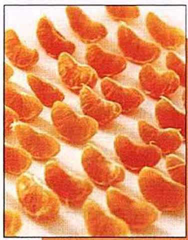
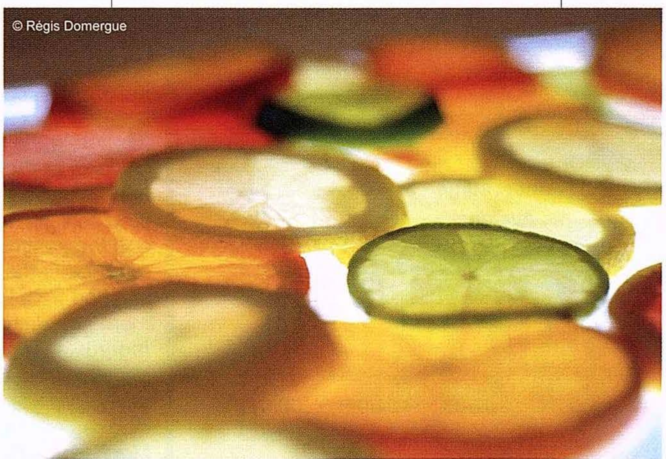


2007-2008 winter citrus season forecasts

Details by producer country

Spain

Seasons come and go and are never the same. With a harvest forecast of 5.6 million tonnes, 2007-2008 will be more than 20% down on the record 7 million tonnes of the preceding season. The decrease results mainly from unfavourable weather conditions that affected fruit setting and aggravated physiological fruit fall—that would probably have been considerable already, given the size of the previous harvest. Furthermore, drought also had an impact, especially in Andalusia. The easy peeler harvest will be down overall (all varieties) by some 10% in comparison with the four-year average. The decrease will be very marked in the heart of the season, with small 'Nules' and 'Clemenvilla' harvests. In contrast the dip will be a little less marked at the end of the season with the continued reconversion of 'Fortuna' but an increase in late hybrids such as 'Nadorcott', as was the case in the early part of the season with the increased momentum of 'Oronules' and 'Clemenruby', which are gradually replacing 'Marisol'. The 7% shortfall of the orange harvest in comparison with average hides a very strong decrease in the availability of fruits—both juice and dessert varieties—at the beginning of the season and mediocre volumes during the second part of the season, with a strong deficit in the 'Valencia' harvest and the structural increase in the production of late dessert varieties like 'Lanelate' and 'Powell'. In contrast, the decrease to more than 25% below average in the lemon crop will be particularly visible in the late segment, with an extremely limited 'Verna' harvest. Only grapefruit production will remain stable in comparison with last year and will be larger than average.



This comparatively modest harvest should allow a return to profitability, while waiting for the setting up of mainly private initiatives aimed at preventing slumps as serious as last season's. Juice industry capacity was too small in 2006-2007 and is to be increased from the word go this time with the coming into service of a new 250 000 t unit (Zuvamesa) in the Valencia administrative region. In particular, this should enable better regulation of the volumes available on the fresh citrus market, and especially the quantities of easy peelers marketed during the critical November-December period. Other units have been set up recently or are at the planning stage (Citricos del Andévalo near Huelva was set up recently and there is a project at Cartaya). This season will also be a test for the Ceven purchase centre set up in April 2007 to group fruits and better defend producers' interests with regard to the downstream part of the chain. Efforts to find new markets will be continued. The Valencia regional government is to provide the support of its export development institute to help exporters to gain a foothold on the Russian market. In addition, the Asian markets are still targeted by certain cooperatives. Test shipments to the Chinese, Japanese and Korean markets will be repeated. Mexico might prove to be an addition to Spanish exporters' portfolio, which totalled 82 countries in 2006-2007.

Finally, from spring 2008 onwards, growers should be able to obtain five new varieties of late easy peelers to enable them to lengthen their marketing season. Two were from mutation of 'Murcott ' and 'Moncada' (an 'Oroval' x 'Kara' cross) and the three others were bred by hybridisation ('Fortune' crossed with 'Ellendale', 'Murcott' or 'Kara)'. 'Tango', the result of a controlled mutation of 'Nadorcott' performed at University of California Riverside should very soon complete the range, joining the five other cultivars currently being studied at IVIA. In fact, figures for 2006 plantings show that the areas devoted to early easy peelers and oranges are tending to decrease to the benefit of late varieties.

These statistics also show that even if sales of seedlings have fallen by about 20% in comparison with 2005, areas under both easy peelers and orange continue to increase, especially in Andalusia where the total has grown from 47 000 ha in 2000 to more than 65 000 ha in 2006. The sector should therefore continue to be very aware of the points mentioned above so as not to risk further serious slumps in the future.

Spain — Citrus — 2007-2008 export forecasts

000 tonnes	Seasons		Evolution	4 last seasons average	2007-2008 / average
	2007-2008	2006-2007			
Total clementines	1 050	1 195	- 12%	1 063	- 1%
Satsuma	50	79	- 36%	96	- 48%
Mandarin/Wilking	50	109	- 54%	114	- 56%
Nova	125	138	- 9%	137	- 9%
Others	155	136	+ 14%	97	+ 60%
Total hybrids	380	461	- 18%	444	- 14%
Total easy peelers	**1 430**	**1 656**	**- 14%**	**1 507**	**- 5%**
Naveline/Navel	500	667	- 25%	761	- 34%
Blond	115	122	- 6%	117	- 2%
Blood	12	15	- 19%	10	+ 16%
Late	616	661	- 7%	490	+ 26%
Total oranges	**1 231**	**1 450**	**- 15%**	**1 369**	**- 10%**
Total lemons	**445**	**497**	**- 10%**	**479**	**- 7%**
Total grapefruits	**38**	**38**	**- 1%**	**33**	**+ 12%**
Total général	**3 144**	**3 642**	**- 14%**	**3 388**	**- 7%**

Source: CLAM

Florida

A harvest attaining the some 25 million 85-lb (40.8-kg) field boxes forecast will keep Florida's position of leading producer country. Nevertheless, this is 2 million boxes less than the 2006-2007 season and about 20 million boxes less than the

Florida — Citrus — 2007-2008 export forecasts					
millions boxes 85 lb (38.6 kg)	Season		Evolution	2000-2004 average	2007-2008 / average
	2007-2008	2006-2007			
White grapefruit	9.0	9.3	- 3%	17.4	- 47%
Coloured grapefruit	16.0	17.9	- 11%	25.7	- 30%
Total grapefruit	**25.0**	**27.2**	**- 8%**	**43.1**	**- 37%**

Source: FDOC

40 million boxes of the seasons preceding the explosion of citrus canker spread by the 2004 and 2005 hurricanes

The 2007 agricultural census covering half of the citrus area shows that the orchards are still shrinking (- 5% from 2006 to 2007). These data confirm FDOC's production forecasts which did not show a marked increase in volumes in the medium term: 30 million field boxes at the beginning of the next decade if the impact of canker is only medium. The consequences of greening, identified during summer 2005 and that also spread rapidly, are not included in this scenario. Profitability decreased strongly in 2006-2007, and this does not encourage replanting. Although fresh fruits are still an interesting outlet, the economic returns of industry, the destination of nearly 60% of the volumes, have been practically nil. However, it should be stressed that with exports exceeding 400 000 t in 2006-2007 and what will probably be a comparable total in 2007-2008, Florida should remaining the world market's leading supplier for many years, unless there are further meteorological catastrophes.

The small size of the fruits this year—the result of a very dry spring—is a subject to be borne in mind. Combined with somewhat late ripening, this factor will result in moderate volumes during the first part of the season. In contrast, autumn rainfall resulted in a size gain and should allow a return to supplies more similar to those of last season at the beginning of 2008. Japan will remain the main market for Florida grapefruit. However, the strong euro may encourage European importers to increase their orders.

USDA intends to lighten the procedure set up in 2006 to prevent the spread of citrus canker outside Florida after it was stated that it is impossible to eradicate the disease. The fruits shipped to countries where citrus fruits are not grown will only be inspected at the packing station and the orchard control and approval measures will be suspended. Shipments to citrus-producing countries will still be forbidden.

Tunisia

Production is increasing for the fifth consecutive year and the total citrus crop should reach 300 000 t. The orange harvest of some 185 000 t will not be the only one to increase. The easy peeler and lemon harvests each totalled between 20 000 and 25 000 t in 2003-2004 and should now approach 40 000 t.

About 600 to 750 ha of land has been newly planted or replanted each year

Tunisia — Citrus — 2007-2008 export forecasts					
000 tonnes	Seasons		Evolution	4 last seasons average	2007-2008 / average
	2007-2008	2006-2007			
Maltese	16	16	0%	18	- 10%

Source: CLAM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Morocco — Citrus — 2007-2008 export forecasts					
000 tonnes	Seasons		Evolution	4 last seasons average	2007-2008 / average
	2007-2008	2006-2007			
Total clementines	234	293	- 20%	237	- 1%
Mandarin/Wilking	-	-	-	1	- 100%
Ortanique	8	8	- 1%	9	- 11%
Nova	6	3	+ 84%	3	+ 86%
Others	13	12	+ 4%	9	+ 38%
Total hybrids	26	23	+ 13%	21	+ 24%
Total easy peelers	**260**	**317**	**- 18%**	**258**	**+ 1%**
Navel	35	23	+ 50%	26	+ 36%
Blond	27	32	- 15%	29	- 6%
Blood	40	39	+ 2%	33	+ 20%
Late	151	163	- 8%	166	- 9%
Total oranges	**253**	**265**	**- 4%**	**254**	**0%**
Total	**513**	**581**	**- 12%**	**512**	**0%**

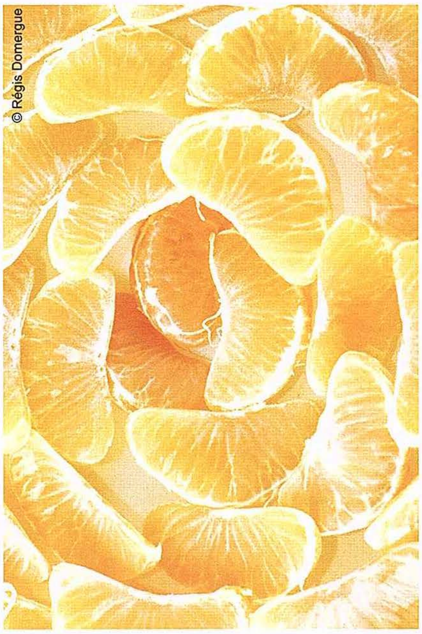
Source: CLAM

since 2003 within the framework of the national citrus programme. The orchard is therefore spreading, in particular outside the traditional Cape Bon area in the extreme north-eastern part of the country. Planting is going fast in the regions west of Tunis (Bizerte, Ariana, Beja/Jendouba and Manouba) and in the Kairouan zone further south. The programme has also made it possible to renovate the orchards to a considerable extent. As a result, 42% of the area under citrus in 2006 consisted of plantings less than ten years old against 10% in 1986. In addition, a dozen new varieties have been added to the catalogue, in particular to lengthen the marketing calendar. These fruits include early and late clementines, hybrid easy peelers such as 'Nova', early and late 'Navel' varieties, etc. The pilot nursery at Ghardimaou provides a large proportion of the registered seedlings. Technical supervision should be enhanced with the creation of a citrus technical centre, one of whose themes will be the control of leaf miner, a pest that still strongly affects citrus productivity.

This development strategy should continue in the coming years. The aim is above all to respond to strong demand on the domestic market that is profitable as it is still closely managed and protected by high import duties. Exports should be limited once again this season to some 20 000 tonnes of 'Maltese' oranges but could increase in the medium term. The aim would be to fill the duty-free quota of 34 000 t of oranges from which Tunisian exporters benefit on the European Union market. Other markets like Russia or the neighbouring countries could subsequently be targeted.

Morocco

Production will display a conjunctural decrease in 2007-2008 and should total some 1.1 million tonnes. The decrease will be about 20% for easy peelers, with the late varieties more affected than the early ones. The figure of - 8% suggested for orange is very much an estimate and the situation will depended greatly on the weather between now and March when the season begins for Maroc Late, the main variety



Three main factors account for the decrease. The weather has been favourable during the key flowering and fruit setting periods, but the drought of the preceding season lowered groundwater and reservoir levels, especially in the Souss region. Alternate bearing of 'Nour' clementine will also have a considerable impact, with 71 000 t expected against 124 000 t in 2006-2007, reducing exportable quantities to a little over 50 000 t. Finally, part of the Sodea-Sogeta orchards—currently changing hands—are temporarily not farmed.

The decrease is not the result of the renaissance experienced by Moroccan citrus growing. According to the census performed in 2006 to draw up a programme for the re-launching of the sector, 20 000 ha was replanted from 1991 to 2006 and the total area under citrus increased by 10 000 ha. Expansion seems to have accelerated in recent years, as is shown by the figures for 2006, with 3 000 ha planted or replanted in just one year! The availability in the form of a 40-year lease of part of the Sodea-Sogeta orchards is an important factor in stimulation in the medium term, as the new operators must undertake an investment and cultivation programme. Private operators (mainly Moroccan) were awarded 5 700 ha within the framework of the first stage in 2005. The second and last stage consisting of about 6 800 ha has just been awarded. Furthermore, the government also intends to play a role in stimulation by setting up a plan for the re-launching of the sector, scheduled to run from 2008 to 2012.

The increase in orchard area should benefit the zones with the best water resources and especially the Gharb, which lies roughly between Casablanca and Tangiers. Drought is the main limiting factor for the sector. The major citrus regions in the Souss and the Oriental region will benefit from a rehabilitation programme (renovation, the extension of micro-irrigation, etc.).

Easy peelers have formed the major part of the plantings in recent years and production should increase considerably, especially in the late segment. Varieties like 'Nour' or 'Nadorcott', with a harvest that should reach some 12 000 t in 2006-2007, have been widely planted in recent years. This new impetus should also make it possible to reverse the trend for recession observed in orange for the last three

Cyprus — Citrus — 2007-2008 export forecasts					
000 tonnes	Seasons		Evolution	4 last seasons average	2007-2008 / average
	2007-2008	2006-2007			
Ortanique	29	33	- 12%	32	- 11%
Nova	1	1	0%	1	+ 8%
Others	1	1	- 8%	2	- 25%
Total easy peelers	**31**	**35**	**- 12%**	**35**	**- 11%**
Oval	-	-	-	1	- 100%
Late	16	15	+ 7%	24	- 34%
Total oranges	**16**	**15**	**+ 7%**	**25**	**- 36%**
Total lemons	**4**	**6**	**- 27%**	**10**	**- 60%**
Total grapefruit	**21**	**20**	**+ 4%**	**25**	**- 14%**
Total	**72**	**75**	**- 5%**	**93**	**- 23%**

Source: CLAM

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Israel — Citrus — 2007-2008 export forecasts					
000 tonnes	Seasons		Evolution	4 last seasons average	2007-2008 / average
	2007-2008	2006-2007			
Ortanique	6	6	- 5%	5	+ 1%
Nova	13	16	- 17%	14	- 8%
Others	32	30	+ 5%	22	+ 45%
Total easy peelers	**50**	**52**	**- 3%**	**41**	**+ 21%**
Navel	2	1	+ 67%	1	+ 135%
Blond	20	17	+ 18%	22	- 10%
Late	8	4	+ 82%	8	+ 3%
Total oranges	**30**	**23**	**+ 33%**	**31**	**- 3%**
White grapefruit	10	10	+ 5%	11	- 11%
Coloured grapefruit/sweetie	67	75	- 11%	68	- 2%
Total grapefruits	**77**	**85**	**- 9%**	**79**	**- 3%**
Total lemons	2	-	-	2	- 9%
Total	**159**	**159**	**0%**	**154**	**+ 3%**

Source: CLAM

seasons. Here again, the late segment should be addressed with varieties such as 'Navelate and 'Lanelate' (12 000 t expected in 2007-2008).

Another positive point is the processing sector, a key for the balance of the industry, which is increasing its capacity. The production facility in Kenitra (ex-FRUMAT) resumed production in February 2007 after being purchased by CITRUMA.

Some changes should also be seen in export trends from the 2007-2008 season onwards. Greater attention should be paid to the EU market in order to limit the overlarge role now played by the Russian market, which was the destination for more than 50% of the volumes exported in 2006-2007. The currently strong euro is a further encouragement for this. Development should also be continued on distant markets—North America and perhaps Asia for the first time as a sanitary protocol is currently being signed with China and Japan. In the coming years, export dynamics will also depend on competition with the domestic market as this has displayed considerable expansion recently.

Cyprus

The trend for the scaling down of the citrus sector is confirmed in the 2007-2008 season. The harvest should total around 170 000 t. This is 30 000 t less than the volume observed at the beginning of the decade and more than 100 000 t less than the end of the 1990s. The situation is increasingly difficult in spite of varietal reconversion, in particular with the replacement of white grapefruit by coloured cultivars and the generalisation of strict quality standards (GLOBALGAP, BRC, etc.). High labour and transport costs weigh on competitiveness and are no longer compensated by government aid. In addition, the drought is tending to become more severe. Total precipitation has been less than 480 mm in the last three seasons, with a total between 360 and 410 mm in two of these years. New plantings have been stopped and the government is thinking about a plan to save the sector.

Israel

The small dip in production expected in 2007-2008 as a result of alternate bearing of the main varietal groups—grapefruit and orange—grown in Israel does not reflect the continued strong growth of the citrus

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sector. The 620 000 t harvest expected is some 180 000 t greater than the volume produced in 2003-2004, during the worst part of slump. The rate of planting of some 600 to 700 ha per year from 2002 accelerated to 1 000 ha in 2006 and a similar figure is expected in 2007 according to USDA. A tangible sign of the regaining of confidence by citrus growers, this recovery is related to several parameters. Firstly, the varietal restructuring of orchards (in short, less orange and white grapefruit and more late easy peelers), the decrease in grapefruit production in Florida and a favourable euro:shekel exchange rate have resulted in good returns once again, even though the last grapefruit season was disappointing. Furthermore, the crucial problem of the shortage of water for farming has been solved by recycled water, now used in 70% of the orchard area. However, shortage of labour is still a technical point for concern.

The area under 'Star Ruby' is increasing strongly, especially in the early zones in northern Israel. However, the strong decrease in the price of concentrated juice and increased competition with Turkey on the fresh fruit market could lead to a slowing of planting in coming seasons. There has also been a very strong increase in late easy peelers and of 'Or' in particular. Total production of this varietal group will reach a record 150 000 t in 2007-2008. Most of the work by the Volcani Center team that develops new varieties is based on these two families of fruits and includes in particular the breeding of sweet grapefruit.

Israeli exporters should continue to diversify their sales outlets. In 2006-2007, some 64% of shipments were reserved for the EU—in spite of an attractive exchange rate—against 75% at the beginning of the decade. The duty-free quota is considered by operators to be limiting and they are negotiating to increase it. The Russian market is the main beneficiary of this change of trend. Asia is also a target for strategic development. The phytosanitary protocol negotiated by Israel for access to the Japanese market is a favourable one (no obligatory inspection at the shipping stage). Exports of white grapefruit could therefore continue to increase. The Chinese market has been open to Israeli citrus since 2007 and may now take the first significant volumes.

Greece

With a harvest of about 1.1 million tonnes expected, production will be some 12% up

Greece — Citrus — 2007-2008 export forecasts					
000 tonnes	Seasons		Evolution	4 last seasons average	2007-2008 / average
	2007-2008	2006-2007			
Clementine	29	28	+ 2%	25	+ 15%
Others	4	3	+ 43%	3	+ 18%
Total easy peelers	**33**	**31**	**+ 6%**	**29**	**+ 16%**
Navel	220	193	+ 14%	207	+ 7%
Blond	20	14	+ 40%	8	+ 143%
Late	65	48	+ 35%	40	+ 62%
Total oranges	**305**	**255**	**+ 19%**	**255**	**+ 20%**
Total lemons	3	1	+ 92%	6	- 59%
Total	**341**	**288**	**+ 18%**	**290**	**+ 18%**

Source: CLAM

on that of the last season and about 6% higher than the four-year average. This overall increase is the result of a larger orange crop. The problem of the narrow range of varieties is still topical. In spite of a conjunctural increase in the volumes of 'Valencia', production is still based to a considerable extent on 'Washington Navel'. As a result, the harvest is strongly concentrated from November to March. Some growers are therefore continuing to reduce the proportion of this variety in their orchards to the benefit of easy peelers. Nevertheless, the production of this citrus group will decrease this season and be about 5% lower than the four-year average. Supply still consists mainly of a seasonal clementine cultivar but some growers seek to lengthen the harvest period by planting early varieties ('Clemenpons', etc.) and hybrids ('Nova').

Lemon production—that exceeded 100 000 t before frost wiped out a large proportion of the orchards in 2005—will remain moderate at some 45 000 t.

Turkey

Turkish citrus production will be down by about 8% at less than 2.4 million tonnes. The fall is a break in the uninterrupted growth observed since the beginning of the decade, with the harvest increasing from 1.5 to 2.6 million tonnes in 2006-2007. The trends vary considerably from one varietal group to another. The grapefruit and orange harvest should reach record levels at 250 000 t and 1.2 million tonnes respectively. In contrast, easy peelers and lemons will suffer from alternate bearing after a large harvest in 2006-2007.

Planting seems to have slowed after the rapid rate of recent years as some growers have turned to other fruit crops such as cherry and pomegranate. But many orchards have not yet started to produce and especially those planted with easy peelers ('Nova', 'Okitsu') and early and late oranges. Some professional sources therefore count on renewed growth of production in the seasons to come. The 3-million-tonne mark could be reached in about 2010.

Turkey — Citrus — 2007-2008 export forecasts

000 tonnes	Seasons		Evolution	4 last seasons average	2007-2008 / average
	2007-2008	2006-2007			
Total clementines	9	11	- 18%	8	+ 15%
Satsuma	105	147	- 29%	121	- 13%
Mandarin/Wilking	82	106	- 23%	63	+ 31%
Nova	35	42	- 17%	24	+ 49%
Others	4	6	- 27%	41	- 90%
Total hybrids	226	301	- 25%	249	- 9%
Total easy peelers	**235**	**312**	**- 25%**	**257**	**- 8%**
Naveline/Navel	185	144	+ 28%	124	+ 49%
Blond	5	3	+ 92%	7	- 25%
Late	54	28	+ 96%	45	+ 21%
Total oranges	**245**	**174**	**+ 40%**	**176**	**+ 39%**
Total lemons	**250**	**334**	**- 25%**	**291**	**- 14%**
Total grapefruits	**185**	**134**	**+ 38%**	**121**	**+ 52%**
Total	**915**	**954**	**- 4%**	**845**	**+ 8%**

Source: CLAM

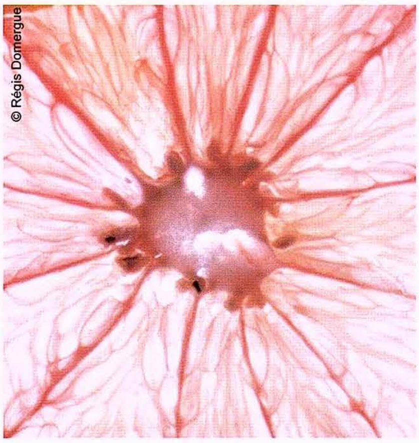
Italy — Citrus — 2007-2008 export forecasts

000 tonnes	Seasons		Evolution	4 last seasons average	2007-2008 / average
	2007-2008	2006-2007			
Clementine	48	46	+ 4%	44	+ 9%
Mandarin/Wilking	4	4	- 5%	5	- 14%
Total easy peelers	**52**	**50**	**+ 4%**	**49**	**+ 7%**
Navel	-	-	-	8	- 100%
Blond	-	-	-	3	- 100%
Blood	101	105	- 4%	74	+ 36%
Late	-	-	-	9	- 100%
Total oranges	**101**	**105**	**- 4%**	**94**	**+ 8%**
Total lemons	39	39	0%	27	+ 41%
Total	**192**	**194**	**- 1%**	**170**	**+ 13%**

Source: CLAM

Italy

Production should return to an average level of around 3.2 million tonnes, about 10% down on the last season. The situation is increasingly difficult in the citrus sector. The domestic market takes about half of production and is tending to shrink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as a result of increasingly keen competition from the other Mediterranean origins and Italian consumers' waning interest in citrus fruits. Efforts are nonetheless being made to make Italian production stand out. Getting on for 10 PGIs have been created since the mid-1990s: lemons from Amalfi, Sorrento, Gargano and Siracuse, blood oranges from Sicily and '*bionda*' oranges from Gargano, clementine from Calabria and the Gulf of Taranto. In addition, the processing industry, another major outlet for production that handled 1.5 million tonnes in 2006-2007 has to face the end of direct aid from the EU this season. It is true that the speciality strategy seems to have produced some results in export sales, especially of 'Tarocco' blood oranges. Penetration of the US and Japanese markets deserves congratulation. However, although volumes have been increasing in recent years, they are still limited in comparison with the quantities grown.

Corsica

Corsican citrus production will be fairly limited in 2007-2008 as winter 2007 was too warm. Shipments of clementine with leaves to mainland France, the main market for this speciality of the island, should not exceed 14 000 t. Grapefruit production should be some 3 000 to 4 000 t.

In spite of the unfavourable weather, 2007 will be remembered by producers. The efforts made in the differentiation of the specific quality of the produce have been recognised at the European level, with the establishment in February of the Protected Geographic Indication 'Clémentine de Corse'. About 70% of total production in Corsica meets the requirements of the strict standards that cover some 70 criteria. An advertising campaign is to run of French radio and television in the second half of November. Another positive feature is the increasingly better structuring and organisation of the sector. The GIE (economic interest grouping) 'Corsica Comptoir' handles the production of four packing stations and now markets about 50% of volumes on a partnership basis with supermarket chains, negotiating directly with the latter.

Much progress has thus been made since the slump caused in particular by the opening of the French market to

Corsica — Citrus — 2007-2008 export forecasts					
000 tonnes	Seasons		Evolution	4 last seasons average	2007-2008 / average
	2007-2008	2006-2007			
Clementine	14	25	- 43%	21	- 33%

Source: CLAM

clementines with leaves from other Mediterranean origins in 1994. But other subjects are still waiting for the growers, such as the rationalisation of packing facilities (more than 10 packing stations on the island!), the use of increasing amounts of sorting rejects resulting from stricter quality standards and the cost and availability of labour.

Egypt

Total citrus production should decrease by 10% in 2007-2008, slipping below 3 million tonnes. Orange is Egypt's speciality and the harvest should total between 1.7 and 1.8 million tonnes.

Nevertheless, this conjunctural decrease is contrary to the main trend and production should increase markedly in the medium term. The decrease in the areas under citrus in the traditional Nile Delta zone is more than compensated by the 10 000 ha of new plantings in the irrigated perimeters developed in the desert over the last decade or so. Recent figures show that the rate of planting has even increased in recent seasons. Furthermore, the extension of good agricultural practices is leading to a distinct increase in yields. The export sector is controlled to a considerable degree by four large private structures and should continue to grow fast. The volumes (mainly oranges) offered for sale on the international market approached 800 000 t in 2006-2007. This is 600 000 t more than at the beginning of the 2000s. It is noted that an interprofessional organisation to represent the export sector was set up this year.

Another feature is that the varietal range of easy peelers and lemons available, that still consists to a great extent of domestic cultivars, should gain diversity in the medium term. The main stakeholders in the sector aim at developing supplies of competitively priced easy peelers and lengthening the sales calendar for oranges, in particular by selling late oranges ■

Eric Imbert, Cirad
eric.imbert@cirad.fr

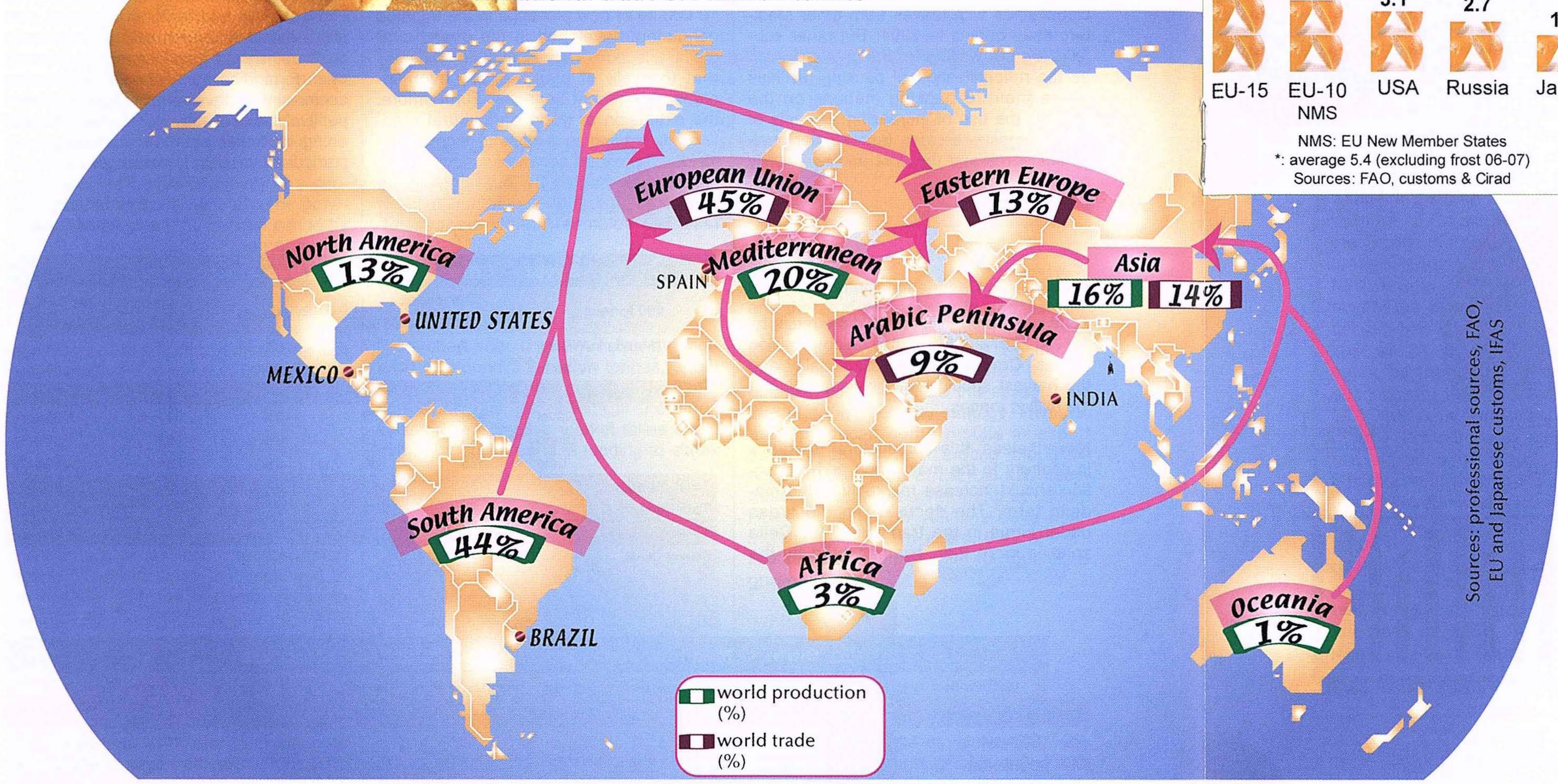
Egypt — Citrus — 2007-2008 export forecasts					
000 tonnes	Seasons		Evolution	4 last seasons average	2007-2008 / average
	2007-2008	2006-2007			
Mandarin/Wilking	7	7	0%	7	+ 4%
Others	-	-	0%	3	- 100%
Total easy peelers	**7**	**7**	**0%**	**10**	**- 24%**
Navel	398	398	0%	311	+ 28%
Blond	25	25	0%	63	- 61%
Late	336	336	0%	231	+ 46%
Total oranges	**759**	**759**	**0%**	**604**	**+ 26%**
Total lemons	**23**	**23**	**0%**	**20**	**+ 14%**
Total	**789**	**789**	**0%**	**631**	**+ 25%**

Source: CLAM

Citrus — Mediterranean region — 2007-2008 export forecasts												
000 tonnes	Total	France	Spain	Morocco	Algeria	Tunisia	Italy	Israel	Cyprus	Greece	Turkey	Egypt*	Gaza*
Total easy peelers	**2 118.4**	**14.0**	**1 430.0**	**260.0**	**-**	**-**	**52.0**	**50.0**	**31.0**	**33.0**	**235.0**	**7.4**	
Satsuma	155.0	-	50.	-	-	-	-	-	-	-	105.0	-	-
Clementine	1 389.6	14.0	1 050.0	233.6	-	-	48.0	-	-	29.0	9.0	-	-
Mandarin/Wilking	143.4	-	50.0	-	-	-	4.0	-	-	-	82.0	7.4	-
Ortanique	42.2	-	-	8.0	-	-	-	5.5	28.7	-	-	-	-
Nova	179.9	-	125.0	5.9	-	-	-	13.0	1.0	-	35.0	-	-
Others	208.2	-	155.0	12.5	-	-	-	31.5	1.2	4.0	4.0	-	-
Total oranges	**3 005.9**	**-**	**1 231.0**	**253.0**	**-**	**26.0**	**101.0**	**30.0**	**15.7**	**305.0**	**245.0**	**762.3**	**37.0**
Navel/Navelina	1 344.0	-	500.0	35.0	-	4.3	-	2.0	-	220.0	185.0	397.6	-
Salustiana	142.0	-	115.0	27.0	-	-	-	-	-	-	-	-	-
Shamouti	29.0	-	-	-	-	-	-	20.0	-	-	3.0	-	6.0
Common blond	50.8	-	-	-	-	4.3	-	-	-	20.0	2.0	24.5	-
Moro-Tarocco	101.0	-	-	-	-	-	101.0	-	-	-	-	-	-
Maltese	15.9	-	-	-	-	15.9	-	-	-	-	-	-	-
Sanguinelli	-	-	-	-	-	-	-	-	-	-	-	-	-
Other blood oranges	41.0	-	-	40.0	-	-	-	-	-	-	1.0	-	-
Verna	12.0	-	12.0	-	-	-	-	-	-	-	-	-	-
Oval	9.0	-	4.0	-	-	-	-	-	-	-	5.0	-	-
Late	1 257.5	-	600.0	151.0	-	1.4	-	8.0	15.7	65.0	49.0	336.4	31.0
Bitter	3.8	-	-	-	-	-	-	-	-	-	-	3.8	-
Total grapefruits	**325.9**	**-**	**37.5**	**-**	**-**	**-**	**2.5**	**77.0**	**21.2**	**1.5**	**185.0**	**1.2**	**-**
White grapefruit	88.9	-	37.5	-	-	-	2.5	10.0	21.2	1.5	15.0	1.2	-
Other grapefruits	237.0	-	-	-	-	-	-	67.0	-	-	170.0	-	-
Total lemons	**768.2**	**-**	**445.0**	**1.6**	**-**	**-**	**38.5**	**2.0**	**4.0**	**2.5**	**250.0**	**22.9**	**1.7**
Other citrus	**7.0**	**-**	**-**	**-**	**-**	**-**	**-**	**7.0**	**-**	**-**	**-**	**-**	**-**
Total	**6 225.4**	**14**	**3 143.5**	**514.6**	**-**	**26.0**	**194.0**	**166.0**	**71.9**	**342.0**	**915.0**	**793.8**	**38.7**

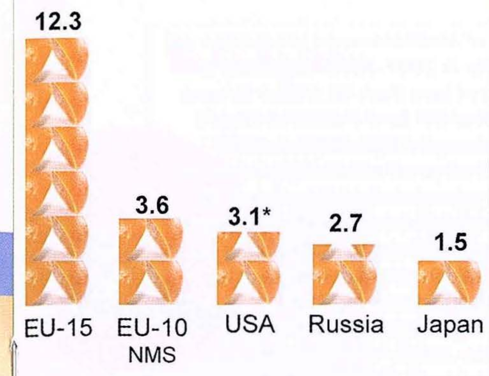
* estimates / Source: CLAM

Oranges... production 60 million tonnes and international trade 5.4 million tonnes



Sources: professional sources, FAO, EU and Japanese customs, IFAS

Orange
Per capita consumption (kg/year)



NMS: EU New Member States
*: average 5.4 (excluding frost 06-07)
Sources: FAO, customs & Cirad

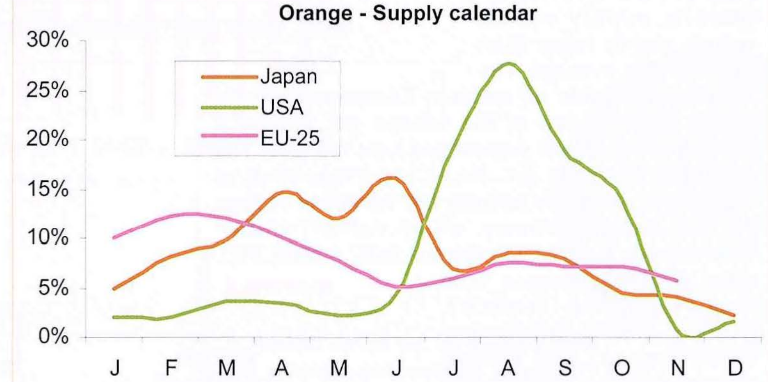
Orange World production 2006-2007	000 tonnes
World	60 421
Brazil	18 523
United States	7 589
Mexico	4 113
Spain	3 396
India	3 100
China	2 412
Italy	2 356
Egypt	1 939
Iran	1 900
Pakistan	1 580
Indonesia	1 312
South Africa	993
Turkey	975
Greece	855
Argentina	770

Orange World exports 2006-2007	000 tonnes
World	5 370
Spain	1 452
South Africa	900
Egypt	762
United States	546
Morocco	264
Greece	255
Turkey	174
Argentina	165
Italy	105
Uruguay	87
China	91
Australia	75
Zimbabwe	44
Honduras	44
Lebanon	44

Orange World imports 2006-2007	000 tonnes
World	5 370
UE to 25	2 317
Russia	391
Saudi Arabia	319
China	236
Canada	225
Korea	123
Japan	121
United States	112
Ukraine	93
Malaysia	86
Romania	81
Switzerland	59
Turkey	54
United Arab Em.	53
Guatemala	43

Sources: EU, USA and Japanese customs, FAO, Cirad

Orange - Supply calendar



Sources: EU, USA and Japanese customs—2005-06 average

Orange — United States imports and production

tonnes	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
Imports	**39 961**	**101 923**	**48 885**	**52 785**	**56 789**	**55 590**	**58 042**	**69 986**	**73 842**	**112 108**
South Africa	375	321	9 647	15 551	13 577	23 726	25 835	23 270	37 511	30 750
Spain	1 441	16 769	1 974	143	-	-	21	12	2	22 920
Australia	25 940	22 258	23 923	16 277	20 189	20 243	18 397	30 993	22 756	22 661
Mexico	8 030	50 683	8 373	14 438	17 469	6 509	8 796	13 039	10 994	19 241
Italy	186	170	221	538	226	287	154	1 226	740	6 176
Others	3 989	11 722	4 748	5 839	5 329	4 825	4 840	1 446	1 838	10 360
Production	**13 670 000**	**9 824 000**	**12 997 000**	**12 221 000**	**12 374 000**	**11 545 000**	**12 872 000**	**9 252 000**	**8 898 000**	**7 589 000**
Florida	79.0%	80.0%	85.0%	80.0%	82.0%	84.0%	79.0%	85.0%	73.0%	74.0%
California	20.0%	19.0%	14.0%	19.0%	17.0%	16.0%	20.0%	15.0%	26.0%	25.0%
Texas	0.0%	0.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
Arizona	0.3%	0.3%	0.4%	0.3%	0.3%	0.2%	0.2%	0.1%	0.2%	0.2%
Industry	**81.0%**	**87.0%**	**83.0%**	**82.0%**	**83.0%**	**79.0%**	**83.0%**	**76.0%**	**78.0%**	**82.0%**

Source: US customs (code 080510), USDA

Orange — Japanese imports and production

tonnes	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Imports	**154 086**	**171 269**	**150 470**	**89 703**	**136 150**	**126 203**	**103 873**	**117 087**	**112 937**	**115 433**	**120 875**
United States	135 683	147 624	131 866	46 204	116 951	104 152	79 611	88 068	85 524	84 629	88 179
Australia	11 960	8 385	7 357	12 460	6 245	7 238	8 765	9 238	6 493	8 443	15 522
Chile	38	87	25	539	1 153	3 680	4 958	6 120	10 408	11 382	9 440
South Africa	5 905	14 161	9 210	13 846	8 547	9 337	8 028	13 276	10 216	10 960	7 714
Italy	-	-	-	-	-	-	-	-	-	-	19
Others	502	1 012	2 011	16 515	3 236	1 796	2 510	385	295	19	1
Production	**124 000**	**134 000**	**124 000**	**111 000**	**104 000**	**104 400**	**98 500**	**89 800**	**88 800**	**74 700**	**74 700**

Source: Japanese customs (code 080510000), FAO

Orange
EU imports by entry point

	1995-1996	2005-2006
Poland	1%	3%
Italy	2%	4%
Spain	1%	5%
Belgium	10%	6%
UK	15%	15%
France	21%	16%
Netherlands	17%	18%
Germany	25%	21%

Source: Eurostat

Orange — EU-25 imports and production

tonnes	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
Total	**2 056 759**	**2 140 635**	**2 027 699**	**2 195 103**	**1 981 617**	**2 343 122**	**2 146 708**	**2 295 781**	**2 108 853**	**2 292 077**	**2 317 629**
Total northern hemisphere*	**1 631 588**	**1 723 499**	**1 557 528**	**1 711 280**	**1 558 010**	**1 741 783**	**1 710 266**	**1 797 095**	**1 637 799**	**1 736 457**	**1 798 693**
Spain	1 022 906	1 171 417	1 045 191	1 229 520	1 035 743	1 318 246	1 307 476	1 384 730	1 125 862	1 222 191	1 332 066
Morocco	228 821	211 683	194 505	168 961	167 012	132 288	163 429	135 149	132 382	140 634	97 147
Greece	65 730	61 641	78 247	65 696	87 780	52 043	35 142	47 256	80 898	108 123	101 424
Egypt	9 618	8 714	8 018	10 740	14 884	26 278	32 013	56 886	103 472	95 135	107 675
Italy	78 762	90 462	63 001	91 113	94 750	78 727	53 253	60 102	67 514	72 798	68 952
Portugal	1 549	249	549	544	779	1 534	463	1 393	7 837	20 897	20 516
Israel	114 607	94 774	70 444	54 592	54 257	30 775	23 586	23 343	27 641	18 937	21 584
Tunisia	14 629	22 876	20 834	24 349	21 377	21 539	16 992	18 545	18 212	18 843	16 458
Turkey	21 243	7 134	13 538	10 125	16 238	21 562	18 189	14 541	30 598	13 878	8 991
Cyprus	18 549	18 549	18 528	18 507	18 269	16 940	16 698	16 953	10 982	7 454	7 634
Others	55 174	36 001	44 674	37 134	46 921	41 853	43 025	38 198	32 403	17 568	16 246
Total southern hemisphere	**425 172**	**417 136**	**470 171**	**483 822**	**423 607**	**601 339**	**436 442**	**498 687**	**471 054**	**555 620**	**518 936**
South Africa	228 358	205 917	270 758	265 228	272 092	312 701	280 941	294 772	256 234	337 210	288 663
Argentina	73 438	74 705	72 957	53 324	31 454	81 157	59 659	64 207	78 022	74 053	80 093
Uruguay	37 175	46 350	49 698	51 623	25 518	48 520	38 664	55 325	51 776	74 956	64 847
Brazil	71 752	67 407	49 944	86 178	63 325	116 608	23 377	48 956	50 076	20 177	47 601
Zimbabwe	13 069	21 528	24 972	24 651	28 039	39 576	32 034	31 968	13 628	10 355	13 642
Chile	86	28	45	193	257	905	723	1 861	16 187	30 133	12 972
Australia	374	774	1 571	1 414	2 311	1 440	1 045	1 597	4 018	4 426	10 079
Others	921	427	226	1 212	612	433	-	-	1 113	4 311	1 041

* Extra-EU imports and EU production (Spain, Italy, Greece, Cyprus, Portugal) / Note: EU-15 from 1995 to 2003, then EU-25 since 2004 / Source: Eurostat