Review of the 2000/2001 citrus season

Paradoxical performance

Prices during the 2000/2001 season can be considered to have been excellent for all the main citrus fruits. A fairly significant decrease in overall potential in comparison with 1999-2000 and the average for the past five seasons goes a long way towards accounting for this performance. The context of a market somewhat short of 'basic' fruits (apples, bananas, etc.) is certainly another factor. Nevertheless, paradoxically, the citrus sectors in some countries have been weakened by the past season. Indeed, the higher prices were far from making up for the particularly marked decrease in the volumes exported by Morocco, Israel and Cyprus (- 30 % approximately in comparison with the average for the preceding five seasons).

Easy peelers

An overall potential smaller than normal after a bumper 1999/2000 season enabled a strong increase in the average price during the season. The quantities held by the major suppliers of EU markets were slightly lower than average (Spain) or much lower (Morocco and Israel). Thus, the average price increased gradually during the season in spite of a concentration of volumes in the community and an increase in shipments from Turkey.

Although substantial quantities of early fruits were available (new increase in the potential of Marisol from Spain and a distinct decrease in shipments to the industry from the same origin), the amounts were slightly less than normal in November. The deficit was more significant during the last part of the season as a result of particularly limited ortanique production in Morocco.

Orange

In spite of a difficult start, the results of the 2000/2001 orange season were very positive. Indeed, serious weather problems in Andalusia in the middle of the season substantially reduced the initial Spanish potential which had promised to be greater than average. Thus, corrected figures for quantities in Spain were only average for Naveline/ Navel and clearly down for *blanca* and late fruits.

Furthermore, production was also well down in the other Mediterranean countries traditionally supplying EU markets, especially with late fruits. The Moroccan potential was down by 29 percent in comparison with the average for the past five years (- 16 percent for late fruits). The fall was about 45 percent for Cyprus and Israel (- 30 percent for late fruits).

Two periods can thus be observed clearly. In the first part of the season, prices rapidly fell to the lowest level observed in recent years as a result of the early start to a Spanish Naveline season with normal fruit volumes in a context of fierce competition with early clementines The market trend changed completely after the weather problems in February. Prices returned to an average level and then rose steadily. The level was historic from May onwards because of the shortfall in late fruits mentioned above.

Grapefruit

The 2000/2001 season terminated with a new substantial increase in the average price. Indeed, market supply volumes were only average. Firstly, supplies from Florida remained close to the 1999/2000 levels (approximately 6.6 million boxes) and hence well down in comparison with 1997/1998 and 1998/1999 (over 8 million boxes).

Mediocre production levels, an unfavourable euro/dollar exchange rate and further increase in Japanese demand for coloured fruits account for these measured volumes. Furthermore, a distinct decrease in Israeli shipments was noted, caused mainly by a shortage of fruit pickers. Turkey therefore confirmed the previous season's good performance and was on practically equal terms with Israel exporters.

Lemon

The season's performance was positive, in spite of very high Spanish production potential. Indeed, Spanish exporters increased their shipments to Eastern Europe by more than 50 000 tonnes following a serious decrease in production as a result of frost in Turkey, the traditional supplier of these markets ■

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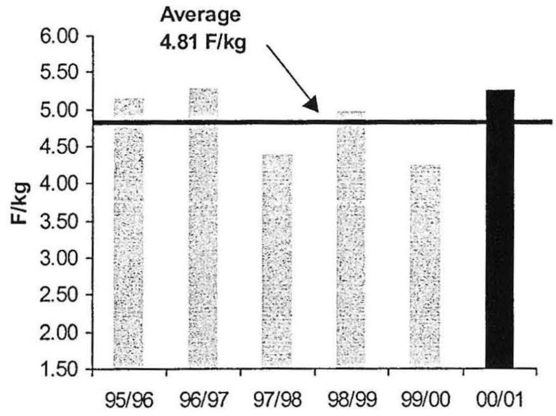
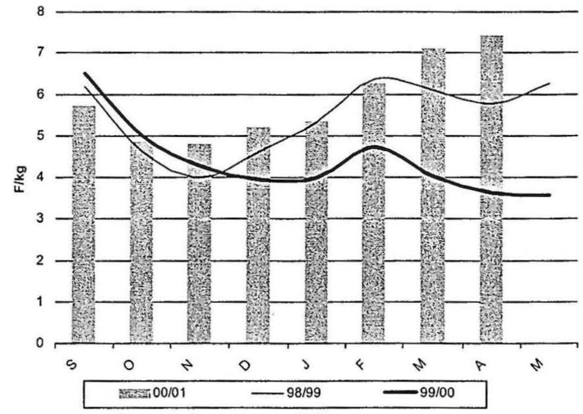
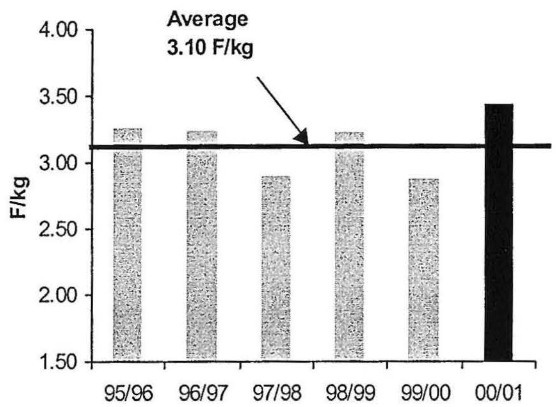
France — Price at import stage

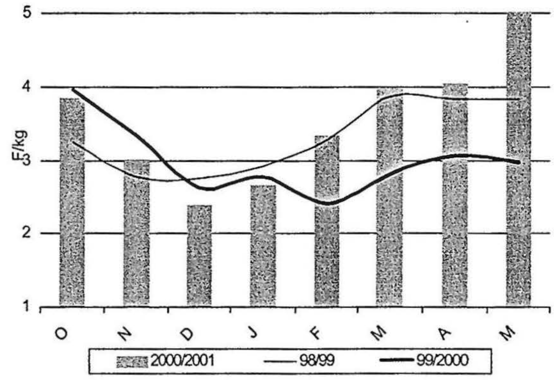
Easy peelers





Orange





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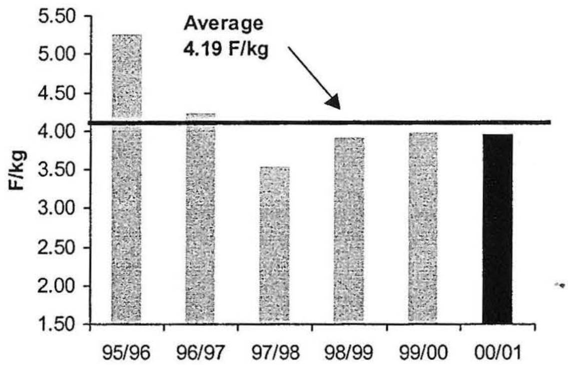
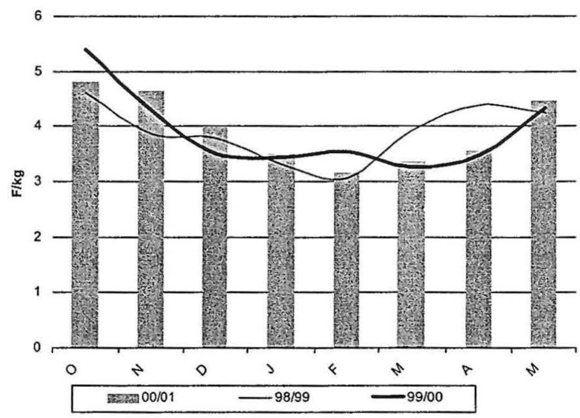
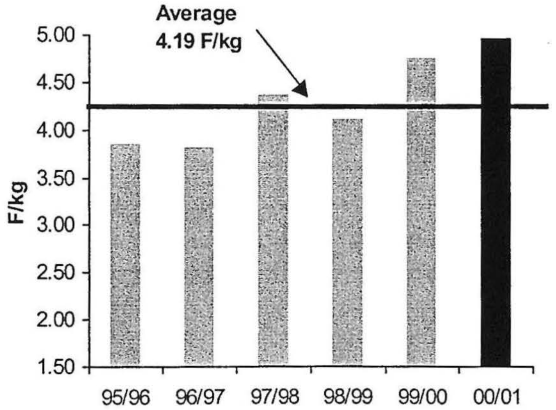
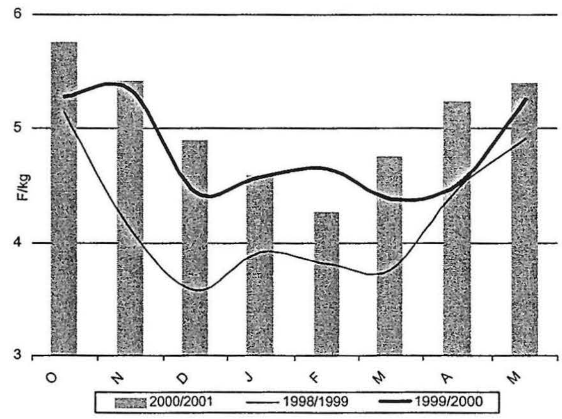




Grapefruit





Source: CIRAD-FLHOR Market News Service, Pomona

Citrus 2000/2001
Mediterranean production
(000 tonnes)

Citrus	Total	France (Corsica)	Spain	Morocco	Algeria	Tunisia	Italy	Israel	Cyprus	Greece	Turkey	Egypt (1)	Gaza (1)
Easy peelers													
Production	**3 881.9**	**22.5**	**1 819.0**	**251.5**	**111.0**	**41.5**	**593.0**	**80.0**	**38.4**	**85.5**	**344.5**	**495.0**	**-**
Domestic sales	**1 628.7**	1.0	336.5	112.2	111.0	41.5	295.1	25.0	11.3	42.4	168.7	484.0	-
Industry	**427.8**	0.5	177.0	3.5	-	-	198.2	26.0	4.9	1.7	16.0	-	-
Losses/Withdrawals	**202.7**	2.3	162.4	-	-	-	27.7	-	-	5.3	-	5.0	-
Export sales	**1 622.7**	18.7	1 143.1	135.8	-	-	72.0	29.0	22.2	36.1	159.8	6.0	-
Orange													
Production	**9 471.2**	**-**	**2 708.8**	**706.3**	**140.0**	**192.8**	**1 876.3**	**218.0**	**102.3**	**1 002.4**	**700.0**	**1 759.3**	**65.0**
Domestic sales	**4 929.0**	-	887.3	413.2	118.0	169.4	984.0	62.0	40.0	282.3	528.8	1 435.0	9.0
Industry	**1 741.9**	-	356.5	36.0	22.0	-	767.2	85.0	22.0	288.0	50.0	100.2	15.0
Losses/Withdrawals	**373.4**	-	278.5	-	-	-	-	-	-	77.3	-	17.6	-
Export sales	**2 426.9**	-	1 186.5	257.1	-	23.4	125.1	71.0	40.3	354.8	121.2	206.5	41.0
Lemon													
Production	**2 301.4**	**-**	**845.9**	**20.0**	**-**	**18.3**	**610.2**	**16.0**	**26.1**	**131.9**	**377.0**	**251.0**	**5.0**
Domestic sales	**878.5**	-	130.0	19.9	-	18.3	182.0	15.0	5.8	77.8	207.1	220.5	2.1
Industry	**622.3**	-	168.6	-	-	-	396.1	1.0	4.8	16.8	19.0	15.0	1.0
Losses/Withdrawals	**75.3**	-	42.0	-	-	-	8.5	-	-	6.3	16.0	2.5	-
Export sales	**725.3**	-	505.3	0.1	-	-	23.6	-	15.5	31.0	134.9	13.0	1.9
Grapefruit													
Production	**558.0**	**-**	**27.0**	**1.2**	**-**	**-**	**49.3**	**316.0**	**38.4**	**8.1**	**110.0**	**3.0**	**5.0**
Domestic sales	**88.4**	-	1.2	0.5	-	-	45.0	20.0	3.1	6.0	9.3	2.3	1.0
Industry	**234.4**	-	2.0	0.4	-	-	-	202.0	8.4	0.1	17.5	-	4.0
Losses/Withdrawals	**0.6**	-	-	-	-	-	-	-	-	0.6	-	-	-
Export sales	**234.6**	-	23.8	0.3	-	-	4.3	94.0	26.9	1.4	83.2	0.7	-
Others citrus													
Production	**41.0**	**-**	**-**	**12.0**	**-**	**5.9**	**15.1**	**8.0**	**-**	**-**	**-**	**-**	**-**
Domestic sales	**20.5**	-	-	11.6	-	5.9	-	3.0	-	-	-	-	-
Industry	**15.5**	-	-	0.4	-	-	15.1	-	-	-	-	-	-
Losses/Withdrawals	**-**	-	-	-	-	-	-	-	-	-	-	-	-
Export sales	**5.0**	-	-	-	-	-	-	5.0	-	-	-	-	-
Total													
Production	**16 253.5**	**22.5**	**5 400.7**	**991.0**	**251.0**	**258.5**	**3 143.9**	**638.0**	**205.2**	**1 227.9**	**1 531.5**	**2 508.3**	**75.0**
Domestic sales	**7 545.1**	1.0	1 355.0	557.4	229.0	235.1	1 506.1	125.0	60.2	408.5	913.9	2 141.8	12.1
Industry	**3 041.9**	0.5	704.1	40.3	22.0	-	1 376.6	314.0	40.1	306.6	102.5	115.2	20.0
Losses/Withdrawals	**652.0**	2.3	482.9	-	-	-	36.2	-	-	89.5	16.0	25.1	-
Export sales	**5 014.5**	18.7	2 858.7	393.3	-	23.4	225.0	199.0	104.9	423.3	499.1	226.2	42.9

(1) estimation

Source: CLAM

Citrus — Mediterranean Basin
2000/2001 — Exports by variety
(000 tonnes)

Citrus	Total	France (Corsica)	Spain	Morocco	Algeria	Tunisia	Italy	Israel	Cyprus	Greece	Turkey	Egypt (1)	Gaza (1)
Satsuma	**225.8**	-	148.8	-	-	-	-	-	-	-	77.0	-	-
Clement.ine	**1 004.0**	18.7	786.8	95.4	-	-	66.0	-	-	32.6	4.5	-	-
Mandarin/Wilking	**159.1**	-	85.5	0.6	-	-	6.0	-	-	-	63.5	3.5	-
Ortanique	**42.0**	-	-	14.0	-	-	-	7.1	20.9	-	-	-	-
Nova	**104.8**	-	82.8	4.5	-	-	-	8.9	0.2	-	8.4	-	-
Others	**87.0**	-	39.2	21.3	-	-	-	13.0	1.1	3.5	6.4	2.5	-
Total easy peelers	**1 622.7**	**18.7**	**1 143.1**	**135.8**	**-**	**-**	**72.0**	**29.0**	**22.2**	**36.1**	**159.8**	**6.0**	**-**
Navel/Navelina	**1 300.1**	-	813.4	18.8	-	-	12.5	2.0	-	270.9	79.5	103.0	-
Salustiana	**89.4**	-	69.1	20.3	-	-	-	-	-	-	-	-	-
Shamouti	**60.9**	-	-	-	-	-	-	45.0	-	-	9.3	-	6.6
Common blond	**39.2**	-	-	0.6	-	-	-	-	-	18.6	-	20.0	-
Moro-Tarocco	**82.5**	-	-	-	-	-	82.5	-	-	-	-	-	-
Maltaise	**22.4**	-	-	-	-	22.4	-	-	-	-	-	-	-
Sanguinelli	**11.3**	-	-	-	-	-	11.3	-	-	-	-	-	-
Other blood oranges	**29.5**	-	4.8	24.7	-	-	-	-	-	-	-	-	-
Verna	**2.4**	-	2.4	-	-	-	-	-	-	-	-	-	-
Ovale	**6.4**	-	-	-	-	-	2.5	-	1.1	-	2.8	-	-
Late	**781.6**	-	295.6	192.7	-	1.0	16.3	24.0	39.2	65.3	29.6	83.5	34.4
Bitter	**1.2**	-	1.2	-	-	-	-	-	-	-	-	-	-
Total oranges	**2 426.9**	**-**	**1 186.5**	**257.1**	**-**	**23.4**	**125.1**	**71.0**	**40.3**	**354.18**	**121.2**	**206.5**	**41.0**
Total lemon	**725.3**	**-**	**505.3**	**0.1**	**-**	**-**	**23.6**	**-**	**15.5**	**31.0**	**134.9**	**13.0**	**1.9**
White grapefruit	**76.1**	-	23.8	0.3	-	-	4.3	13.0	26.9	1.4	5.7	0.7	-
Other grapefruits	**158.5**	-	-	-	-	-	-	81.0	-	-	77.5	-	-
Total grapefruits	**234.6**	**-**	**23.8**	**0.3**	**-**	**-**	**4.3**	**94.0**	**26.9**	**1.4**	**83.2**	**0.7**	**-**
Others	**5.0**	**-**	**-**	**-**	**-**	**-**	**-**	**5.0**	**-**	**-**	**-**	**-**	**-**
Total	**5 014.5**	**18.7**	**2 858.7**	**393.3**	**-**	**23.4**	**225.0**	**199.0**	**104.9**	**423.3**	**499.1**	**226.2**	**42.9**

(1) estimations

Source: CLAM