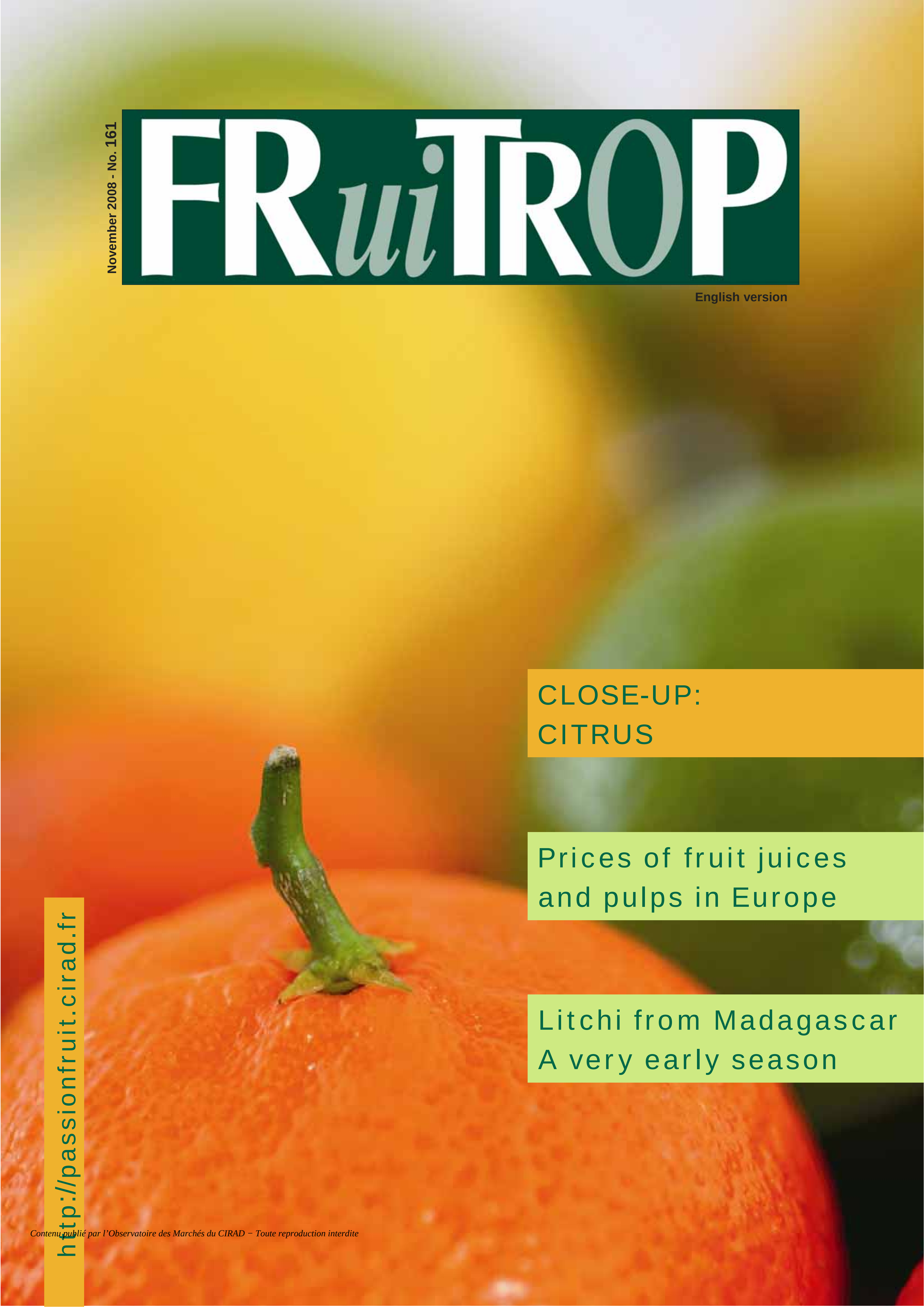


November 2008 - No. 161

FRuiTROP

English version

CLOSE-UP: CITRUS

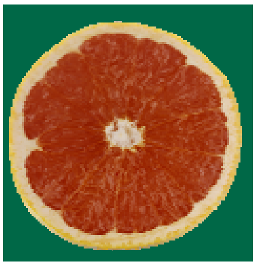
Prices of fruit juices and pulps in Europe

Litchi from Madagascar A very early season

http://passionfruit.cirad.fr

Winter citrus 2007-08 season report

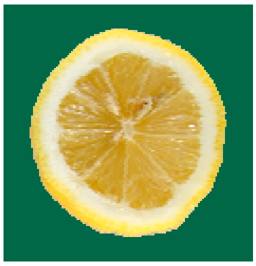
Detail by type of fruit



Grapefruit

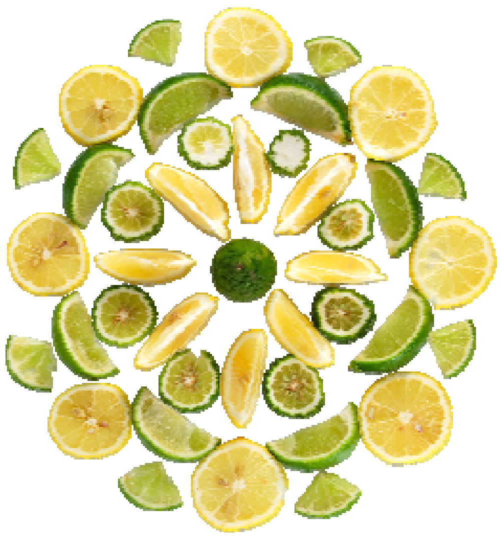
The 2007-08 winter season confirmed the return of more ample supplies of the EU market. Cumulated arrivals from Florida, the Mediterranean and Central America approached 290 000 tonnes, a slight increase on the 280 000 t in 2006-07. The two seasons form a break with the 230 000 to 245 000 t received just after the nosedive of Florida, the world's leading producer, following the hurricanes in 2004 and 2005. But Florida is part of the reason for this upsurge in volumes, with some 5 million 17-kg boxes delivered in 2007-08 in comparison with 4.4 million in 2006-07 and 2.1 million in 2005-06. The increase results partly from a harvest that was more generous, although still limited in comparison with the pre-2004 volumes. There is probably a conjunctural component as well as a proportion of the fruits initially destined for the Japanese market was shipped to the EU as fruit size was too small. The continuing of the dazzling arrival of Chinese shaddock is the second component of the larger supplies. After totalling some 3 000 tonnes in 2004-05 they exceeded 45 000 tonnes, making China the third largest supplier of the EU market in terms of quantity.

In this context, fruits from Mediterranean sources and Central America lost market shares. The decrease was moderate for Israel and Spain, which shipped volumes similar to those of 2006-07. It was more marked for Cyprus and even more so for Turkey, handicapped by small fruit size and focused concentrated than ever on the Eastern European markets. The unusual and late arrival schedule followed by Florida fruits as a result of the size problem mentioned above upset the other sources present on the market. Israel sold much larger volumes than usual at the beginning of the season, with arrivals from Florida more present at the end of the winter and in the spring. The average price for the season was very similar to that of 2006-07 in spite of the increase in volumes



Lemon

The 2007-08 winter season will be remembered by all the lemon growers in the world as an exceptional one after a succession of very difficult years. Prices rocketed on all the large international markets. However, this undoubted improvement for both fresh lemon and concentrated juice did not reflect the true structure of the market. A strong conjunctural decrease in Mediterranean supply caused the strong increase in prices on the fresh lemon market in Europe. A heatwave in summer 2007 greatly reduced production in Spain and Turkey, the two sources that account for most of EU market supply. The producer countries that currently keep their production for domestic consumption therefore appeared on the international market (Morocco, Tunisia, Egypt, etc.). The US and Japanese markets displayed similar excitement as part of Californian production had been wiped out by frost in 2006. A structural adjustment plan is still being examined in Spain



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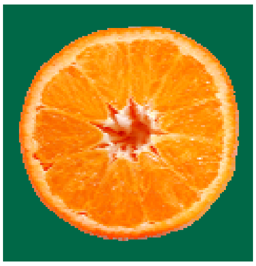


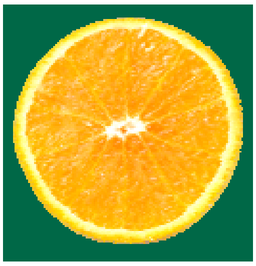
Easy peelers

Economic results are positive again after two very difficult seasons for a large proportion of exporting countries. This good performance is related to the return of Mediterranean production to a moderate level, in particular as a result of the marked deficit in Spain. At about 2.1 million tonnes, production of this giant producer dropped by more than 15% in comparison with the large harvest of 2006-07 and by about 5 to 10 % in comparison with the average. In addition, the Moroccan harvest displayed a distinct deficit and Turkish production was only average and so these countries could not benefit fully from a very open market. The volumes exported by Mediterranean sources totalled some 2.1 million tonnes; this was about 15% less than the preceding season and some 4% less than the average. Exporters concentrated their shipments on the European Union and Eastern Europe at the expense of 'diversification' markets such as the United States. However, after being substantial at the beginning of the season as a result of the development of early clementine orchards in Spain, supply soon displayed a deficit because of the small harvest of full-season clementines ('Nules') in the same country. Supply was particularly limited from January onwards as the harvests of late cultivars were short in all producer countries (all the Spanish varieties, 'Nour' from Morocco and 'Or' from Israel). The season came to a very early end

Citrus — Production in the Mediterranean region in 2007-2008

000 tonnes	Total	France	Spain	Morocco	Algeria	Tunisia	Italy	Israel	Cyprus	Greece	Turkey	Egypt	Gaza*
Easy peelers													
Production	**4 878.4**	**19.2**	**2 077.1**	**470.6**	**111.0**	**71.0**	**690.2**	**123.1**	**43.9**	**64.9**	**495.0**	**712.5**	**-**
Domestic sales	2 145.7	-	328.0	195.4	111.0	71.0	441.6	49.0	11.1	32.3	258.2	648.0	-
Industry	362.3	-	231.0	3.0	-	-	47.3	24.0	4.5	1.8	15.0	35.7	-
Losses/withdrawals	258.1	3.2	100.9	-	-	-	128.3	-	-	4.3	-	21.4	-
Export sales	2 112.3	16.0	1 417.2	272.2	-	-	73.0	50.1	28.2	26.5	221.8	7.4	-
Orange													
Production	**10 398.2**	**-**	**2 704.3**	**732.4**	**140.0**	**180.0**	**2 346.0**	**115.4**	**78.0**	**930.5**	**1 173.0**	**1 939.2**	**59.4**
Domestic sales	5 399.3	-	795.0	407.7	140.0	154.0	1 632.1	43.0	37.1	233.5	927.1	1 021.7	8.1
Industry	1 746.3	-	566.0	29.0	-	-	589.1	42.0	22.9	288.0	98.0	97.0	14.3
Losses/withdrawals	305.1	-	67.7	-	-	-	-	-	-	179.2	-	58.2	-
Export sales	2 947.5	-	1 275.6	295.7	-	26.0	124.8	30.4	18.0	229.8	147.9	762.3	37.0
Lemon													
Production	**2 114.2**	**-**	**543.0**	**35.0**	**-**	**31.0**	**573.2**	**36.1**	**10.6**	**46.5**	**500.0**	**334.4**	**4.4**
Domestic sales	1 181.2	-	150.0	20.6	-	31.0	377.7	30.0	4.0	30.3	251.1	284.8	1.8
Industry	257.8	-	64.8	-	-	-	146.0	2.0	1.0	1.4	25.0	16.7	0.9
Losses/withdrawals	45.8	-	22.8	-	-	-	-	-	-	13.0	-	10.0	-
Export sales	629.4	-	305.4	14.4	-	-	49.5	4.1	5.6	1.8	223.9	22.9	1.7
Grapefruit													
Production	**624.0**	**3.8**	**47.6**	**-**	**-**	**-**	**7.5**	**235.1**	**35.5**	**7.3**	**245.0**	**37.7**	**4.5**
Domestic sales	94.6	-	1.5	-	-	-	6.3	10.0	2.6	3.9	35.9	33.5	0.9
Industry	192.2	-	6.0	-	-	-	1.2	144.0	15.9	1.6	18.0	1.9	3.6
Losses/withdrawals	64.6	0.6	2.0	-	-	-	-	-	-	0.9	60.0	1.1	-
Export sales	272.7	3.2	38.1	-	-	-	-	81.1	17.1	0.9	131.1	1.2	-
Others													
Production	**11.4**	**-**	**-**	**-**	**-**	**-**	**-**	**11.4**	**-**	**-**	**-**	**-**	**-**
Domestic sales	6.5	-	-	-	-	-	1.5	5.0	-	-	-	-	-
Industry	12.0	-	-	-	-	-	12.0	-	-	-	-	-	-
Losses/withdrawals	-	-	-	-	-	-	-	-	-	-	-	-	-
Export sales	6.4	-	-	-	-	-	-	6.4	-	-	-	-	-
Total													
Production	**18 039.7**	**23.0**	**5 372.1**	**1 238.0**	**251.0**	**282.0**	**3 630.4**	**521.0**	**168.0**	**1 049.2**	**2 413.0**	**3 023.8**	**68.3**
Domestic sales	8 827.3	-	1 274.5	623.7	251.0	256.0	2 459.2	137.0	54.8	300.0	1 472.3	1 988.0	10.8
Industry	2 570.6	-	867.8	32.0	-	-	795.6	212.0	44.3	292.8	156.0	151.3	18.8
Losses/withdrawals	673.6	3.8	193.4	-	-	-	128.3	-	-	197.4	60.0	90.7	-
Export sales	5 968.2	19.2	3 036.4	582.3	-	26.0	247.3	172.0	68.9	259.0	724.7	793.8	38.7

* estimates / Source: CLAM



Orange

The economic results for the season were satisfactory in Western Europe. As for easy peelers, supply was markedly short as a result of limited harvest in the large countries supplying these markets (Morocco and especially Spain). The season got off to a difficult start after an unusually late end to the season for 'Valencia' from South Africa. The marketing of northern hemisphere production therefore started very late at the beginning of the season as supermarket referencing did not switch until November or even December. Nevertheless, operators remained calm, given the deficit in 'Naveline' and 'Navel' production. Supply broadened with the change to the late varieties, with a better harvest of both 'Navelate' and 'Valencia'. However, the season started early for the latter with the premature end of that of 'Naveline' and 'Navel' and demand was healthy in a context free of all competing produce such as strawberries and then stone fruits. Under these conditions, fruits from complementary sources benefited from a very open market, as was seen with the fine season for 'Maltese' from Tunisia and for 'Maroc Late'. The average season price was high. Supplies for the Eastern European markets were fairly substantial at the beginning of the season, especially as the 'Navel' harvests were good in Turkey and Egypt. Nevertheless, the second part of the season was light after frost in Turkey at the end of January

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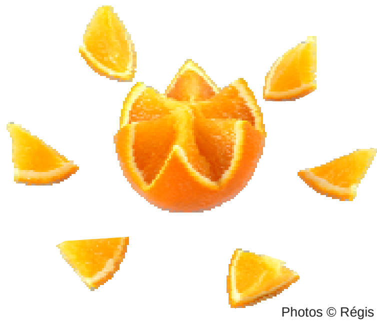


Photos © Régis Domergue

Citrus — Mediterranean region — Exports by variety in 2007-2008

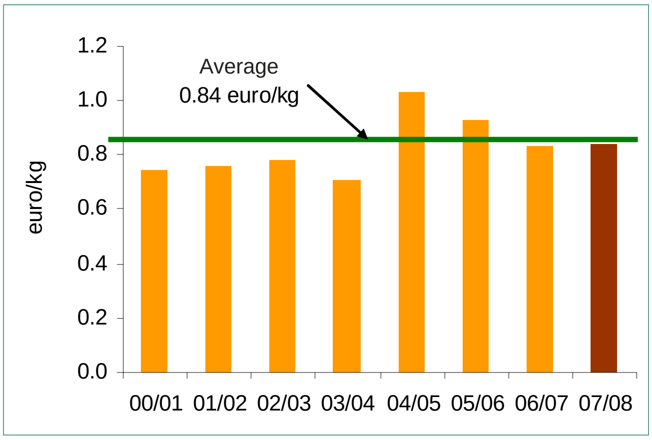
000 tonnes	Total	France	Spain	Morocco	Algeria	Tunisia	Italy	Israel	Cyprus	Greece	Turkey	Egypt*	Gaza*
Total easy peelers	2 112.3	16.0	1 417.2	272.2	-	-	73.0	50.1	28.2	26.5	221.8	7.4	-
Satsuma	159.7	16.0	56.4	-	-	-	-	-	-	-	103.3	-	-
Clementine	1 419.7	-	1 061.9	243.9	-	-	69.7	-	-	24.2	4.0	-	-
Mandarin/Wilking	141.7	-	81.4	-	-	-	3.3	-	-	-	49.6	7.4	-
Ortanique	16.9	-	-	10.4	-	-	-	5.4	1.0	-	-	-	-
Nova	163.5	-	105.4	6.0	-	-	-	16.9	1.1	-	34.1	-	-
Others	210.7	-	112.1	11.7	-	-	-	27.8	26.0	2.3	30.8	-	-
Total oranges	2 947.5	-	1 275.6	295.7	-	26.0	124.8	30.4	18.0	229.8	147.9	762.3	37.0
Navel/Navelina	1 366.0	-	622.6	29.0	-	4.3	6.6	1.5	-	181.2	123.1	397.6	-
Salustiana	130.8	-	102.7	28.1	-	-	-	-	-	-	-	-	-
Shamouti	25.2	-	-	-	-	-	-	17.0	-	-	2.2	-	6.0
Common blond	35.1	-	-	-	-	4.3	-	-	-	2.8	3.5	24.5	-
Moro-Tarocco	94.8	-	-	-	-	-	94.8	-	-	-	-	-	-
Maltese	15.9	-	-	-	-	15.9	-	-	-	-	-	-	-
Sanguinelli	5.0	-	-	-	-	-	5.0	-	-	-	-	-	-
Other blood oranges	43.3	-	-	43.1	-	-	-	-	-	-	0.2	-	-
Verna	9.5	-	9.5	-	-	-	-	-	-	-	-	-	-
Oval	3.0	-	-	-	-	-	3.0	-	-	-	-	-	-
Late	1 201.0	-	538.9	195.4	-	1.4	3.3	11.9	18.0	45.8	18.9	336.4	31.0
Bitter	5.7	-	1.9	-	-	-	-	-	-	-	-	3.8	-
Total grapefruits	272.7	3.2	38.1	-	-	-	-	81.1	17.1	0.9	131.1	1.2	-
White grapefruits	72.3	-	38.1	-	-	-	-	11.9	8.2	0.5	8.2	1.2	-
Other grapefruits	204.5	3.2	-	-	-	-	-	69.2	8.8	0.4	122.9	-	-
Total lemons	629.4	-	305.4	14.4	-	-	49.5	4.1	5.6	1.8	223.9	22.9	1.7
Other citrus	6.4	-	-	-	-	-	-	6.4	-	-	-	-	-
Total	5 968.2	19.2	3 036.4	582.3	-	26.0	251.4	172.0	68.9	259.0	724.7	793.8	38.7

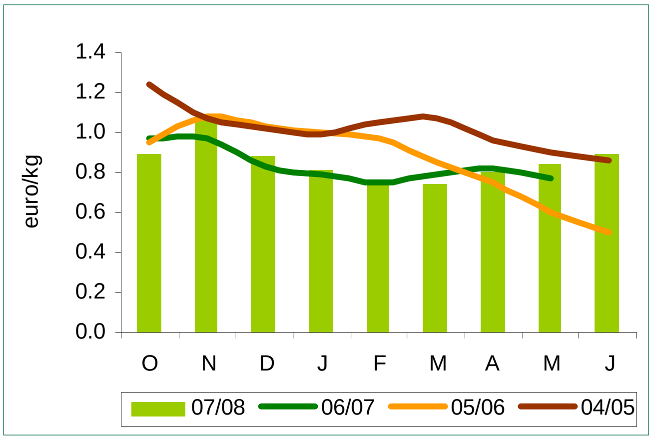
* estimates / Source: CLAM

Average import price in France

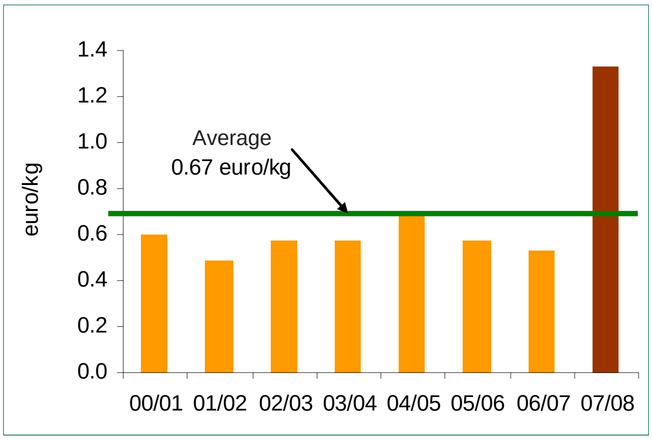
Monthly average import price in France

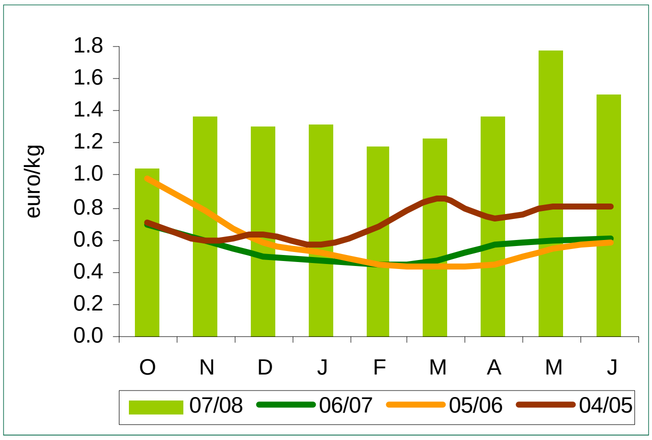
Grapefruit



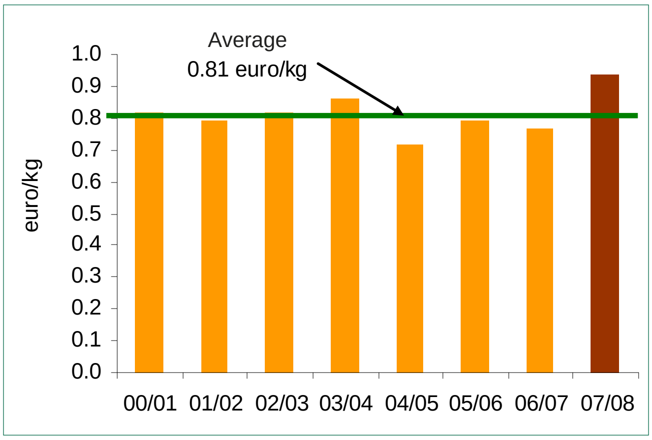


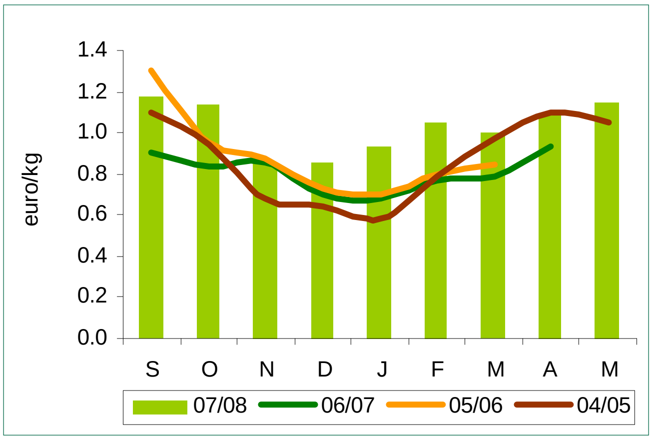
Lemon





Easy peelers





Orange