# 2001/2002 citrus season forecasts Details by origin

### Spain: more and more!

The volumes available for export in the coming season seem to be substantial, in spite of probable under-estimation criticised by some Spanish professionals. The total export potential is reported to exceed 3.1 million tonnes, a 9 percent increase in comparison with last season and 6 percent up on the average of the last five seasons. Supplies to industry will probably be much greater than last year since hail in the Valencia region will have increased the quantities of rejected fruits, especially oranges.

Although the quantities of easy peelers are returning to average levels, the increase is much more marked for oranges (+ 8 percent) and lemons (+ 18 percent).

The historic production level of late fruits (+ 25 percent in comparison with the average for the past five seasons) goes a long way towards explaining the increase in the potential for oranges. Indeed, the new orchards of Lane Late, Navelate and Valencia Late to a lesser extent are coming into

production. The available quantities of Naveline / Navel are returning to an average level. The volumes of blanca oranges, led by Salustiana, are reported to be up but lower than average. The figures for 2001/2002 confirm the more or less total disappearance of blood oranges from Spanish orchards.

The trend for easy peelers is fairly similar to that of last year. The potential of Marisol is continuing to increase. In contrast, potential season clementine and hybrid production seems to be lower than average.

The first batches of Marisol received confirm that the fruits are substantially smaller than usual. However, the rainfall in the Valencia region at the end of September may improve the situation for Nules clementines, hybrids and late oranges. The ripeness index is a week ahead of last years—already very early

#### Citrus — 2001/2002 Export forecasts — Spain Average Trend Season 000 tonnes of 5 last Trend for 2001/2002 2000/2001 2001/2002 seasons Total clementine 856 786.8 9% 820 4% 151 Satsuma 110 148.8 - 26% - 27% Mandarin/Wilking 90 85.5 116 - 23% 5% Nova 82 82.8 - 1% 89 - 7% Others 40 23 70% 39.2 2% Total hybrids 322 356.3 - 10% 379 - 15% Total easy peelers 1 178 1 143.1 3% 1 199 1% Navelina/Navel 850 813.0 5% 825 3% Blond 75 69.0 9% 81 - 7% Blood orange 6 7.2 - 17% 11 - 44% Late varieties 427 298.4 43% 341 25% **Total oranges** 1 358 1 187.6 14% 1 258 8% 505.3 9% Total lemon 550 468 18% Total grapefruit 25 23.8 5% 23 11% 2 858.8 9% 2 948 **Total** 3 111 7%

Source: CLAM

#### Does the truth lie elsewhere?

Although western Europe is the main shipping destination for Mediterranean citrus exporters, most operators have made increasing efforts to diversify since the mid-1990s.

Indeed, the community market is saturated, taking 3.4 to 3.6 million tonnes of Mediterranean citrus fruits (that is to say 70 to 75 percent of the total potential).

Furthermore, Spain is the heavyweight in the region and, benefiting from the advantages reserved for members of the European Union, leaves less and less room for its challengers, especially those outside the EU. Heavily hit by this change in spite of the customs concessions allowed by the EU, Morocco is certainly the country that has been most reactive. The share of volumes reserved for western Europe was still 80 percent during the 1996/1997 season and subsequently decreased to 55 percent in 1999/2000. Moroccan exporters sought the keys to success partly in North America (especially Canada) and above all in Russia. They did not hesitate to make substantial investments in large-scale marketing operations to gain a foothold in this market, with poster campaigns in recent seasons to draw the attention of Russian consumers to Maroc Late.

An irony of history is that the Moroccans have met those that had encouraged their conquests on the markets in question. Indeed, Spain does not have enough room for manoeuvre in Europe either. It is true that production trends (especially of easy peelers) show that the giant citrus grower still seems to be in a growth phase. Exporters thus concentrate more on eastern Europe (in particular thanks to a distinct increase in shipments of easy peelers) and have opened a breach in the North American market. Furthermore, after several trials in 2000/2001, the Japanese market might open more widely to Spanish easy peelers from this season onwards. These efforts made to diversify enabled Spanish exporters to be present in no less than 62 countries last year.



### Morocco: back to normal

Moroccan export potential will increase strongly this season in comparison with a particularly poor 2000/2001 season. The alternate bearing effect may partially account for the improvement. In addition, rainfall was more abundant in the east (in the Berkane region, accounting for about 40 percent of the potential for clementines) and the centre. In contrast, the situation is still critical in the Souss plains where orchards have been simply abandoned.

Nevertheless, although the export potential is recovering a higher than average level in easy peelers, especially hybrids, the same does not apply to oranges, with an overall 8 percent decrease in comparison with the average for the past five years. However, late fruits, forming most of the volumes exported, are least affected (- 4 percent).

Thus, even if the priority remains the honouring of contracts with 'remote markets' (Canada and Russia), Moroccan easy peelers and oranges should return to the community market this season. The regular shipping line from Morocco to the northern EU (Southampton, Dieppe and Rotterdam) will be put into service again.

With regard to quality, grades appear to be normal to high in most regions.

Only the size of the fruits from the Souss plains may be slightly down. Maturity is substantially early and it should be possible to start the season a week earlier than last year. The serious pip problems experienced in 2000/2001 seem to be the result of circumstances, with the simultaneous flowering of clementines and hybrids in the Souss. The presence of pips should not therefore be so marked this season. The sector seems to be mobilised to find a solution to the

recurrent problem of water shortage in the Souss. On the one hand it seems that some operators are determined to reverse the trend seen for the past ten years by re-launching plantations in the north and east at the expense of the south. On the other, the government may soon decide to award larger subsidies for trickle irrigation, which is still little developed because of its cost (increase of state aid from 25 to 50 percent of the total installation cost)

Citrus -	<b>– 2001/200</b>	2 Export f	orecasts -	— Morocco	)
000 tonnes	Sea	son	Trend	Average of 5 last	Trend for
	2001/2002	2000/2001	TTOTA	seasons	2001/2002
Total clementine	164	95.4	71%	156	5%
Mandarin/wilking	1	0.6	67%	1	- 32%
Ortanique	23	14.0	64%	24	- 3%
Nova	6	4.5	33%	5	30%
Others	50	21.3	134%	26	91%
Total hybrids	80	40.4	97%	56	43%
Total easy peelers	244	135.8	79%	212	16%
Navel	45	18.8	139%	56	- 19%
Blond	29	20.9	37%	30	- 3%
Blood orange	23	24.7	- 7%	29	- 20%
Late varieties	204	192.7	6%	214	- 4%
Total oranges	301	257.1	17%	328	- 8%
Total	545	392.9	38%	540	1%

Source: CLAM

### Corsica: aiming at certification

Production should be the same as last year and little different to an average season.

After the efforts made to improve clementine quality in recent seasons, the Corsican citrus sector is now in the certification phase. An application for a Protected Geographical Indication (PGI) is shortly to be submitted to the European Commission and an application for conformity certification is now at the public consultation phase in the Journal Officiel de la République

Française. These ... two procedures could be completed during the first half of 2002 and come into force during the 2002/2003 season. The Association pour la Promotion et la Défense de la Clémentine de Corse (APRODEC) and the INRA/CIRAD agricultural research station at San Giuliano are the driving forces behind these applications.

Precise crop management is defined in the specification and the soil and climate features typical of Corsica are described. Only a certain number of

C	itrus — 200	1/2002 Expo	rt forecas	ts — Corsic	a .
000 tonnes	Sea	son	Trend	Average of 5 last	Trend for
	2001/2002	2000/2001	rrenu	seasons	2001/2002
Clementine	20	18.7	7 %	18	14 %

Source: CLAM

varieties are registered. The traceability and consumer safety aspect (no post-harvest treatments) of course forms part of the approach. With regard to produce characteristics, emphasis is laid on presentation with leaves and on natural colouring (no pre- or post-harvest colour activators). Likewise, a range of grades is laid down (from 46 mm to 68 mm inclusive), together with specified organoleptic characteristics that are more restrictive than the European standard (acidity range and sugar:acid ratio). Finally, the fruits must be in packaging close with netting that can display the term 'Clémentine de Corse'. As a complement to this approach, an application for 'Label Rouge' certification is being prepared for the 'Commune' variety ■



### Turkey: continued growth

The strong export growth since 1998/1999 should continue in 2001/2002. Exports in 2000/2001 reached a record level of nearly 500 000 tonnes, in spite of the frost that considerably affected lemon production and that of oranges and easy peelers to a lesser extent. The Turkish citrus industry aims at 600 000 t this season.

Development of the production of easy peelers is continuing and is a strategic line, as is grapefruit. Production of Minneola, a speciality in the eastern Mediterranean region, is continuing to increase strongly. Nova was likewise almost completely absent from the range of varieties produced in Turkey four seasons ago but is now supplied in significant quantities.

The quantities of grapefruit should be stable in 2001/2002 but substantial increases are to be expected in the medium term.

Citrus -	<b>—2001/20</b>	02 Export	forecasts	— Turkey	
000 4	1203	son		Average	Trend
000 tonnes	2001/2002	2000/2001	Trend	of 5 last seasons	for 2001/2002
Total clementine	6	4.5	33%	4	63%
Satsuma	85	77.0	10%	70	21%
Mandarin/Wilking	68	63.5	7%	42	62%
Nova	12	8.4	43%	6	111%
Others	9	6.4	41%	12	- 28%
Total hybrids	174	155.3	12%	128	36%
Total easy peelers	180	159.8	13%	134	45%
Navelina/Navel	80	79.5	1%	56	44%
Blond	10	9.3	2%	5	79%
Late varieties	36	32.4	10%	22	63%
Total oranges	126	121.2	3%	83	51%
Total lemon	220	134.9	63%	129	70%
Total grapefruit	85	83.2	2%	64	33%
Total	611	499.0	22%	410	53%

Source: CLAM

Lemon production is reaching a record level this season after last year's frost. Turkey should thus be able to regain its shares of traditional eastern European markets that it lost to Spain last year.

Orange production is similar to that of last year. Exports only concern a small proportion of production and are governed to a considerable extent by market opportunities

### Israel: still fragile

The production level should be similar to that of last year, with a slight increase in the easy peeler crop making up for a decrease in the orange potential. However, the Citrus Marketing Board of Israel is counting on an increase in the export potential. The grades seem higher and the

measures taken to alleviate the problem of the shortage of Palestinian labour should reduce the proportion of the crop left on the trees (15 percent in 2000/2001 according to USDA).

Thus, the availability of easy peelers should be greater and return to an

Citrus —	2001/2002	2 Export f	orecasts -	- Israel	
		son		Average	Trend
000 tonnes	2001/2002	2000/2001	Trend	of 5 last seasons	for 2001/2002
Ortanique	8	7.1	13%	9	- 11%
Nova	11	8.9	24%	9	27%
Others	17	13.0	31%	18	- 6%
Total easy peelers	36	29.0	24%	36	1%
Navel	2	2.0	0%	5	- 62%
Blond	50	45.0	11%	76	- 34%
Late varieties	25	24.0	4%	29	- 14%
Total oranges	77	71.0	8%	110	- 30%
White grapefruit	17	13.0	30%	25	- 33%
Coloured grapefruit/Sweetie	80	81.0	- 1%	94	- 15%
Total grapefruit	97	94.0	3%	119	- 19%
Total	210	194.0	8%	265	- 21%

Source: CLAM

average level overall. However, examination of details by variety reveals considerable disparity. Substantially higher than average volumes of Suntina (Nova) compensate a distinct decrease in Topaz (Ortanique) and of the other varieties to a lesser degree. The supplies of Or and Mor will continue to increase but will remain marginal in comparison with the major Israeli specialities like Minneola, Suntina and Topaz.

The quantities of oranges should be substantially greater than those of last year but will still be distinctly below the average for recent seasons. The grubbing up of the least productive Valencia and Shamoutis orchards is continuing. Thus, Israel's presence on the orange market should continue to decrease in the years to come. Supplies of grapefruit should be similar to last year's



### The eastern Mediterranean, land of contrasts

The evolution of total citrus exports from the Mediterranean countries in the Middle East is contrasted to say the least. Of course water availability goes a long way towards accounting for the widening gap between these countries with regard to citrus growing.

Drought has a strong effect on Israeli growers, as is shown by the 100 000 tonne fall in exports in less than 5 years and the reported grubbing up of 5 000 hectares in the past two years. For example, the government decided in 2000 to halve the water quota for agriculture and increase the price per cubic metres by 20 percent. However, other economic and political factors are involved in Israel. Producers' returns are down in 2000-2001 as a result of an unfavourable shekel/euro exchange rate in spite of the very firm prices seen in the EU. Likewise, the closing of the frontiers with the occupied territories, a frequent measure during the last season, caused a shortage of labour and a considerable percentage of the fruits was left on the trees (approximately 15 percent in 2000/2001 according to USDA).

Conversely, Turkish exports have never been stronger, flirting with the 500 000 t mark in recent seasons (i.e. more than 100 000 t more than in the early 1990s). On the one hand, there is no lack of water from deep aquifers and on the other yields and quality are improving thanks to the modernisation of production structures, in particular with the appearance of industrial plantations of a good technical standard. Finally, although the pressure on land exerted by the tourist sector is still intense, the area under citrus is increasing again and replacing cotton plantations that are shifting to the new irrigated perimeters, especially in south-east Anatolia (the gigantic GAP project).

### Tunisia: status quo

As usual, the share of production reserved for export will be modest. The local market is particularly profitable in Tunisia and will continue to take 70 to 80 percent of the orange crop. The available potential for the coming season could be substantially higher than last year according to an official estimate provided by the *Groupement Interprofessionnel des* 

Agrumes et Fruits and in spite of a production decrease of 10 percent. The poor average fruit grade affected the export potential last year but seems to be distinctly better this season. Recent rainfall in the Cape Bon region should enhance this improvement. Almost all the export volumes will be shipped to the French market

Cit	irus — 200°	1/2002 Expo	ort forecas	ts — Tunis	ia .	
000 tonnes	Sea	son	T1	Average of 5 last	Trend	
	2001/2002	2000/2001	Trend	seasons	for 2001/2002	
Maltaise	29	22.4	29%	22	33%	

Source: CLAM

### Italy: sector renovation

As weather conditions have been normal, except for a shortage of water in Sicily, an increase of about 5 percent is expected, with production that should approach 3 300 000 tonnes. Nevertheless, Italy will be little present on export markets, as usual. Italian production of easy peelers and oranges will be sold locally (50 to 55 percent) or processed (30 to 40 percent). Likewise, nearly 65 percent of the lemon crop is for industry or the

domestic market (30 percent). The presence of exported Italian clementines will be intensified although they should total only about 6 percent of the Mediterranean export potential. The niche market for clementines with some attached twigs and leaves will continue to form a significant proportion of exports. Supplies of blood oranges, an Italian speciality with a market share of nearly 55 percent will recover a stronger level

Citrus	<u> </u>	002 Export	forecast		
000 tonnes	Sea	son	Trend	Average of 5 last	Trend for
	2001/2002	2000/2001	Trond	seasons	2001/2002
Clementine	73	66.0	11%	48	54%
Mandarin/Wilking	6	6.0	0%	8	- 21%
Total easy peelers	79	72.0	10%	56	36%
Navel	13	12.5	6%	9	43%
Blood orange	100	93.8	6%	83	19%
Late varieties	20	18.8	6%	14	44%
Total oranges	133	125.1	6%	106	25%
Total	212	197.1	8%	162	31%

Source: CLAM

### Egypt: increasingly present

The 2001/2002 season should be marked by an increase in Egyptian orange exports. A significant growth in export potential is expected, mainly for Valencia and Navel oranges.

This trend is the symbol of the ongoing changes in the citrus industry in Egypt. Large industrial orchards with a good technical level are developing outside the traditional

delta zone. Thus, the national production potential of 2 500 000 tonnes puts Egypt in third position in the Mediterranean zone and further increase will be seen in the medium term.

The recent creation of an Egyptian citrus exporters' federation is another example of this dynamism ■

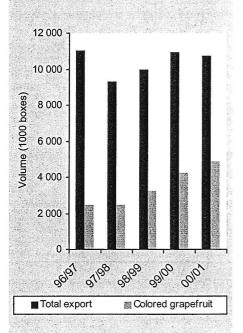


#### Japanese consumers see red!

The changes in Japanese society are also changing the eating habits of Japanese consumers and hence the market for imported fruit in Japan. Thus, Japanese grapefruit importers who buy nearly half of the volumes exported from Florida (approximately 10 million 17-kg boxes per year) are opting increasingly for coloured fruits.

This change is similar to the one that occurred in Europe in the 1980s and seems particularly rapid. Indeed, the share of coloured fruits hardly exceeded 20 percent of the total exported in 1996/1997 but reached 45 percent in 2000-2001 after steady growth (see graph).

This change, combined with other factors, is not without an effect on the European market. The increase in the price of coloured fruits related to this increasing interest of Japanese consumers is one of the factors, together with a strong dollar and modest production levels, that make it possible to explain the only medium arrivals in the EU in the past two seasons (more than 8.3 million boxes in 1997/1998 and 1998/1999 in comparison with some 6.5 million boxes in 1999/2000 and 2000/2001).



Citrus — 2001/2002 Export forecasts — Egypt											
000 tonnes	Sea	son	Tuend	Average	Trend						
	2001/2002	2000/2001	Trend	of 5 last seasons	for 2001/2002						
Navel	116	103.0	13%	99	17%						
Blond	27	20.0	35%	48	- 44%						
Late varieties	98	83.5	17%	82	20%						
Total oranges	241	206.5	17%	229	5%						

Source: CLAM

### **Greece: optimistic forecasts**

The supplies of oranges, a varietal group forming 80 to 85 percent of Greek citrus production, should be comparatively stable. Lemon no longer has a substantial export potential and will probably decline

further. The increase in clementine supplies that was noticeable in recent seasons following the development of plantations in northern Greece should now mark a pause ■

Citrus —	-2001/200	2 Export f	orecasts	— Greece	
000 4	Sea	son	T1	Average	Trend
000 tonnes	2001/2002	2000/2001	Trend	of 5 last seasons	for 2001/2002
Clementine	24	32.6	- 26%	26	- 6%
Others	5	3.5	31%	3	34%
Total easy peelers	29	36.1	- 20%	29	- 2%
Navel	280	270.9	3%	241	16%
Blond	20	18.6	8%	7	189%
Late varieties	74	65.3	13%	65	14%
Total oranges	374	354.8	5%	313	20%
Total lemon	25	31.0	- 18%	31	- 18%
Total	428	421.9	1%	373	15%

Source: CLAM

### Florida: the shadow of tristeza

Total Florida grapefruit production should be slightly higher than last year but fairly close to the average for recent seasons. Nevertheless, examination of the distribution by varietal group shows a slight shortage of coloured grapefruit in comparison with an average year.

Furthermore, it can be supposed that the marked trend in recent years for the shipping of coloured fruits to Japan (cf. box) will be confirmed, thus reducing the proportion of fruits shipped to the European Union. Export volumes to Europe should

therefore be fairly similar to those of the last two seasons in spite of a less unfavourable euro/dollar exchange rate than in 2001/2002.

Florida growers are increasingly worried about tristeza virus. Over half of the grapefruit trees are grafted on sour orange, which is particularly susceptible to the disease. According to USDA, production could decrease by about 25% by 2005/2006 following grubbing up and then return to normal by 2010 after replanting ■

000 tonnes	Sea	son		Average	Tre for 2001/2002	
	2001/2002	2000/2001	Trend	of 5 last seasons		
White grapefruit	20 000	18 700	7%	19 375	3%	
Coloured grapefruit	28 000	27 300	3%	29 625	- 5%	
Total grapefruit	48 000	46 000	4%	49 000	- 2%	

Source: USDA

## Citrus — Mediterranean Basin 2001/2002 Export forecasts by variety (000 tonnes)

Citrus	Total	France (Corsica)	Spain	Morocco	Algeria	Tunisia	Italy	Israel	Cyprus	Greece	Turkey	Egypt (1)	Gaza (1)
Satsuma	195.0	_	110.0	-	-						85.0		-
Clementine	1142.9	20.0	856.0	163.5	-	-	73.3		-	24.1	6.0	·	-
Mandarin/Wilking	169.1	-	90.0	1.0	_	_	6.0	-	-		68.0	4.1	-
Ortanique	53.9	; <b>_</b> .	_	22.9	-	-	-	8.0	23.0		-	3 <b></b> .3	-
Nova	111.2		82.0	6.0			<del></del>	11.0	0.2	-	12.0	-	-
Others	124.6	-	40.0	49.8	_	-	-	17.0	1.3	4.6	9.0	2.9	_
Total easy peelers	1 796.7	20.0	1 178.0	243.2	-	-	79.3	36.0	24.5	28.7	180.0	7.0	_
Navel/Navelina	1 388.2	-	850.0	45.0	-	-	13.2	2.0	2.0	280.0	80.0	116.0	-
Salustiana	102.6	-	75.0	27.6	-	-	4	÷	¥	-	-	_	-
Shamouti	66.1	1-0	-	:	-		-	50.0	-	.=.	9.5	-	6.6
Common blond	47.0		-		-	( <del>-</del>	-		-	20.0	-	27.0	-
Moro-Tarocco	87.6	-	-	-	-		87.6		-	-	-	-	-
Maltaise	29.0	-	-	-	=	29.0	-	-	-	•	-	-	-
Sanguinelli	12.9	-	-	1.0	-	-	11.9	-	-	-	-	-	-
Other blood oranges	27.0	-	4.0	23.0	=	-	-	-	=	-	-	-	-
Verna	2.0	-	2.0	-	-	-	-	-	-	-	-	-	-
Ovale	8.1	<b></b>	-	-	-	-	2.6	-	2.0		3.5	-	-
Late	945.7	•	425.0	204.0	-	1.0	17.3	25.0	35.0	74.0	32.0	98.0	34.4
Bitter	2.0	-	2.0		<b>.</b>	-	=	-	i <del>-</del>	-	-	-	-
Total oranges	2 718.2	•	1 358.0	300.6	•	30.0	132.6	77.0	39.0	374.0	125.0	241.0	41.0
Total lemon	845.9	•	550.0	•	-	-	23.6	1.0	13.0	25.4	220.0	11.0	1.9
White grapefruit	79.4	-	25.0				4.3	16.9	25.0	1.2	6.0	1.0	
Other grapefruits	158.9	-		-	-	-	-	79.9	•	-	79.0	-	-
Total grapefruits	238.3	-	25.0	-	10	-	4.3	96.8	25.0	1.2	85.0	1.0	-
Others	5.0	-		•	•		<b>15</b>	5.0	-	-	-	-	
Total	5 604.1	20.0	3 111.0	543.8		30.0	239.8	215.8	101.5	429.3	610.0	260.0	42.9

(1) estimations

Source: CLAM