2002/2003 citrus season forecasts
Details by origin

Spain: record beaten !

The 2002/2003 season promises to be one of large volumes. Production should go slightly beyond the 5.8-million-tonne mark, equalled only twice in the history of citrus growing (in 1997 and 1999). Records should also be approached in the quantities available for export. The category making most progress is the easy peelers. Spain already controls more than 50% of the world market for these and will strengthen its leading position. Indeed, the spectacular increase in the available quantities of hybrids such as Clemenvilla, Fortuna and other late varieties should take the export potential to over 1.3 million tonnes. The overall development of the clementine group is more modest (+ 3% in relation to the average) than that of hybrids, but the new decrease in Oroval and Fine masks a considerable increase in early varieties such as Marisol. The increased presence of early diversification varieties such as Oronules, Arrufatina and Clemenpons and late varieties like Afourer should be noted. Oranges are not left behind. The export potential should be slightly greater than last year's record 1.45 million tonnes. Spanish professionals forecast a new increase in the production of Lane Late and Navelate as a result of the start of production of new orchards. These varieties were developed to fill the production gap between Navel and Valencia and now total over 450 000 t, that is to say 16% of Spanish production as a whole. The amounts of Naveline and Navel should be slightly smaller than those of the last season but still at an average level. Lemon production will probably be distinctly smaller than last year (some 10% down at 900 000 tonnes). However, the quantities available for export should be similar to those of the last season as a result of a return to a normal level of discarded fruits and losses. The production calendar should return to normal after the very early dates of last year ■

Citrus — 2002/2003 Export forecasts — Spain

000 tonnes	Season		Trend	Average of 5 last seasons	Trend for 2002/2003
	2002/2003	2001/2002			
Total clementine	870	840.1	4%	842	3%
Satsuma	115	111.2	3%	142	- 19%
Mandarin/Wilking	130	90.0	44%	110	18%
Nova	110	85.4	29%	87	26%
Others	85	58.4	46%	33	155%
Total hybrids	440	345.0	28%	373	18%
Total easy peelers	**1 310**	**1 185.1**	**11%**	**1 214**	**8%**
Navelina/Navel	880	904.4	- 3%	855	3%
Blond	100	98.0	2%	84	19%
Blood orange	4	6.5	- 38%	11	- 62%
Late varieties	485	437.9	11%	364	33%
Total oranges	**1 469**	**1 446.8**	**2%**	**1 311**	**12%**
Total lemons	**500**	**481.6**	**4%**	**487**	**3%**
Total grapefruits	**26**	**26.6**	**- 2%**	**23**	**15%**
Total	3 305	3 140.1	5%	3 035	9%

Clementine — a subject of dissension

After a bitter struggle lasting for more than 10 months, Spanish exporters finally obtained the re-opening of US frontiers for their clementines. Exports of easy peelers from Spain developed very rapidly from the 1999/2000 season onwards and were then halted on 5 December 2001 after the discovery of Mediterranean fruit fly larvae—live according to USDA.

However, the final rule applied on 15 October 2002 and published in the *Federal Register* imposes new constraints on Spanish importers. They include the obligation to harvest the fruits from clearly identified fields, respecting the precise rules of the Medfly management programme approved by the Spanish government. The duration of cold treatment is also extended to two days. The list of the other criteria to be respected is long. The cost of supervision and controls by the Animal and Plant Health Inspection Service must of course be paid—in advance—by Spanish exporters.

Finally, the American market is only partially opened. Spanish clementines are forbidden in citrus-producing states (Arizona, California, Florida, Louisiana, Texas, Puerto Rico, and any other US citrus producing territory).
The first two ships sailed from Spanish ports at the end of week 43. Nevertheless, given the late opening of the frontiers, the volumes exported to the United States will probably not reach the levels obtained in previous seasons.

Morocco: return to a normal season

The overall volumes available for export in the 2002/2003 season should return to a normal level after two meagre seasons. Easy peelers should recover completely. This progress is related to a considerable extent to the large potential expected in clementines (although grades may be medium to small—especially for the fruits from some parts of the Souss and from Berkane). In contrast, only moderate quantities of hybrids will be available. In particular, the volumes of ortaniques will be very limited, with a large proportion of production sent for processing after the problems experienced during the last season. Progress is less marked for oranges. The volumes expected are distinctly greater than last year's but remain below the average level. Indeed, the availability of Navel and late oranges will be somewhat insufficient. The volumes for processing are nevertheless modest, carrying the risk of further weakening an already precarious situation. The export structure is similar to that of the past season, with two groups (Maroc Fruit Board and Fresh Fruit Board) empowered to work in markets outside the European Union. The first shiploads of clementine left for Canada at the end of October. Priority will then be awarded to the Russian market. The European Union season will probably not start before mid-November. With regard to the future, Moroccan professionals would like to be able to give more momentum to the citrus re-launching plan. State subsidies are planned to encourage growers to replant (the state covers about 10% of the cost) and make more use of micro irrigation. However, the actual impact may well be modest this season ■

Citrus — 2002/2003 Export forecasts — Morocco

000 tonnes	Season		Trend	Average of 5 last seasons	Trend for 2002/2003
	2002/2003	2001/2002			
Total clementine	172	122.0	41%	146	18%
Mandarin/wilking	9	0.6	1 400%	1	603%
Ortanique	8	13.3	- 41%	22	- 64%
Nova	8	5.2	54%	5	48%
Others	35	48.5	- 28%	33	6%
Total hybrids	60	67.6	- 12%	61	- 3%
Total easy peelers	**232**	**189.6**	**22%**	**207**	**12%**
Navel	39	31.7	21%	48	- 20%
Blond	30	27.8	6%	30	- 1%
Blood orange	31	27.1	16%	29	9%
Late varieties	194	152.9	27%	209	- 7%
Total oranges	**294**	**239.5**	**23%**	**316**	**- 7%**
Total	**526**	**429.1**	**22%**	**523**	**0%**

Source: CLAM

Egypt: new trends to be expected

Although production will be markedly down (- 14% in comparison with 2001-2002), orange exports should continue to increase to some 315 000 tonnes in 2002/2003, that is to say an increase of nearly 100 000 tonnes in two years. It is true that these volumes are modest in comparison with production of nearly 2 000 000 tonnes in 'good years', giving Egypt the third place among the Mediterranean countries. This new development is the result partly of an increase in the areas under citrus (industrial plantations outside the traditional delta area).
Structures have also modernised, enabling marked gains in quality, and are becoming organised, with the creation of an interprofessional body. They are also more innovative in the search for new markets. The Chinese market has thus recently opened the door to Egyptian citrus and negotiations with Japan are in progress.
Likewise, the signing in June 2001 of a trade agreement with the European Union enables Egyptian exporters to benefit from a levy-free quota of oranges (55 000 tonnes in 2002 and 60 000 tonnes from 2003) from the beginning of December, to the end of May on condition that the entry price is at least Euros 266 per tonnes. Egypt's position on the international orange market should therefore continue to develop in the coming years. In contrast, the volumes of other groups of citrus fruits available for export are marginal. Production of small fruits is nevertheless substantial in Egypt ■

Citrus — 2002/2003 Export forecasts — Egypt

000 tonnes	Season		Trend	Average of 5 last seasons	Trend for 2002/2003
	2002/2003	2001/2002			
Mandarin/wilking	5.0	5.6	- 16%	2	110%
Others	3.0	2.7	4%	1	109%
Total easy peelers	**8.0**	**8.0**	**- 10%**	**4**	**109%**
Navel	148.0	134.6	10%	105	42%
Blond	35.0	31.6	9%	42	- 18%
Late varieties	131.0	117.6	11%	88	49%
Total oranges	**313.1**	**283.8**	**10%**	**234**	**34%**
Total lemons	**11.0**	**11.0**	**2%**	**14**	**- 17%**
Total	**332.0**	**302.8**	**9%**	**252**	**33%**

Turkey: just a pause in the dynamics

Exports should decrease noticeably in comparison with the exceptional 2001/2002 season during which new records were attained for all the citrus families thanks to very favourable weather conditions. The potential available will nevertheless remain much higher than the average of the past five years for all products and a new record should be beaten in oranges. The volumes earmarked for exports should be in the neighbourhood of 200 000 tonnes (+ 7 % in comparison with the preceding season), thanks to the very marked development of the Navel group and to a lesser extent of late varieties such as Valencia Late. Available quantities of easy peelers, grapefruit and lemons should be markedly down in comparison with the last season but should remain 25 to 35 % higher than the average for the last five seasons. The medium-term prospects indicate significant new developments in the citrus sector. Indeed, planting is progressing strongly in south-east Anatolia, where cotton is gradually giving way to citrus. New increases in production are therefore expected in the years to come, especially concerning easy peelers (satsuma, especially Okitsu and Nova) oranges (early and late Navel and Valencia Late). The increases expected in lemons and grapefruit are more modest ■

Citrus — 2002/2003 Export forecasts — Turkey

000 tonnes	Season		Trend	Average of 5 last seasons	Trend for 2002/2003
	2002/2003	2001/2002			
Total clementine	7	9.3	- 25%	5	45%
Satsuma	114	139.3	- 18%	82	39%
Mandarin/Wilking	57	70.3	- 19%	53	7%
Nova	10	11.7	- 15%	7	39%
Others	12	14.0	- 14%	9	39%
Total hybrids	193	235.3	- 18%	149	29%
Total easy peelers	**200**	**245.0**	**- 18%**	**154**	**30%**
Navelina/Navel	152	142.4	7%	75	103%
Blond	6	6.1	- 2%	6	- 1%
Late varieties	42	38.8	8%	27	55%
Total oranges	**200**	**187.0**	**7%**	**108**	**85%**
Total lemons	**200**	**282.0**	**- 29%**	**161**	**24%**
Total grapefruits	**100**	**112.3**	**- 11%**	**75**	**33%**
Total	**700**	**826.3**	**- 15%**	**498**	**40%**

Source: CLAM

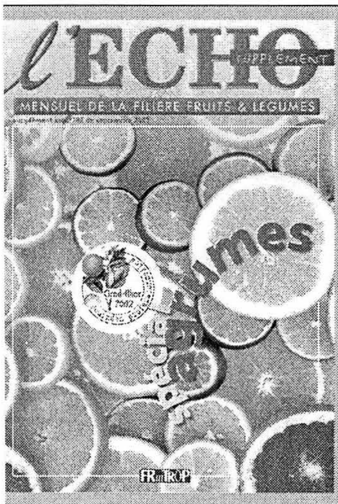
Israel: temporary or lasting recovery?

Will the 2002/2003 season mark an upturn? After four seasons of steady fall, with exported quantities decreasing from 330 000 tonnes in 1998/1999 to 130 000 tonnes in 2001/2002, Israeli professionals forecast a return to a potential of about 190 000 tonnes in 2002/2003. Solutions appear to be emerging for attempting to settle certain fundamental problems. On the one hand, the government is to support growers in their search for labour, especially from abroad. On the other hand, the strong decrease in the area under citrus (more than 5 000 ha of citrus has been lost since 1999) results in more water being available for orchards. Water will nevertheless be supplied on a quota basis and will be increasingly expensive. The downstream end of the sector is also becoming organised. Thus, MTEX (Mehadrin and Tnuport) and Agrexco should alone handle nearly 90% of the potential. Furthermore, the alliance made with several South African export groups enables year-round presence of the Jaffa brand in the UK (Israel's main citrus market in the European Union), a major advantage with regard to supermarket customers. The new dynamics seems to have encouraged certain growers to replant, mainly in easy peelers (especially Or) and certain orange varieties (Navel and Shamouti). This season's recovery then remains to be made permanent ■

Citrus — 2002/2003 Export forecasts — Israel

000 tonnes	Season		Trend	Average of 5 last seasons	Trend for 2002/2003
	2002/2003	2001/2002			
Ortanique	7	4.4	59%	8	- 11%
Nova	12	10.1	17%	9	32%
Others	16	10.9	47%	16	- 2%
Total easy peelers	**35**	**25.0**	**37%**	**33**	**5%**
Navel	1	0.7	43%	3	- 70%
Blond	40	22.9	75%	58	- 31%
Late varieties	20	10.3	95%	22	- 10%
Total oranges	**61**	**34.0**	**80%**	**84**	**- 27%**
White grapefruit	15	9.4	60%	25	- 41%
Coloured grapefruit/Sweetie	76	58.9	29%	87	- 13%
Total grapefruits	**91**	**68.0**	**33%**	**112**	**- 19%**
Total lemons	**3**	**0**	**-**	**1**	**471%**
Total	**190**	**127.0**	**49%**	**230**	**- 17%**

Source: CLAM

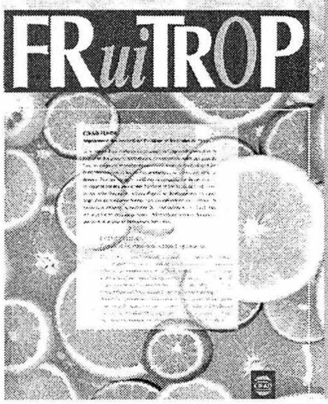


Everything about citrus

CIRAD-FLHOR and its journal *FruiTrop*, in collaboration with *L'ECHO*, has published a 16-page colour document devoted to citrus fruits. All aspects of the sector are addressed: history, agronomy, products, pests and diseases, harvesting and storage.

In two languages (French and English), the brochure is available for *FruiTrop* readers on request.

Contact: odm@cirad.fr



Tunisia: local market still predominant

The share of production reserved for export will be modest, as usual. The local market is particularly profitable and will continue to take 70 to 80% of orange production. The potential for next season will be similar to last year's volume and consist almost entirely of a single variety, Maltese. Practically all of this will go to the French market.The GIF (*Groupement interprofessionnel des fruits*), replacing the GIAF from this season onwards, wishes to set up a citrus renovation plan based on varietal diversification in order to generate larger quantities for export ■

Citrus — 2002/2003 Export forecasts — Tunisia

000 tonnes	Season		Trend	Average of 5 last seasons	Trend for 2002/2003
	2002/2003	2001/2002			
Maltese	24	21.8	10%	23	4%

Source: CLAM

Italy: situation unchanged

Orange and easy peeler production should decrease by 15% in 2002/2003. Indeed, the water shortage is still marked in Sicily, the site of most Italian citrus production. Furthermore, structural problems remain in citrus growing (ageing orchards, fragmentation of production structures and lack of organisation). The export potential will therefore decrease by nearly 20% for these two categories of produce. It is noted that varietal reconversion is continuing in easy peelers, with clementines continuing to develop at the expense of mandarins.

Lemon production should be stable at 500 000 tonnes but only very small quantities will be reserved for export ■

Citrus — 2002/2003 Export forecasts — Italy

000 tonnes	Season		Trend	Average of 5 last seasons	Trend for 2002/2003
	2002/2003	2001/2002			
Clementine	54	63.3	- 15%	49	10%
Mandarin/Wilking	4	5.6	- 23%	7	- 39%
Total easy peelers	**58**	**69.0**	**- 16%**	**56**	**4%**
Navel	11	12.8	- 18%	11	- 4%
Blood orange	80	95.9	- 17%	86	- 8%
Late varieties	16	19.3	- 18%	17	- 6%
Total oranges	**106**	**128.0**	**- 17%**	**114**	**- 7%**
Total lemons	**19**	**18.7**	**2%**	**21**	**- 7%**
Total	**183**	**215.7**	**- 15%**	**191**	**- 4%**

Source: CLAM

Corsica: certification paying off already?

The results of the last season were particularly satisfactory. The average price attained a record Euro 0.93 per kg, 30% more than the average of recent seasons. The certification application in progress made a substantial contribution to this good performance; the context competing origins. Production conformity certification and PGI (Protected Geographical Indication) received support from 60 to 70% of producers and are currently at the final validation stage. The volumes available for the coming season should be slightly lower than

Citrus — 2002/2003 Export forecasts — Corsica					
000 tonnes	Season		Trend	Average of 5 last seasons	Trend for 2002/2003
	2002/2003	2001/2002			
Clementine	20	21	- 5%	19	8%

Source: CLAM

Greece: a slight increase

The quantities of oranges, the varietal group accounting for 80 to 85% of Greek production, will be slightly greater than those of last year according to official sources. In contrast, professionals are counting on a much more marked increase. The volumes of clementines available will continue to increase as a result of the development of the plantations in the northern part of the country ■

Citrus — 2002/2003 Export forecasts — Greece					
000 tonnes	Season		Trend	Average of 5 last seasons	Trend for 2002/2003
	2002/2003	2001/2002			
Clementine	31	26.5	17%	27	17%
Others	0	0.5	- 60%	3	- 93%
Total easy peelers	**31**	**27.0**	**16%**	**30**	**6%**
Navel	217	205.0	6%	225	- 4%
Blond	3	2.6	- 4%	7	- 64%
Late varieties	48	48.6	- 2%	61	- 21%
Total oranges	**267**	**256.0**	**4%**	**293**	**- 9%**
Total lemons	**8**	**8.3**	**1%**	**23**	**- 64%**
Total	**306**	**291.3**	**5%**	**346**	**- 11%**

Source: CLAM

Florida: the first effects of tristeza

What last year was only a distant threat considered by some as somewhat nebulous seems to be taking real shape in the USDA forecasts for the 2002/2003 season. The first tangible effects of tristeza on grapefruit (and also orange) production are there. As is shown in the table below, the decrease is probably some 10% in comparison with the last season, for both white and coloured varieties. However, application of the comparison to the average for the past five seasons, the fall is 15% for coloured varieties and 13% for white fruits. Shortage of moisture during the flowering period resulted in a considerable decrease in the number of fruits per tree but is not sufficient to account for the low production expected. In fact, the number of producing trees is down by 5 to 6% as a result of grubbing up because of tristeza. The volumes available for export should therefore be down while competition between markets is increasing for coloured fruits. Japan, the leading market for Florida grapefruit, took more coloured fruits than white fruits for the first time in 2001/2002 ■

Citrus — 2002/2003 Export forecasts — Florida					
000 tonnes	Season		Trend	Average of 5 last seasons	Trend for 2002/2003
	2002/2003	2001/2002			
White grapefruit	17 000	18 900	- 10%	19 280	- 12%
Coloured grapefruit	25 000	27 800	- 10%	29 260	- 15%
Total grapefruits	**42 000**	**46 700**	**- 10%**	**48 540**	**- 13%**

Source: USDA

Tristeza in Florida

Tristeza is one of the most widespread diseases of citrus, occurring all over the world apart from a few Mediterranean producer countries. This virus disease (citrus tristeza virus, CTV) is spread by aphids such as *Aphis gossypii* and *Toxoptera citricida*. The main symptoms are the general wilting of the tree, pale veins and wood invagination. Sour orange, widely used as rootstock, is particularly susceptible to the disease.

The economic impacts are considerable as production decreases gradually until the tree dies. More than 20 million orange trees have been lost to CTV in Brazil. There is no curative control method. The only solution is the grubbing up of infected trees and replanting.

A recent University of Florida study (*Projecting Effects of Citrus Tristeza Virus on Florida Citrus Production* by Mark Brown and Ed Stover, available from http://edis.ifas.ufl.edu/BODY_FE330) describes several scenarios according to the rate of spread of the disease, making it possible to estimate the consequences for Florida citrus orchards.

For grapefruit, assuming medium spread of the disease (losses spread over a 12-year period), production would decrease gradually from 47 million boxes in 2001/2002 to 36 million in 2005/2006. It would increase from 2006/2007 but would only recover present levels in 2009/2010. The study describes other loss rate hypotheses, with losses spread over periods of 8 to 16 years.

FRuiTROP

Citrus — Mediterranean Basin
2002/2003 Export forecasts by variety
(000 tonnes)

Citrus	Total	France (Corsica)	Spain	Morocco	Algeria	Tunisia	Italy	Israel	Cyprus	Greece	Turkey	Egypt (1)	Gaza (1)
Satsuma	**229.0**	-	115.0	-	-	-	-	-	-	-	114.0	-	-
Clementine	**1 153.9**	20.0	870.0	172.0	-	-	53.8	-	-	31.1	7.0	-	-
Mandarin/Wilking	**205.0**	-	130.0	9.0	-	-	4.3	-	-	-	57.0	4.7	-
Ortanique	**44.8**	-	-	7.8	-	-	-	7.0	30.0	-	-	-	-
Nova	**140.2**	-	110.0	8.0	-	-	-	11.8	0.4	-	10.0	-	-
Others	**152.8**	-	85.0	34.8	-	-	-	16.0	2.0	0.2	12.0	2.8	-
Total easy peelers	**1 925.7**	**20.0**	**1 310.0**	**231.6**	**-**	**-**	**58.1**	**34.8**	**32.4**	**31.3**	**200.0**	**7.5**	**-**
Navel/Navelina	**1 446.9**	-	880.0	38.5	-	-	10.5	1.0	-	216.9	152.0	148.0	-
Salustiana	**129.1**	-	100.0	29.1	-	-	-	-	-	-	-	-	-
Shamouti	**52.0**	-	-	-	-	-	-	40.0	-	-	6.0	-	6.0
Common blond	**37.6**	-	-	0.5	-	-	-	-	-	2.5	-	34.6	-
Moro-Tarocco	**70.0**	-	-	-	-	-	70.0	-	-	-	-	-	-
Maltaise	**24.0**	-	-	-	-	24.0	-	-	-	-	-	-	-
Sanguinelli	**10.5**	-	-	1.0	-	-	9.5	-	-	-	-	-	-
Other blood oranges	**34.4**	-	4.0	30.4	-	-	-	-	-	-	-	-	-
Verna	**-**	-	-	-	-	-	-	-	-	-	-	-	-
Ovale	**7.1**	-	-	-	-	-	2.1	-	1.0	-	4.0	-	-
Late	**994.0**	-	485.0	194.0	-	1.0	13.7	20.1	33.0	47.7	38.0	130.5	31.0
Bitter	**2.0**	-	2.0	-	-	-	-	-	-	-	-	-	-
Total oranges	**2 807.6**	**-**	**1 471.0**	**293.5**	**-**	**25.0**	**105.8**	**61.1**	**34.0**	**267.1**	**200.0**	**313.1**	**37.0**
Total lemons	**755.4**	**-**	**500.0**	**-**	**-**	**-**	**19.1**	**3.0**	**12.0**	**8.4**	**200.0**	**11.2**	**1.7**
White grapefruit	**77.3**	-	26.0	-	-	-	-	15.0	25.0	2.3	8.0	1.0	-
Other grapefruits	**169.0**	-	-	1.0	-	-	-	76.0	-	-	92.0	-	-
Total grapefruits	**246.3**	**-**	**26.0**	**1.0**	**-**	**-**	**-**	**91.0**	**25.0**	**2.3**	**100.0**	**1.0**	**-**
Others	**4.9**	**-**	**-**	**-**	**-**	**-**	**-**	**4.9**	**-**	**-**	**-**	**-**	**-**
Total	**5 739.9**	**20.0**	**3 307.0**	**526.1**	**-**	**25.0**	**183.0**	**194.8**	**103.4**	**309.1**	**700.0**	**332.8**	**38.7**

(1) estimates

Source: CLAM