	**+ 28**	**+ 6**	**50 293**	**+ 19**	**- 12**

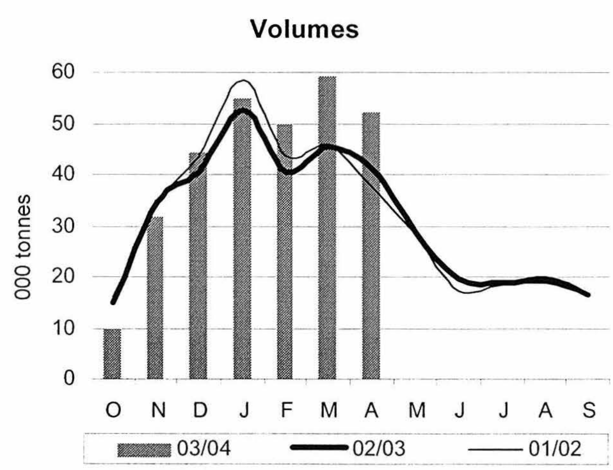
Orange

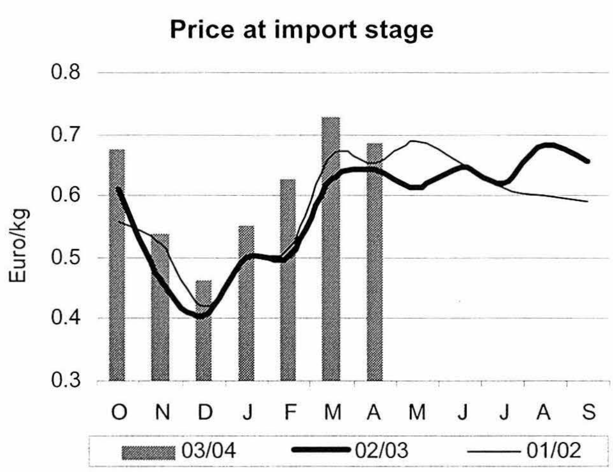
APRIL 2004	Price	Volumes
Monthly comparison: April 2004 / March 2004	↘ - 6%	↘ - 12%
Annual comparison: April 2004 / April 2003	↗ + 7%	↗↗ + 27%

Market performance was excellent for the third month running. The volumes sold and average prices were distinctly higher than the average for the recent seasons. The recovery of interest in dessert oranges stimulated by Lanelate/Navelate from Spain lasted until the end of the season for the variety. Demand returned to an average level after the switch to Valencia Late in the last part of the month. The month's performance was patchy for Maroc Late.

Supplies were still dominated by Lanelate from Spain during the first three weeks of the month. Demand remained at a very satisfactory level until the end of the season even though prices were distinctly firmer than in previous years. The change to Valencia Late from Spain was gradual until the last supplies of 5/6 grade Navelate and then speeded up noticeably in France at the end of the month. But the atmosphere of the market changed. Prices in France returned to the levels of preceding years. Activity slowed on the markets in the north of the EU. Monthly sales of Maroc Late reached a good level, but prices decreased noticeably as this origin became increasing bogged down in an often laborious wholesale market. The season for Maltese from Tunisia ended early at the beginning of the month (limited potential) but under good conditions.

Estimated market releases in France





Estimated market releases in France by origin

Tonnes	April 2004	Comparisons (%)		Season total	Season comparisons (%)	
		2004/2003	2004/2002	2003/2004	03-04/02-03	03-04/01-02
Spain	45 023	+ 27	+ 50	270 290	+ 13	+ 12
Tunisia	580	- 30	- 80	8 365	- 20	- 33
Morocco	6 450	+ 33	+ 36	12 396	+ 32	+ 18
Total	**52 053**	**+ 27**	**+ 38**	**291 051**	**+ 12**	**+ 10**

Grapefruit

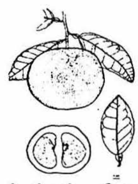
APRIL 2004

Monthly comparison: April 2004 / March 2004

Price	Volumes
↘ – 6%	↘↘ – 26%

Annual comparison: April 2004 / April 2003

Price	Volumes
↘ – 19%	↗↗ + 63%

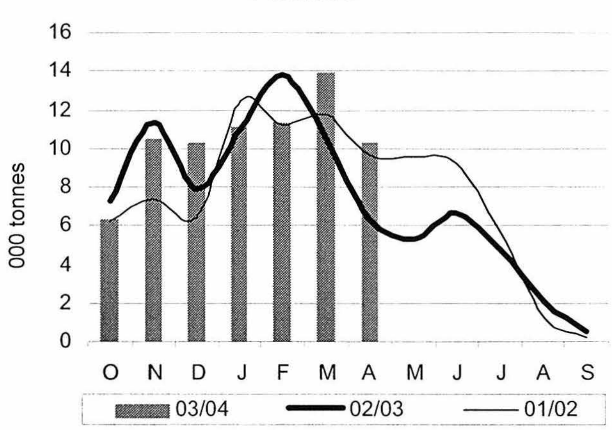


The last part of the winter season did not match the optimistic forecasts made by most importers and analysts. Supplies of both Florida and Mediterranean fruits were much more plentiful than expected as many operators had speculated on a sharp rise in prices like that of April 2003. What actually happened was roughly the opposite. Although the balance remained satisfactory for Florida, the Mediterranean origins were unable to find the expected market outlet because of the prolonging of the Florida season.

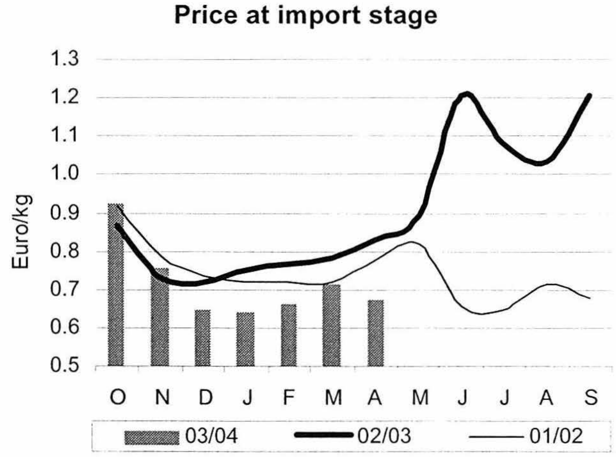
Arrivals from Florida were marginal from the start of the second half of the month in 2003 but continued strongly throughout the month in 2004. Demand for fruits from this origin was fair but not sufficient to cause a marked increase in price, especially as many Florida operators had substantial stocks in hand. This unexpected prolonging of supplies from Florida did not enable Mediterranean origins to benefit from the hoped-for changes in referencing on supermarket shelves, while large quantities remained in the hands of exporters or producers and in European ports. Prices were lowered strongly, reaching the lowest for the five last seasons for fruits from both Israel and Turkey.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

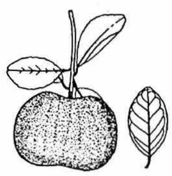
Tonnes	April 2004	Comparisons (%)		Season total	Season comparisons (%)	
		2004/2003	2004/2002	2003/2004	03-04/02-03	03-04/01-02
Florida	7 713	+ 111	- 1	59 769	+ 9	+ 13
Turkey	1 374	+ 646	+ 116	7 848	+ 15	+ 11
Israel	1 184	- 48	- 7	6 164	- 3	+ 24
Total	**10 271**	**+ 63**	**+ 6**	**73 781**	**+ 8**	**+ 13**

Easy peelers

APRIL 2004

Monthly comparison: April 2004 / March 2004	
Price	Volumes
↘ – 8%	↘↘ – 57%

Annual comparison: April 2004 / April 2003	
Price	Volumes
↗ + 11%	↗↗ + 42%

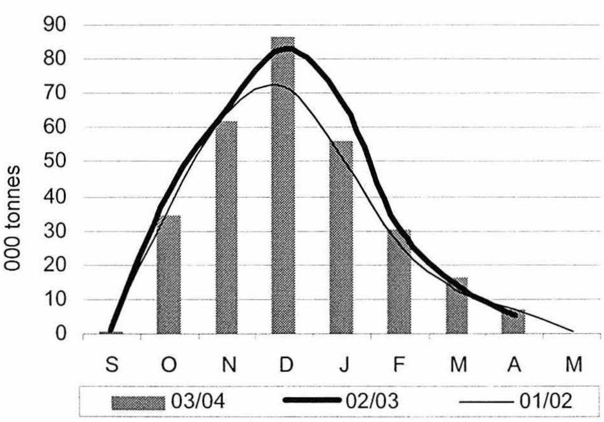


The end of the season held no surprises. Only medium grade Ortanique fetched decent prices as demand was limited and very selective. Supplies were plentiful in spite of a decrease in Moroccan production.

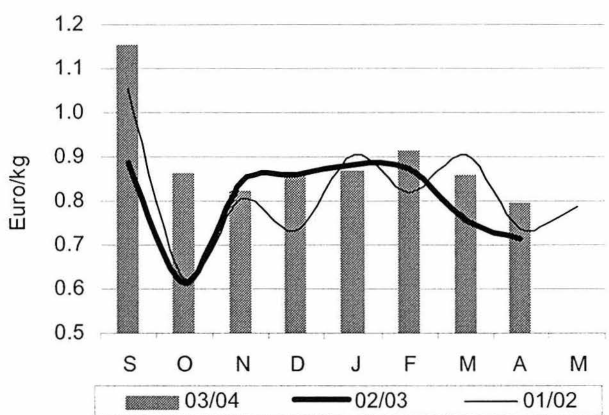
Supplies in the last month of the winter season were based only on the last Ortanique. Relatively large quantities were available. Morocco, which provided most of supplies in recent seasons, nevertheless had only a small export potential (varietal reconversion). This shortfall was amply compensated by a marked increase in Spanish production. Cyprus, Israel and Egypt shipped the rest of supplies. Pressure increased slightly on the northern European markets from week 14 onwards with the reception of the first massive quantities of Satsuma/ Okitsu from Argentina and southern Africa. Demand followed the usual pattern, slowing considerably and becoming extremely selective. Only good quality medium grade fruits sold at a good price.

Estimated market releases in France

Volumes



Price at import stage



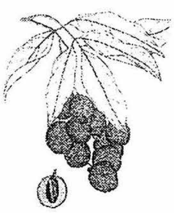
Estimated market releases in France by origin

Tonnes	April 2004	Comparisons (%)		Season total	Season comparisons (%)	
		2004/2003	2004/2002	2003/2004	03-04/02-03	03-04/01-02
Spain	6 912	+ 40	+ 21	245 842	- 7	+ 9
Morocco	185	-	- 86	29 176	+ 56	+ 13
Corsica	0	0	0	17 475	- 24	+ 2
Israel	0	0	+ 0	1 468	- 8	- 44
Total	**7 097**	**+ 42**	**+ 1**	**293 961**	**- 5**	**+ 8**

Litchi

APRIL 2004

Thailand — Litchi by air Import price	Min	Max
France	7.0	7.5
Belgium	5.5	7.0
Netherlands	6.0	7.0
UK	5.2	10.0



April this year was a period of transition from the end of the season in the Indian Ocean and the start of the Asian season. The last shipments from South Africa arrived in mid-March and were sold until the beginning of April, mainly in northern European countries.

The prices of South African litchis were low and little representative of the market. Indeed, operators were clearing the last of these not particularly attractive fruits of uneven quality to make way for shipments from Thailand. The latter country continued and intensified its shipments in April, switching gradually from air to sea transport.

France

The French market received regular supplies of fruits to substitute litchi, such as longan and rambutan. Longans from Thailand were first shipped by air and sold at EUR 5.50 to 6.00 per kg at the beginning of the month. Shipments by sea gradually took over, with the fruits negotiated at EUR 3.00 and then 2.00 per kg on the wholesale market. In parallel, rambutans shipped from Madagascar by air sold at about EUR 6.00 to 7.00 per kg at the beginning of the month and subsequently at EUR 5.50–6.00 per kg for extremely limited quantities. The fall in price resulted in particular from too large a supply of rambutan from French Guiana sold at around EUR 5.50–6.00 per kg at the beginning of the month and then dipping to EUR 3.50 per kg in mid-month. The origin disappeared rapidly from the shops in the second half of the month. These rambutans are shipped in 4-kg cardboard trays double-packed with a plastic bag of the type used by Réunion exporters for fresh litchi on the branch. The condensation inside the plastic wrapping seems to have caused rapid deterioration of the fruits and especially oxidation of the spines. Rambutans from Thailand, generally shipped in packages of two 1-kg punnets, sold in small quantities at a fairly steady EUR 6.00–6.50 per kg.

Importers took delivery of the first litchis shipped by air from Thailand in the second week of the month. Prices remained stable at EUR 7.00-7.50 per kg until the end of the month. The first containers were announced for the beginning of May.

Belgium

Thai litchis were supplied steadily to Belgium in small quantities, given the high prices asked for these fruits shipped by air (EUR 7.00 per kg). Prices weakened to EUR 5.5-6.5 per kg in the middle of the month. The first arrivals by ship were announced for the last week of the month at EUR 4.25–4.50 per kg.

The Netherlands

Litchis were supplied by air from Thailand only. They sold at EUR 7.00 per kg at the beginning of the month and the last shipments went at EUR 6.00 per kg the following week. Indeed, shipment by sea took over in mid-April with a selling price of EUR 4.75 per kg, weakening to EUR 4.00–4.50 per kg at the end of the month. Fruits were received steadily and operators considered them to be of good quality but small.

Germany

A small quantity of Thai litchi supplied specialised retailers. The price at import release stage was about EUR 4.50 per kg.

United Kingdom

Supplies were very small in April because of the very high prices asked for Thai fruits shipped by air. Operators waited for supplies from this origin to increase, and especially the start of arrivals by sea, to benefit from more affordable prices. Small quantities from Thailand changed hands at the beginning of the month at EUR 9.00 to 10.00 per kg. Operators hoped that the Easter holidays would encourage consumers to buy litchis, but the prices put off most customers. Prices had halved at the end of the month to around EUR 5.20–6.00 per kg. Professionals felt that the increase in supply and in competition in May should bring prices down. Arrivals from China and India on the British market were expected at the end of May.

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

MADAGASCAR
CTHT UNION EUROPEENNE
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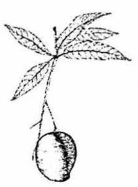
Mango
West African season

APRIL 2004 — Mango — Imported volumes Estimates in tonnes				
Weeks 2004	15	16	17	18
By air				
Peru	50	40	5	-
Brazil	20	-	-	-
Mali	25	35	45-50	45
Burkina Faso	15	22	10	30
Côte d'Ivoire	-	35	30-40	15-20
By sea				
Côte d'Ivoire	70	150	260-280	380-400



April is characterised by continuous, marked under-supply. The lengthening of the Peruvian season was not enough to make up for the shortage of produce resulting from the slow start to the export seasons in West African countries. Scarce supply resulted in substantial price increases until the end of the period.

Given the shortage of produce available on the European market as a whole, operators called on suppliers to encourage them to ship goods. This resulted in an extension to the Peruvian export season beyond the usual date and the arrival of mangoes of many varieties and from many origins in small quantities. The absence of a leading origin led to a somewhat incoherent price policy, given the quantitative and qualitative disparity in supplies. The phenomenon amplified during the first third of the month when the supermarket chains were preparing for Easter. Several obstinately wished to promote mango for Easter although supply is rarely compatible at this time of year. Supermarket promotion operations were mainly for Kent shipped by sea. The source of supply changes in the first half of April with the end of the Peruvian and South African season and the start of shipments from the West African origins. The period is thus not very auspicious for promotion operations requiring large, regular shipments at competitive prices.

Shipment **by air** is more flexible and increased in the first half of the month, cumulating the last shipments from Peru and the increasing shipments from West Africa. The price of Peruvian fruit decreased as the fruits were distinctly overripe. In contrast, the quality of the shipments from West Africa was uneven and the fruits were generally not very ripe or even immature. The voluntary lack of maturity—to avoid infestation by fruit fly—disturbed sales as purchasers want fruits that are ready to eat. Operators must take the phenomenon into account and become organised to 'ripen' the fruits between reception and release on the market. Prices were high in the first half of April and then fell during the second half, except for the Kent variety from Côte d'Ivoire, whose quality was better mastered.

The slow increase in shipments **by sea** left the European market under-supplied throughout the month, leading to higher prices than during the preceding months. The phenomenon was aggravated by the decrease in deliveries of fruits from South America because of decreased production (weather conditions) and commercial reasons (the poor financial results of the winter season). These substantial price variations according to the time of year are harmful in the long term, making mango an everyday item whereas it is a noble exotic fruit that deserves prices that are more stable throughout the year, like similar produce.

Mango — Price in euros — Import stage					
Weeks 2004		15	16	17	18
By air (kg)					
Peru	Kent	3.50-4.50	3.50-4.20	3.00-4.00	-
Mali	Amélie	2.30-2.80	2.30-2.50	2.30-2.50	2.30-2.40
Mali	Valencia	3.00-3.50	3.00-3.50	2.50-3.50	2.50-3.50
Mali	Kent	-	4.00	3.50-4.00	2.50-3.50
Burkina Faso	Amélie	2.50-2.80	2.30-2.50	2.30-2.50	2.30-2.40
Burkina Faso	Kent	-	-	-	3.50-4.00
Côte d'Ivoire	Kent	4.00-4.50	4.00-4.50	4.00-4.50	4.00-4.50
By sea (box)					
Peru	Kent	4.50-5.50	6.50-8.00	7.00	-
Brazil	Tommy Atkins	4.50-5.00	5.00-6.00	-	-
Côte d'Ivoire	Amélie	5.00-5.50	5.50-6.00	5.00-6.00	4.00-5.50
Côte d'Ivoire	Kent	-	-	7.00	6.00-7.50