2003/2004 citrus season forecasts
Details by product

Easy peelers

All the factors seem to be assembled for a good 2003/2004 season. It should be possible to avoid the recurrent over-production from mid-October to mid-November observed in recent seasons. Smaller quantities of early varieties will be available while demand should be livelier both in the European Union (with a more attractive varietal mix with less Marisol and more Clemenpons/Oronules) and for long distance exports (with shipments to the United States starting at the beginning of the season). The heart of the season should be more generously supplied with clementines than in previous years (a big season for Nules). However, the small quantities of Nova will help to reduce overall supplies to a lower level. The quantities of exports to the United States and Eastern Europe will play a capital role during this period of more tense market balance (mid-November to early December). The growth of these markets in recent seasons (15% per year in Eastern Europe!) makes the situation more peaceful, even if the rise of the euro against the other currencies is undoubtedly a handicap. Supplies seem thin during the last part of the season (8% lower than average for hybrids).

Orange

The potential similar to that of last year on a market that seems to have displayed a growth trend for two seasons, thanks to the recovery of consumption in Eastern Europe is a fairly good sign. But the varietal mix is different to last year's. The first part of the season in which Navel and Naveline are dominant will be less well supplied than last year. In contrast, larger quantities will be available during the period devoted to late varieties as a result of the steady development of the areas under Lanelate. As was the case last year, the Valencia market may be squeezed between that of Navelate and the start of the summer season. However, the strong decrease in European production of stone fruits and kiwi should be particularly marked during this period. This could generate a transfer of consumption to late oranges.

Lemon

The quantities available should be very similar to last year's. The considerable decrease of the Turkish potential, especially at the beginning of the season, is fairly precisely compensated by an increase in Spanish Primofiore. The ability of Spanish exporters to develop shipments to Eastern Europe will be a determinant factor in market balance.

Grapefruit

Mediterranean supplies should be similar to last year's and fairly average. However, the small size of Turkish fruits could strengthen the trend for the development of shipments to Eastern Europe. The quantities from Florida should also be fairly similar to last year's, in spite of a 9% increase in production. Autumn rainfall may cause a decrease in potential. In addition, the Japanese market is continuing its switch to coloured fruits. The quantities available on the EU market should therefore be in phase with consumption that tends to dwindle a little more each year ■

Market context and availability of competing produce

The market context promises to be exceptionally clear. The 2003/2004 European apple harvest is dipping beneath the 7-million-tonne mark (-3% in comparison with last year and 11% lower than the average). Production has not been as modest since 1991. Frost and hail caused serious losses in the main producer countries (the Italian crop is 6% down on last year and the French crop 2%). Golden delicious, the European heavyweight, is one of the most affected varieties. However, the potential problems resulting from the heat wave will probably lead to practically normal supply during the first part of the season followed by a marked shortage. The new EU members have harvested 6% more than last year and 8% more than average.

The same causes have the same effects on pears, with a small harvest (9% down on 2002 and 6% lower than average). All varieties are strongly affected except for Conference. France is particularly affected as the decrease is 20% in comparison with 2002 and 27% lower than the average. Production in Italy, the leading EU producer, is 6% down on last year's.

Finally, as if it were necessary to complete the black picture, the quantities of kiwi available are also smaller. The 450 000 t expected in the northern hemisphere is 4% down on the last season. Although the French harvest is practically normal, the fall is significant in Greece (-30%). The production losses caused by frost in Italy should be partially compensated by the start of production of new orchards.

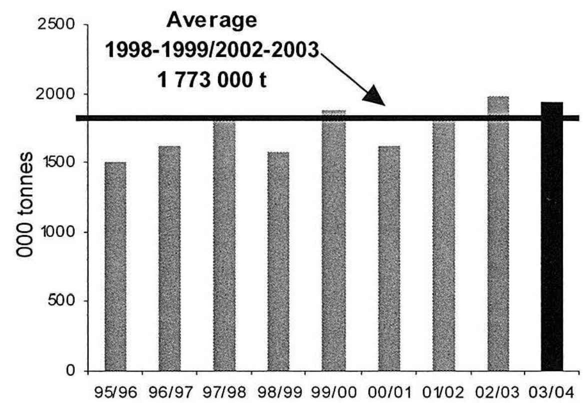
Citrus — 2003/2004 Export forecasts — Mediterranean Basin

Easy peelers

Easy peelers — 2003/2004 Export forecasts Mediterranean Basin

000 tonnes	Seasons 2003/2004	Seasons 2002/2003	Trend	Average of 5 last seasons	Trend for 2003/2004
Satsuma	**292**	288.1	+ 1%	232	+ 26%
Clementine	**1 211**	1 199.8	+ 1%	1 101	+ 10%
Mand./Wilking	**146**	189.5	- 23%	180	- 19%
Ortanique	**36**	36.3	- 1%	45	- 19%
Nova	**138**	125.2	+ 10%	105	+ 31%
Others	**113**	143.5	- 22%	112	+ 1%
Total	**1 935**	**1 982.4**	**- 2%**	**1 773**	**+ 9%**

Source: CLAM

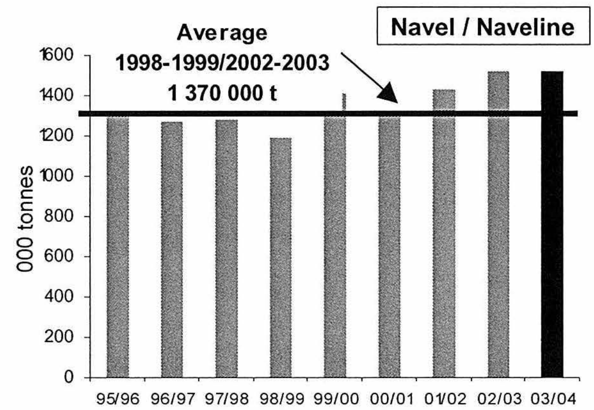


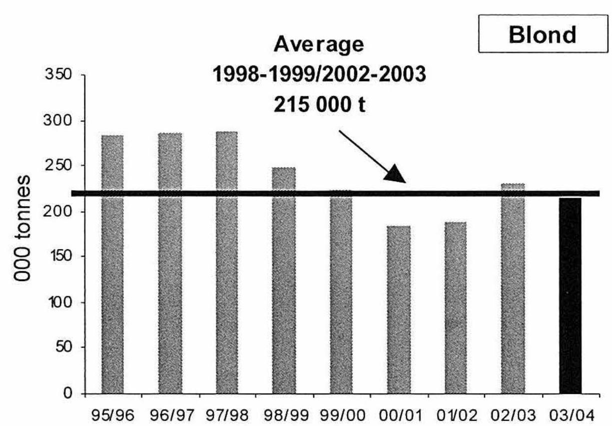
Orange

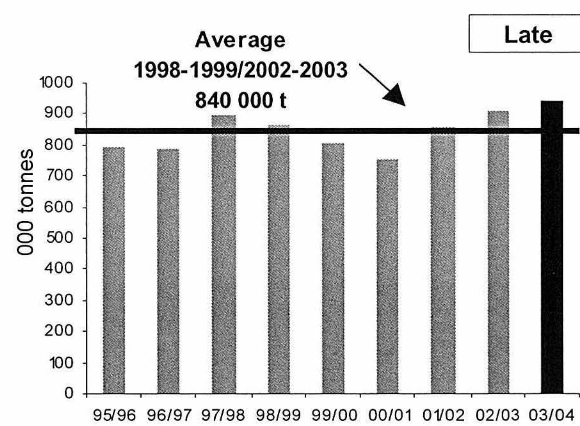
Orange — 2003/2004 Export forecasts Mediterranean Basin

000 tonnes	Seasons 2003/2004	Seasons 2002/2003	Trend	Average of 5 last seasons	Trend for 2003/2004
Navel/naveline	**1 516**	1 517.6	0%	1 370	+ 11%
Blond	**216**	229.7	- 6%	215	0%
Blood	**102**	116.4	- 12%	140	- 27%
Late	**940**	910.7	+ 3%	839	+ 12%
Total	**2 773**	**2 774.1**	**0%**	**2 561**	**+ 8%**

Source: CLAM





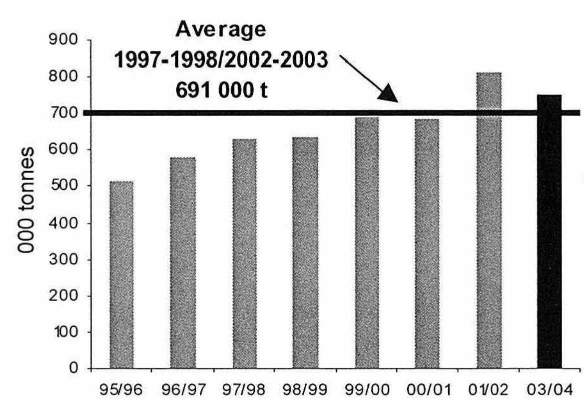


Lemon

Lemon — 2003/2004 Export forecasts Mediterranean Basin

000 tonnes	Seasons 2003/2004	Seasons 2002/2003	Trend	Average of 5 last seasons	Trend for 2003/2004
Spain	**550**	501	+ 10%	479	+ 15%
Cyprus	**11**	13	- 13%	14	- 22%
Turkey	**170**	191	- 11%	161	+ 6%
Greece	**20**	24	- 18%	23	- 16%
Total	**751**	**752**	**0%**	**691**	**+ 9%**

Source: CLAM



Source: CIRAD-FLHOR Market News Service, Pomona