

Indicators

September 2004

The main fruits	In shares by total volume and expenditure on fruits for the month in France		
	%	Volumes	Expenditure
Grapes	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.

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Sept. 2004 / Sept. 2003			
Price	↗	Vol.	⇒↘

Grapes

The market for the main varieties, except for Chasselas, was fairly satisfactory until the end of the month. Prices remained higher than in 2003. The situation worsened in Week 39. Demand did not follow the marked increase in supplies.

Sept. 2004 / Sept. 2003			
Price	⇒↘	Vol.	⇒↗

Apple

The market was more difficult than last year even though the harvest is comparatively small. Exports were particularly slow because of strong competition on the northern markets from new EU member-countries. This affected the domestic market, which became more competitive. Prices were down on those of 2003.

Sept. 2004 / Sept. 2003			
Price	↘	Vol.	=

Peach/Nect.

The market did not improve in September. The end of the season was laborious for want of demand. Prices remained markedly lower than in 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

SEPTEMBER 2004

Monthly comparison: Sept. 2004 / August 2004

Price	Volumes
↗ + 20%	↗ + 6%

Annual comparison: Sept. 04 / Sept. 03

Price	Volumes
↘ - 2%	↗ + 6%



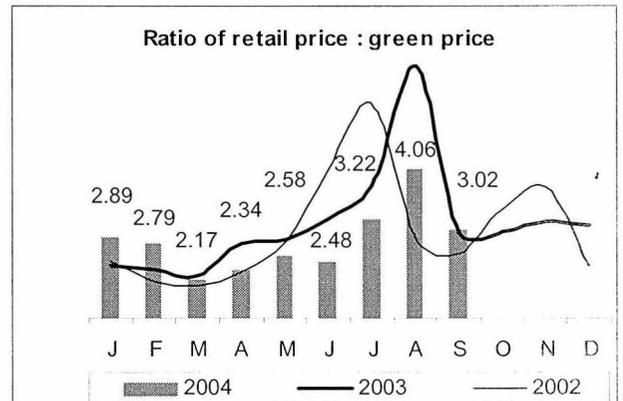
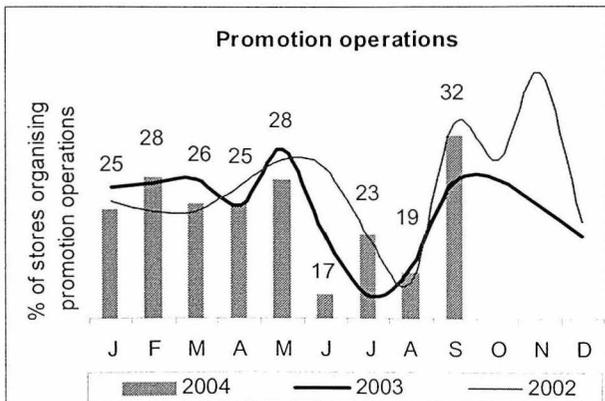
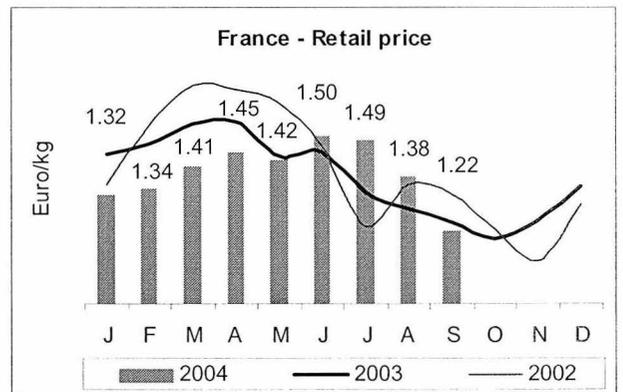
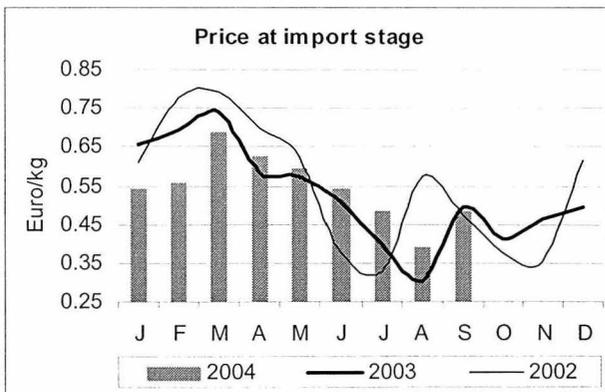
The market performed relatively well during the first half of the month in spite of more generous supplies of West Indian, African and dollar bananas than in recent years. Demand was satisfactory, particularly thanks to strong highlighting at the retail stage. The usual slowing of business in mid-September made the balance of the community market more delicate. The average monthly price was 2% down on that of 2003.

Supplies of West Indian and African bananas increased steadily throughout the month and was slightly more ample than in previous years (8% above average). The market nevertheless remained balanced. Domestic demand emerged from its summer torpor at the beginning of the month—as every year—and remained at a good

level during the first fortnight, with significantly more promotion operations run than in recent years (promotion rate up by 8%) and an attractive retail price (- 7%). Quay prices were comparatively low in August and therefore increased steadily and in mi-month reached a higher level than in 2002 and 2003. The situation then worsened

noticeably thereafter. Release from ripening facilities slowed both in France and on the other major EU markets. As a result, exports, which had been active in spite of slightly increasing arrivals of dollar bananas, slowed distinctly. Prices became more flexible and stocks accumulated at the end of the month.

French banana market — Indicators



European banana market — Indicators

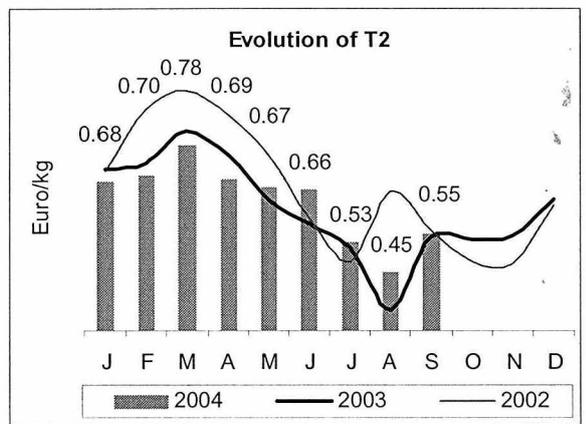
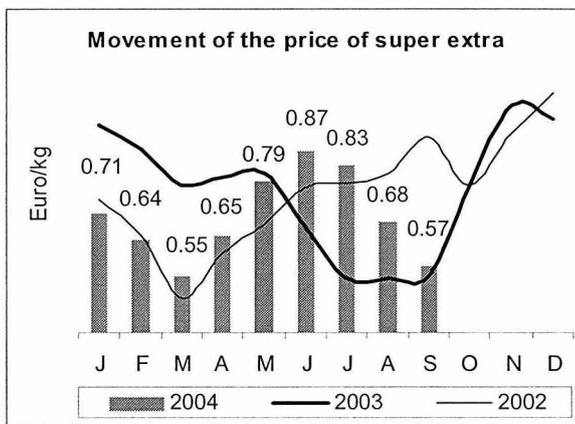
Main origins in Europe

Tonnes	September 2004	Comparisons (%)		Total season 2004	Season comparisons (%)	
		2004/2003	2004/2002		2004/2003	2004/2002
Martinique	23 550	+ 25	+ 3	189 017	+ 7	- 1
Guadeloupe	5 191	- 29	- 39	55 825	- 15	- 24
Canaries	28 813	0	+ 14	294 164	+ 4	+ 1
Côte d'Ivoire	17 518	+ 5	+ 8	157 992	+ 2	0
Cameroon	22 842	+ 4	+ 35	199 994	- 1	+ 16

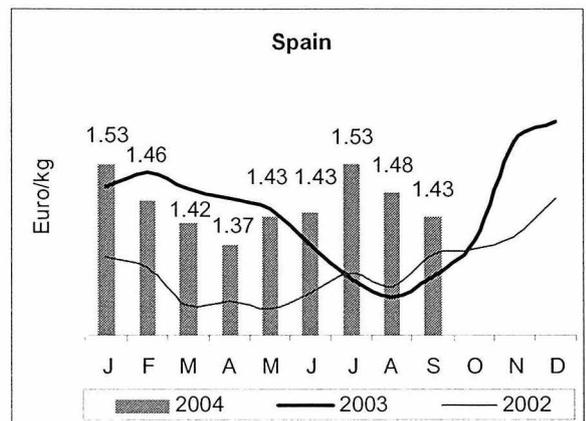
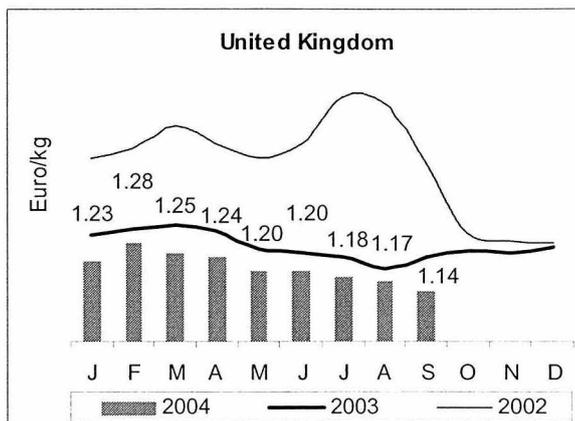
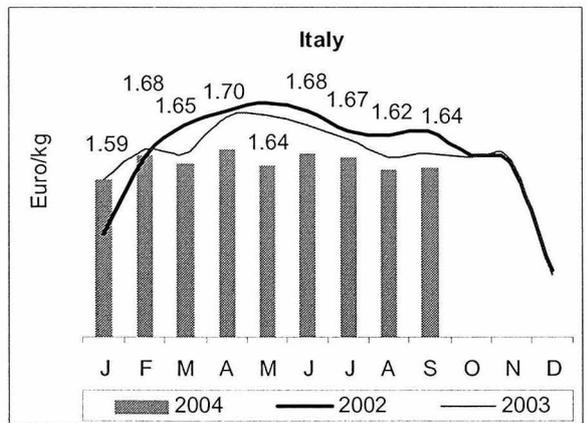
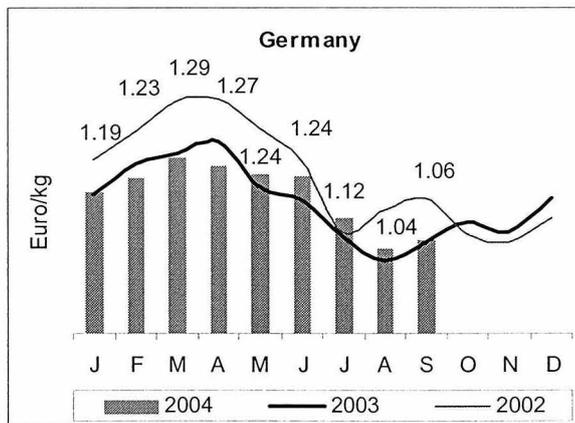
Index (base 100 in September 2003)

Dollar	123	+ 23	+ 31	ND	+ 11	+ 12
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Green price in Europe



Retail price in Europe



Sources: CIRAD-FLHOR, SNM, TW Marketing Consulting

Avocado

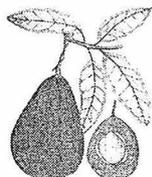
SEPTEMBER 2004

Monthly comparison: Sept. 2004 / August 2004

Price \downarrow - 6% Volumes $\uparrow\uparrow$ + 22%

Annual comparison: Sept. 04 / Sept. 03

Price \downarrow - 4% Volumes $\uparrow\uparrow$ + 33%



Just as rain follows sunshine, a buoyant avocado market always seems to be followed by a major crisis period. The disaster scenario ran again in September as arrivals of Hass were completely unreasonable in the second half of the month (Mexican shipments larger than usual, prolongation of the Peruvian season and a sudden large increase in Chilean presence in the EU).

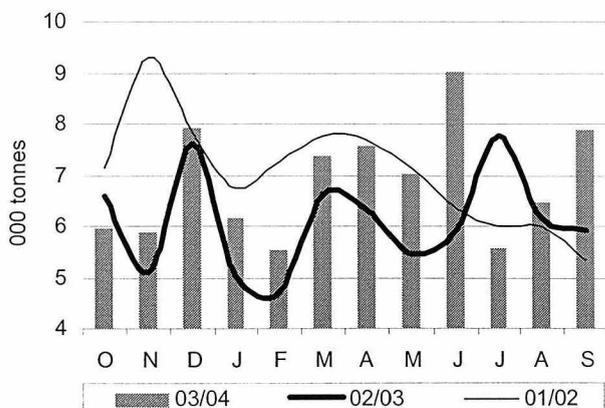
The market was distinctly under-supplied and buoyant until week 36 and then changed totally in Week 37 as a result of the rapid increase in supplies of Hass. Mexican supplies increased more rapidly than in previous seasons while the flow from Peru remained steady and strong. Furthermore, extremely large

shipments from Chile hit the community market from Week 38 onwards as the natural north American outlet was not very favourable and there was demand from European importers. In spite of the organising of promotion operations, the Hass market collapsed under the weight of this

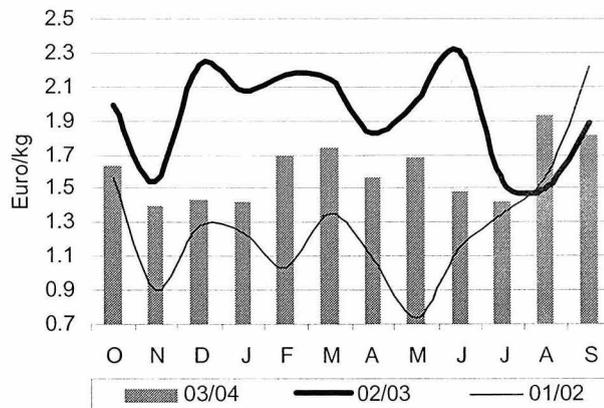
probably unprecedented deluge of goods. Prices sank to a level well below cost at the end of the month. In this context, the market for green varieties was catastrophic even though normal quantities were imported.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	September 2004	Comparisons (%)		Season total 2003/2004	Season comparisons (%)	
		2004/2003	2004/2002		03-04/02-03	03-04/01-02
Spain	553	+ 54	+ 215	1 179	+ 228	+ 79
Mexico	2 545	+ 28	+ 78	3 842	+ 29	+ 133
South Africa	1 547	- 29	- 42	12 784	- 12	- 26
Chile	1 040	+ 124	+ 721	1 040	+ 124	+ 721
Peru	1 361	+ 287	+ 653	6 312	+ 27	+ 223
Kenya	835	+ 39	+ 10	7 603	- 21	+ 32
Total	7 881	+ 33	+ 48	32 760	- 1	+ 19

Grapefruit

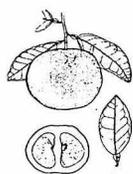
SEPTEMBER 2004

Monthly comparison: Sept. 2004 / August 2004

Price **↗ + 16%** Volumes **↘ - 27%**

Annual comparison: Sept. 04 / Sept. 03

Price **↘ - 35%** Volumes **↗ + 24%**



The prospect of very limited shipments from Florida from October onwards because of production losses caused by hurricane Frances strongly influenced the market. Operators with good quality fruits (most of the batches from Honduras, the last arrivals from South Africa and the first Cuban fruits at the end of the month) did not have to force sales in September. The average price was therefore distinctly above average even though demand was relatively slow.

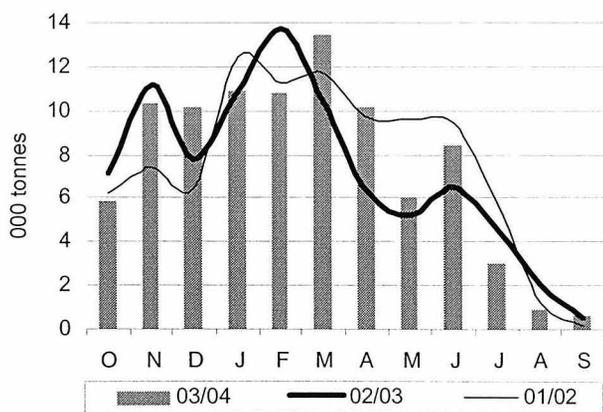
The market was balanced but lacklustre at the beginning of the month before changing in Week 37 after the announcement of the heavy losses caused by hurricane Frances to the Indian River plantations in Florida (three-quarters of the state's production potential). The prospect of a downturn in supply volumes from October onwards led operators

handling summer or off season origins and who held fruits with satisfactory keeping quality to extend marketing into the beginning of the winter season. Prices therefore remained very firm throughout the month for good quality produce (most of the batches from Honduras, the last arrivals from South Africa and the first fruits from Cuba at the

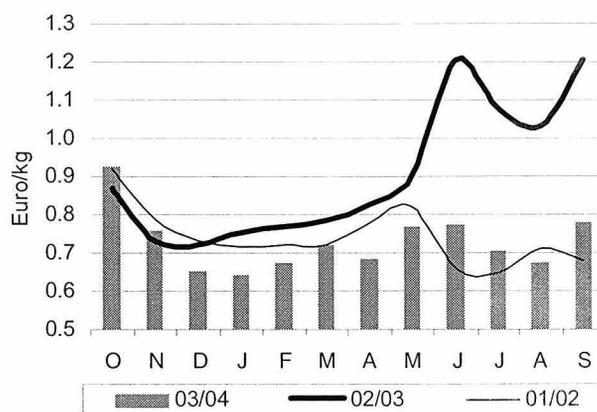
end of the month). In this context, complementary supplies from Mexico were more ample than in preceding years. Argentinian operators were unable to benefit from this favourable situation because of the mixed quality of a large proportion of the last batches available.

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 2004	Comparisons (%)		Season total	Season comparisons (%)	
		2004/2003	2004/2002		2003/2004	03-04/02-03
Argentina	82	+ 216	- 55	7 102	+ 1	+ 14
South Africa	574	+ 14	+ 1 300	9 261	- 12	- 26
Total	656	+ 24	+ 193	16 363	- 7	- 13

Litchi

SEPTEMBER 2004

Litchi Import price — in euros per kg

		Min	Max
Netherlands	Israel	2.50	3.50
	Belgium		
Belgium	Israel	2.50	2.75
	France		
France	Israel	2.00	3.00
	Spain	5.00	10.00



The litchi market in September was characterised by limited supplies, with the gradual winding down of the Israeli export season. Paradoxically, demand became more lively and kept prices fairly firm while fruit quality tended to worsen. The sale of Israeli litchis continued until at least the middle of the month on some European markets. Meanwhile, litchi shipments started from Spain and continued at a measured pace throughout the month.

France

The Israeli season finished fairly quickly on the French market. The few batches delivered at the end of August/beginning of September sold rapidly, benefiting from a slight, short-lived return of interest by specialised fruit distributors. The situation was good for importers at the end of the season while the produce received was distinctly more delicate than before. Supplied in bulk or punnets, Israeli litchis had a dull appearance and a hard shell or, on the contrary, the fruits had softened. Mould spots were also observed on some stored batches. The first shipments of litchi from Spain meant that the fruit was present on the market without interruption. Supplies from this new origin were regular but small throughout September. It is estimated that Rungis market handled about 5 or 6 palettes a week. Prices increased as these quantities were very small. Poorly set at the beginning of the season, they rose in the second half of the month because of the small supplies in relation to demand and also because of shippers' determination to obtain high prices that were not always justified in the light of the transport cost of these goods. It seems that only the French market received Spanish litchis in

September. The existence of a large Spanish community in France has been mentioned as a reason for this!

Belgium

The sale of litchis from Israel ceased rapidly at the beginning of the month and no supplies were then received. Fruits from Spain do not interest Belgian operators because of the very high prices asked during this period of timid recovery after the summer holidays.

Netherlands

Litchi supplies are scarce in September. The end of shipments from Israel at the beginning of the month nonetheless made it possible to continue to sell this fruit until mid-September. As supplies became rare, prices rose as a result of livelier demand, in spite of gradual worsening of fruit quality. Dutch operators seem to have received considerable demand from Scandinavian countries at this time and this contributed to sending prices higher.

United Kingdom

The market was still very slow, with small quantities from Israel at the beginning of the month dwindling in subsequent weeks. Demand remained small and sales involved small quantities. At the beginning of September, litchis from Israel were sold at 2.95 to 3.70 euros per kg and

The Israeli season was very early this year. Indeed, the first shipments left at the beginning of July, three weeks earlier than the start of the 2003 season. With 865 tonnes of fruits shipped to the EU, Israeli exports increased by nearly 30% in comparison with the last season. The rate of arrivals was also different this year with a very strong, rapid increase in the quantities shipped and then a slow decrease from the end of July/beginning of August. As they were early, Israeli fruits competed directly with those from Thailand, partly explaining the end of shipments from the latter origin. According to several European operators, it would seem that Israeli exports this year were targeted more at northern European markets because of the poor economic results in 2003 on markets like France, for example.

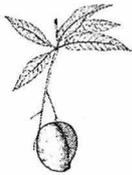
then rose to 3.70 to 4.00 euros per kg for the last batches from this origin that were of mediocre quality (desiccation). 'Carmel' brand litchis disappeared from the market in the middle of the month and were replaced by other brands of the same origin. The next shipments of litchis should be from the Indian Ocean, and in particular from Mauritius.

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



Mango

West African Season



A slight return of interest in mango was observed at the end of August/beginning of September, with prices on the rise. The situation only truly recovered in the second half of the month as arrivals decreased considerably. The recovery of business was fairly slow for the tropical fruit range and the irregularity of mango supplies did not encourage an increase in consumption.

The combination of arrivals by **ship** from Israel, end of season batches from Mexico and further quantities from Senegal and Brazil clogged the market at the end of August. Most of this produce was not of very attractive quality (Israeli fruits were very green and spots developed on those from Senegal and Mexico). Demand was very cautious in spite of a slight increase at the very beginning of the month. Most of supplies—Keitt and Tommy Atkins—sold slowly. Kent from Senegal (the only origin apart from Israel shipping this variety) sold satisfactorily in this context even though problems of

quality increased. In the first half of September the market cleared produce of poor quality that had been stored for some time, with sales sometimes at low prices. The scarcity of supplies in the second part of the month favoured a price recovery for fruits shipped by sea. The relative shortage of goods led several operators to release Brazilian Tommy Atkins fruits on the French market which is traditionally not very keen on this variety.

The situation for mango shipped by **air** was more confused as supplies were not very coherent. The

multiplication of origins, varieties and quality hindered a true recovery. Several batches of mango from Senegal consisted of very hard fruits that were difficult to sell as they were, whereas there was definite demand for Kent. The quality of mango shipped from Israel by air worsened gradually while demand became firmer. Very uneven ripeness slowed retailers' purchases. Fruits of this origin did not fully profit from the market opportunity open to them and they sold at mid-level prices.

Mango — Imported volumes					
Estimates in tonnes					
Weeks	36	37	38	39	40
By air					
Senegal	-	15	8	5	3
By sea					
Senegal*	38	-	18	18	15
Israel**	710	na	na	na	na

* Estimated arrivals in Europe
** Estimated arrivals in Europe by air and sea

Mango — Price in euros — Import stage						
Weeks 2004		36	37	38	39	40
By air (kg)						
Senegal	Kent	3.00-3.30	2.60-3.00	2.60-3.00	2.50-2.80	2.60
Israel	Maya	2.50-3.00				
Israel	Kent	2.80-3.20	2.50-3.50	3.00-4.00	3.00	
Israel	Keitt				3.00-3.50	2.80-3.20
By sea (box)						
Mexico	Kent	3.00-5.00				
Senegal	Kent	3.50-4.50	3.50-5.00	4.50-5.00	5.00-5.50	5.00-5.50
Israel	Tommy Atkins	2.50-3.00	2.50-3.00			
Israel	Keitt	4.5	4.00-4.50	4.00-4.50	4.00-4.50	2.50-4.00
Brazil	Tommy Atkins	3.00-3.50	3.00-3.50	3.00-3.50	3.50-4.00	3.50-4.00

Weekly monitoring of the European mango market is available during the West African season.

Import prices, estimation of releases, trends, etc.



Pierre Gerbaud

Information from:
322, rue de la Tour - Centra 149
94566 Rungis cedex - France

Tel: 33 (0)1 46 87 47 41
Mob: 33 (0)6 77 76 11 56
pierregerbaud@hotmail.com