

Review of the 2001/2002 citrus season

An honourable performance

The results were markedly down on the 'excellent vintage' of 2000/2001. The average season price nevertheless remained at a good level for all families of citrus except for lemon. On the one hand, only average volumes were shipped to the EU as the eastern European markets took a larger proportion than previously of the large potential available this season. Furthermore, the competition for the other 'basic' fruits was modest (the European apple harvest volume was mediocre, and banana shipments were measured). The overall trade context was not very favourable as 11 September had aggravated the existing sluggishness. The confirmation of the rise of Turkey, especially in easy peelers, is among the noteworthy features of the season.

Easy peelers

Numerous difficult episodes marked the 2001/2002 season. Firstly, the early maturity of most varieties combined with unfavourable weather (somewhat high temperatures combined with rainfall and then frost in certain zones) caused serious quality problems resulting in considerable ups and downs on the market. In addition, the Spain-USA Medfly crisis also had a negative impact. Finally, the German market was disappointing as the economic situation led a large proportion of consumers to prefer cheaper oranges to easy peelers.

The balance is nevertheless satisfactory in economic terms on western European markets. As an example, the average price in France fell in comparison with the preceding season but remained at a good level. The quantities shipped were fairly ample this season for all markets as a whole (11% up on 2000/2001 and 6% up on the average) but modest in the EU (3% down on average). The eastern European markets developed considerably, taking nearly 40% more than the average of previous seasons.

Orange

The season was fairly satisfactory on EU markets in spite of a particularly

difficult start (late end to the southern hemisphere seasons, abundance of cheap clementines). On the one hand, the quantities available in the EU were only 2% larger than average in spite of an overall 10% increase in exports in comparison with 2000/2001 and 5% in comparison with the average. Demand was also healthy, with easy peeler customers often falling back on orange for reasons of quality (there were numerous problems in easy peelers) or economics, as mentioned in the preceding paragraph.

Grapefruit

The volumes sold decreased substantially once again. The market thus lost nearly 50 000 tonnes in five seasons, with the volumes traded decreasing from some 255 000 tonnes in 1997/1998 to 209 000 tonnes in 2001/2002. The decrease goes a long way towards explaining the excellent average price, equal to that of the last season. Other factors such as the poor competition from Honduras and Cuba at the beginning of the season and the quota applied to small Florida fruits (grades 48 and 56) until February also contributed to this good performance. Other trends appeared in addition to the shrinking of the market. Turkey continued to increase its market share at the expense of Israel, which lost its

position as second largest winter supplier of the European Union by a considerable margin.

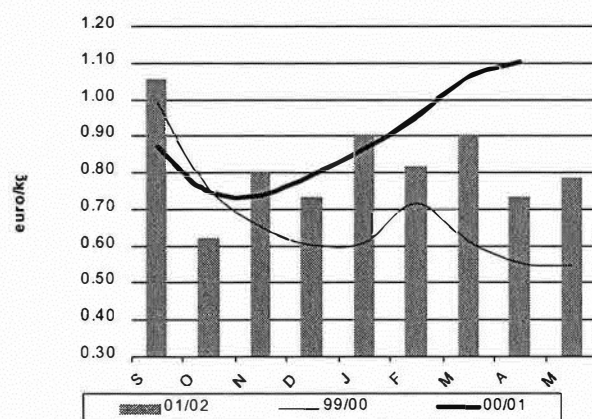
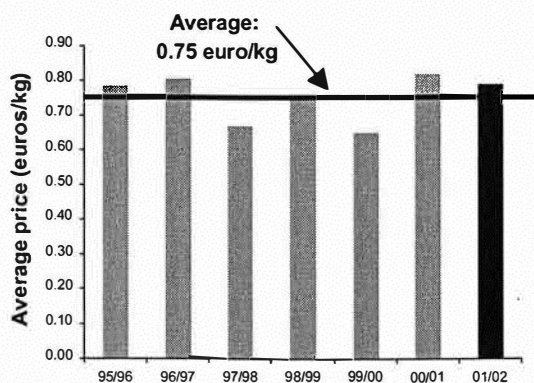
Lemon

The season was particularly difficult. Record harvests were achieved in two of the main Mediterranean producer countries (more than 1 000 000 tonnes in Spain and nearly 600 000 tonnes in Turkey, the latter overtaking Italy for the first time). Spanish exports attained only a moderate level, as producers sent record volumes for processing (nearly 220 000 tonnes against some 140 000 to 170 000 tonnes in previous seasons). However, exports targeted the EU markets as Turkish competition was particularly strong in eastern Europe. Turkey does not possess large processing facilities and concentrated on the fresh fruit market, exporting more than 280 000 tonnes in 2001-2002 (against 130 000 to 200 000 tonnes in preceding years), mainly to Eastern European markets. The average price in France thus reached the lowest level for seven years ■

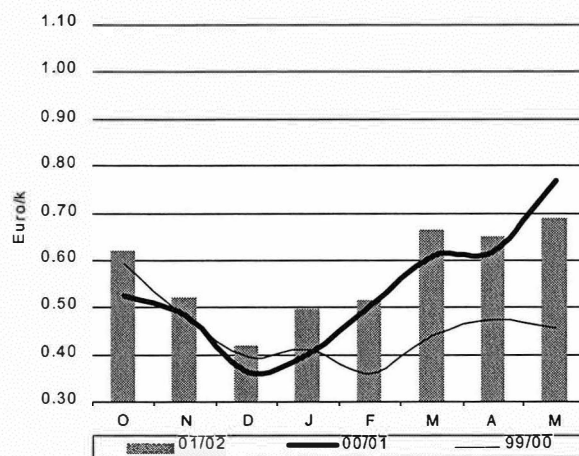
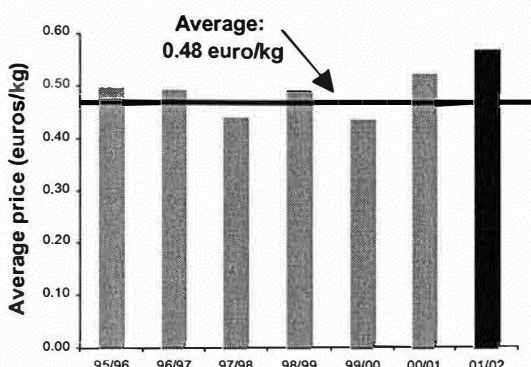
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France — Price at import stage

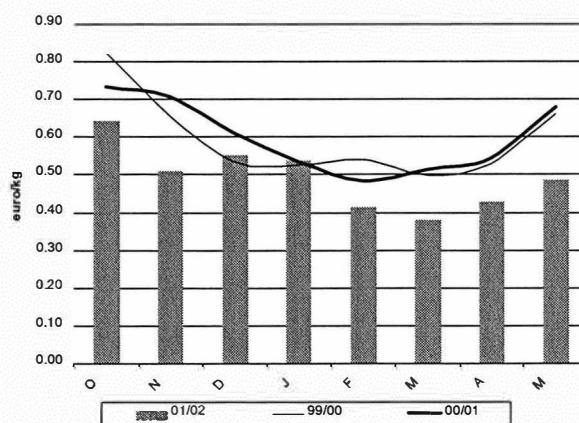
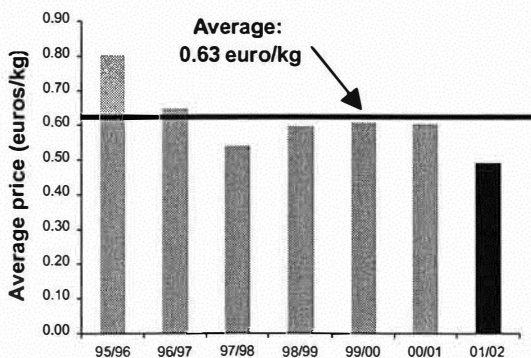
Easy peelers



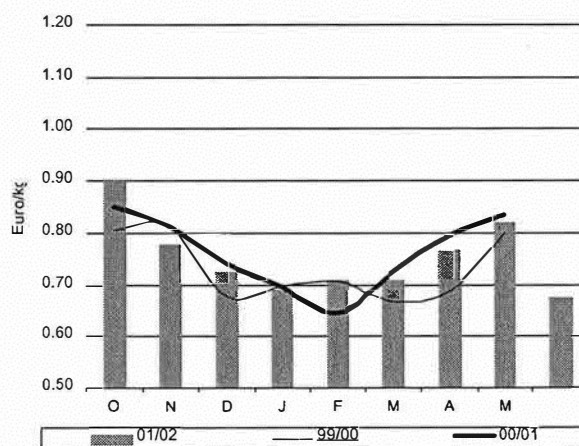
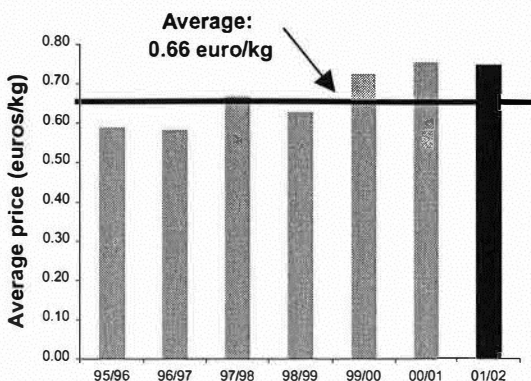
Orange



Lemon



Grapefruit



Source: CIRAD-FLHOR Market News Service, Pomona

Citrus 2001/2002

Mediterranean production

(000 tonnes)

Citrus	Total	France (Corsica)	Spain	Morocco	Algeria	Tunisia	Italy	Israel	Cyprus	Greece	Turkey	Egypt (1)	Gaza (1)
Easy peelers													
Production	4 225.9	24.8	1 778.1	405.8	111.0	42.4	611.1	83.4	48.7	67.0	410.0	643.6	-
Domestic sales	1 844.8	1.0	232.0	213.7	111.0	42.4	402.3	30.0	12.4	27.3	146.4	626.3	-
Industry	439.5	0.5	252.6	2.5	-	-	130.0	28.0	5.6	1.3	19.0	-	-
Losses/withdrawals	141.4	2.3	108.5	-	-	-	9.9	-	-	11.7	-	9.0	-
Export sales	1 800.2	21.0	1 185.0	189.6	-	-	68.9	25.4	30.7	26.7	244.6	8.3	-
Orange													
Production	9 997.4	-	2 923.7	725.5	140.0	185.9	1 828.6	159.9	92.8	1 077.0	820.0	1 984.6	59.4
Domestic sales	5 243.5	-	924.4	468.2	118.0	163.8	967.2	62.0	39.2	261.2	557.2	1 674.2	8.1
Industry	1 708.9	-	484.8	17.3	22.0	-	691.3	64.0	20.0	319.7	75.5	-	14.3
Losses/withdrawals	374.5	-	65.7	-	-	-	42.1	-	-	240.1	-	26.6	-
Export sales	2 670.5	-	1 448.8	240.0	-	22.1	128.0	33.9	33.6	256.0	187.3	283.8	37.0
Lemon													
Production	2 643.5	-	1 017.8	20.0	-	24.4	571.4	19.0	20.0	107.7	590.0	268.8	4.4
Domestic sales	989.8	-	140.0	19.9	-	24.4	224.6	15.0	5.0	57.1	263.0	239.0	1.8
Industry	599.4	-	218.0	-	-	-	322.5	4.0	4.0	10.0	25.0	15.0	0.9
Losses/withdrawals	239.9	-	178.2	-	-	-	5.6	-	-	32.3	20.0	3.8	-
Export sales	814.4	-	481.6	0.1	-	-	18.7	-	11.0	8.3	282.0	11.0	1.7
Grapefruit													
Production	529.7	-	31.0	3.0	-	-	51.5	250.3	37.6	8.8	140.0	3.0	4.5
Domestic sales	89.3	-	1.4	1.9	-	-	47.5	20.0	3.0	4.1	8.2	2.3	0.9
Industry	202.9	-	3.0	0.6	-	-	3.4	162.0	10.0	0.8	19.5	-	3.6
Losses/withdrawals	2.0	-	-	-	-	-	0.3	-	-	1.7	-	-	-
Export sales	235.5	-	26.6	0.5	-	-	0.3	68.3	24.6	2.2	112.3	0.7	-
Others citrus													
Production	51.6	-	-	12.0	-	6.6	25.0	8.0	-	-	-	-	-
Domestic sales	48.7	-	-	11.6	-	6.6	27.5	3.0	-	-	-	-	-
Industry	25.2	-	-	0.4	-	-	24.8	-	-	-	-	-	-
Losses/withdrawals	0.2	-	-	-	-	-	0.2	-	-	-	-	-	-
Export sales	5.0	-	-	-	-	-	-	5.0	-	-	-	-	-
Total													
Production	17 448.1	24.8	5 750.6	1 166.3	251.0	259.3	3 087.6	520.6	199.1	1 260.5	1 960.0	2 900.0	68.3
Domestic sales	8 216.1	1.0	1 297.8	715.3	229.0	237.2	1 669.1	130.0	59.6	349.7	974.8	2 541.8	10.8
Industry	2 975.9	0.5	958.4	20.8	22.0	-	1 172.0	258.0	39.6	331.8	139.0	15.0	18.8
Losses/withdrawals	758.0	2.3	352.4	-	-	-	58.1	-	-	285.8	20.0	39.4	-
Export sales	5 525.6	21.0	3 142.0	430.2	-	22.1	215.9	132.6	99.9	293.2	826.2	303.8	38.7

(1) estimates

Source: CLAM

Citrus — Mediterranean Basin

2001/2002 — Exports by variety

(000 tonnes)

Citrus	Total	France (Corsica)	Spain	Morocco	Algeria	Tunisia	Italy	Israel	Cyprus	Greece	Turkey	Egypt (1)	Gaza (1)
Satsuma	250.5	-	111.2	-	-	-	-	-	-	-	139.3	-	-
Clementine	1 082.2	21.0	840.1	122.0	-	-	63.3	-	-	26.5	9.3	-	-
Mandarin/Wilking	172.1	-	90.0	0.6	-	-	5.6	-	-	-	70.3	5.6	-
Ortanique	46.0	-	-	13.3	-	-	-	4.4	28.3	-	-	-	-
Nova	112.7	-	85.4	5.2	-	-	-	10.1	0.3	-	11.7	-	-
Others	136.7	-	58.3	48.5	-	-	-	10.9	2.1	0.2	14.0	2.7	-
Total easy peelers	1 800.2	21.0	1 185.0	189.6	-	-	68.9	25.4	30.7	26.7	244.6	8.3	-
Navel/Navelina	1 431.4	-	904.4	31.7	-	-	12.8	0.7	-	204.8	142.4	134.6	-
Salustiana	125.8	-	98.0	27.8	-	-	-	-	-	-	-	-	-
Shamouti	35.0	-	-	-	-	-	-	22.9	-	-	6.1	-	6.0
Common blond	34.2	-	-	-	-	-	-	-	-	2.6	-	31.6	-
Moro-Tarocco	84.3	-	-	-	-	-	84.3	-	-	-	-	-	-
Maltese	21.8	-	-	-	-	21.8	-	-	-	-	-	-	-
Sanguinelli	11.6	-	-	-	-	-	11.6	-	-	-	-	-	-
Other blood oranges	33.6	-	6.5	27.1	-	-	-	-	-	-	-	-	-
Verna	-	-	-	-	-	-	-	-	-	-	-	-	-
Ovale	6.8	-	-	-	-	-	2.6	-	0.9	-	3.3	-	-
Late	883.5	-	437.9	152.9	-	0.3	16.7	10.3	32.7	48.6	35.5	117.6	31.0
Bitter	2.5	-	2.0	0.5	-	-	-	-	-	-	-	-	-
Total oranges	2 670.5	-	1 448.8	240.0	-	22.1	128.0	33.9	33.6	256.0	187.3	283.8	37.0
Total lemons	814.4	-	481.6	0.1	-	-	18.7	-	11.0	8.3	282.0	11.0	1.7
White grapefruit	73.7	-	26.6	0.5	-	-	0.3	9.4	24.6	2.2	9.4	0.7	-
Other grapefruits	161.8	-	-	-	-	-	-	58.9	-	-	102.9	-	-
Total grapefruits	235.5	-	26.6	0.5	-	-	0.3	68.3	24.6	2.2	112.3	0.7	-
Others	5.0	-	-	-	-	-	-	5.0	-	-	-	-	-
Total	5 525.6	21.0	3 142.0	430.2	-	22.1	215.9	132.6	99.9	293.2	826.2	303.8	38.7

(1) estimates

Source: CLAM