

## EUROPEAN MARKET

**Demand starting to perk up more on the European market, with prices gradually strengthening, especially in Northern and Eastern Europe.**

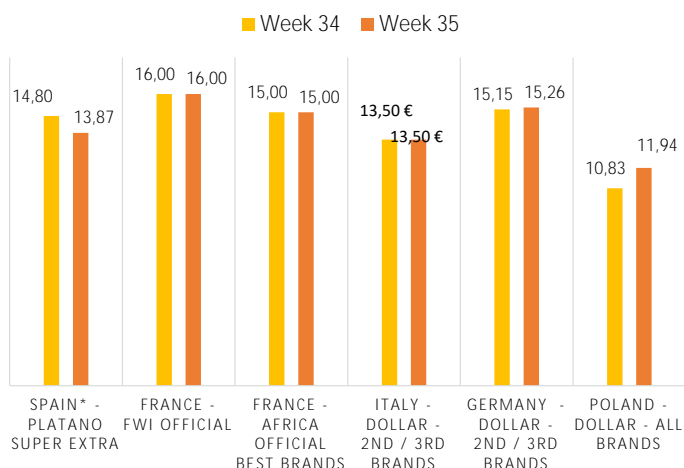
This week, shipments from Colombia and Costa Rica are continuing to grow, without being excessive. Ecuadorian volumes are also moderate and near average. Regarding Africa, shipments are increasing, whether for Côte d'Ivoire, Cameroon or Ghana. Hence overall African volumes are back to slightly above-average levels (+3%). Volumes from the French West Indies are slightly down, at levels below average for the season. Some operators in Northern Europe are facing slight shipping delays. In a context of demand starting to pick up again in the run-up to the new school year, and given the promotions in place, this is helping spot prices start to strengthen, especially in Germany and Eastern Europe. In France, this strengthening trend is slightly less marked, although it is starting to be felt with some operators. In Italy, the market is still not moving. Spain is the only country where prices are continuing to drop, because of excessive volumes from the Canaries.

### Reference Price : EU- 27



Week 35	W35 / W34	2024 / ave.22-23
14.06 €	+ 0.34 €	- 4 %

SYNTHESIS OF UE PRICES BY BRANDS/CATEGORIES (€/18,5 KG BOX)



## RUSSIAN MARKET

### Reference Price : Russia



Week 35	W35 / W34	2024 / ave.22-23
12.50 US \$ / box	+ 4.00 \$	- 13 %

## US MARKET

### Reference Price : USA



Week 34	W34 / W33	2024 / ave.22-23
17.06 US \$ / box	+ 0.99 \$	- 29 %

Source SOPISCO

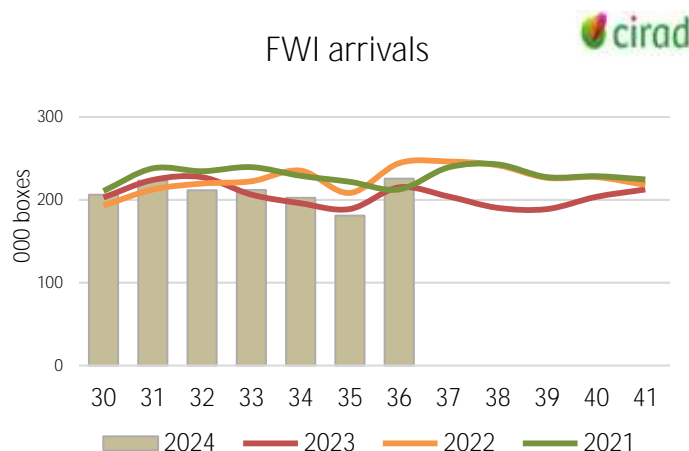
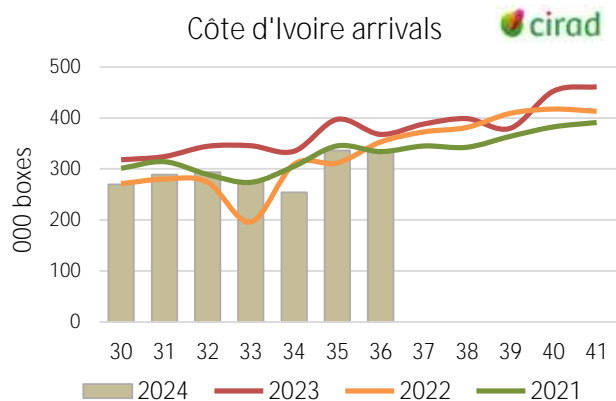
## Europe



## ARRIVALS (in boxes)

a significant proportion of volumes discharged in France are re-exported.

	Week 34	Week 35	Cumul Week 35	2024/2023	2024 / 2021	Forecast Week 36
Guadeloupe	69 158	57 068	2 042 045	3%	-1%	78 467
Martinique	133 223	124 043	5 156 133	2%	-7%	147 064
<b>Total Antilles</b>	<b>202 381</b>	<b>181 111</b>	<b>7 198 178</b>	<b>2%</b>	<b>-5%</b>	<b>225 531</b>
Côte d'Ivoire	254 231	336 225	11 505 602	-4%	3%	334 790
Cameroun	198 642	204 798	7 704 472	11%	0%	227 600
Ghana	53 578	73 800	2 985 462	23%	41%	72 984
<b>Total Afrique</b>	<b>506 451</b>	<b>614 823</b>	<b>22 195 536</b>	<b>3%</b>	<b>6%</b>	<b>635 374</b>
Canaries	378 378	378 378	13 128 324	-5%	19%	0
<b>TOTAL</b>	<b>1 087 211</b>	<b>1 174 312</b>	<b>42 522 037</b>	<b>0%</b>	<b>8%</b>	<b>860 905</b>



## Week 35 : UE Arrivals FWI / Africa / Surinam

Vessels	ETA	From	To	Load (boxes)
Fort Fleur d'épée	Tu 27	Martinique	Dunkerque / Rouen	124043
Fort Fleur d'épée	Tu 27	Guadeloupe	Dunkerque	57068
Caribbean Star	Tu 27	Cameroun	Anv/Portsmouth	165420
Caribbean Star	Tu 27	Côte d'Ivoire	Anv/Portsmouth	57340
Caribbean Star	Tu 27	Ghana	Anv/Portsmouth	42284
Anl Wyong	Tu 27	Côte d'Ivoire	Dunkerque	36468
CS Quality	Mon 26	Cameroun	P. Vendres/Vado	39378
CS Quality	Mon 26	Côte d'Ivoire	P. Vendres/Vado	164290
CS Quality	Mon 26	Ghana	P. Vendres/Vado	31516
Divers ports conteneurs	ND	Côte d'Ivoire	Divers Ports	73532

## Week 36 : UE Arrivals FWI / Africa / Surinam

Vessels	ETA	From	To	Load (boxes)
Sambhar	Tu 03	Martinique	Dunkerque / Rouen	147064
Sambhar	Tu 03	Guadeloupe	Dunkerque	78467
Colombian Star	Tu 03	Cameroun	Anv/Portsmouth	188558
Colombian Star	Tu 03	Côte d'Ivoire	Anv/Portsmouth	55712
Colombian Star	Tu 03	Ghana	Anv/Portsmouth	36834
Navios Azure	Tu 03	Côte d'Ivoire	Dunkerque	40976
Star First	Mon 02	Cameroun	P. Vendres/Vado	39042
Star First	Mon 02	Côte d'Ivoire	P. Vendres/Vado	164078
Star First	Mon 02	Ghana	P. Vendres/Vado	36150
Divers ports conteneurs	ND	Côte d'Ivoire	Divers Ports	74024

## FRANCE

Market continuing to revive gradually, with prices starting to strengthen slightly.

The French market still has a good supply of fruit, without any surpluses from either the dollar or African origins, or from the FWI. Meanwhile, thanks to the end of the holidays and in anticipation of the new school year, demand is continuing to rally bit by bit. For the moment, the general spot trend remains for strong and stable prices, even though some operators are already observing some strengthening, especially in anticipation of some shipping delays due to congestion at the port of Cartagena. Consequently, the low prices from the preceding weeks are increasingly scarce on the market, and the price range is narrowing.

## Trend



Deliveries

Prices

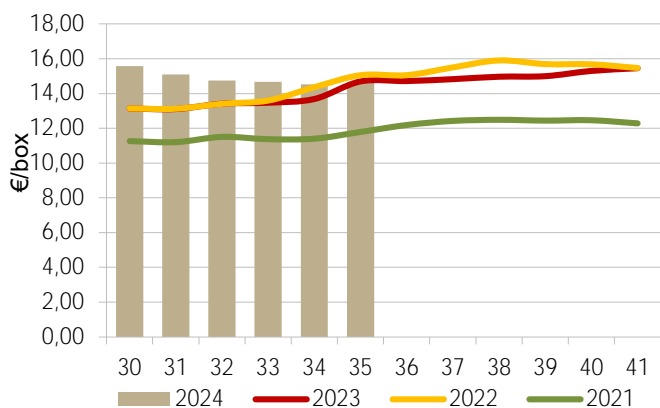
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## GREEN PRICES

France - average green price  
(all sources, weighted by volumes)



First category			
Best brands <i>(before the new tariffications to come)</i>			Standard brands / Spot price
Africa	FWI (Planteur)	Dollar	All origins
€/box 15.00	€/box 16.00	€/box 15.00	€/box 13.00 / 14.00 (15.00)

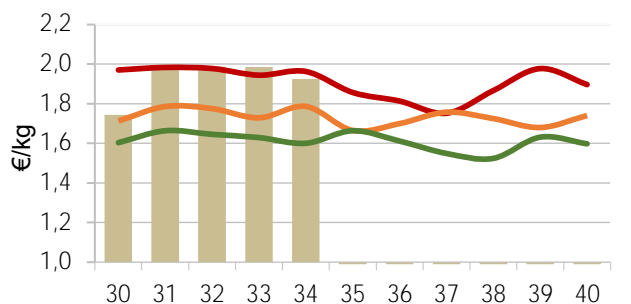
( ) : price reported on a minority share of the offer

## FRANCE



### RETAIL PRICES—Conventional

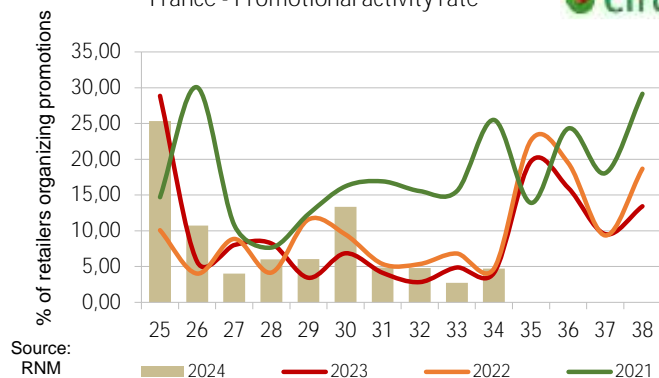
France - Retail prices



Source: RNM

2024 2023 2022 2021

France - Promotional activity rate



Source:  
RNM

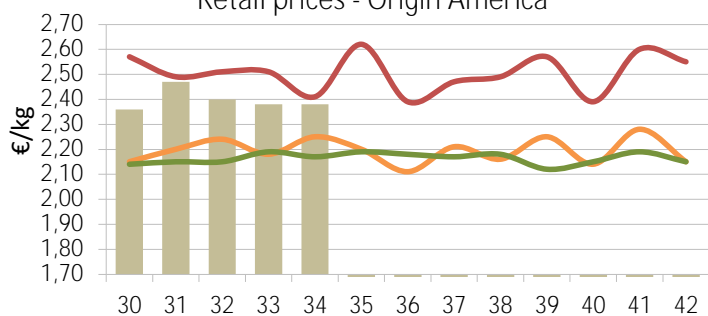
2024 2023 2022 2021

The « Réseau des Nouvelles de Marché » (RNM) observes retail prices of agricultural products in 150 stores located throughout France. This sample is representative of 150 stores and hypermarkets with a size greater than 1,000 m<sup>2</sup>.



### RETAIL PRICES—Organic

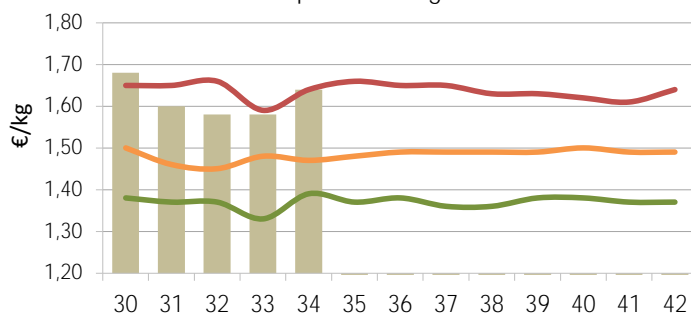
France - Organic bananas  
Retail prices - Origin America



Source: RNM

2024 2023 2022 2021

France - Organic banana  
Wholesale prices - Origin America



Source: RNM

2024 2023 2022 2021

## GERMANY

### Situation on the German market perking up slightly.

Incoming volumes from the dollar countries remain moderate, at levels close to the two-year average. Meanwhile demand is starting to rally more significantly, especially since a number of promotions are already in place. Stocks have been cleared, and on top of that, some operators are facing slight shipping delays. In this context prices are starting to strengthen.

### Trend



Deliveries

Prices

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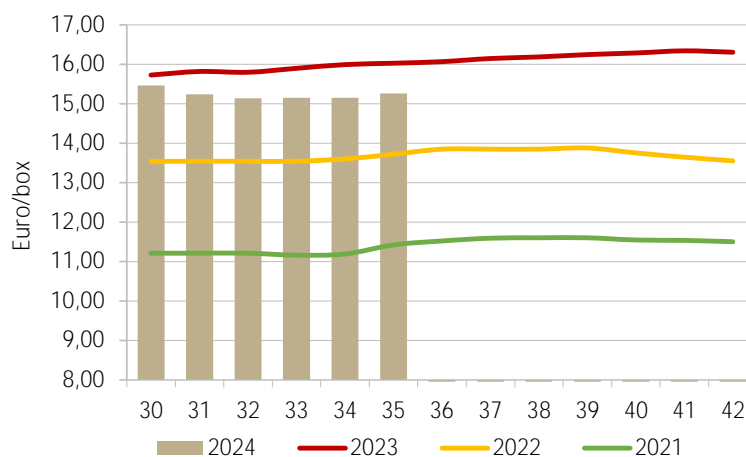
## GREEN PRICES

### First category

### All brands

€/ box  
12.50 / 13.50

Germany - Green price



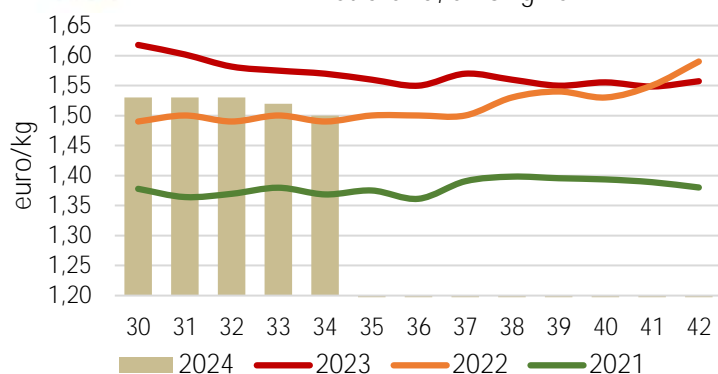
## GERMANY



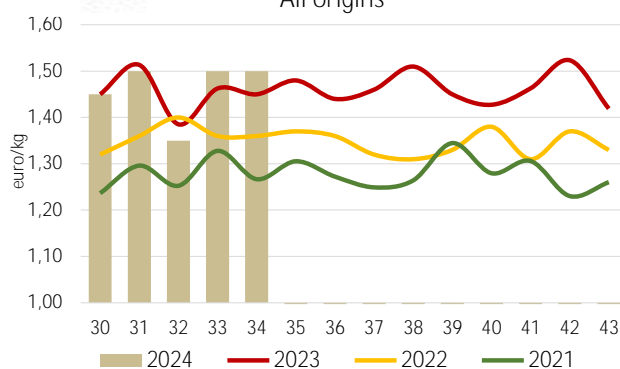
### RETAIL PRICES—Conventional



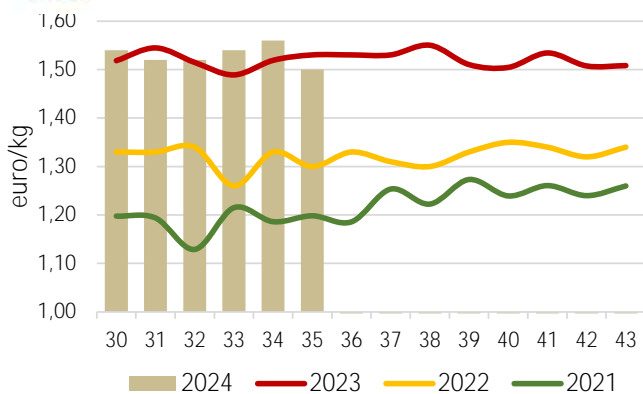
Germany - Wholesale prices  
First brand, all origins



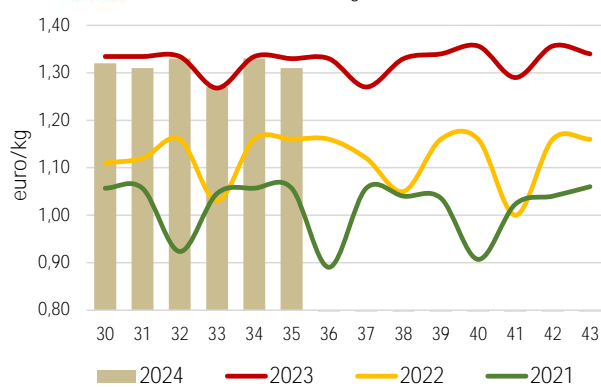
Germany - Retail prices  
All origins



Germany - Retail prices Discounters  
All origins



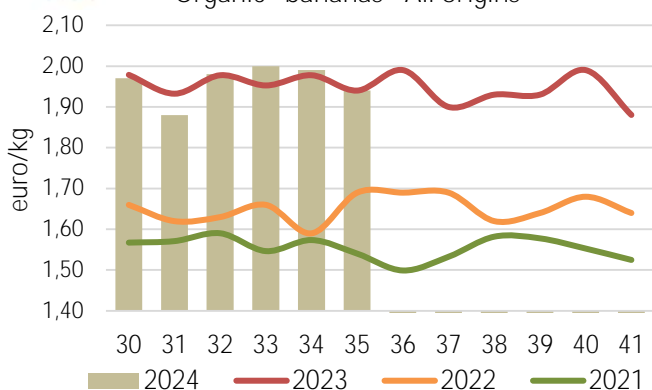
Germany - Retail prices Discounters ALDI  
All origins



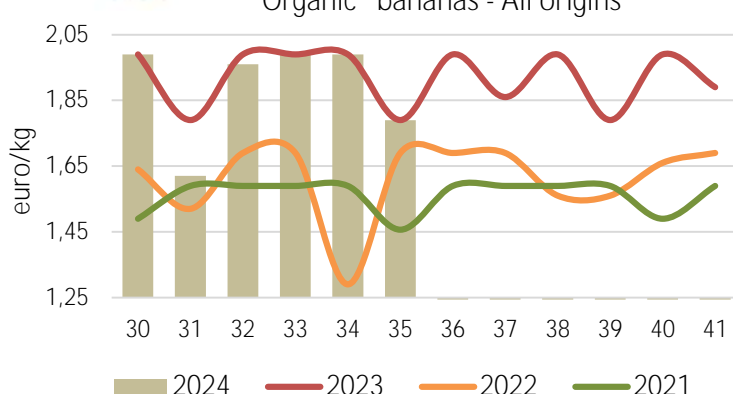
### RETAIL PRICES—Organic



Germany - Retail prices Discounters  
Organic bananas - All origins



Germany - Retail prices Aldi  
Organic bananas - All origins



## ITALY

## Italian market still stable.

As for the rest of Europe, shipments are moderate. Meanwhile, demand is still very quiet due to the ongoing high summery temperatures. In addition, the new school year is not scheduled to start until mid-September. Ripening centre output is fluid and sufficient for current consumption. In this context prices remain stable.

## Trend



Deliveries

Prices

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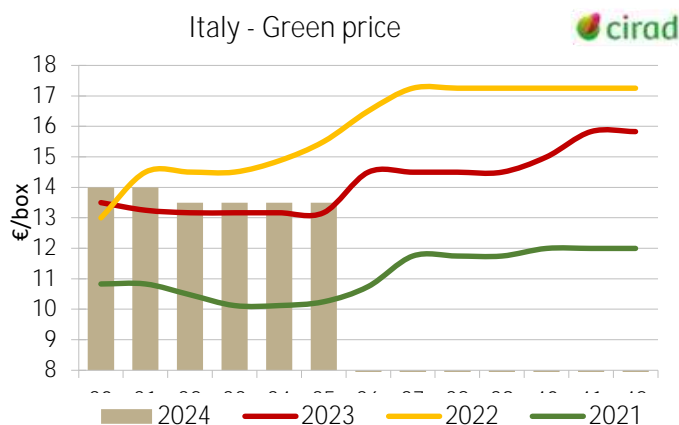
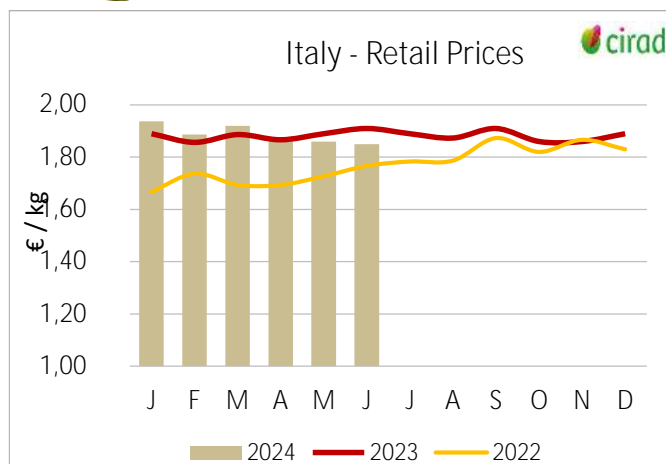


## GREEN PRICES

Premium	Standard brands	Cat I	Cat II
17.00 / 17.50	14.00 / 14.50(15.00)	13.00 / 13.50	(10.50) 11.00 / 12.00



## RETAIL PRICES



## SPAIN

Fall in Canaries platano prices still ongoing, albeit less marked.

Shipments are still stable and some batches, especially in category 1 and extra, are still being destroyed in an attempt to regulate the market. This is all the more vital since consumption is still not strong enough. In this context green prices are continuing to decline, though the fall is a bit more controlled. Dollar banana prices are slightly higher than last week, except for some stock batches, which are still selling at low prices.

## Trend

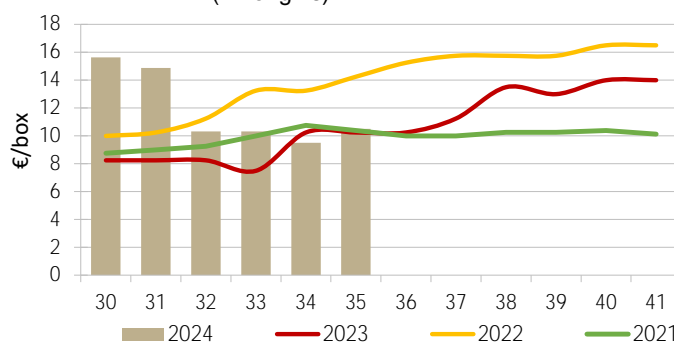


Deliveries

Prices

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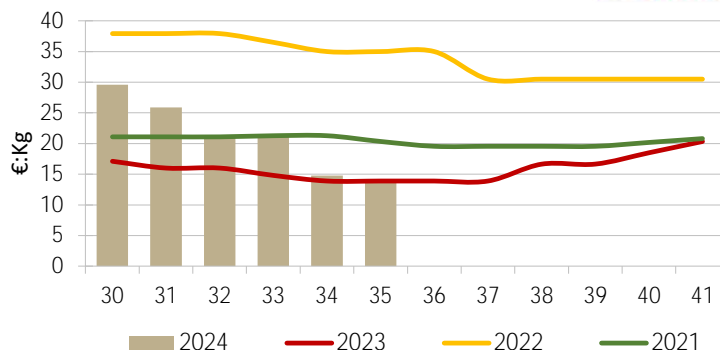
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Spain - Green prices imported bananas  
(All origins)

## GREEN PRICES

## Platano de Canarias (18.5 kg box equivalent)

Super extra		Extra	Cat I
Best brands	Standard brands		
€/box	€/box	€/box	€/box
13.87	12.02	10.18	-

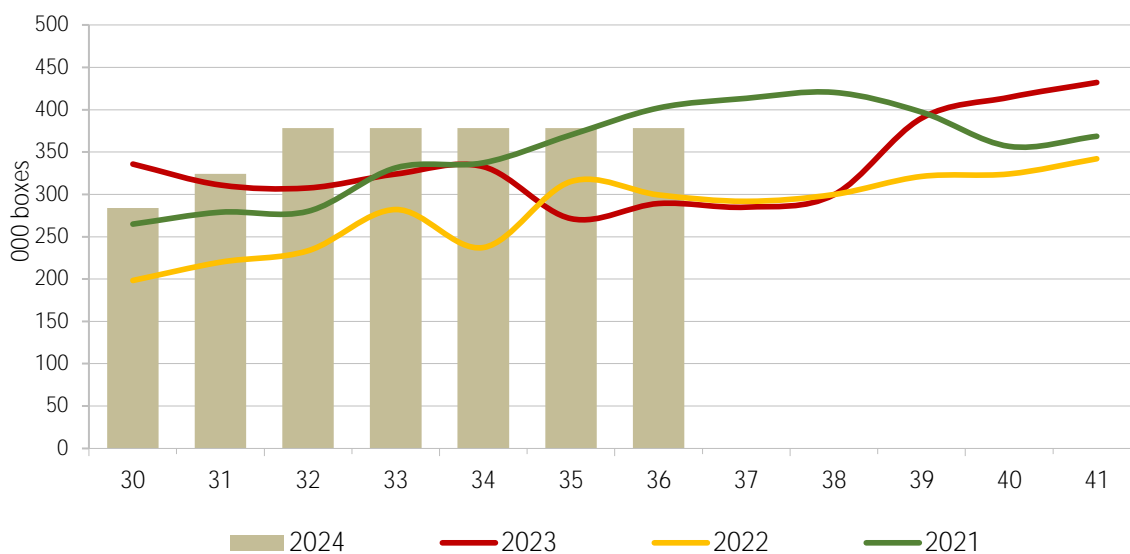
Platano de Canarias - Green price  
(Super Extra category)

## SPAIN



### ARRIVALS

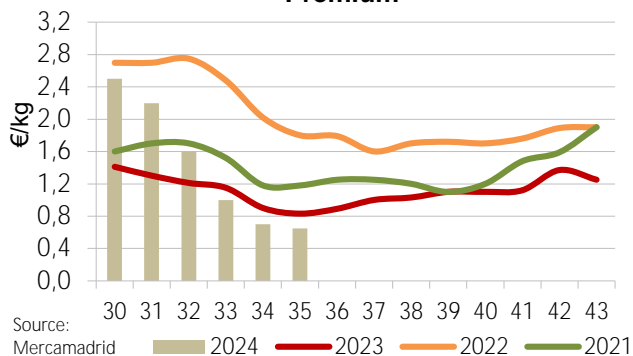
Arrivals - Canary islands



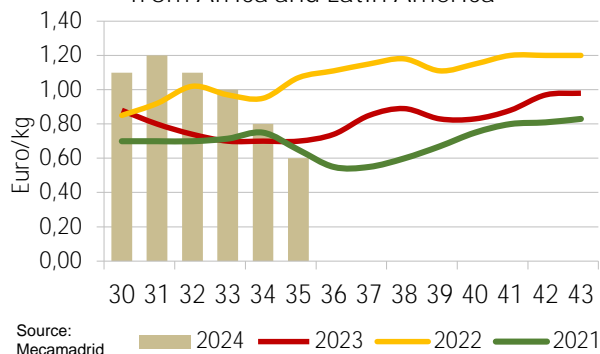
### WHOLESALE



Wholesales prices - Platano de Canarias Premium



Wholesales prices - Imported Banana from Africa and Latin America



**POLAND**

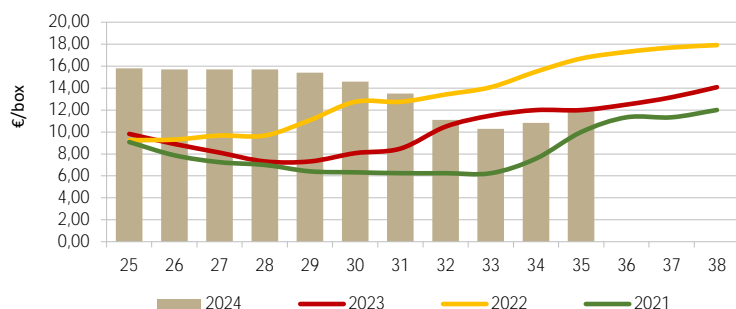
Eastern markets are gradually regaining momentum.

However, demand remains generally weak in Romania and Poland, despite the approach of the back-to-school period. It is certainly a little more active than in previous weeks, but it is above all the limited volumes of bananas that are driving prices up. In Poland, certain lots in stock or from Western Europe can sometimes be sold at derisory prices.

**GREEN PRICES**

Poland - 1st category (€/box)		2nd category
Best brands	Standard brands	
12.50 / 14.00	11.00 / 12.50	9.50

Poland - Average green prices  
(All brands)

**Trend**

Deliveries

Prices

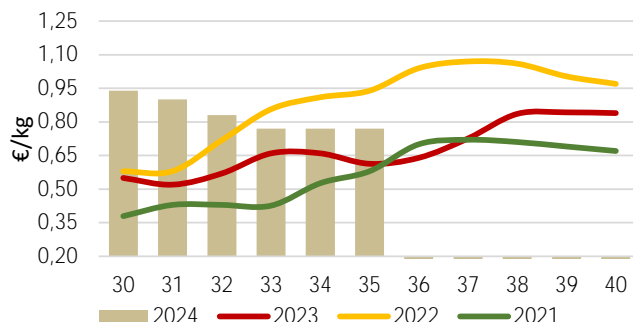
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**YELLOW PRICES**

Poland - 1st category (€/kg)		2nd category
Best brands	Standard brands	
0.80 / 0.86 (0.89)	0.74 / 0.78	0.68 / 0.74

Poland - Wholesales prices (all brands)

**ROMANIA**

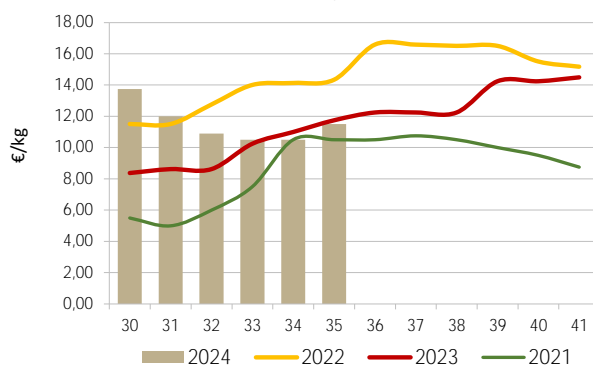
Romania - Premium (€/box)

2nd category

12.00 / 13.00

(9.00) 10.50 / 11.50

Romania - Green prices



## RUSSIA

**Demand is awakening and the market is rising again!**

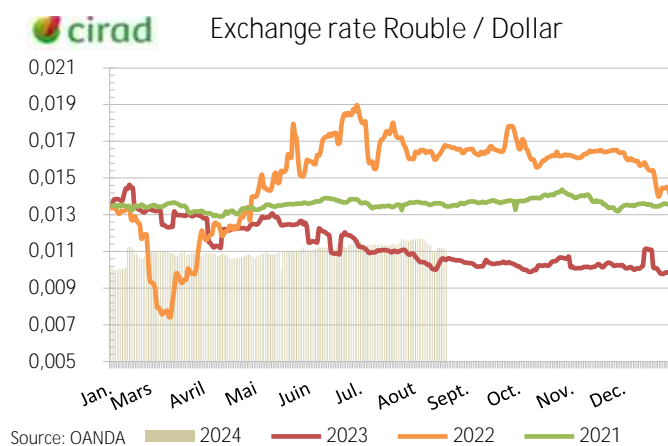
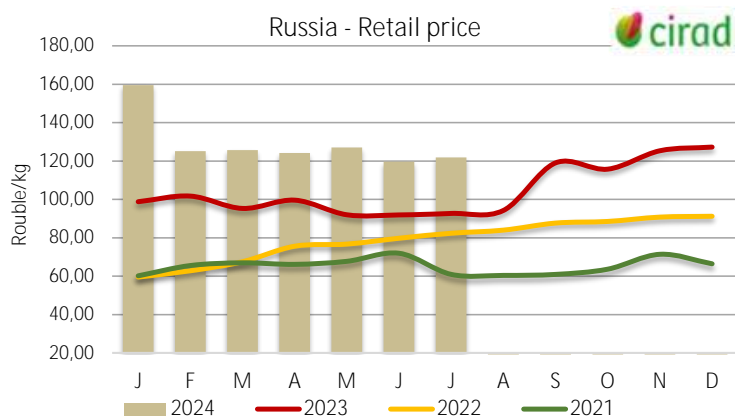
Volumes are up slightly on the Russian market, but this has not prevented an increase in CIF green prices at the port of Saint Petersburg. Indeed, as the back-to-school season approaches, demand is regaining a little momentum.

## Trend



Deliveries

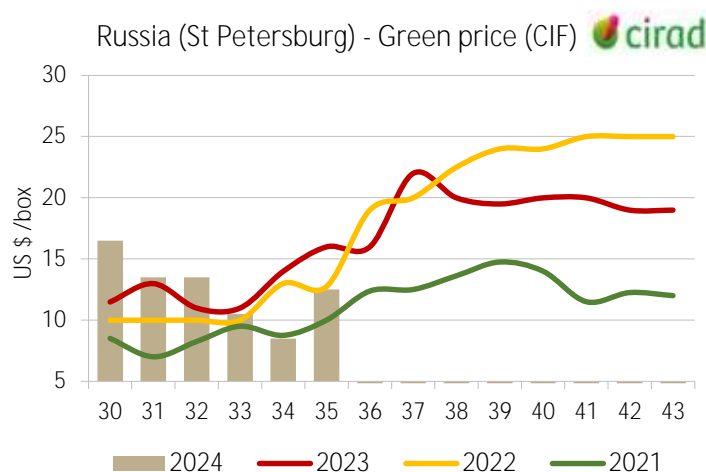
Prices



## GREEN PRICES (CIF)

## CIF Price - St Petersburg

**\$/box**  
12.50

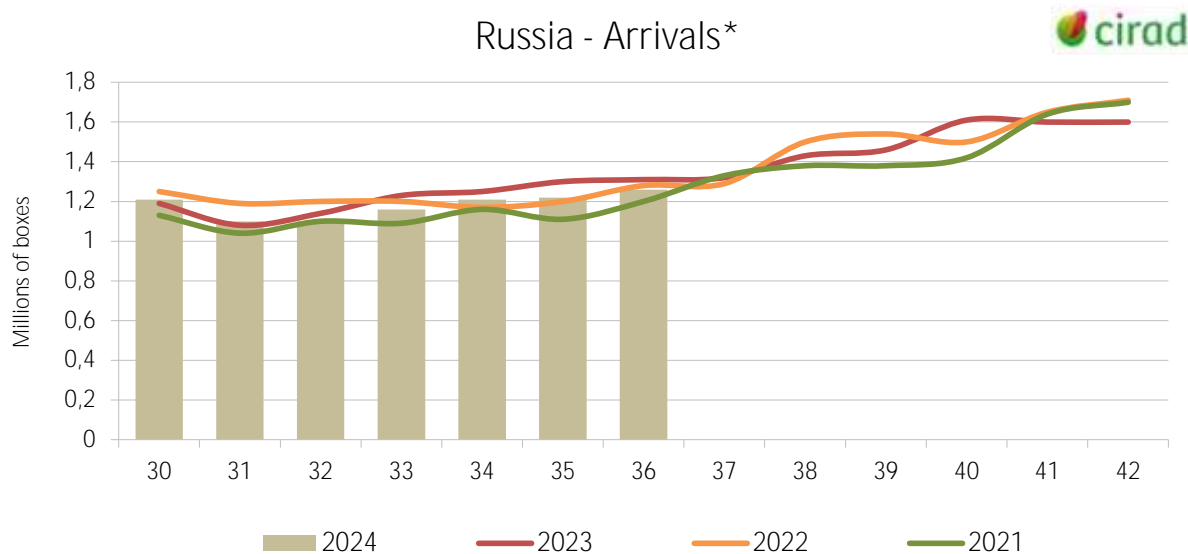


## RUSSIA



### ARRIVALS (in boxes)

	Week 34	Week 35	Accumulate W35	2024 / 2023	2024 / 2022	Forecast W36
Russia	1 210 000	1 220 000	52 410 000	-10%	-5%	1 260 000



\*Arrivals in the port of Saint-Petersbourg/Novorossisk