Review of the 2002/2003 citrus season

Marked by internationalisation

Although the 2002/2003 season was not a great vintage, it can be considered to have been satisfactory. The sales volumes of fruits of Mediterranean origin reached record levels for easy peelers and oranges while selling prices in France and the rest of the European Union remained at good levels. Only a few origins that suffered serious production losses after bad weather in December and January had more mixed results. Strongly increasing demand on eastern European markets and the recovery of shipments to the United States are undoubtedly the main features of the season. They also make it possible to address the coming seasons with a measure of optimism.

Easy peelers

The balance for the season fortunately differs from a start that can be described as catastrophic. It is increasingly clear that the North American market is essential for the balance of the community market during the first part of the season. The potential in Marisol was substantial in 2002/2003 and the US embargo was lifted too late in mid-October. Large volumes of fruits thus accumulated in the EU during a period of timidity with regard to the variety. It should nevertheless be noted that Clemenpons and Oronules—available in significant quantities for the first time—were very well received in spite of firm prices. The character of the season changed completely at the beginning of November. On the one hand shipments to the USA resumed (Spain exported 55 000 tonnes). On the other hand, the community market was very active in November and December thanks in particular to the excellent quality of the fruits available. This excellent performance in the heart of the season accounts for the excellent average price during the season; this was 9% higher than average. The market deteriorated distinctly from mid-January onwards as the poor weather at the end of December (rain followed by frost) had a very negative impact on quality. Another excellent performance was that of exports to Eastern Europe. These increased steadily to almost 500 000 tonnes.

Orange

The quantities available were distinctly higher than those of preceding seasons as a result of a conjunctural increase in Naveline production and an increase in the area under late varieties (especially Navelate). The quantities shipped to the EU were similar to last year's and confirmed the trend for the stabilisation of consumption during the winter period. Only French demand was noticeably more sluggish than in the previous season. In contrast, shipments to Eastern Europe rocketed (100 000 t more than in 2001/2002) as a result of Egypt breaking into the market. Prices achieved in the EU were comparatively satisfactory (above average in France) in spite of several difficult periods (November/December and then the spring).

Grapefruit

The results were clearly satisfactory in economic terms as the mean season price was much higher than average (+15%) for the fourth year running. In contrast, unfortunately, it confirms the falling trend in consumption once again. In five years, EU imports from the three leading winter suppliers (Florida, Israel and Turkey) have decreased by more than 25%, i.e. 70 000 tonnes. This season also displayed certain special features. The Florida season finished extremely early in the European Union as a combined result of the structural decrease in production (tristeza) and increasingly large shipments of coloured fruits to Japan. Another new point was the fall in Turkish exports to the EU (after several years of two-figure growth) to the benefit of Eastern European markets that are more reliable than before and just as profitable. These two factors can probably be seen as new trends.

Lemon

Supplies were much less plentiful than last year as Turkish production returned to normal after the 2001/2002 boom. Community demand remained stable and prices were distinctly higher than those of last year and higher than average. Spain strengthened its presence in Eastern Europe as Turkish supplies were less plentiful. However, in contrast with the position of the other fruits, the demand on these markets slowed after growing strongly and steadily in recent seasons ■

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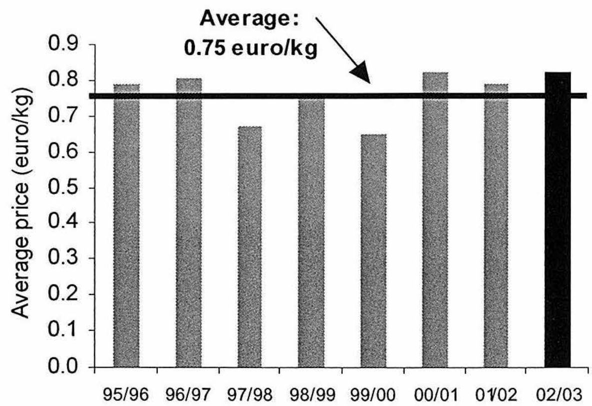
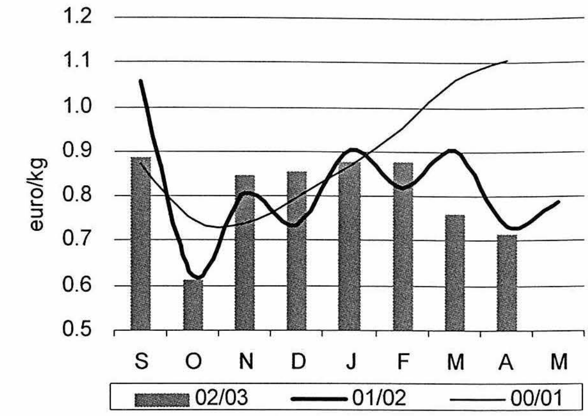
France — Prices at import stage

Easy peelers





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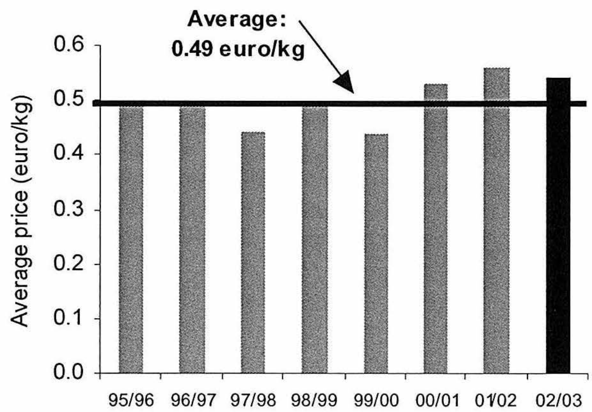

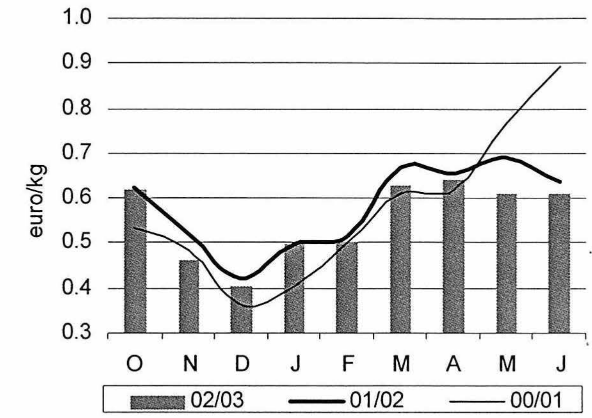

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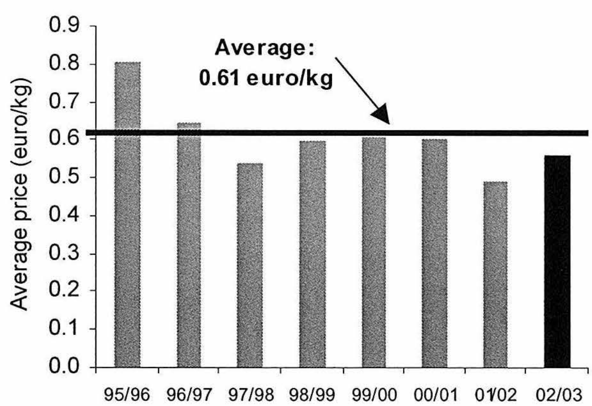
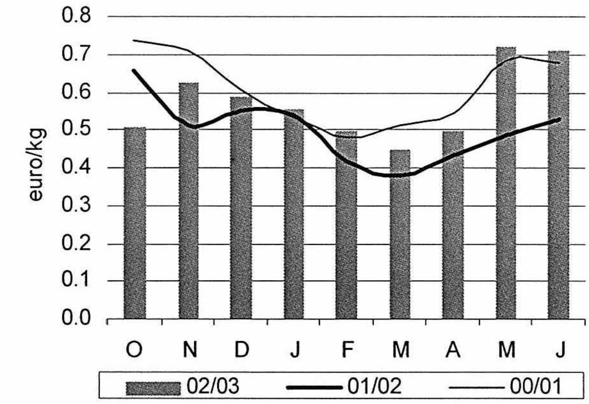
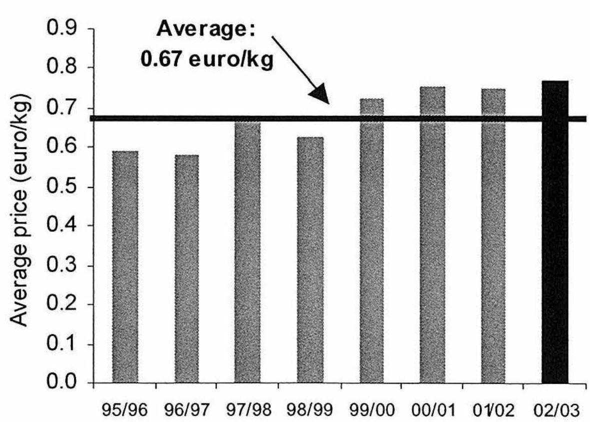
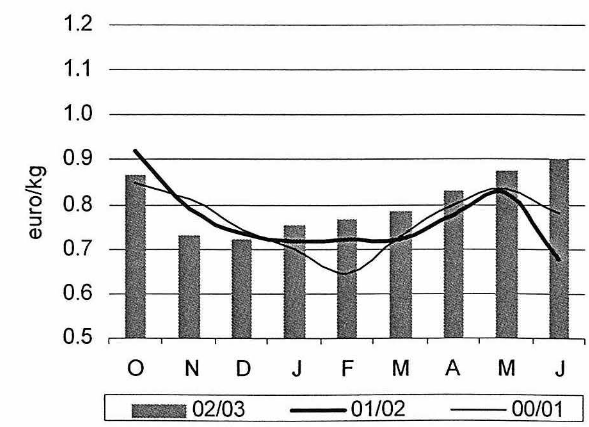




Grapefruit





Source: CIRAD-FLHOR Market News Service, Pomona

Citrus 2002/2003
Mediterranean production
(000 tonnes)

Citrus	Total	France (Corsica)	Spain	Morocco	Algeria	Tunisia	Italy	Israel	Cyprus	Greece	Turkey	Egypt (1)	Gaza (1)
Easy peelers													
Production	**4 340.9**	**28.0**	**2 010.0**	**478.4**	**111.0**	**30.7**	**548.3**	**71.0**	**46.0**	**82.9**	**400.0**	**534.6**	**-**
Domestic sales	**1 689.7**	1.0	266.0	154.5	111.0	30.7	389.5	30.0	11.3	38.9	132.5	524.3	-
Industry	**410.8**	0.7	244.0	3.7	-	-	125.7	18.0	5.7	1.5	11.5	-	-
Losses/withdrawals	**258.0**	2.6	130.2	111.8	-	-	-	-	-	8.0	-	5.4	-
Export sales	**1 982.4**	23.7	1 369.8	208.4	-	-	33.1	23.0	29.0	34.5	256.0	4.9	-
Orange													
Production	**9 900.0**	**-**	**2 935.0**	**800.1**	**140.0**	**159.9**	**1 723.6**	**142.4**	**89.4**	**1 176.9**	**985.0**	**1 688.3**	**59.4**
Domestic sales	**4 501.6**	-	897.0	358.0	118.0	142.7	835.0	61.0	36.2	221.1	663.6	1 160.9	8.1
Industry	**2 077.5**	-	581.0	44.2	22.0	-	808.1	54.0	19.0	313.1	117.9	103.9	14.3
Losses/withdrawals	**506.8**	-	48.1	123.7	-	-	2.9	-	-	305.3	10.0	16.8	-
Export sales	**2 814.1**	-	1 408.9	274.2	-	17.2	77.6	27.4	34.2	337.4	193.5	406.7	37.0
Lemon													
Production	**2 335.5**	**-**	**962.0**	**10.0**	**-**	**27.3**	**486.4**	**20.0**	**19.7**	**108.6**	**442.5**	**254.6**	**4.4**
Domestic sales	**905.8**	-	140.0	9.5	-	27.3	203.8	15.0	5.0	63.6	205.5	234.3	1.8
Industry	**510.6**	-	187.0	-	-	-	265.0	3.0	2.0	11.7	26.0	15.0	0.9
Losses/withdrawals	**167.0**	-	134.4	0.5	-	-	-	-	-	9.6	20.0	2.5	-
Export sales	**752.1**	-	500.6	-	-	-	17.6	2.0	12.7	23.7	191.0	2.8	1.7
Grapefruit													
Production	**511.0**	**-**	**37.0**	**26.0**	**-**	**-**	**10.1**	**255.0**	**38.6**	**9.3**	**127.5**	**3.0**	**4.5**
Domestic sales	**70.2**	-	-	25.5	-	-	4.4	20.0	2.0	5.0	9.4	3.0	0.9
Industry	**206.6**	-	3.4	-	-	-	-	171.0	9.0	1.1	18.5	-	3.6
Losses/withdrawals	**1.4**	-	-	0.1	-	-	-	-	-	1.3	-	-	-
Export sales	**232.8**	-	33.6	0.4	-	-	5.7	64.0	27.6	1.9	99.6	-	-
Other citrus													
Production	**40.4**	**-**	**-**	**-**	**-**	**6.7**	**25.1**	**8.6**	**-**	**-**	**-**	**-**	**-**
Domestic sales	**11.1**	-	-	-	-	6.7	1.4	3.0	-	-	-	-	-
Industry	**25.1**	-	-	-	-	-	25.1	-	-	-	-	-	-
Losses/withdrawals	**-**	-	-	-	-	-	-	-	-	-	-	-	-
Export sales	**5.6**	-	-	-	-	-	-	5.6	-	-	-	-	-
Total													
Production	**17 127.8**	**28.0**	**5 944.0**	**1 314.5**	**251.0**	**224.6**	**2 793.5**	**497.0**	**193.7**	**1 377.7**	**1 955.0**	**2 480.5**	**68.3**
Domestic sales	**7 178.4**	1.0	1 303.0	547.5	229.0	207.4	1 434.1	129.0	54.5	328.6	1 011.0	1 922.5	10.8
Industry	**3 230.6**	0.7	1 015.4	47.9	22.0	-	1 223.9	246.0	35.7	327.4	173.9	118.9	18.8
Losses/withdrawals	**933.2**	2.6	312.7	236.1	-	-	2.9	-	-	324.2	30.0	24.7	-
Export sales	**5 787.0**	23.7	3 312.9	483.0	-	17.2	134.0	122.0	103.5	397.5	740.1	414.4	38.7

(1) estimates

Source: CLAM

Citrus — Mediterranean Basin 2002/2003 — Exports by variety

(000 tonnes)

Citrus	Total	France (Corsica)	Spain	Morocco	Algeria	Tunisia	Italy	Israel	Cyprus	Greece	Turkey	Egypt (1)	Gaza (1)
Satsuma	**288.1**	-	144.9	-	-	-	-	-	-	-	143.2	-	-
Clementine	**1 199.8**	23.7	918.5	187.6	-	-	29.0	-	-	33.8	7.2	-	-
Mandarin/Wilking	**189.5**	-	118.3	-	-	-	4.1	-	-	-	63.8	3.3	-
Ortanique	**36.3**	-	-	5.8	-	-	-	3.0	27.5	-	-	-	-
Nova	**143.5**	-	111.6	6.1	-	-	-	9.0	0.3	-	16.5	-	-
Others	**125.2**	-	76.5	8.9	-	-	-	11.0	1.2	0.7	25.3	1.6	-
Total easy peelers	**1 982.4**	**23.7**	**1 369.8**	**208.4**	**-**	**-**	**33.1**	**23.0**	**29.0**	**34.5**	**256.0**	**4.9**	**-**
Navel/Naveline	**1 517.6**	-	898.0	32.8	-	-	7.8	0.4	-	226.6	156.7	195.3	-
Salustiana	**149.2**	-	117.9	31.3	-	-	-	-	-	-	-	-	-
Shamouti	**32.7**	-	-	-	-	-	-	18.0	-	-	8.7	-	6.0
Common blond	**53.8**	-	4.0	-	-	-	-	-	-	8.2	-	41.6	-
Moro-Tarocco	**51.1**	-	-	-	-	-	51.1	-	-	-	-	-	-
Maltese	**17.0**	-	-	-	-	17.0	-	-	-	-	-	-	-
Sanguinelli	**7.0**	-	-	-	-	-	7.0	-	-	-	-	-	-
Other blood oranges	**41.0**	-	7.7	33.3	-	-	-	-	-	-	-	-	-
Verna	**0.3**	-	0.3	-	-	-	-	-	-	-	-	-	-
Oval	**4.3**	-	-	-	-	-	1.6	-	1.1	-	1.6	-	-
Late	**937.1**	-	378.0	176.8	-	0.2	10.1	9.0	33.1	102.6	26.5	169.8	31.0
Bitter	**3.0**	-	3.0	-	-	-	-	-	-	-	-	-	-
Total oranges	**2 814.1**	**-**	**1 408.9**	**274.2**	**-**	**17.2**	**77.6**	**27.4**	**34.2**	**337.4**	**193.5**	**406.7**	**37.0**
Total lemons	**752.1**	**-**	**500.6**	**-**	**-**	**-**	**17.6**	**2.0**	**12.7**	**23.7**	**191.0**	**2.8**	**1.7**
White grapefruit	**84.1**	-	33.6	-	-	-	5.7	9.0	27.6	1.9	6.3	-	-
Other grapefruits	**148.7**	-	-	0.4	-	-	-	55.0	-	-	93.3	-	-
Total grapefruits	**232.8**	**-**	**33.6**	**0.4**	**-**	**-**	**5.7**	**64.0**	**27.6**	**1.9**	**99.6**	**-**	**-**
Others	**5.6**	**-**	**-**	**-**	**-**	**-**	**-**	**5.6**	**-**	**-**	**-**	**-**	**-**
Total	**5 787.0**	**23.7**	**3 312.9**	**483.0**	**-**	**17.2**	**134.0**	**122.0**	**103.5**	**397.5**	**740.1**	**414.4**	**38.7**

(1) estimates

Source: CLAM