

2004/2005 citrus season forecasts

Details by origin

Spain: test season on Asian markets

Spanish production is displaying a pause in its strong growth dynamics after several record-breaking seasons. Weather problems caused significant losses in some parts of the Valencia region and Murcia and varietal reconversion is still in progress. Nevertheless, although the 6.1 million tonnes forecast is some 2% down on 2003/2004, Spanish citrus growing will nevertheless display its second best performance of all time. Furthermore, trends are very varied from one family of citrus to another and some groups such as **easy peelers** even display a spectacular increase (2.3 million tonnes expected, that is to say a 17% rise in comparison with 2003/2004). A possible downward revision of this estimate to take into account the heavy rainfall and hail that hit the Valencia region at the beginning of September will not affect the trend. Supplies should be ample throughout the season. The structural decrease of the Satsuma group is continuing. The quantities available for export (mainly for the British market) should even decrease more noticeably than the decrease in production would indicate as the special saving clause ruled by Brussels for Chinese

canned produce should enable the re-launching of the processing sector. The decrease will be well compensated by the strong development of early clementines. The production of new clones (led by Oronules and Clemenpons) is exploding and approaching that of Marisol, volumes of which are stable in spite of ongoing varietal reconversion. The heart of the season will also be well supplied. Firstly, large quantities of Nules clementines will be available. Secondly, Clemenvilla production will return to above average levels after the shortage in the last season. The February dip in volumes caused by *Alternaria* (a fungus) in Fortuna orchards will be less marked than in 2003/2004 as it will be partially compensated by increasing quantities of Ortanique. No satisfactory varietal alternative to Fortuna has yet been found.

With production down by about 6% in comparison with last year, **orange** is one of the fruits most seriously affected by frost at the end of February/beginning of March, with significant losses of Naveline. Salustiana supplies will also be smaller. However, although the quantities available would seem

short for the beginning of the season, the same does not apply to the second part. The continued increase in the production of Lanelate will more than make up for the decrease in Valencia production.

Lemon production will be some 15% down because of late frost and then rain in June in the Murcia region. Verna, the variety shipped during the second part of the season, is particularly seriously affected. The coming into production of new plantations will lessen the shortage of Primofiori.

Production is continuing to increase in Andalusia and will form more than 20% of Spanish production this season. The aim is not just to complete the supplies from the Valencia region at the end of the season but also to develop specific market segments (for example; two-thirds of the area under organic citrus in Spain—some 1 000 ha—is in Andalusia). The 2004/2005 season will be that of a turning towards Asia for Spanish exporters, whose portfolio already covers 71 buyer countries. Easy peelers can enter Japan for the first time, with extremely strict sanitary procedures. The South Korean market has also opened up since 3 October. However, shipments should remain very modest during this 'test' season. Uncertainty clouds certain destinations that have gained importance in recent seasons. What quantities of easy peelers will the United States be able to take in the context of a still unfavourable euro:dollar exchange rate? The possible doubling of customs dues on this market in retaliation to the new community measures for US products might aggravate the problem. How will the Polish market behave? If the end of the awarding of export refunds for this destination (and more generally to the other new member countries) does not worry operators, the distinct decrease in shipments last year is a real matter for concern.

Citrus — 2004/2005 export forecasts — Spain					
000 tonnes	Seasons		Trend	Average of 5 last seasons	Trend for 2004/2005
	2004/2005	2003/2004			
Total clementine	1 050.0	937.6	+ 12 %	881.7	+ 19 %
Satsuma	120.0	129.0	- 7 %	134.1	- 11 %
Mandarin/Wilking	80.0	128.1	- 38 %	113.0	- 29 %
Nova	150.0	148.8	+ 1 %	103.1	+ 45 %
Others	90.0	59.8	+ 51 %	51.7	+ 74 %
Total hybrids	440.0	465.7	- 6 %	401.9	+ 9 %
Total easy peelers	1 490.0	1 403.3	+ 6 %	1 283.6	+ 16 %
Naveline/Navel	850.0	982.7	- 14 %	911.8	- 7 %
Blond	132.0	163.2	- 19 %	106.9	+ 24 %
Blood orange	2.0	2.4	- 17 %	7.3	- 73 %
Late varieties	480.0	432.5	+ 11 %	384.7	+ 25 %
Total oranges	1 464.0	1 580.8	- 7 %	1 410.7	+ 4 %
Total lemons	550.0	549.2	0 %	498.3	+ 10 %
Total grapefruits	28.0	28.6	- 2 %	27.6	+ 2 %
Total	3 532.0	3 561.9	- 1 %	3 220.2	+ 10 %

Source: CLAM

Morocco: processing problems surface as Frumat sinks

Alternate bearing should have a positive effect on production in 2004/2005. The first forecast of the season mentions an increase of about 9% for easy peelers and about 16% for orange as weather conditions were favourable during flowering and setting. But this

increase requires normal rainfall this autumn as fruit grades are markedly down in the Souss, the region where nearly 60% of Moroccan citrus fruits are grown.

Supplies of clementines will be about 10% greater than last year and than average. The increase in the area planted with the late clone Nour is accentuating the positive effect of alternate bearing. The variety is often chosen by growers to replace Ortanique and the gradual abandoning of the latter is being confirmed (very poor export sales performance as a result of the ageing of the orchards). The potential probably approaches 55 000 tonnes this season. Part of the Fine clementine plantations are also being replanted with spontaneous mutations like Larache and Sidi Aissa, a larger fruit. The quantities of Afourer, a high-quality hybrid bred from Murcott, will continue to increase (to approximately 8 000 t against 7 400 t in 2003/2004). The variety is now protected in the EU under the name Nadorcott. The Spanish growers who have planted it must pay 7 euros per tree to make their orchards legal.

Maroc Late, the Moroccan name for Valencia Late, will probably be available in larger quantities than last year, greater than average. Washington blood oranges, Salustiana and Navel will continue to complete the export range in limited quantities. Plantations of Lanelate are increasing as the variety is considered as a strategic line.

Production should nevertheless still be limited. Although the export or grower/exporter sector continues to invest (in particular in certification—obtained in 2003/2004 by a significant proportion of the large groups), the world of production is still in the background. The national citrus plan that aims at 34 000 ha of replantation/extension between 1998 and 2010 has still not given the new stimulus that was hoped for. The replanting rate is only about 40% of that planned. The subsidy awarded, covering only 10% of the cost and a succession of seasons with disappointing economic returns seem to have taken the edge off the motivation of a proportion of growers. The gradual switch of landholding from the SODEA to the private sector could generate dynamism. The 7 700 ha of citrus owned by this state company (i.e. 10% of total land under citrus) have been or will be offered in two stages (2004 and 2005) to local or foreign private investors. The size of the lots varies between 800 and 1 200 ha. From this season onwards, the fresh fruit sector can no longer count of the market regulation provided until now by Frumat, the only processing company in Morocco. After another catastrophic season in 2003/2004, when only 2 000 t of fruit was processed (in comparison with more than 300 000 t at the end of the 1980s), the company went into official receivership in June. Its assets included three production sites (Casablanca, Kenitra and Sebti Guerdane) and a packaging unit.

Ready-prepared citrus. Del Monte trips but plays again

Convenience and quick preparation are undoubtedly two of the watchwords in food marketing today. Thus all the professionals in the citrus sector agree—probably rightly—that products such as trays of freshly peeled orange or grapefruit have strong potential. The launching by FDOC and Del Monte in October 2001 of a development project for a high-capacity machine seemed to have given the multinational firm a considerable lead. The prototype, described in *Fruitrop*, seemed promising. But, as several months of silence with regard to the progress of the project appeared to indicate, extrapolation of the technical to the industrial scale was a fiasco. The enzyme treatment essential for softening the peel in the light of the throughput considerably affected the quality of the finished product and reduced its shelf life. In addition, the peeling phase was far from being mastered from the technical point of view. So Del Monte announced in July that it was throwing in the sponge. The bill was a heavy one for the FDOC as it had invested nearly 600 000 dollars since the launching of the operation. However, fresh-cut citrus is still a strong strategic line for Del Monte and a new technology is already at the design stage at Coral Gables. The strong point of the machine built by ABL Costruzioni Meccaniche of Modena is that no prior enzyme treatment is required in spite of the high throughput (30 fruits per minute). Costing some 150 000 dollars, the investment will be paid off in the first year of operation according to the manufacturer.

Citrus — 2004/2005 export forecasts — Morocco					
000 tonnes	Seasons		Trend	Average of 5 last seasons	Trend for 2004/2005
	2004/2005	2003/2004			
Total clementine	206.1	180.3	+ 14 %	155.5	+ 33 %
Mandarin/Wilking	-	-	-	-	-
Ortanique	9.0	8.8	+ 2 %	12.5	- 28 %
Nova	6.3	1.8	+ 250 %	4.9	+ 28 %
Others	8.9	8.2	+ 9 %	27.2	- 67 %
Total hybrids	24.2	18.8	+ 29 %	44.6	- 47 %
Total easy peelers	230.3	199.1	+ 16 %	200.1	+ 15 %
Navel	26.0	13.5	+ 93 %	31.6	- 18 %
Blond	30.7	24.1	+ 27 %	28.4	+ 8 %
Blood orange	34.0	22.8	+ 49 %	27.7	+ 23 %
Late varieties	200.0	177.9	+ 12 %	179.2	+ 12 %
Total oranges	290.7	238.3	+ 22 %	266.9	+ 9 %
Total	521.0	437.4	+ 19 %	467.0	+ 11 %

Source: CLAM

Florida: a blow to the heart

August and September 2004 were undoubtedly the worst months ever experienced by Florida citrus growers. Three major hurricanes hit the 'Sunshine State' in forty days. Damage to both grapefruit and orange was considerable but differed between the species. A large proportion of the orange harvest remains to be marketed (about 176 million boxes against an average of 220 million boxes during the last five seasons). The same is not true of grapefruit, as Frances and then Jeanne swept through the heart of the Indian River area with winds of between 170 and 195 kph, wiping out two-thirds of production. The harvest forecast thus totals only about 15 million boxes (the quantities available have never fallen below 35 million boxes, even after the worst frosts that hit the state in the 1980s). How will the quantities be allocated between the fresh fruit market and industry? The processing sector normally handles about 60% of harvest potential (23 million of the 41 million boxes harvested in 2003/2004). Some

experts consider that the processing industry could be limited to 7 million boxes. Although existing stocks correspond to about 7 months of sales, the concentrate market would in this case be about 20% short in comparison with a normal year. Prices have more than doubled since the last hurricane. On this assumption, approximately 8 million harvest boxes would remain for fresh consumption (i.e. half of the quantity available last year) to be shared between the domestic and export markets. Operators will decide according to the prices proposed. There is no doubt that in this case the US and Japanese markets—the most profitable—would obtain more produce than the European market.

The cost price will in any case be very high for European and Japanese importers, given the farm gate price, even though the euro:dollar and yen:dollar exchange rates are very favourable. Another question arises: have the plantations suffered structural damage? It would seem that few trees were uprooted even though the winds were very strong. However, some operators fear that the presence of standing water in the orchards for a fairly long time might have caused root asphyxia. If this were to be true, there could also be a shortfall in the 2005/2006 season. This would be another hard knock for many very fragile companies in the citrus growing sector.

Citrus — 2004/2005 export forecasts — Florida

000 boxes	Seasons		Trend	Average of 5 last seasons	Trend for 2004/2005
	2004/2005	2003/2004			
White grapefruit	4 000	15 900	- 75 %	18 730	- 78 %
Coloured grapefruit	11 000	25 000	- 56 %	27 640	- 59 %
Total grapefruit	15 000	40 900	- 63 %	46 370	- 67 %

Source: USDA

Note: 1 box = about 38.6 kg

Italy: chi va piano va sano

Production should return to normal after two years with serious harvest deficits (the impact of the eruption of Etna on production in Sicily in 2002/2003 and then frost and a heat wave in 2003/2004). The harvest is increasing by about 15% for all the varietal groups except for grapefruit. The sector still lacks organisation and competitiveness and is still experiencing a slump.

Exports are still marginal in relation to production—the second largest in the Mediterranean area. Italian citrus fruits are exposed to increased competition from those of other Mediterranean origins, even on the domestic market. However, the sector is trying to restructure itself, in particular by operations financed by Brussels under the aegis of the *piano agrumi* (citrus plan). Thanks to

this, efforts in breeding are continuing. The aim for orange is the development of pigmented varieties (an Italian speciality) with a longer production calendar. Tarocco Sciré, currently being distributed, is harvested from January to March. Earlier clones (Tarocco Tapi, picked from December onwards) or later ones (Tarocco Messina, Misterbianco and Meli) are currently being studied. Tacle, an easy peeler bred by crossing Monreal and Tarocco, is little distributed as yet. Marketing operations are also planned or already set up to make more of these original fruits (a PGJ for Sicilian blood oranges, etc.). The processing sector is the main outlet for Italian citrus fruits and its European subsidy is to be lowered by 15% in 2004/2005 as the quantities sold to industry exceeded the maximum authorised last season.

Citrus — 2004/2005 export forecasts — Italy

000 tonnes	Seasons		Trend	Average of 5 last seasons	Trend for 2004/2005
	2004/2005	2003/2004			
Clementine	28.0	24.3	+ 15 %	47.6	- 41 %
Mandarin/Wilking	5.0	4.0	+ 25 %	5.5	- 9 %
Total easy peelers	33.0	28.3	+ 17 %	53.2	- 38 %
Navel	10.7	9.3	+ 15 %	11.0	- 2 %
Blond	14.8	13.3	+ 11 %	2.7	+ 456 %
Blood orange	58.3	51.7	+ 13 %	78.4	- 26 %
Late varieties	14.2	12.6	+ 13 %	16.2	- 12 %
Total oranges	98.0	86.9	+ 13 %	108.2	- 9 %
Total lemons	22.0	19.4	+ 13 %	21.1	+ 4 %
Total	153.0	134.6	+ 14 %	182.4	- 16 %

Source: CLAM

Corsica: all out for quality labels

The clementine harvest will return to an average level after the small volumes of 2003/2004. The fruits seem to be somewhat smaller than average and ripeness is back to normal after being very early in the last season. Growers are still working on making their produce stand out for its quality. Product conformity certification (*Certification Conformité Produit*, CCP) was

Citrus — 2004/2005 Export forecasts — Corsica					
000 tonnes	Seasons		Trend	Average of 5 last seasons	Trend for 2004/2005
	2004/2005	2003/2004			
Clementine	20	18.7	+ 7 %	20.2	- 1 %

Source: CLAM

obtained in 2003, the awarding of a PGI is in progress in Brussels and a *Label Rouge* is targeted for 2006. It is true that the fairly good economic

results of the last two seasons encourage the continuing of this kind of approach.

Israel: bouncing back into business

The recovery of Israeli citrus growing announced for several seasons has now become tangible. For the first time in years, forecasts for 2004/2005 indicate a larger harvest (with a marked increase in easy peelers and oranges). The uninterrupted succession of decreases experienced between the beginning of the 1980s and the last season resulted in a decrease in production from 1 800 000 t to less than 450 000 t.

The quantities of easy peelers available should increase by nearly 70% and exceed 55 000 t for export. Although the increase in Suntina is only modest (+ 15%), it is much more marked for Mineola, with nearly 10 000 t available for export. It can even be qualified as explosive for most of the new varieties, with the production of Or passing the 10 000-tonne mark for the first time.

Export intentions for Shamouti, the main Israeli variety, should increase by about 40%, that is to say as much as production. A slight decrease is forecast for grapefruit. Nevertheless, as the fresh fruit market is very promising both in Europe and Japan, exports should be considerably larger than the initial forecasts as the amounts destined for processing should decrease (65 000 t of coloured grapefruit and 78 000 t of white are currently scheduled for delivery to processors). Furthermore, in February a Volcani Center team revealed the launching of a new grapefruit hybrid, standing out by its 17% sugar content.

This overall increase results from growers renewed confidence in citrus growing. The water quotas available for farming have been increased after cuts in recent years and the price per cubic metre has

fallen considerably. Labour from Asia has made up for the shortage of Palestinian workers. The excellent economic results of the 2003/2004 season are also considered to be encouraging (although strongly linked to the very favourable sheqel:euro exchange rate).

Planting is therefore continuing strongly and the new areas put under citrus now exceed the areas grubbed up. The increase is reported to be 200 to 300 ha in 2004 (i.e. a total of approximately 18 000 ha). The new plantations are mainly in the central part of the country between Hadera and Ashkelon. New hybrids have been chosen (Or, Mor, Ora, Rishon and Merav) and also Shamouti and Newhall (early Naveline) oranges.

This season also marks a deep-seated change in sector supervision structures. The citrus division of the new Plant Marketing Board is replacing the CMBI which had existed since 1940. The Russian market seems to be one of the main strategic axes for development. A promotion campaign is planned in Russia in 2004/2005.

Furthermore, an agreement has been reached to settle the dispute between Israeli and European authorities concerning the customs tariff to be applied to fruits from the Gaza Strip and the West Bank. Mention of the town of origin of production must appear on the boxes, which then may or may not benefit from the preferential zero rating agreement between the EU and Israel.

Citrus — 2004/2005 Export forecasts — Israel					
000 tonnes	Seasons		Trend	Average of 5 last seasons	Trend for 2004/2005
	2004/2005	2003/2004			
Ortanique	6.0	4.9	+ 22 %	5.1	+ 18 %
Nova	18.1	15.1	+ 20 %	10.2	+ 77 %
Others	32.0	13.0	+ 146 %	13.8	+ 132 %
Total easy peelers	56.1	33.0	+ 70 %	29.1	+ 93 %
Navel	5.0	0.3	+ 1 567 %	1.3	+ 291 %
Blond	30.1	20.9	+ 44 %	31.6	- 5 %
Late varieties	10.0	8.0	+ 25 %	13.3	- 25 %
Total oranges	45.1	29.2	+ 54 %	46.2	- 2 %
White grapefruit	12.0	10.0	+ 20 %	12.9	- 7 %
Coloured grapefruit/ Sweetie	60.0	59.9	0 %	69.4	- 13 %
Total grapefruits	72.0	69.9	+ 3 %	82.3	- 12 %
Total lemons	4.9	0.0	-	1.0	+ 390 %
Total	178.1	132.1	+ 35 %	158.6	+ 12 %

Source: CLAM

Turkey: growth still strong

The Turkish citrus growing sector is hoping for success again after a financially disastrous 2003/2004 season. Production is rising strongly again, with an expected 2.2 million tonnes. The harvest will have increased by more than 600 000 t in only six seasons and the trend is probably far from over. Large areas in the Cukurova, a vast region running from Mersin in the west to Hatay in the south-east (Antakya), with Adana in the centre, are now available for citrus growing. A large proportion of the traditional cotton and maize has been shifted to the immense new irrigation perimeters created by the development of the Tigris and the Euphrates (the GAP project in eastern Anatolia, which plans the equipping of 1.8 million hectares, of which about 20% has been completed). The Cukurova was already the site of 70% of Turkish citrus production in 2003, including 90% of lemon (mainly in the Mersin area), 90% of grapefruit and 60% of orange and easy peelers (Adana and Hatay areas). Lemon is not included in new plantings, which favour the other categories of citrus. The scale of the planting of new orchards of Satsuma confirms Turkish citrus growers' interest in Western European markets. Easy peeler production should approach 550 000 t in 2004/2005, pulverising the previous record of 150 000 t set in 2003/2004. Size is obviously down

Citrus — 2004/2005 export forecasts — Turkey					
000 tonnes	Seasons		Trend	Average of 5 last seasons	Trend for 2004/2005
	2004/2005	2003/2004			
Total clementine	6.0	4.9	+ 22 %	6.3	- 4 %
Satsuma	175.0	103.0	+ 70 %	105.5	+ 66 %
Mandarin/Wilking	75.0	59.1	+ 27 %	60.0	+ 25 %
Nova	10.0	6.9	+ 45 %	9.9	+ 1 %
Others	35.0	26.0	+ 35 %	15.2	+ 131 %
Total hybrids	295.0	195.0	+ 51 %	190.6	+ 55 %
Total easy peelers	301.0	199.9	+ 51 %	196.9	+ 53 %
Naveline/Navel	148.0	108.9	+ 36 %	111.5	+ 33 %
Blond	4.0	4.3	- 7 %	5.8	- 31 %
Late varieties	19.0	20.9	- 9 %	27.0	- 30 %
Total oranges	171.0	134.1	+ 28 %	144.3	+ 18 %
Total lemons	300.0	160.1	+ 87 %	192.7	+ 56 %
Total grapefruits	90.0	113.6	- 21 %	98.8	- 9 %
Total	862.0	607.7	+ 42 %	632.7	+ 36 %

Source: CLAM

noticeably, especially in Satsuma. With 600 000 t expected, the lemon harvest should return to its peak level after two seasons of shortfall. Competition with Spain may well be fierce on the Russian market and, to a lesser extent, on the Ukrainian market. The quantities of orange will probably be well down on last year's, but still distinctly above average. The decrease in grapefruit production was to be expected for reasons of alternate bearing and the prolonged stay of the fruits on the trees in 2003/2004 because of marketing difficulties. But the scale of the decrease should be viewed in proportion. For reasons of speculation, the massive production losses in Florida seem to have spread to certain Turkish orchards!

The 25% decrease announced officially would appear to be a maximum and in any case a better reflection of the situation than the 50% or even 70% mentioned by certain exporters. The eastern markets (especially Russia, Ukraine and Romania) will keep priority for orange, easy peelers and lemon (especially as the rouble:lira exchange rate is less disadvantageous than in 2003/2004). But exporters should concentrate their shipments of grapefruit on a historically under-supplied community market. According to USDA, the amount of export subsidy awarded in the form of a deduction from export taxes will continue to decrease but should remain significant.

Greece: structural losses

Frost in February 2004 destroyed a significant proportion of last season's harvest and will also have consequences for the 2004/2005 harvest. Even though the experts still find it difficult to agree on the figures, it can be considered that there will be a substantial shortfall in lemon and easy peeler production.

In contrast, the decrease in the orange crop should be more moderate. The main export destinations for Greek citrus should continue to be Hungary, Poland and the Czech Republic. According to

Citrus — 2004/2005 export forecasts — Greece					
000 tonnes	Seasons		Trend	Average of 5 last seasons	Trend for 2004/2005
	2004/2005	2003/2004			
Clementine	19.7	24.5	- 20 %	29.0	- 32 %
Others	0.8	0.2	+ 300 %	1.6	- 49 %
Total easy peelers	20.5	24.7	- 17 %	30.6	- 33 %
Navel	222.5	234.0	- 5 %	229.3	- 3 %
Blond	8.0	5.0	+ 60 %	7.5	+ 7 %
Late varieties	32.0	22.5	+ 42 %	58.7	- 46 %
Total oranges	262.5	261.5	0 %	295.5	- 11 %
Total lemons	16.5	15.2	+ 9 %	20.4	- 19 %
Total	299.5	301.4	- 1 %	346.5	- 14 %

Source: CLAM

professionals, the halting of export refunds by Brussels for these

destinations is amply compensated by easier logistics.

Egypt: subsidies pruned

The excellent performance in 2003/2004 confirmed the change in part of the citrus growing sector. Exports attained 490 000 t for the first time, and so quantities have doubled in three seasons. The khamsin, a sand-bearing wind that blows during the flowering period, spared 2004/2005 production. In addition, new orchards are still being planted in the desert. The traditional Nile citrus growing zones are still the main areas but these recent plantings now account for 28% of total production. The varieties being developed also differ from the traditional Egyptian cultivars (Navel, Succari sweet orange and common mandarin under the local name Baladi) as they are grown for export. So the leading varieties are Valencia Late, Navelate Nova and Mineola. Export volumes should nonetheless decrease in 2004/2005. The government has decided to stop the

Citrus — 2004/2005 export forecasts — Egypt					
000 tonnes	Season		Trend	Average of 5 last seasons	Trend for 2004/2005
	2004/2005	2003/2004			
Mandarin/wilking	6.6	6.6	0 %	3.9	+ 68 %
Others	3.2	3.2	0 %	2.1	+ 52 %
Total easy peelers	9.8	9.8	0 %	6.0	+ 62 %
Navel	202.0	223.9	- 10 %	149.0	+ 36 %
Blond	48.0	47.7	+ 1 %	38.0	+ 26 %
Late varieties	205.0	194.7	+ 5 %	127.8	+ 60 %
Total oranges	455.0	466.3	- 2 %	314.8	+ 44 %
Total lemons	15.0	14.7	+ 2 %	11.2	+ 34 %
Total	479.8	490.8	- 2 %	332.0	+ 45 %

Source: CLAM

export subsidies awarded in the two preceding seasons (USD75 per tonne in 2002/2003 and USD50 per tonne in 2003/2004). The measure is aimed at refocusing the export sector on true professionals alone. Although the three main private companies continued to handle 80% of shipments, many small, non-specialised operations sprouted after the setting up of the aid system. The

great majority of shipments will continue to go to markets in the Middle East and Eastern Europe. However, larger quantities should be shipped to the community market because of the increase in the zero-rated community tariff quota from 50 000 t to 89 000 t this season (with respect of an entry price).

Tunisia: from GIAF to GIF

Citrus — 2004/2005 export forecasts — Tunisia					
000 tonnes	Seasons		Trend	Average of 5 last seasons	Trend for 2004/2005
	2004/2005	2003/2004			
Maltese	22.0	18.3	+ 20 %	21.3	+ 3 %

Source: CLAM

Production should increase by about 9% this season, returning to an average level after a dip in 2003/2004. The ageing of the

orchards is the main problem in Tunisian citrus growing. The domestic market is still as profitable as it was and will continue to take

80% of the produce available. So, as usual, exports will be limited to the variety Maltese and the quantities will remain marginal (some 22 000 tonnes is forecast). The GIAF, the sector framework structure, has been replaced by the GIF whose scope covers the entire fruit sector.

Cyprus: quantities up

Citrus — 2004/2005 export forecasts — Cyprus					
000 tonnes	Seasons		Trend	Average of 5 last seasons	Trend for 2004/2005
	2004/2005	2003/2004			
Ortanique	29.0	32.1	- 10 %	25.8	+ 12 %
Nova	0.5	0.4	+ 25 %	0.3	+ 67 %
Others	1.8	1.6	+ 13 %	1.5	+ 20 %
Total easy peelers	31.3	34.1	- 8 %	27.6	+ 13 %
Oval	1.1	0.9	+ 22 %	2.6	- 57 %
Late varieties	32.0	31.4	+ 2 %	37.4	- 14 %
Total oranges	33.1	32.3	+ 2 %	40.0	- 17 %
Total grapefruits	28.5	27.8	+ 3 %	26.0	+ 10 %
Total lemons	11.9	13.3	- 11 %	13.7	- 13 %
Total	104.8	107.5	- 3 %	107.3	- 2 %

Source: CLAM

Production promises to be somewhat small this season, 8% down in comparison with last

year and even 15% down on average. Grapefruit and Mandora, two of the three Cypriot specialities,

are fairly seriously affected. But with favourable market prospects, grapefruits export intentions are similar to last year's. Shipments of late oranges, another traditional Cypriot niche, will be equivalent to those of last year.

The sector is already very organised. It consists of a cooperative accounting for 50% of exports and several large growers and does not seem to have had any particular difficulties in grouping as a producers' organisation to be able to benefit from European aid (especially for processing).

Citrus — Mediterranean Basin 2004/2005 Export forecasts by variety (000 tonnes)

Citrus	Total	France (Corsica)	Spain	Morocco	Algeria	Tunisia	Italy	Israel	Cyprus	Greece	Turkey	Egypt (1)	Gaza (1)
Satsuma	295.0	-	120.0	-	-	-	-	-	-	-	175.0	-	-
Clementine	1 329.8	20.0	1 050.0	206.1	-	-	28.0	-	-	19.7	6.0	-	-
Mandarin/Wilking	166.6	-	80.0	-	-	-	5.0	-	-	-	75.0	6.6	-
Ortanique	44.0	-	-	9.0	-	-	-	6.0	29.0	-	-	-	-
Nova	184.9	-	150.0	6.3	-	-	-	18.1	0.5	-	10.0	-	-
Others	171.7	-	90.0	8.9	-	-	-	32.0	1.8	0.8	35.0	3.2	-
Total easy peelers	2 192.0	20.0	1 490.0	230.3	-	-	33.0	56.1	31.3	20.5	301.0	9.8	-
Navel/Naveline	1 464.2	-	850.0	26.0	-	-	10.7	5.0	-	222.5	148.0	202.0	-
Salustiana	160.7	-	130.0	30.7	-	-	-	-	-	-	-	-	-
Shamouti	40.1	-	-	-	-	-	-	30.1	-	-	4.0	-	6.0
Common blond	72.8	-	2.0	-	-	-	14.8	-	-	8.0	-	48.0	-
Moro-Tarocco	49.8	-	-	-	-	-	49.8	-	-	-	-	-	-
Maltese	22.0	-	-	-	-	22.0	-	-	-	-	-	-	-
Sanguinelli	8.5	-	-	-	-	-	8.5	-	-	-	-	-	-
Other blood oranges	36.0	-	2.0	34.0	-	-	-	-	-	-	-	-	-
Verna	-	-	-	-	-	-	-	-	-	-	-	-	-
Oval	9.2	-	-	-	-	-	2.1	-	1.1	-	6.0	-	-
Late varieties	1 015.3	-	480.0	200.0	-	0.2	12.1	10.0	32.0	32.0	13.0	205.0	31.0
Bitter	3.0	-	3.0	-	-	-	-	-	-	-	-	-	-
Total oranges	2 881.6	-	1 467.0	290.7	-	22.2	98.0	45.1	33.1	262.5	171.0	455.0	37.0
Total lemons	922.0	-	550.0	-	-	-	22.0	4.9	11.9	16.5	300.0	15.0	1.7
White grapefruit	74.3	-	28.0	0.4	-	-	-	12.0	28.5	1.4	4.0	-	-
Other grapefruits	146.0	-	-	-	-	-	-	60.0	-	-	86.0	-	-
Total grapefruits	220.3	-	28.0	0.4	-	-	-	72.0	28.5	1.4	90.0	-	-
Others	10.1	-	-	-	-	-	-	10.1	-	-	-	-	-
Total	6 226.0	20.0	3 535.0	521.4	-	22.2	153.0	188.2	104.8	300.9	862.0	479.8	38.7

(1) estimates

Source: CLAM