2002/2003 citrus season forecasts
Details by product

Easy peelers
The quantities overall will be very large in spite of a further decrease in the satsuma potential. The volumes of hybrids are reaching record levels as a result of the strong increase in potential quantities of early fruits such as Nova and later varieties like Fortuna. In contrast, the quantities of ortaniques, hybrids available right at the end of the season, will be lower than average. The development of clementines is less marked with regard to the trend for all varieties. However, the disparities between cultivars are great. The earliest varieties like Marisol continue to make distinct progress while season fruits like Nules are somewhat down in comparison with an average season. Varieties such as Clemenpons, Arrufatina and Oronules, all three of which are early clementines from Spain, and hybrids such as Afourer (from Spain and Morocco) and Or (Israel) will continue their growth.

Orange
As for easy peelers, large volumes are expected. The quantities of Navel/Navelina are similar to those of last season and much higher than average. However, blood oranges now form only 5% of supplies and are continuing to decrease. The fall since the early 1990s in the quantities of blond fruits such as Salustiana and Shamouti displays a pause. The most spectacular increase of the season will be the late varieties again, with fresh increases in Lane Late and Navelate.
Quantities should be substantial during the first part of the season, with large amounts of early clementines and Naveline. Supplies of clementines will be more modest in November and December as a result of only average supplies of Nules. However, increased supplies of Nova will counter-balance this to a certain degree in a context of large supplies of oranges. Quantities should be large during the second part of the easy peeler season, except for the very end of the season when the quantity of ortaniques will be down. Likewise, supplies will be plentiful during the late orange season. The fresh increase in quantities of Lane Late and Navelate from Spain will probably postpone the beginning of the Valencia season.

Lemon
Supplies will return to normal levels on the lemon market after the very large volumes of the 2001/2002 season. The Spanish potential is similar to that of last year while that of Turkey will decrease considerably.

Grapefruit
The potential of the Mediterranean origins should be slightly greater than last year's, with an increase in Israel making up for a decrease in Turkey. Overall supplies to the European market should nevertheless display a substantial shortfall as Florida production is markedly down and the shipment of coloured fruits to Japan from Florida will probably increase ■

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Market context and the availability of competing products

The panorama of the markets of fruits competing with citrus is more contrasted than in 2001/2002. Although the shortage of apples is even more marked than last year, the same does not apply to kiwis and bananas.

The European apple harvest was down again (- 3% in comparison with 2001) and is well below the performance of an average season (- 6.5%). Only Italy, the leading producer in the European Union, has large quantities (+ 8% in comparison with the average). The quantities available are down in France (- 3.6%) and there is a clear shortage in the other major producer countries in the EU (- 20% in Germany, - 11% in Spain and approximately - 30% in the United Kingdom, the Netherlands and Belgium). The deficit will be particularly marked in the second part of the season.

In contrast, kiwi supplies will be more plentiful. Italian production will recover to at least an average level after last year's marked deficit. Likewise, the French harvest will be larger this year.

Similarly, the banana market should be at least fairly amply supplied until the end of 2002.

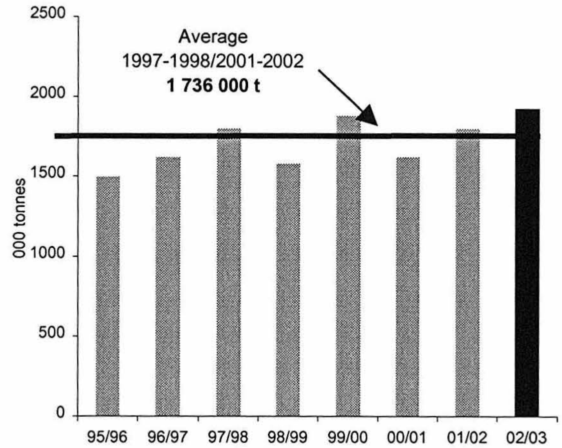
Citrus — 2002/2003 Export forecasts — Mediterranean Basin

Easy peelers

Easy peelers — 2002/2003 Export forecasts Mediterranean Basin

000 tonnes	Season		Trend	Average of 5 last seasons	Trend for 2002/2003
	2002/2003	2001/2002			
Clementine	1 154	1 082.2	7%	1 086	6%
Mand./Wilking	205	172.1	19%	174	18%
Satsuma	229	250.5	- 9%	224	2%
Nova	140	112.7	24%	108	30%
Ortanique	45	46.0	- 3%	49	- 8%
Others	153	137.1	11%	96	59%
Total	**1 926**	**1 800.6**	**7%**	**1 737**	**11%**

Source: CLAM

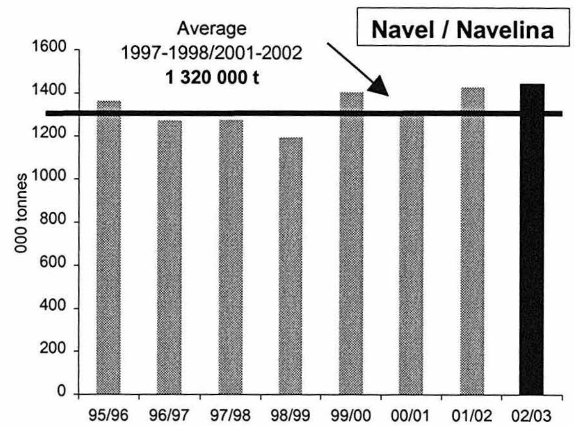


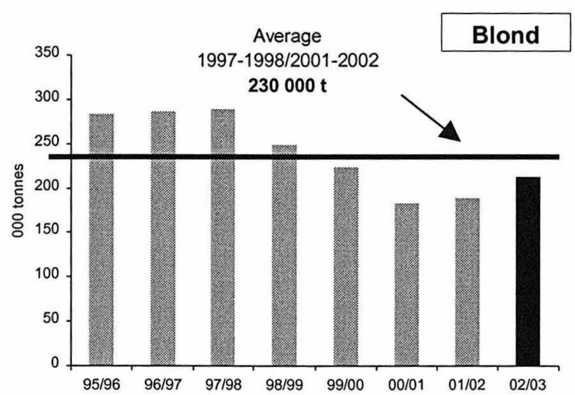
Orange

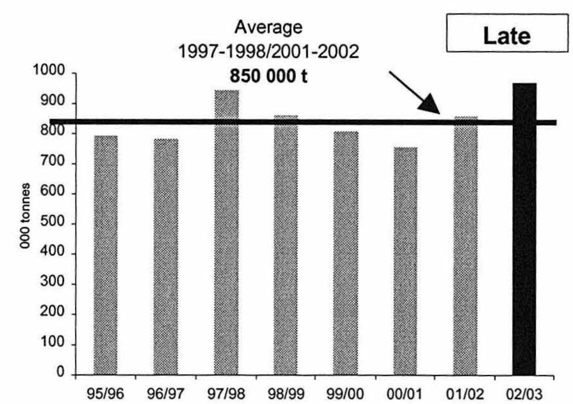
Orange — 2002/2003 Export forecasts Mediterranean Basin

000 tonnes	Season		Trend	Average of 5 last seasons	Trend for 2002/2003
	2002/2003	2001/2002			
Navel/navelina	1 447	1 431.4	1%	1 322	9%
Late	970	859.0	13%	847	15%
Blond	213	189.0	13%	227	- 6%
Blood	139	151.3	- 8%	149	- 7%
Total	**2 769**	**2 630.7**	**5%**	**2 545**	**9%**

Source: CLAM





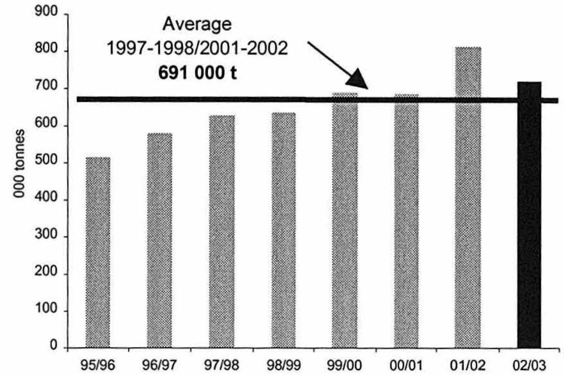


Lemon

Lemon — 2002/2003 Export forecasts Mediterranean Basin

000 tonnes	Season		Trend	Average of 5 last seasons	Trend for 2002/2003
	2002/2003	2001/2002			
Spain	500	482	4%	487	3%
Turkey	200	282	- 29%	161	24%
Greece	8	8	1%	23	- 64%
Cyprus	12	11	9%	14	- 15%
Total	**720**	**783**	**- 12%**	**685**	**4%**

Source: CLAM



Source: CIRAD-FLHOR Market News Service, CLAM, Pomona