2001/2002 citrus season forecasts
Details by product

Easy peelers

The situation differs considerably from one varietal group to another. Thus, the size of the Spanish early clementine (Marisol) crop should weigh on the first part of the season. In contrast, the quantities of season varieties (Nules clementines and Clemenvilla) in November and December will be only average for the origins exporting mainly to the EU markets. Likewise, late fruits will be available in only slightly above average volumes.

Orange

The season seems to be amply supplied. A marked increase in potential is noted for all varietal groups in comparison with the last season. The increase in comparison with an average year is less marked but is still very clear for all the major varietal groups (Naveline / Navel and late fruits) and blood oranges.

The first part of the season should be comparatively difficult. Indeed, the potential of Naveline / Navel is high and competition from easy peelers may well be intense (substantial potential of Marisol early clementine).

The decrease in the availability of blond (*blanca*) fruits may allow a mid-season improvement, especially as the return to average supplies of clementines and late hybrids should result in regained interest in orange. The late fruit season starting in March seems to be amply supplied.

Small grade fruits should form a larger proportion of supplies than usual.

Lemon

Very large quantities of lemons should be available in 2001/2002. Spanish production is reaching a historic level because of the marked increase in the Primofiore export potential. Supply pressure may well be heavy from October to April when this variety is dominant.

Furthermore, the return in force of Turkey may well strongly limit exports to Eastern Europe, where Spanish operators sold large quantities last year. Supplies therefore risk remaining concentrated on EU markets, where there is very little demand elasticity for lemon. The complementary origins (Greece and Cyprus) will probably not play a role this year.

Grapefruit

Supplying of the market should be fairly similar to that of last year as the potential of the main Mediterranean origins (Israel and Turkey) is practically unchanged. Likewise, production of coloured varieties in Florida should be close to that of last year (+ 3 percent) ■

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Market context and availability of competing produce

Temperate fruits represent substantial volumes during the winter but competition from these should be noticeably less marked than usual.

The European apple harvest promises to be distinctly smaller than the average for the past five seasons (- 4 percent, that is to say a fall of about 300 000 t). However, the crop seems large in Poland. Likewise, the quantities of pears will be limited (-7 percent in comparison with an average season, i.e. a fall of 175 000 t). Finally, European kiwi crop forecasts indicate a marked production decrease in all European Union countries. The overall potential appears to be 20 percent down on last year's (approximately - 100 000 t).

In contrast, bananas risk being a more aggressive competitor than last year. The end of the drought should enable production in the West Indies, Costa Rica and Colombia to return to stronger levels. Ecuador suffered a marked decrease in production in 2001 but should be more present this season. African suppliers should also be up a little again. Larger quantities will therefore be available in Eastern Europe. The volumes for the EU markets will be stable for reason of quotas. However, more aggressive pricing can be expected.

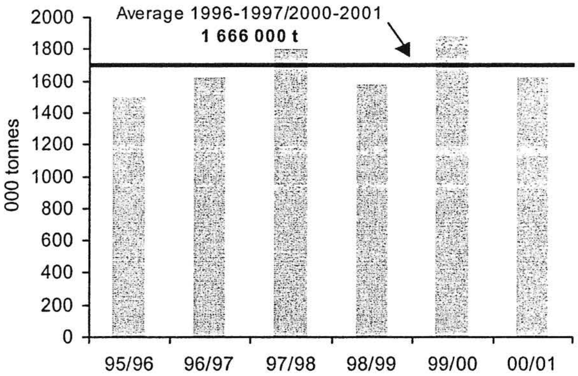
Citrus — 2001/2002 Export forecasts — Mediterranean Basin

Easy peelers

Easy peelers — 2001/2002 Export forecasts Mediterranean Basin

000 tonnes	Season 2001/2002	Season 2000/2001	Trend	Average of 5 last seasons	Trend for 2001/2002
Clementine	1 143	1 004	14%	1 070	7%
Mand./Wilking	169	159	6%	171	- 1%
Satsuma	195	226	- 14%	221	- 12%
Nova	111	105	28%	49	11%
Ortanique	54	42	43%	85	47%
Others	125	87	6%	105	6%
Total	**1 797**	**1 623**	**11%**	**1 701**	**6%**

Source: CLAM



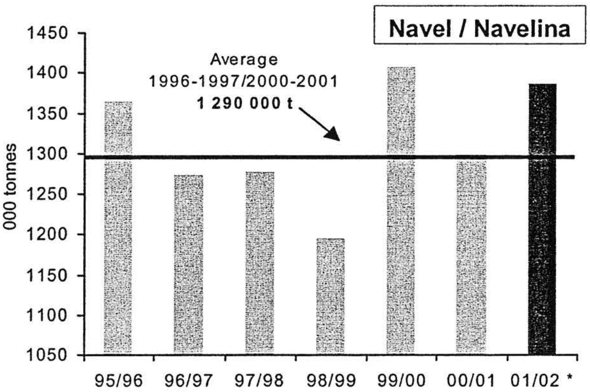
*: forecast / Source: CLAM

Orange

Orange — 2001/2002 Export forecasts Mediterranean Basin

000 tonnes	Season 2001/2002	Season 2000/2001	Trend	Average of 5 last seasons	Trend for 2001/2002
Navel/naveline	1 386	1 300	7%	1 290	7%
Late	921	756	22%	832	11%
Blond	210	183	15%	246	- 15%
Blood	158	148	6%	145	9%
Total	**2 675**	**2 387**	**12%**	**2 513**	**6%**

Source: CLAM



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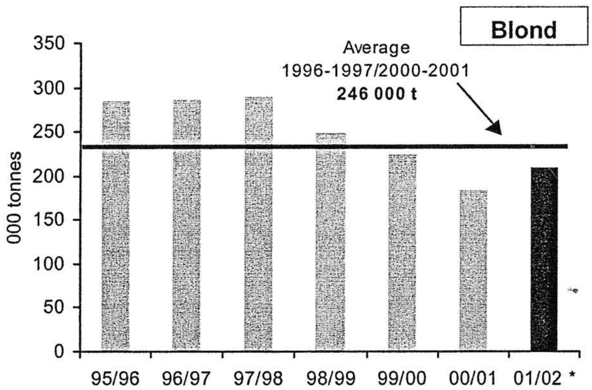

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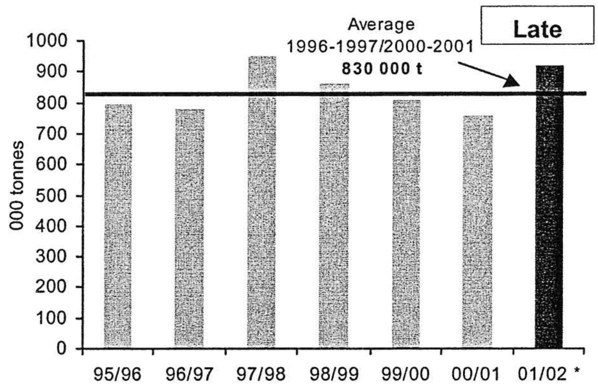


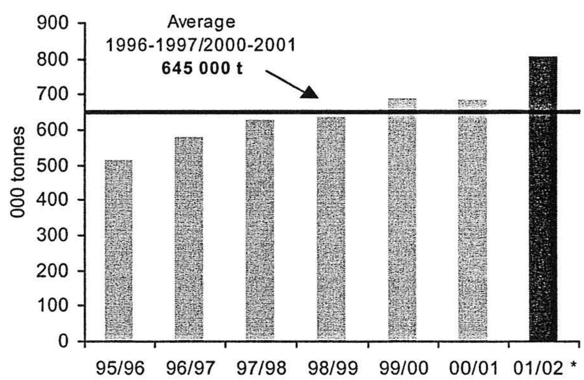
*: forecast / Source: CLAM

Lemon

Lemon — 2001/2002 Export forecasts Mediterranean Basin

000 tonnes	Season 2001/2002	Season 2000/2001	Trend	Average of 5 last seasons	Trend for 2001/2002
Spain	550	505	9%	468	18%
Turkey	220	135	63%	129	70%
Greece	25	31	- 18%	31	18%
Cyprus	13	16	- 16%	17	- 21%
Total	**808**	**687**	**18%**	**645**	**25%**

Source: CLAM



*: forecast / Source: CLAM

Source: Cirad-flhor Market News Service, Pomona