

Indicators
June 2004

The main fruits

In shares by total volume and expenditure on fruits for the month in France		
%	Volumes	Expenditure
Peach/Nectarine	20	22
Apple	18	18
Apricot	9	11

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.....	7
Avocado	9
Orange	10
Grapefruit.....	11
Litchi.....	12
Mango.....	13

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

Peach/Nect. The market remained very favourable. Supplies were moderate as the fruits ripened some 10 days late and although the harvest was larger than that of 2003, it was still distinctly smaller than average. Demand remained satisfactory and prices were firm throughout the month.

June 2004 / June 2003			
Price	↗	Vol.	↘

Apple Supplies were very limited as a result of the large shortfall in French production and the run-up to the end of the season. Granny Smith, red apples and Gala from the southern hemisphere completed supplies. Prices remained markedly higher than average.

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

Apricot The considerable shortage of early varieties in France (Rouge du Roussillon, Orangé de Provence) resulted in very firm prices throughout the month.

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

JUNE 2004

Monthly comparison: June 2004 / May 2004

Price	Volumes
↘ - 9%	↘ - 2%

Annual comparison: June 2004 / June 2003

Price	Volumes
↗ + 6%	↗ + 1%

Performance was acceptable. The average price was up slightly in spite of supplies that were normal for the season. Comparatively low temperatures had a doubly positive effect by limiting competition from stone fruits and maintaining the level of banana consumption. But the performance during the first half of the year remains alarming, with the worst sales for the period in five years.

Supplies of fruits from the West Indies and Africa were average. In parallel, demand was satisfactory in May and remained fairly lively. The volumes sold on the home market were well up on those of previous years. Nevertheless, promotion operations were even rarer than in past seasons and retail prices remained high as a

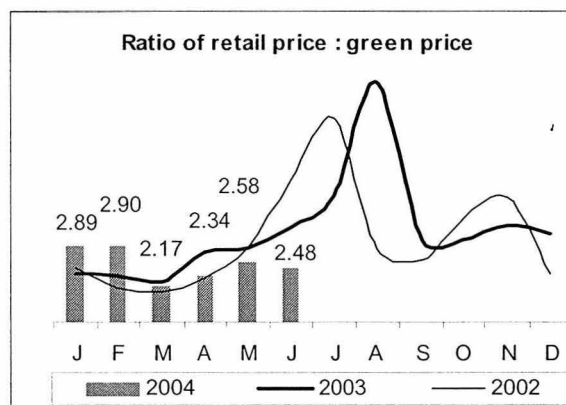
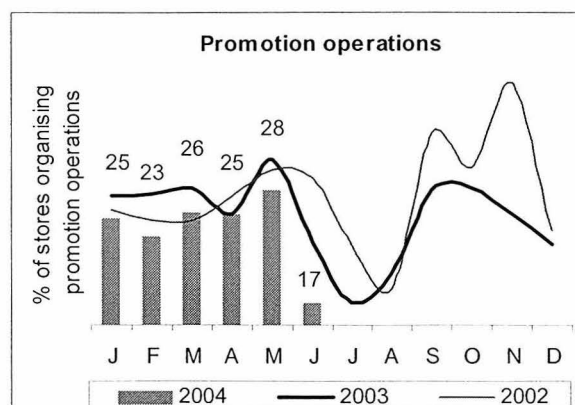
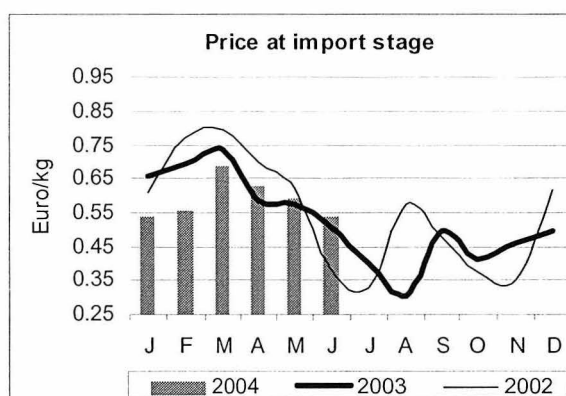
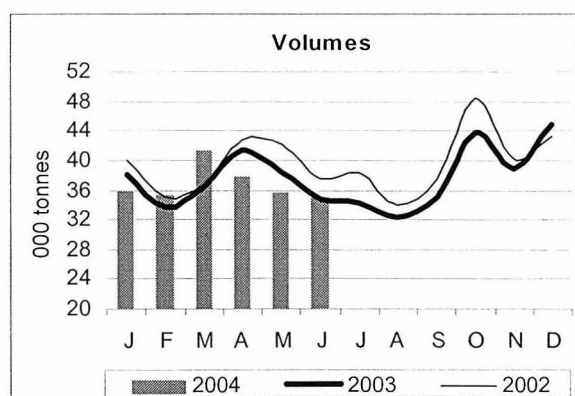
result of firm on-quay prices. However, bananas remained very attractive as competition from the season's fruits was weaker than in previous years during the first two-thirds of the month. Furthermore, temperatures lower than normal for the season encouraged consumption. Export flows remained strong, especially to northern Europe,

as arrivals of dollar bananas were medium and even very small in the middle of the month (because of a strike in Colombia). Prices remained at a good level for the season during the first half of the month. The average monthly price thus remained at a fairly satisfactory level.

Tonnes	June 2004	Comparisons (%)		Total season 2004	Season comparisons (%)	
		2004/2003	2004/2002		2004/2003	2004/2002
Côte d'Ivoire	7 151	- 8	- 12	48 320	+ 4	- 9
Cameroon	8 036	+ 9	- 12	56 660	0	+ 5
Martinique	14 930	+ 7	+ 9	85 765	+ 3	- 2
Guadeloupe	5 006	- 13	- 22	30 461	- 14	- 22
Total	35 123	+ 1	- 6	221 206	- 1	- 5

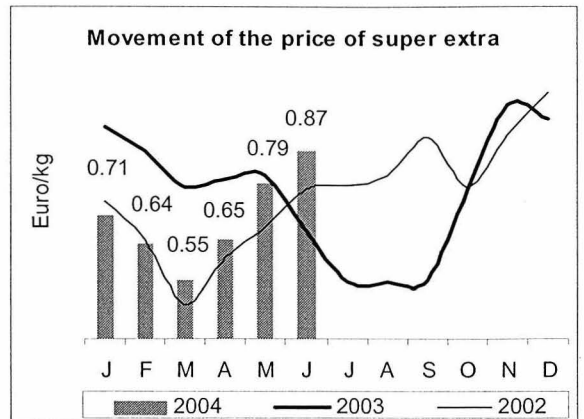
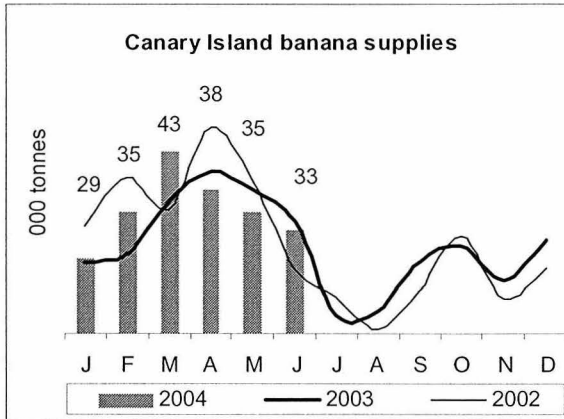
Estimated market releases in France

Retail market in France

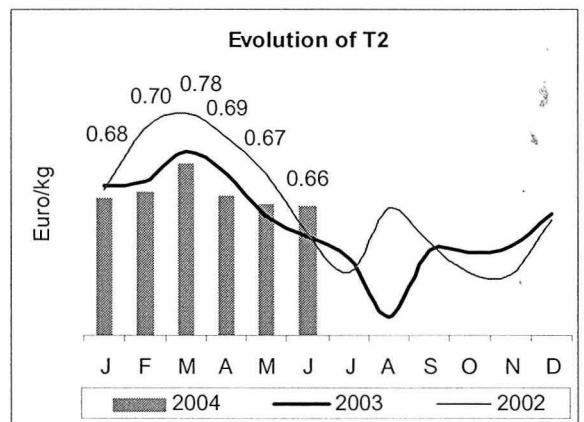
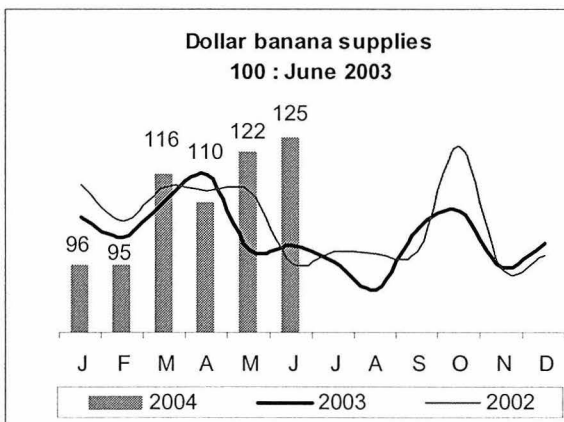


Banana — Indicators for French export markets

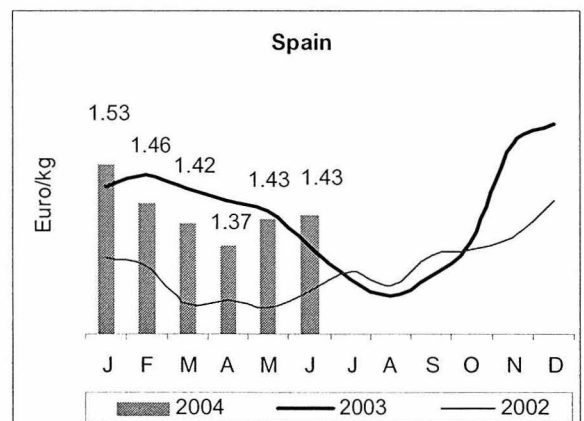
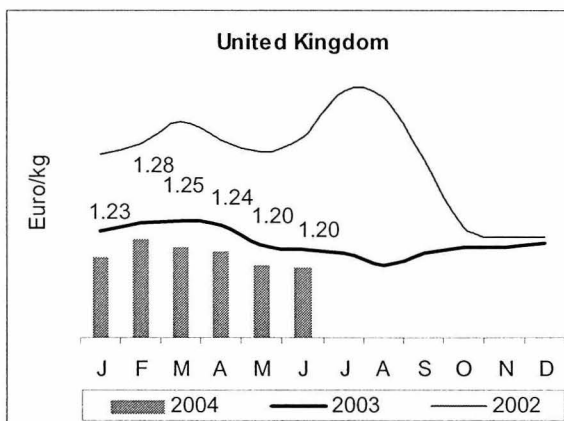
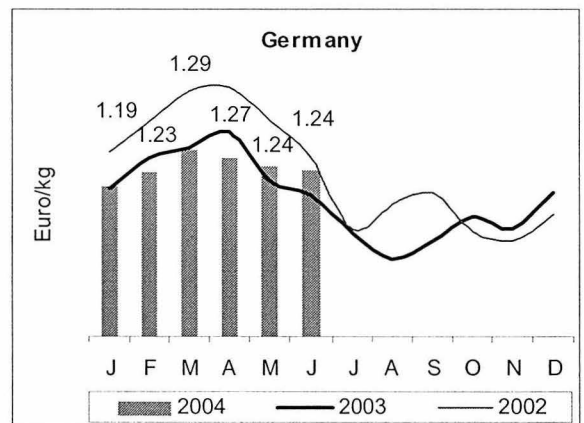
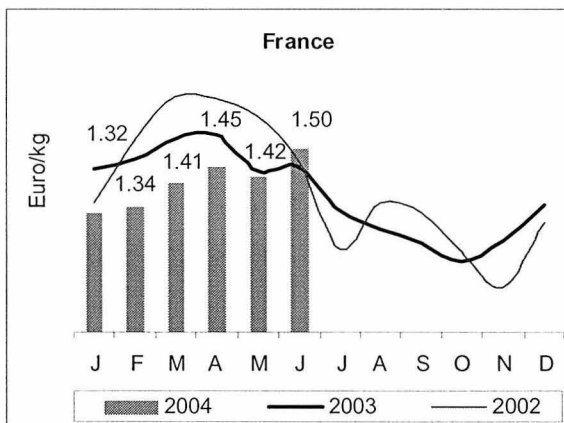
Spain



Northern Europe



Retail price in Europe



Sources: CIRAD-FLHOR, SNM, TW Marketing Consulting

Avocado

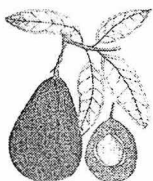
JUNE 2004

Monthly comparison: June 2004 / May 2004

Price	Volumes
↘ - 12%	↗ + 26%

Annual comparison: June 2004 / June 2003

Price	Volumes
↘ - 36%	↗ + 59%



The market was extremely difficult, as is shown by a monthly price 10 percent lower than average. This resulted from the record level reached by supplies. The quantities shipped from South Africa in June swung up above normal again and the Spanish season was prolonged. In parallel, Peru, which was still a marginal origin in 2001, has become a major supplier of the EU market. However, the overall decrease in price was still much less than the increase in volumes.

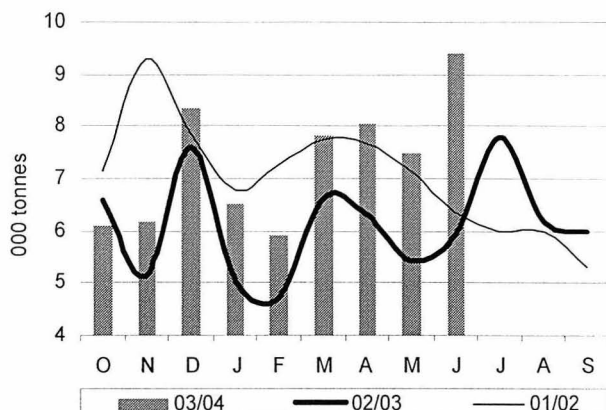
Supplies—especially of Hass—were from extremely varied origins. The Spanish season was extended and substantial quantities arrived throughout the month. Although arrivals of Hass from South Africa remained medium, those from Peru increased strongly. The small volumes

shipped from Mexico in June were not a reflection of a season during which 4.2 million boxes will have been exported to the EU. Demand decreased as a result of competition from the season's fruits and was not such as to take these volumes. Prices decreased throughout the month. The

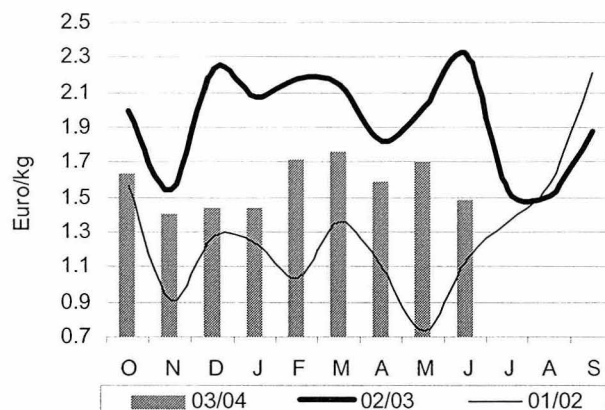
market was also very difficult for green varieties. In addition to pressure from Hass, supply was varied even though shipments from Kenya were fairly small. Supplies of Fuerte from South Africa were short in May and then increased strongly, exceeding those of the last two seasons.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	June 2004	Comparisons (%)		Season total	Season comparisons (%)	
		2004/2003	2004/2002		03-04/02-03	03-04/01-02
Spain	3 122	+ 432	+ 89	28 094	+ 91	- 1
Mexico	314	- 3	-	14 428	- 99	- 99
South Africa	3 649	+ 16	+ 9	5 972	+ 2	- 19
Peru	1 707	+ 64	+ 271	2 588	+ 91	+ 462
Kenya	606	- 27	- 11	5 658	- 6	+ 79
Total	9 398	+ 59	+ 48	56 740	+ 35	+ 20

Orange

JUNE 2004

Monthly comparison: June 2004 / May 2004

Price	Volumes
↗ + 4%	↘ - 35%

Annual comparison: June 2004 / June 2003

Price	Volumes
↗ + 13%	↗ + 40%



The winter season was very satisfactory right to the end. Both the quantities marketed and the average price increased noticeably again. Demand was focused on Valencia from Spain and Morocco and was very strong. Navel from South Africa found it difficult to gain a position, but the small volumes shipped meant that the market remained under control.

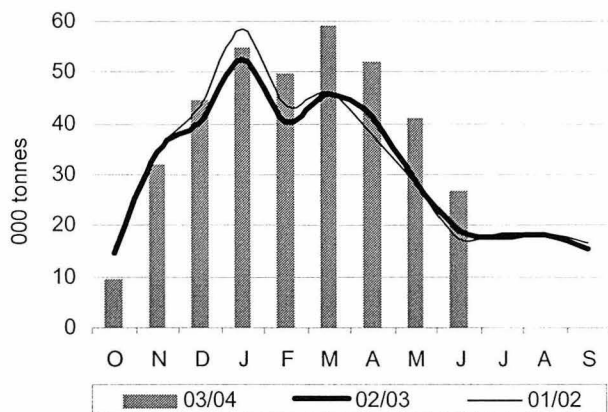
Demand was astonishingly strong once again during the second part of the season. Some professionals consider that the dynamism generated by Navelate had a positive effect on the Valencia market, the target of demand in June. Spanish sales thus increased distinctly. The market was

even extremely tense at the end of the month as a result of a shortage of produce at the shipping stage. Maroc Late also benefited from the enthusiasm and the season lasted until the very end of the month. Not so much interest has been shown in the product in June since 1996. Prices

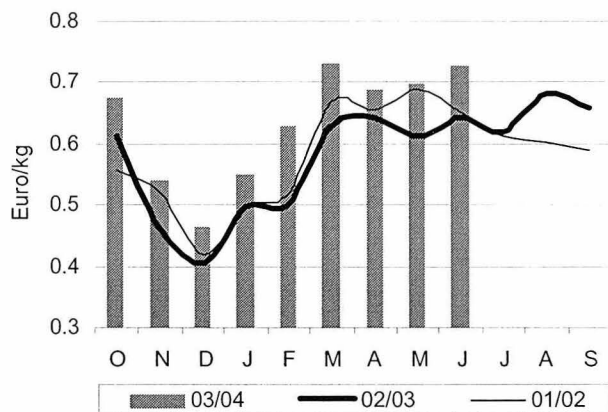
were distinctly higher than average for both Spanish and Moroccan fruits. The situation obviously weighed on the start of the South African Navel season, especially as a significant proportion of fruits were not perfectly ripe. But supplies were small and the market remained under control.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	June 2004	Comparisons (%)		Season total	Season comparisons (%)	
		2004/2003	2004/2002		03-04/02-03	03-04/01-02
Spain	16 683	+ 36	+ 55	322 006	+ 15	+ 15
South Africa	3 710	- 9	- 30	13 862	- 11	- 21
Morocco	6 255	+ 126	+ 402	31 737	+ 77	+ 72
Total	26 648	+ 40	+ 54	367 605	+ 17	+ 17

Grapefruit

JUNE 2004

Monthly comparison: June 2004 / May 2004

Price

=↗ + 1%

Volumes

↗↗ + 36%

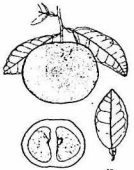
Annual comparison: June 2004 / June 2003

Price

↘↘ - 36%

Volumes

↗↗ + 29%



Performance was disappointing. Although cumulated supplies from the southern hemisphere were smaller than usual, the average price was markedly down on preceding years. Demand was fairly good because of the late start to the stone fruit season and does not seem to be the reason. In contrast, the prolonging of the season in Florida and Turkey weighed on the establishment of fruits from Argentina and South Africa.

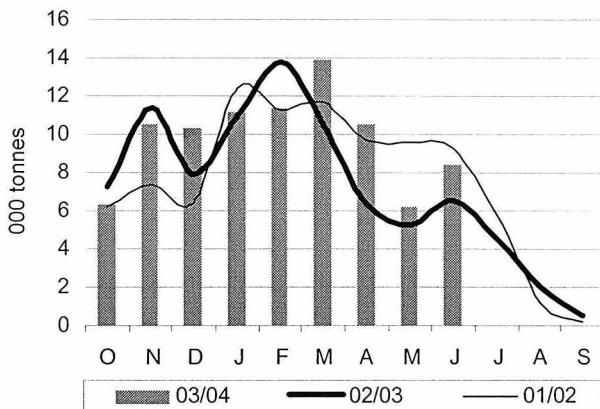
South African supplies were more plentiful than last year but still markedly down on normal seasons (late ripening and drought in the Mpumalanga region where more than 40 percent of total production is grown). Thus, although supplies from Argentina were up on those of

preceding years, total supplies from the southern hemisphere were slightly down on average. However, a broader range of fruits from winter origins was available, especially from Florida and Turkey, because of the volumes received in May. Fruits from Argentina and South Africa thus found it difficult

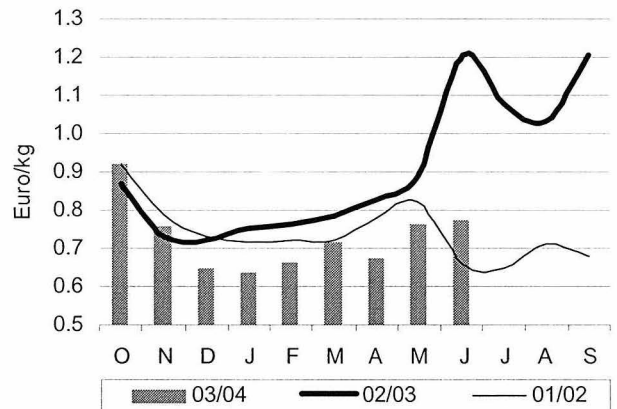
to gain a foothold on the market for the greater part of the month, especially in supermarkets. Although demand was comparatively satisfactory, prices tended to fall. The average monthly price was nearly 15 percent down on the average for recent years.

Estimated market releases in France

Volumes



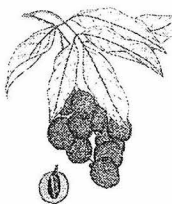
Price at import stage



Estimated market releases in France by origin

Tonnes	June 2004	Comparisons (%)		Season total	Season comparisons (%)	
		2004/2003	2004/2002		03-04/02-03	03-04/01-02
Florida	-	0	0	61 089	+ 11	+ 6
Argentina	4 073	+ 41	+ 40	6 785	+ 4	+ 16
Turkey	22	0	0	8 402	+ 23	+ 15
Israel	-	0	0	7 411	- 5	- 1
South Africa	4 332	+ 22	- 23	8 020	- 6	- 30
Total	8 427	+ 29	- 9	91 707	+ 9	+ 2

Litchi



The European market is still substantially dominated by Thai produce shipped in sea containers. Picking started in the northern part of the country and the volumes exported to Europe increased considerably, with a strong effect on prices. Most of the litchis from Thailand are received by Dutch operators and then redistributed to the various European markets. Smaller flows are also shipped to the markets in France, the UK, etc.

The imminent start of litchi exports from Israel was announced at the end of June. The harvest there is thus very early (two or three weeks earlier than the 2003 season) and should be large. It is reminded that Israel exported 670 tonnes of litchis during the last season that ran from the end of July to mid-September.

France

Sea shipments of longan from Thailand ended in the first third of June, with prices around 1.00-1.50 euros per kg. Shipments of rambutan from the same origin continued; the quantities were extremely limited and prices remained stable at some 6.00 euros per kg throughout the period. Practically all these fruits were delivered in boxes containing two 1 kg punnets wrapped in film. Litchi was rare in May but available in much larger quantities in June. Most were fruits shipped from Thailand by sea. The gradual increase in quantities weakened prices through June. The existence of parallel distribution channels also weighed on prices. Indeed, fruits from Thailand were sold directly by supermarkets specialising in ethnic goods at the same price as on the wholesale markets. Fruit quality was considered to be satisfactory in terms of size, taste and colour (although the fruits were paler than those delivered in May). Marked differences were nevertheless observed in these criteria according to brand. Supplies from Thailand were

completed from time to time by batches of litchi shipped by air from various sources. A few batches of fresh litchi from Mexico were sold in the first half of the month. The first batches displayed attractive colour, good taste quality (sugar content and aroma) and the fruits were larger than 30 mm. Unfortunately, the small quantities and the high prices asked were soon found to be incompatible with demand at this time of year and imports from this origin soon ceased. New shipments from China reached the market at the end of the month. The fruits were of good quality but takers were rare. They sold at around 5-6 euros per kg while operators had hoped for twice this. Finally, a few batches of a large-fruit variety from Thailand was offered at 8-10 euros per kg (fresh litchis on the branch packed in 5 kg plastic crates). As for the fruits from Mexico, these were sold on a clearance sale basis, confirming the weak demand for this type of produce at this time of year.

Belgium

The price of Thai litchis fell steadily throughout the month as supplies from this origin increased. Quality was satisfactory overall. Demand was limited by competition from large quantities of the season's fruits.

The Netherlands

The prices of litchis from Thailand fell markedly in the second half of June when the quantities shipped suddenly

Thailand — Litchi by sea Import price — in euros/kg

JUNE 2004	Min	Max
	Netherlands	2.00 3.50
	Belgium	2.00 4.00
	France	3.00 4.00
	Germany	2.00 3.00

increased. The increase in tonnage and also the multiplication of the number of operators selling litchi caused this weakening. Commercial pressure increased strongly, leading operators to make price concessions to prevent market saturation and the storage of large quantities of produce as this is always bad for business in the medium term. The trend was also accentuated by the uneven quality of the batches received.

United Kingdom

Demand for tropical fruits—including litchi—slowed noticeably. Demand was focused more on the season's fruits that were available in large quantities and at attractive prices. Thailand is currently the main supplier of litchis, with prices ranging from 2.60 to 3.75 euros per kg for fruits shipped by sea. Market conditions will probably not improve in the coming weeks insofar as India and Israel should ship to the British market, increasing commercial pressure on litchi.

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



Mango

West African Season



The market was very sluggish throughout the month. After being over-supplied in the first fortnight it gradually cleared during the second half of the month. Over-supply was the result of the accumulation of large shipments from Côte d'Ivoire and decreasing demand. Indeed, consumer preference for the season's fruits was particularly marked this year, even when they were more expensive. Côte d'Ivoire was the main source of mangoes for France and Europe during the period, regaining its position as a key supplier after a lack-lustre 2003 season.

The strong, rapid increase in shipments **by sea** from Côte d'Ivoire from mid-May onwards first saturated the French market. The re-export markets were then an opportunity for selling the fruits that arrived. The intensity of arrivals finally amply covered demand and stocks were accumulated. The shipments caused trade tension especially as demand for tropical fruits decreased considerably, with preference clearly going to the season's fruits. Côte d'Ivoire nevertheless benefited from the almost complete absence of competing origins and especially Brazil; this feature limited the fall in prices. The price decrease in the first half of June is also explained by the uneven quality of the produce shipped from Côte d'Ivoire. Mixed stages of ripeness

made it difficult to sell the fruits, especially on export markets that tend to require firm, well-coloured produce. Here, it would seem that the fruits carried on reefer ships displayed greater variation in ripeness than those shipped in door-to-door containers. These observations should be viewed with caution insofar as the management of fruit quality begins upstream of transport operations. A decrease in shipments from Côte d'Ivoire in the second half of June caused another market transition phase. Prices firmed gradually and varied for recent deliveries and fruits released from storage. A few arrivals from Guinea and Mali at the end of the month partially made up for the shortage resulting from the end of the Côte d'Ivoire season.

The air mango market was amply supplied throughout June. With 100 tonnes and more arriving weekly, trade tension was substantial for this produce. Many retailers preferred to purchase cheaper sea-shipped mango and earn a better margin for the same fruit quality. The marketing of fruits shipped by air has become increasingly complex, partly because of the quantities arriving and also because of the fall in fruit quality and the increase in the number of stages in the chain. The widespread distribution of these fruits adversely affected control of release of the fruits on the market. Prices firmed at the end of the month but less than for mangoes shipped by sea.

JUNE 2004	Mango — Imported volumes Estimates in tonnes				
	Weeks 2004	23	24	25	26
	By air				
	Mali	40	60	50	50
	Burkina Faso	20	30	45	18
	Côte d'Ivoire	nc	nc	nc	
	Mexico				10
	By sea				
	Côte d'Ivoire	1 100	650	500	400
	Guinea		200	140	

Mango — Price in euros — Import stage					
Weeks 2004		23	24	25	26
By air (kg)					
Mali	Amélie	2.00 - 2.50			
Mali	Valencia	1.80 - 2.00	2.00 - 2.50	2.30 - 2.50	2.30 - 2.50
Mali	Kent	1.80 - 2.50	2.00 - 2.80	2.10 - 2.80	2.00 - 2.50
Burkina Faso	Kent	2.00 - 2.50	2.00 - 3.00	2.20 - 3.00	2.30 - 2.50
Côte d'Ivoire	Kent	3.00 - 3.40	2.50 - 4.00	3.00	2.50
By sea (box)					
Côte d'Ivoire	Kent	3.50 - 4.30	3.80 - 4.20	3.50 - 4.50	4.00 - 5.00
Guinea	Keitt			3.00 - 3.50	4.00 - 4.50
Mali	Keitt				4.00 - 5.00