

Mediterranean citrus

Fresh market world leaders

Citrus fruits are one of the pillars of Mediterranean agriculture, with citrus orchards covering nearly a million hectares in 2003 according to FAO. The 19 million tonnes harvested (all varieties) in 2003 make the region one of the leaders in terms of production (18% of the world total).

Spain, with a harvest total of 6.3 million tonnes in 2003, clearly dominates Mediterranean citrus production, followed by Italy with 3.1 million tonnes. Turkey, whose plantations are increasing strongly thanks to the new orchards in eastern Anatolia, is disputing the third place with Egypt. Morocco and Greece each produce some 1.3 to 1.4 million tonnes. Significant quantities of all the major families of citrus are present. The region thus accounts for approximately 20% of world lemon and easy peeler production and 16% of oranges. Grapefruit is the least developed group with about 11% of the world total.

No statistics exist on the direct jobs generated by the citrus growing sector. However, considering minimum labour requirements of 133 days per hectare in mechanised planting (J.C. Praloran), it can be estimated that the sector probably employs a minimum of 550 000 people. Furthermore, citrus growing also helps to settle populations and to set up a social fabric in often underprivileged rural zones.

Export growth reservoirs

Outlets for production are fairly variable from one country to another. Spain, Turkey, Morocco and Cyprus are resolutely focused on exports, with more than a third of the quantities produced handled by international trade. Thus, with export volumes exceeding 5.8 million tonnes in 2002/2003—a market share of about 60%—the Mediterranean very clearly dominates world trade in fresh citrus. Overall growth in the world citrus

trade has been about 1.5% per year over the last decade and thus distinctly smaller than that of other fruits. Indeed, the increase in the standard of living in the developed countries has caused a transfer of demand from fresh to processed products such as juice. The stagnation of orange sales and the slowing of those of grapefruit hide the rapid, strong development of international trade in easy peelers and lemon, both of which display growth of 3 to 4% per year over the past 10 years, similar to those of the most dynamic produce.

In addition, the development prospects for the coming years remain very strong. The community market has considerable margins for growth and the Mediterranean area is practically the sole supplier from mid-October to June. The constant efforts made in breeding make it possible to extend the season (new early or late hybrids) and to replace the varieties that are least attractive for consumers.

Certain non-traditional markets such as the United States or Eastern Europe will continue to develop strongly, in particular for products such as easy peelers, lemon and orange. Finally, other export destinations with strong potential, such as Japan, have started to open their doors to citrus from the Mediterranean. These prospects should allow the Spanish, Turkish and, to a lesser degree, Moroccan citrus industries to continue to enjoy strong growth.

Other countries are devoting production mainly to domestic consumption. Citrus fruits make a strong contribution to food self-

sufficiency in Tunisia, Egypt and Algeria. With 30 to 50 mg per 100 g, these fruits form the main source of vitamin C in the Mediterranean area. Their carotene content is also very significant. Thanks to these two components, citrus fruits contribute to preventing heart disease and certain kinds of cancer.

A small role for industry

Industry is the main outlet in certain countries such as Italy (concentrated lemon) and Israel (concentrated grapefruit). Spain is more oriented towards the fresh fruit market but nevertheless processes large quantities—about one million tonnes. Morocco also has an extraction/concentration unit. Although the total volume processed exceeds 3 million tonnes, the Mediterranean plays only a fairly minor role on the world concentrated juice market, very markedly dominated by Brazil and the United States (with respectively 11.8 and 10.7 million tonnes of citrus delivered to industry in 2001, that is to say nearly 80% of the world total). Spain's share of the canned easy peeler segment market was very significant in the 1990s but has decreased strongly as the result of competition from China. The processing sector is mainly used as a tool for regulating the quantities supplied to the market for fresh fruits, except in Italy and Israel ■

Eric Imbert, CIRAD-FLHOR
eric.imbert@cirad.fr