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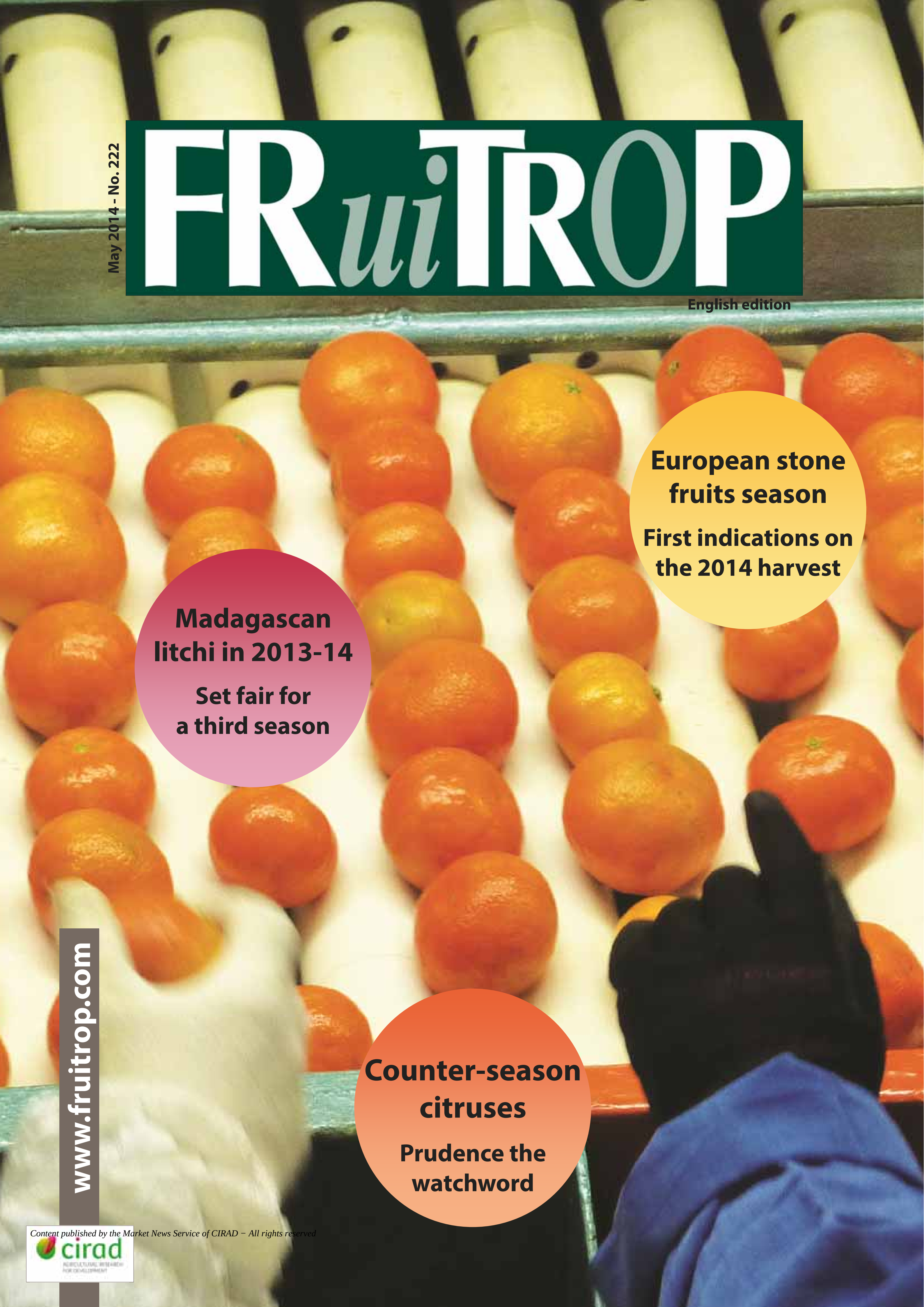
English edition



European stone fruits season

First indications on the 2014 harvest

Madagascan litchi in 2013-14

Set fair for a third season

Counter-season citruses

Prudence the watchword

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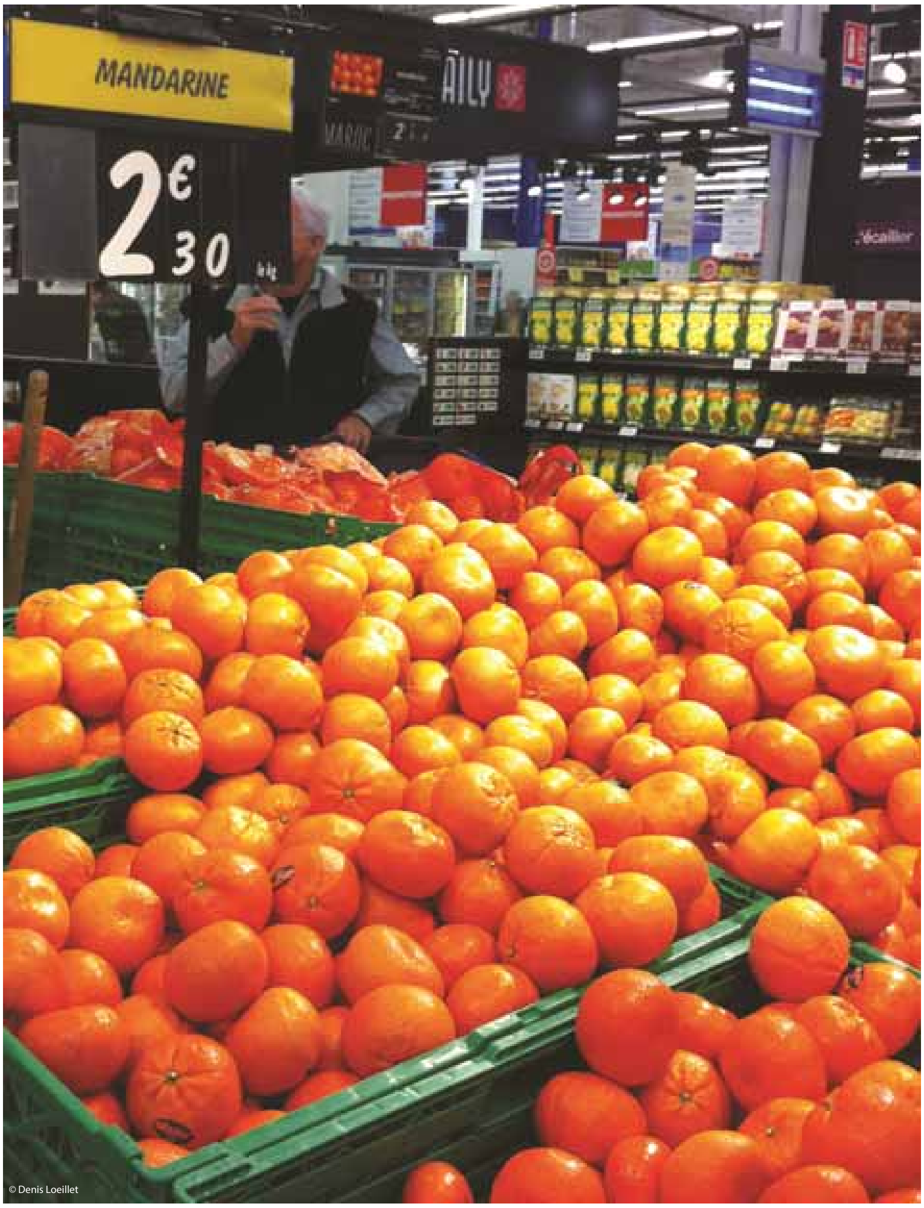
Counter-season citruses

2014 European season: prudence the watchword



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The 2014 citrus counter-season is not set to be trouble-free. However, the volumes set to be offered on the world market do not appear to be wildly excessive. There will even be a clear shortfall for the lemon. For the other citruses, the combined production of the various Southern Hemisphere supplier countries is registering a high level, but not so far off the 2013 level. However, the market context seems much more difficult, especially on the Old Continent. In the EU-28, competing produce is set for a much bigger presence, through both the leftover Mediterranean citruses and the stone fruit harvests which are taking up most of the shelf space in Southern Europe. In Eastern Europe, the devaluation of the rouble could hinder shipments to the big Russian market.

South Africa
A new production record … or nearly

Citrus — South Africa Export forecast			
in tonnes	2014	Comparison	
		2013	2010-2013 average
Orange	1 130 000	- 2 %	+ 8 %
Small citrus	138 000	+ 9 %	+ 20 %
Grapefruit	251 000	- 6 %	+ 18 %
Lemon	182 000	+ 14 %	+ 17 %
Total	**1 701 000**	**0 %**	**+ 11 %**

Source: CGA


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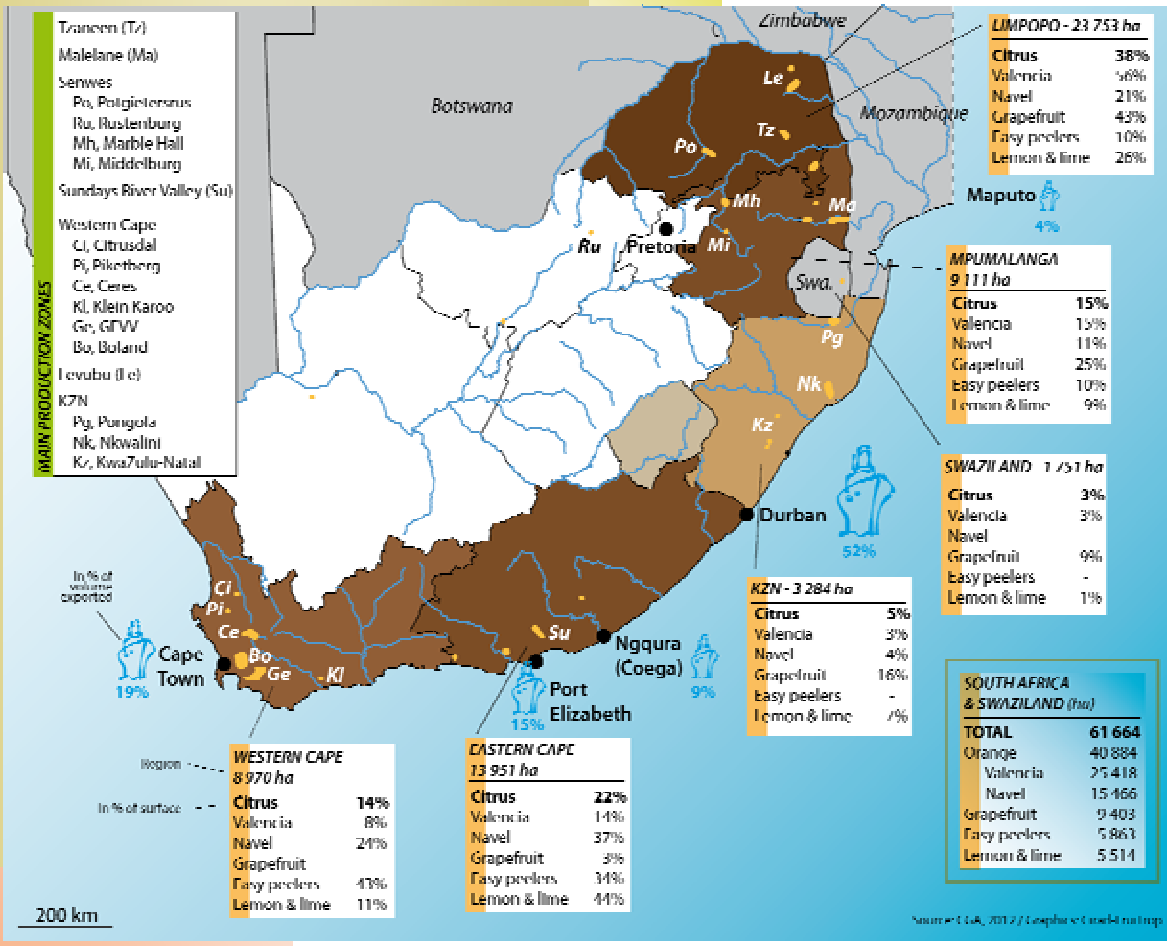
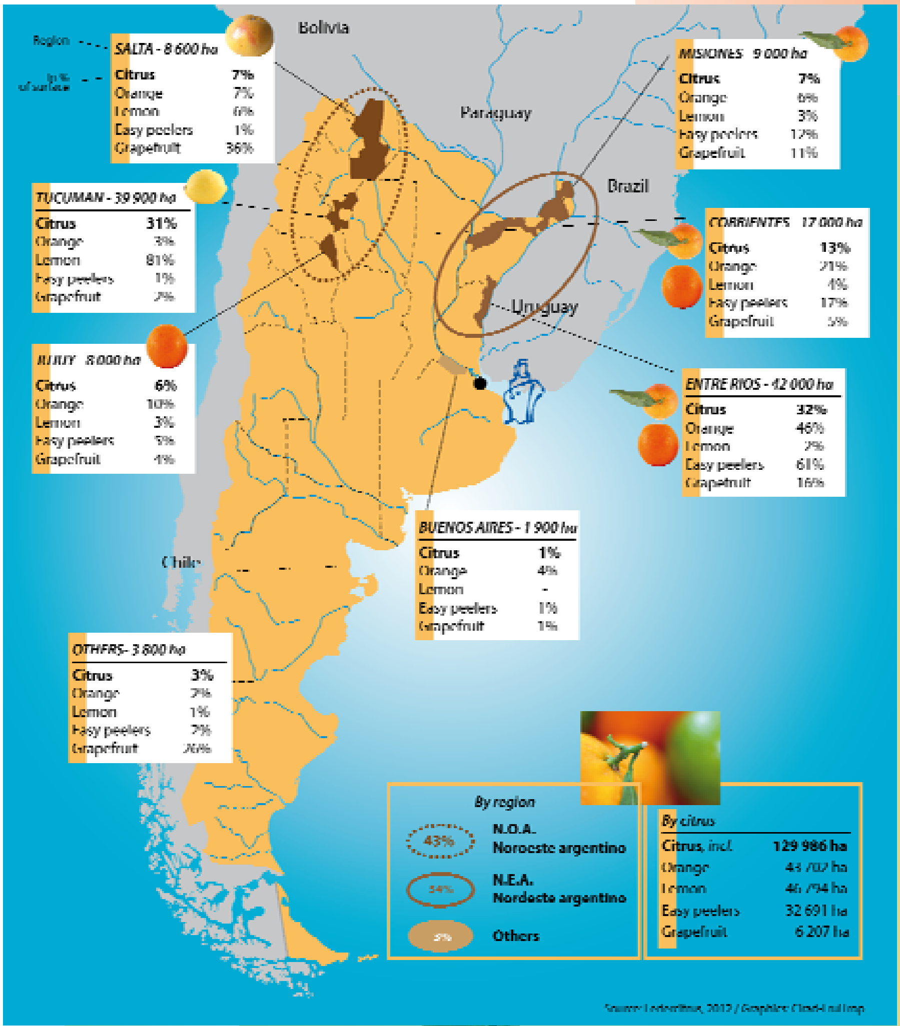
South Africa is once more set for a bumper season, as the number one supplier to the world counter-season citrus trade. Combined exports for all the citrus families should be able to maintain the record level of 113 million 15-kg boxes achieved in 2013. The season will be in line with the average for the past two seasons for the orange (small rise for Navel and slight fall for Valencia). It is set to be big for small citruses and the lemon (15 % above average for the past two years), while the grapefruit will remain just as abundant (10 % above average), despite a downturn from 2013. The size range appears to be up from last season, except with small citruses.

The high production level once more this year reflects the expansion of the South African cultivation stock. Sales of plants, waning to below the 2 million units per year mark until 2008, have picked up. They were between 2.9 and 3.2 million units from 2009 to 2012. While no-one is planting grapefruit any more, growth is continuing at a very high tempo for small citruses (particularly late hybrids), and to a lesser degree for the lemon. As for the orange, planting seems relatively stable for Navel, but has bounced back for Valencia. Expansion is greatest in the Limpopo, in the far north of the country, as well as in the more southern provinces of Eastern and especially Western Cape.



Argentina
Less production, but a bit more competitiveness

The trend seems very different for Argentina, the world number two player. The frost during the Southern winter 2013 in the north of the country (in particular the provinces of Tucuman and Salta) caused major production losses, especially as the trees were at an advanced vegetative stage and already stressed by the drought. The ongoing low precipitation level, followed by the hot summer, did nothing to help matters. The lemon, the jewel of the country's citrus growing industry, was particularly affected. With barely 700 000 t, the harvest was 40 to 50 % down on a normal season, registering its lowest level for the past ten years. Valencia production should also register a fall, with the early northern zones more affected than the coastal zones. Only the small citrus harvest should rise, thanks to the planting carried out in recent years.



The country's economic situation remains unfavourable for the export sector, although the 20 % devaluation of the peso applied in early 2014 should enable Argentinean professionals to claw back some of their lost competitiveness. The rampant inflation of recent years caused an explosion in production costs, which did not fail to affect exports: after exceeding one million tonnes in 2007, volumes dropped below the 500 000-t mark in 2013. Furthermore, the risk of introduction of greening seems increasingly significant. No new cases have been detected since the discovery of a few isolated contaminated plants in the far north of Misiones province, but the disease is now present in regions of neighbouring Paraguay adjoining the citrus growing region of Corrientes where the vector is present. Finally, frost seems to have caused the loss of certain young orchards, especially lemon ones, in Tucuman province. So 2014 production is very likely to return to its nominal level for this citrus.

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Citrus — Argentina — Export forecast

in tonnes	2014	Comparison	
		2013	2010-2013 average
Orange	50 000	- 37 %	- 56 %
Small citrus	90 000	+ 2 %	- 15 %
Lemon	200 000	- 29 %	- 24 %
Total	**340 000**	**- 25 %**	**- 30 %**

Sources: Federcitrus, Shaffe

Citrus — Uruguay — Export forecast			
in tonnes	2014	Comparison	
		2013	2010-2013 average
Orange	75 000	+ 7 %	+ 12 %
Small citrus	48 000	+ 29 %	+ 18 %
Lemon	17 000	+ 37 %	+ 20 %
Total	**140 000**	**+ 17 %**	**+ 15 %**

Sources: MGAP, Shaffe


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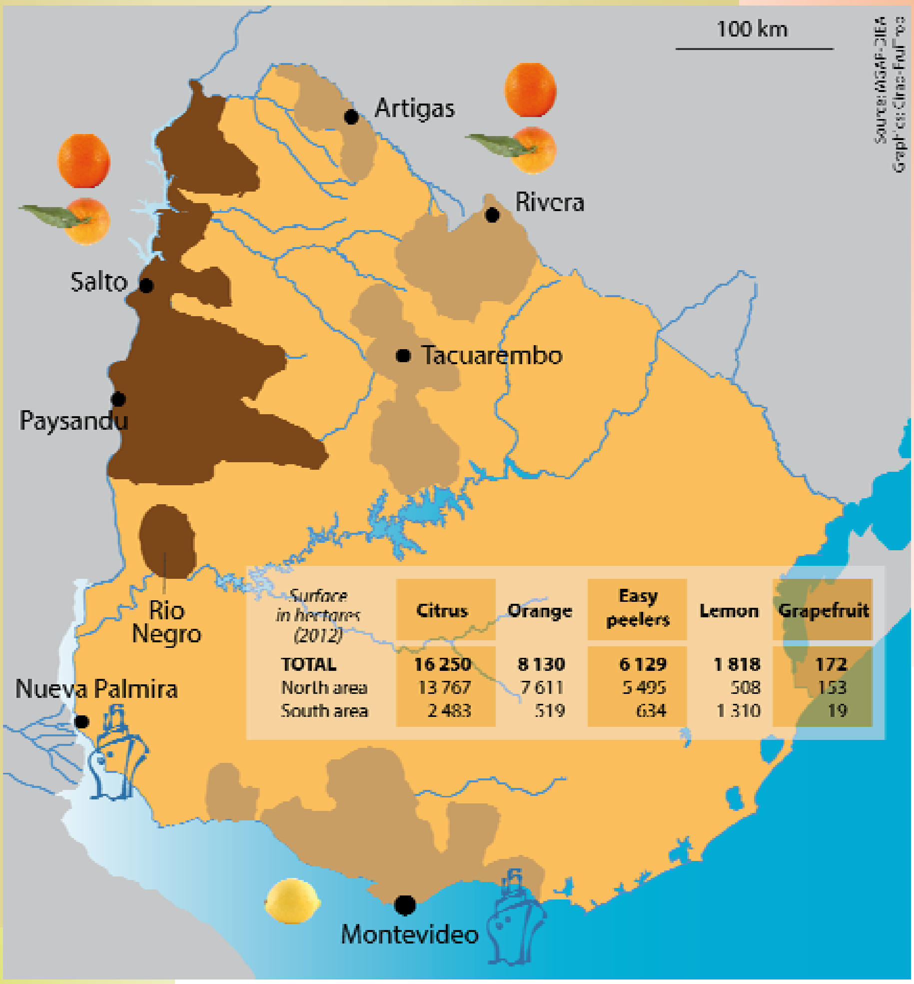
Uruguay
From one extreme to the other

The 2013 harvest was the lowest for the past ten years, in particular because of a devastating spell of frost. The 2014 harvest could be one of the biggest, according to an initial estimate provided by professionals. With just over 320 000 t, it should slightly exceed that of 2012, marking a rise of more than 20 % from last season. Exports could climb back to their best level since the beginning of the decade, both for small citruses, and the orange and lemon. The very high humidity prevailing in early spring does not seem to have had a major impact on the quality of the produce.



	Hectares	In % Junin	Piura	Lima	Ica	Lambayeque	Others
Total, incl.	61 696	26%	26%	9%	4%	3%	32%
Easy peelers	11 691	32%	0%	37%	12%	0%	19%
Lemon	22 749	1%	67%	0%	0%	7%	25%
Orange	27 256	44%	2%	5%	3%	2%	44%

Peru
Still growing

Unsurprisingly, the production growth dynamic will remain lively in Peru. The new orchards, planted at a very high tempo in recent years on the central coast (2 000 to 2 500 ha/year according to professional sources), are entering production or reaching their prime. Hence exports should register an increase of approximately 10 %, and for the first time exceed the symbolic 100 000-t mark. The dynamic will vary between small citrus varieties, with this family making up most of Peru's exports. The increase should be particularly considerable for the satsuma (+ 20 %), especially Okitsu, thanks to a positive alternation effect on production. It should also be considerable for W. Murcott and other late hybrids abundantly planted in recent years. Conversely, no significant increase is expected for Minneola.

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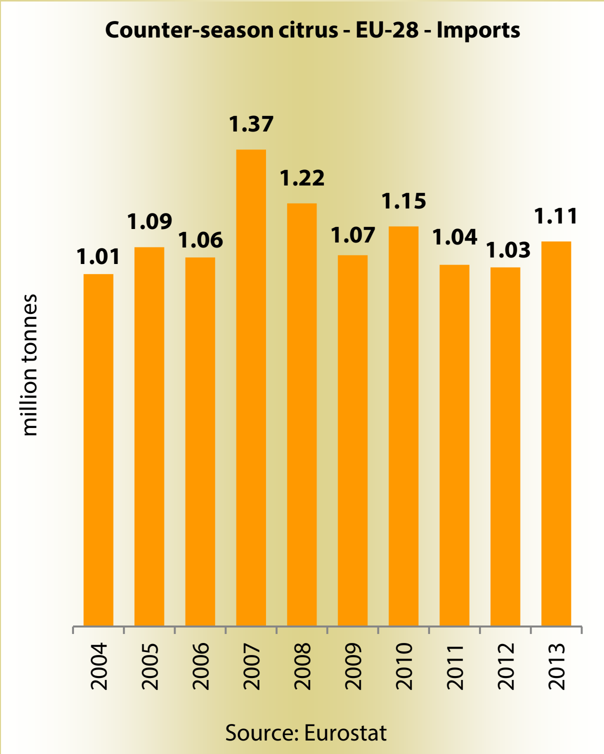
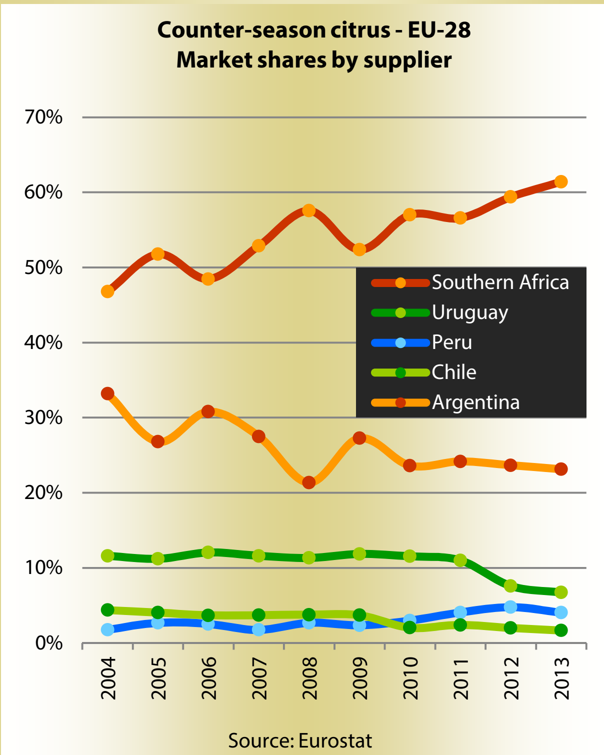
Citrus — Peru — Export forecast

in tonnes	2014	Comparison 2013	Comparison 2010-2013 average
Orange	10 000	- 17 %	+ 4 %
Small citrus	94 000	+ 23 %	+ 42 %
Total	**104 000**	**+ 2 %**	**+ 37 %**

Source: Procitrus





European consumption not to be overestimated

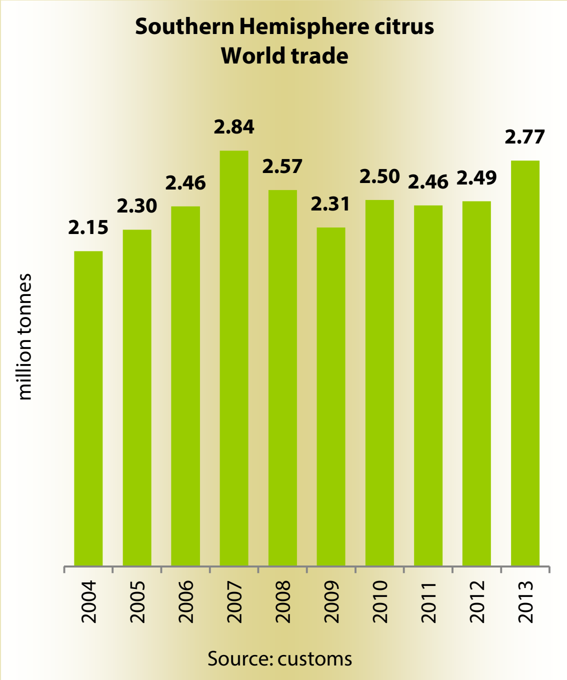
The EU is still the leading world market for Southern Hemisphere citruses, and as such is essential. Nonetheless, imports have been fixed at between 1.0 and 1.2 million tonnes for around a decade (excluding climate effects on Mediterranean production). In the absence of large-scale promotions, which are not in place today, no natural market growth should be expected. Consumption seems to be at best mature for all the citrus families, including small citruses. Unsurprisingly, it seems to be waning for the grapefruit, as well as the orange. While certain sources are on the rise, such as Southern Africa and Peru, this is to the detriment of the other market suppliers. Faced with major competitiveness problems, countries from the southern tip of Latin America (Uruguay and above all Argentina) have lost a lot of ground over the past decade.

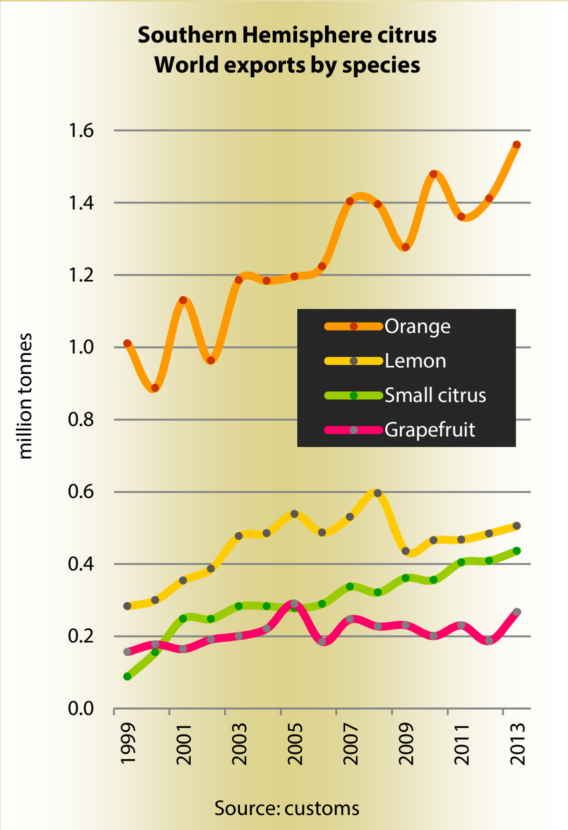
A notoriously more difficult market context in 2014 in terms of competing fruits

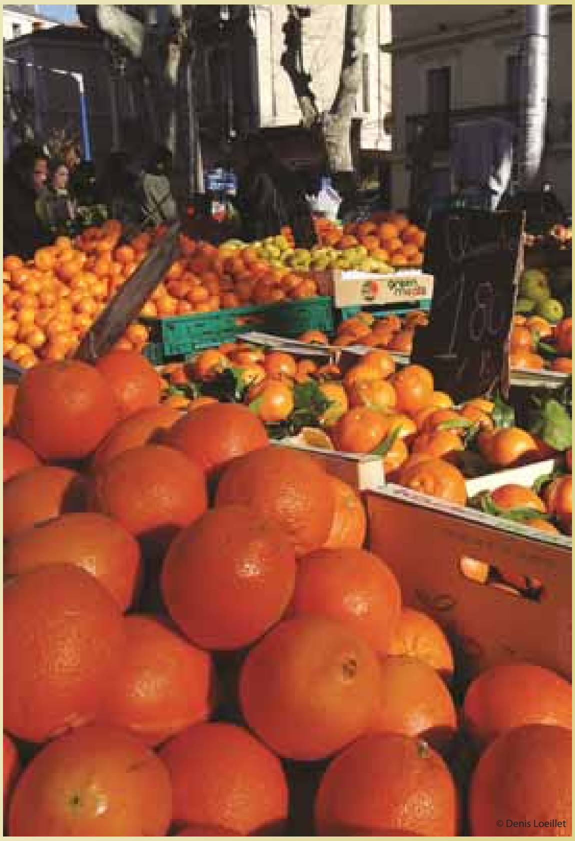
Besides the flat consumption trend described above, other more short-term factors are making the market unwelcoming in 2014. Competition from the fruit section "heavyweights" is set to be highly intense. On the one hand, unlike in 2013, apple prices will be very aggressive given the size of European stocks. Yet above all, the stone fruits supply is set to be very large in all

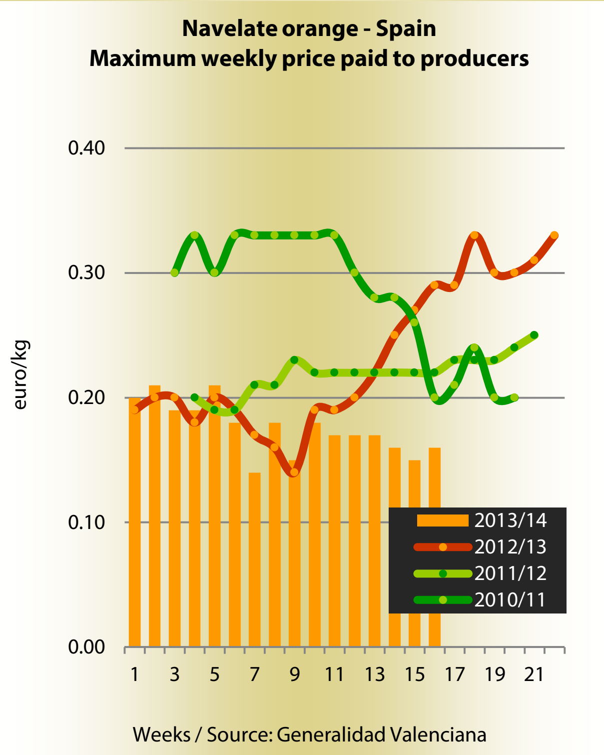
World market for Southern Hemisphere citruses

Stability on the Southern Hemisphere citruses market? That is the conclusion we might draw from the misleading combined exports figure for all citrus families, which has plateaued at approximately 2.5 million tonnes since 2007 (except for a minor spurt in 2013). The abrupt slump in lemon volumes in the late 2000s conceals regular and solid growth on the markets for the other families, except for grapefruit. Orange exports have risen by nearly 400 000 t over the past decade, despite waning volumes absorbed by the EU. The Asian, Middle East and, to a lesser degree, US markets have been particularly dynamic. Regarding small citruses, world trade has risen by more than 100 000 t, with the United States, Russia and Asia the main driving forces. The grapefruit and lemon are the two poor relations. The grapefruit has seen a downward trend, with the EU-28 waning more distinctly than Japan in recent years. The lemon market has recovered some of its dynamic, without returning to its late 2000s level.









the big Southern European producer countries. The climate conditions were very favourable for all families of these fruits, with a mild winter (no production loss due to frost to lament). In addition, peach and nectarine surface areas are continuing to rise slightly in Spain, to the detriment of seeded fruits. Hence peaches, nectarines, apricots and cherries should register an above-average production level in Spain, France and Italy (combined Mediterranean production up by 10 to 12 % from 2013, and by 6 to 7 % from the 2009-2012 average for peaches and nectarines, according to Europech). An aggravating factors is that the apricots will become increasingly appealing thanks to the renewal of the varietal range over recent years.

Leftover Mediterranean citruses much more present in 2013

The Mediterranean production volumes will also have a bigger presence than in 2013. The extension of the small citrus winter season, due to the growth in production of late varieties, such as the Israeli Or or Spanish/Moroccan Nadorcott, can be seen as a positive point. It enables the Southern Hemisphere sources to harness an already established sales dynamic, and prevent an interruption in the supply to the supermarket sector.

Conversely, the risk of overlap between produce from the two Hemispheres seems to be extremely high for the grapefruit in May, and above all for the orange. Spanish Navelate is still widely available. The large surface areas for late and super-late table oranges, set up until the end of the last decade, are continuing to reach their prime, while demand has been particularly slack, probably because of the mild winter. Egypt, on the strength of its resurgent orange production, will also have a bigger presence than in 2013. There is a similar observation for the grapefruit: there was high production in both Israel and Turkey, with the big downturn in Russian demand adding to a structural problem of declining consumption in Western Europe, which seems to be intensifying.

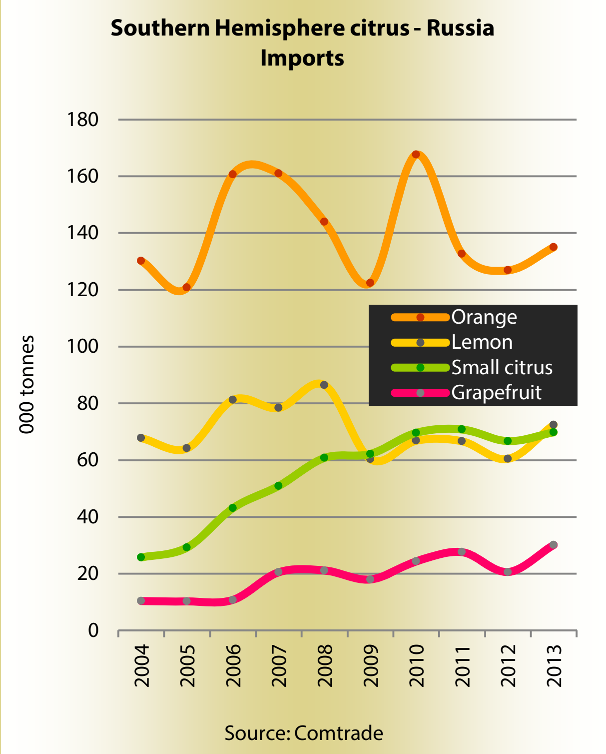
Prices were extremely poor throughout the season for both these citrus families, with no improvement taking shape for the end of the season. As for the lemon, the Spanish Verna volumes still to be sold also seem to be greater than in 2013, though the prices are registering a decent level for this variety nonetheless.

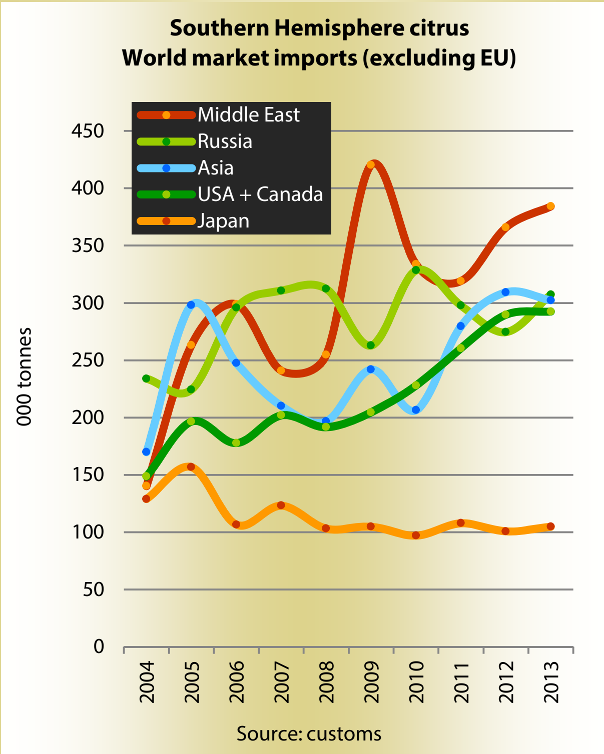
More difficult market access for Argentina and Uruguay, and sword of Damocles hanging over South Africa more menacingly than ever

On top of all that, the market access conditions seem to be more difficult or uncertain than in 2013 for most of the major sources. Unlike in previous seasons, produce from Argentina and Uruguay will no longer be entitled to zero customs duty. Citruses will no longer be among the products eligible for the Generalised Scheme of Preferences, and this season importers will need to pay duty ranging from 6 % for the lemon to 16 % for small citruses, with 10 % for the orange (source: Export helpdesk - EU). Finally, while the Community's borders have been re-opened to South African citruses since January, without any change to the black spot control measures, the risk of a sudden closure persists. Such a decision, or the possible modification of the access rules that could be decided at the DG SANCO meeting of 26 or 27 May, would of course radically change the scenario for this season, and not only in terms of the European market. South African professionals have spared no effort in preventing the fateful threshold of five interceptions from being reached - which would mean a lockdown of the borders (reinforced spot checks, withdrawal of export approval to the EU from nearly 1 200 orchards, i.e. ten times more than in 2013, etc.).

Finding alternative markets, but outside of Europe!

Given the constraints mentioned above, the European Community seems to be a high-risk market, particularly for the orange and grapefruit, at the beginning of the season. Prudence is the watchword, with import levels liable to be in the lower range, particularly for the two above-mentioned families. The other world markets, which absorb nearly 50 % of the world summer citrus trade, seem to represent more than useful alternatives this season. Nonetheless, some of these too should be contemplated with the utmost prudence. This is the case with Russia, the world number two market after the EU, with imports stabilised at 300 000 t in recent years (i.e. just over 10 % of world trade). The devaluation by nearly 20 % of the rouble from last season will doubtless deter many exporters from this market. The Argentinean pear export season, registering a 20 % drop in exports from 2013 despite falling prices, is a clear illustration of this.





Relatively open markets in North America and Asia

So it is rather markets outside of Europe that will need to be the focus for absorbing the production growth from certain sources. The United States and Canada appear to provide relatively safe value. Prices there have registered a level considerably higher than last season, because of production losses caused by frost in California. Doubtless South Africa, which this season will launch a simplified sanitary protocol test (in particular, reduced cold insect control treatment time), will seek to take advantage of this. The same goes for Uruguay, which for the first time will see the doors of this market open from the beginning of the season. Nonetheless, the scale of these two markets must not be overestimated either, with average imports of approximately 200 000 t for the United States, and 100 000 t for Canada in a normal Californian production year. Demand should be at a fairly good level in Asia, thanks to the natural growth of markets such as China, Malaysia, the Philippines or South Korea. On the other hand, the probable extension of the Egyptian season on the Middle East markets, which absorb large volumes of around 400 000 t, should be considered at least at the beginning of the season ■

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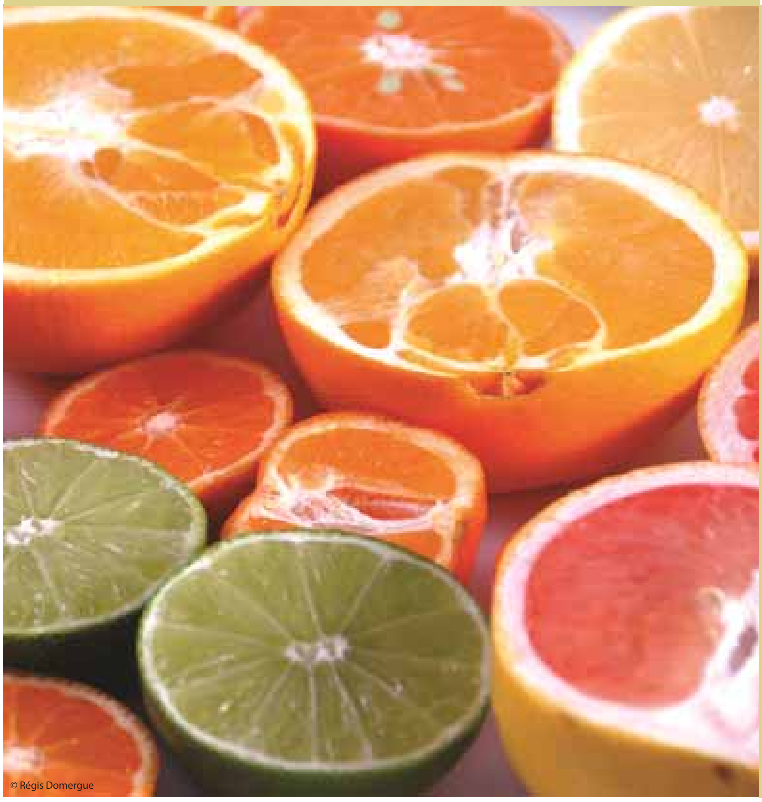

Real progress in the negotiations to reopen the US market to the Argentinean lemon?

The US and Argentinean plant health sanitary inspection bodies (APHIS and SENASA) have just written a new chapter in the saga of their quest toward reopening the US market to the Argentinean lemon, which has been running since 2001. The work of two research bodies has demonstrated that the lemon did not host *Xylella fastidiosa*, the bacterium behind variegated chlorosis, and that the disease could not be transmitted by the pips. The US authorities declared that this argument should help speed up the process of reopening the borders to lemons from north-west Argentina, and that consequently, it would also have a positive impact on the negotiations on "sweet citruses".

European counter-season lemon market

Luxury lemonades!

True, lemon consumption has been fixed at between 220 000 and 250 000 t for six years. True, it is also perfectly inflexible. And true, Spanish late lemon volumes (Verna) seem to be bigger than last season because of the slightly more abundant production (+ 15 % from 2012 and 2013). However, it is indeed the lemon that seems to be the least uncertain of all the summer citrus markets this season. The obvious reason is of course the scarcity of Argentinean production. The world's main Southern Hemisphere lemon exporter, which provides three-quarters of the Community market supply during the summer, reportedly has a harvest of approximately 700 000 t, 40 to 50 % less than last season. This production level does not even represent the average annual volumes sent for processing, which fluctuate between 800 000 t and one million tonnes! And more than ever this season the industry can afford to pay a decent price for the raw materials, with essential oil rates registering another boom: with 43 000 USD per tonne in late April according to FoodNews, they are nearing the historical high of 45 000 USD/t seen in 2008, marking a rise of more than 15 000 USD/t from 2013. In this context, will Argentina be able to maintain its average export level to the Community, which is at between 160 000 and 190 000 t? The question is being asked, with certain professionals banking on a fall in volumes of approximately 30 % (200 000 t against just over 280 000 t in 2013). What is for sure is that the shipments will not be made under just any price conditions. A transfer to the EU of some of the 40 000 t per year exported to the Russian market, which seems unappealing this season, could contribute to considerably narrowing the shortfall.

So the context seems extremely favourable for South Africa, the number two player on the Community market. Its production is coming together. The harvest should recover a normal level in Sundays River, the country's main production area. In addition, the expanded surface areas in the Senwes region (Mpumalanga) are starting to bear fruit. Hence the export potential could reach a record level, exceeding for the first time 12 million 15-kg boxes. But, there is a but! Exporters will probably remain cautious with respect to the Community market, with the main production zones situated in sectors of low to high prevalence for black spot.

The auxiliary sources should not have much of a presence in the EU. The US market seems highly appealing, with this winter's frost causing the loss of approximately 20 % of the Californian harvest according to official sources. The average price calculated by the USDA was in excess of 26 USD per box in late April, as opposed to 20 to 22 USD the previous two seasons. So Chile, the historical market supplier, should remain focused on its natural market. Uruguay, a "minor" player on the Community market, should be more discreet than ever. The US market will be open from the start of the season, for the first time.

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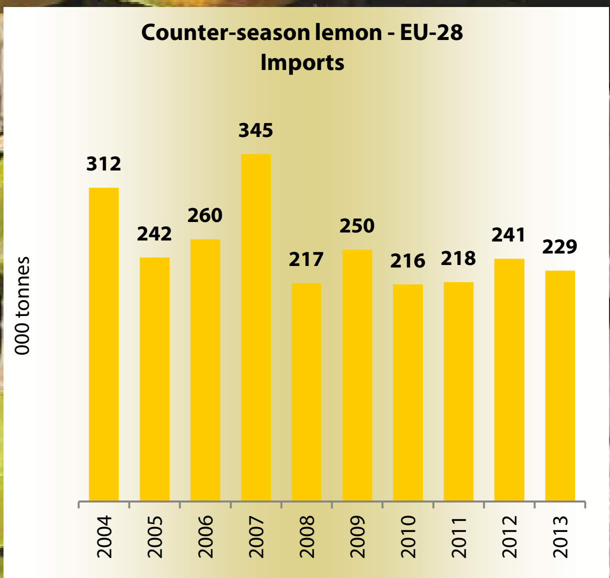
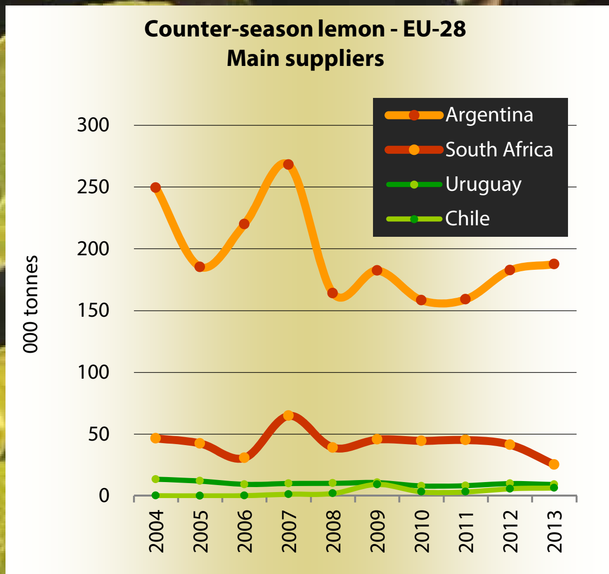
Lemon — Southern Hemisphere
Export potential estimates

in tonnes	2014	Comparison	
		2013	2010-2013 average
South Africa	182 000	+ 14 %	+ 17 %
Argentina	200 000	- 29 %	- 24 %
Uruguay	17 000	+ 37 %	+ 20 %
Total	**399 000**	**- 12 %**	**- 8 %**

Professional sources, Shaffe



Source: Eurostat



Source: Eurostat

Counter-season lemon — European Union — Imports

in tonnes	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Total, of which	**311 618**	**242 182**	**260 389**	**344 793**	**216 854**	**250 009**	**215 532**	**217 737**	**241 025**	**229 253**
Argentina	249 449	185 303	219 942	267 893	163 969	182 387	*158 391*	159 063	182 580	187 449
South Africa	46 571	42 466	30 722	64 830	39 007	45 633	*44 532*	45 233	41 385	25 363
Uruguay	13 512	11 983	9 342	10 002	10 166	10 762	*8 064*	8 280	9 959	9 194
Chile	95	25	187	1 353	1 888	9 275	*3 211*	3 217	5 751	6 333
Dom. Rep.	3	38	99	237	1 172	1 947	*1 198*	1 943	1 256	632
Brazil	1 573	2 366	96	477	652	5	*136*		92	249
Zimbabwe	415	0	2	3				0	2	32

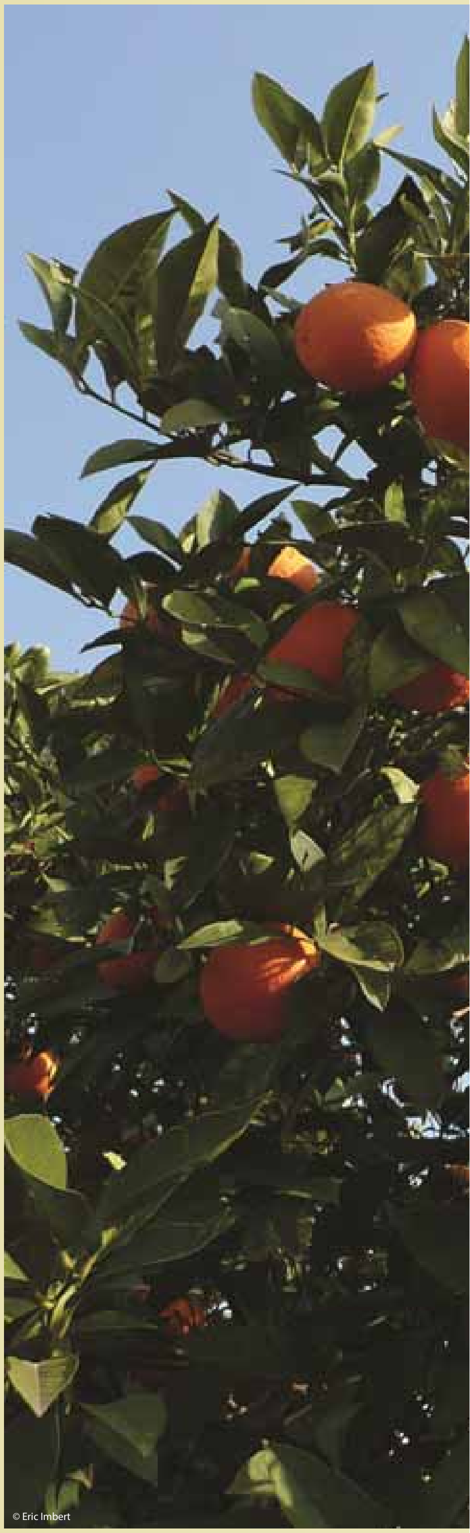
Source: Eurostat

European counter-season orange market

How to move on from the "worst winter season in history"?

That is undoubtedly the question haunting the nights of South African exporters. There is again a bumper harvest in South Africa. The export potential of Navel should reach a historic level. Among the three main production areas providing three-quarters of the country's exports, two registered a 5 to 10 % rise (Western Cape and Sundays River), with Senwes down by approximately 10 %. The Valencia volumes available are set to be slightly less than in the record 2013 season, but have maintained a very high level. The small production rise expected in Letsitele (25 % of the South African harvest) and Hoedspruit only partially compensates for the fall in the other big areas (Sundays River and above all Senwes). Yet the Community market seems very difficult this season. True, it is no longer absorbing 50 % of exports from this source, as was still the case in the late 2000s. Yet with approximately 400 000 to 430 000 t imported in recent years, it nonetheless remains South Africa's main market. It is not the other Southern Hemisphere competitors that Southern Africa should fear, as it is increasingly firmly established in the EU, with a market share going in ten years from just over 50 % to nearly 80 %. Argentina and Uruguay are now just auxiliary sources for the Old Continent. The positive effect of the devaluation of the Argentinean peso on competitiveness could be counterbalanced by a less favourable customs regime on the EU-28 borders as of 1 January (10% customs duty on oranges, instead of the exemption previously in force), a measure also affecting Uruguay. It is rather the demand level which could pose problems. Combined annual imports for all sources have fluctuated for the past five years between 530 000 t and 655 000 t. There is every reason to believe that an extremely conservative hypothesis should be favoured this season. Consumption was extremely poor during the winter, and still is now in early spring. Furthermore, Spain, which provides 70 % of the Community market supply, has very large leftover volumes to sell, both for juice orange and table orange. The Valencia harvest seems to be of a similar level to last season, but it started very late because of poor Salustiana sales. As for late and super-late Navel, sales are slack, while production is peaking due to the entry into production of the new orchards planted between the mid and late 2000s. The smallish size range, though less marked than with Naveline, could maybe help ease the pressure a bit. The rise to prominence of Egypt, more significant every year, is another competition factor on the East European markets, but also in the EU-28.

It is most fortunate that some diversification markets seem to be much less gloomy than the EU-28. Prices are appealing in the United States, due to the production losses suffered by California during the winter (more than 20 USD per box in late April, versus 14 to 16 USD in the previous two seasons). The test implementation of a simplified sanitary protocol for South Africa is an additional attraction factor. The Asian markets could also continue to grow (China, Malaysia, Korea, etc.). Conversely, prudence is probably the order of the day in the Middle East, because of a bigger Egyptian presence than in previous years.



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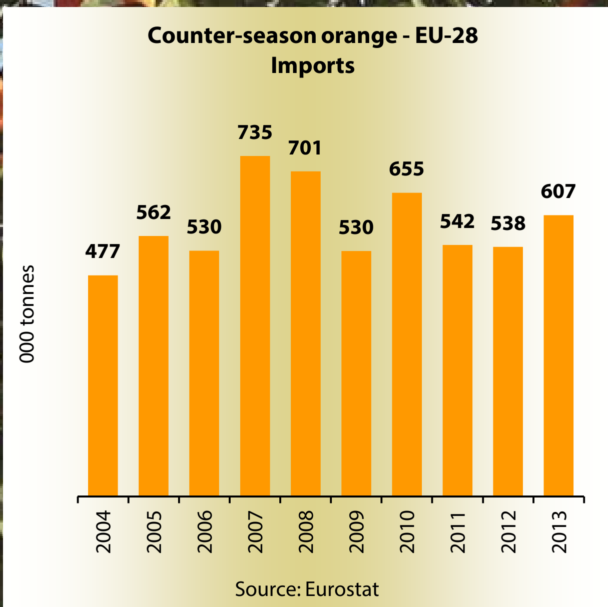
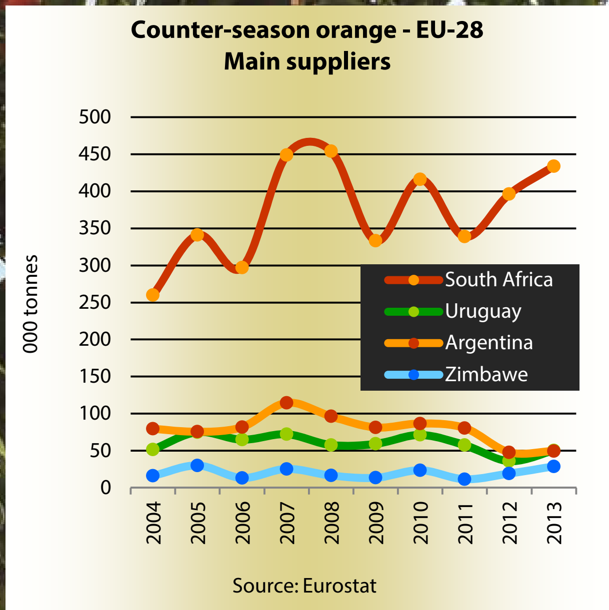
Orange — Southern Hemisphere Export potential estimates			
in tonnes	2014	Comparison	
		2013	2010-2013 average
South Africa	1 130 000	- 2 %	+ 8 %
Argentina	50 000	- 37 %	- 56 %
Uruguay	75 000	+ 7 %	+ 12 %
Total	**1 255 000**	**- 4 %**	**+ 2 %**

Professional sources, Shaffe





Counter-season orange — European Union — Imports

in tonnes	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Total, of which	**476 929**	**561 676**	**530 340**	**734 565**	**701 032**	**529 560**	**655 309**	**542 240**	**538 071**	**606 770**
South Africa	260 034	341 031	296 973	448 674	453 956	333 211	416 018	338 664	396 015	433 637
Uruguay	51 825	75 145	64 930	72 261	57 700	59 293	71 279	57 610	36 012	50 268
Argentina	79 584	75 607	81 906	114 628	96 350	81 413	86 702	80 720	47 971	49 653
Zimbabwe	16 215	30 153	13 342	25 488	16 582	13 517	23 705	11 645	19 257	28 903
Brazil	50 414	20 459	47 937	34 066	26 091	16 217	33 903	26 872	13 276	21 248
Peru	81	166	454	5 921	12 361	2 678	6 192	9 892	7 254	10 565
Swaziland	13 645	10 375	13 654	19 274	14 878	12 983	9 566	11 879	12 005	9 801
Chile	4 019	4 426	10 105	9 006	21 385	8 609	6 899	4 716	5 730	2 208
Australia	1 113	4 315	1 041	5 250	1 730	1 640	1 045	243	553	487

Source: Eurostat

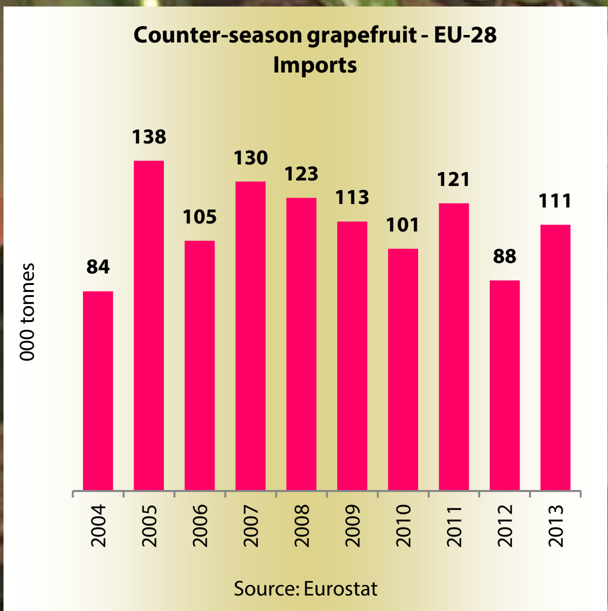
European counter-season grapefruit market

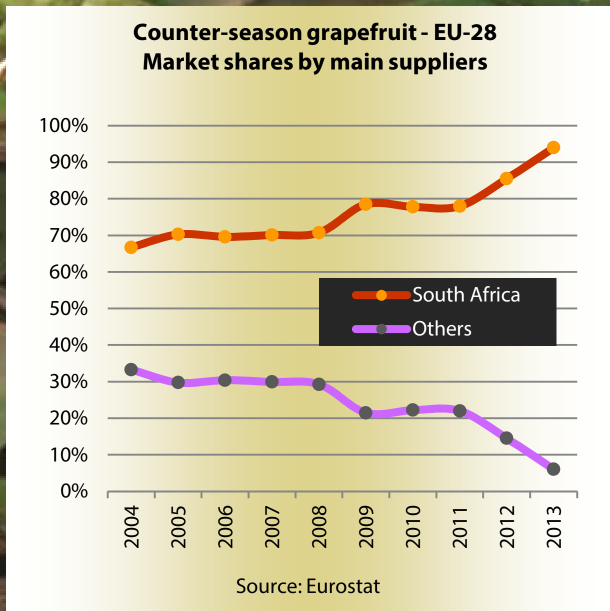
Heavy volumes and markets tighter than ever

Just as for the orange, it is not the Southern Hemisphere competitors that will pose problems to South Africa this season. This country is currently in a near-monopoly position in the summer, with Argentina having pulled out since the late 2000s. Nonetheless, this lack of competition still less makes for a gentle stroll than in previous years. On the one hand, the harvest will not reach the record level of 2013, but will remain particularly large, with the fruit size range on the big side. On the other hand, the season will start in a rather swollen context in the EU. Despite incoming shipments falling and waning early, significant stocks of Floridian fruits will remain available in the first half of May. The Mediterranean season was catastrophic (significant downturn in volumes and prices), but should finish earlier. The record for this winter season — no better than lacklustre — highlights the third problem facing all the players on this market: an increasingly pronounced decline in consumption. Finally, there are strong grounds to fear that the alternative markets will be unable to absorb greater volumes than last season, or even similar volumes. Will Japan, South Africa's other main market as well as the EU-28, still maintain an import level of approximately 50 000 t, despite another collapse of the winter market? Incoming shipments from Florida actually registered a 25 % fall between 2012-13 and 2013-14, i.e. approximately 1 million lost boxes. The previous seasons show that hitherto the winter market decline has never affected the counter-season market. Conversely, we can be more concerned about the Russian market, South Africa's number three market in 2013 with approximately 25 000 t. The devaluation of the rouble could easily raise retail prices and deter exporters from this destination. The only good news in this very gloomy outlook is the possible lateness of the Mexican season, which could slightly extend the South African trading period.

Grapefruit — Southern Hemisphere Export potential estimates			
in tonnes	2014	Comparison	
		2013	2010-2013 average
South Africa	251 000	- 6 %	+ 18 %

Professional sources - Shaffe





Counter-season grapefruit — European Union — Imports										
in tonnes	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Total, of which	**83 676**	**138 291**	**104 771**	**129 566**	**122 792**	**112 876**	**101 410**	**120 529**	**88 210**	**111 461**
South Africa	55 833	97 170	72 924	90 825	86 852	88 616	78 897	94 006	75 412	104 725
Zimbabwe	1 436	5 001	2 227	3 556	1 409	1 947	2 053	2 228	1 360	2 414
Swaziland	5 369	7 197	7 210	10 085	9 260	6 707	9 906	14 986	8 480	2 328
Argentina	19 583	26 869	17 627	23 186	24 171	14 828	9 129	8 276	1 485	1 080
Chile	200	474	2 513	959	719	70	363	18	176	105
Mozambique	780	919	120	0	0	240	669	1 016	840	89
Uruguay	401	576	2 063	775	298	213	140	0	0	0
Others	75	85	87	180	83	255	251	0	457	721

Source: Eurostat

European counter-season small citrus market

Musical chairs on a market no longer on the rise

Unsurprisingly, the small citrus harvest from Southern Hemisphere producer countries promises to be bigger in 2014. Planted surface areas, which have developed vigorously in most Southern Hemisphere producer countries in recent years, are continuing to reach their prime. South Africa is set for another record season. Exports from the number one supplier to the Community market should exceed 9 million boxes, marking a rise of approximately 8 % from last season. The increase is set to be approximately 6 % for the satsuma, 7 % for the clementine and just over 8 % for the hybrids. This dynamic should grow even more considerably in the years to come, in particular for the hybrids (the most planted family in South Africa since 2009, and which represents from 20 to 25 % of total sales of citrus plants since this date). Peru, in second position on the Community market for several years, will not be outdone. Combined exports for all destinations should grow by just over 10 %, for the first time approaching the symbolic 100 000-t mark. The increase will be particularly considerable for the satsuma (+ 30 %) and W. Murcott.

So while the supply seems considerably larger for most exporter countries, the appetite of European consumers must not be overestimated, in particular in a context of strong competition from summer fruits. The figures for the 2013 season have unfortunately confirmed those of previous seasons: consumption of small citruses has stopped rising during the summer season since 2010. Import quantities have even lost just over 10 000 t since this date. The UK and Irish markets, which absorb more than 50 % of total EU-28 imports, are continuing to grow. Conversely Scandinavia, the Community's number two market, is stuck in a dead calm, with volumes no longer growing. The other EU-28 markets are still exhibiting low consumption, with no dynamic seeming to take shape. It is most fortunate that the US market appears to be very open. The growth rate in exports, of around 10 000 t per year on average in recent years, could go through a short-term peak given the early end to the Californian season.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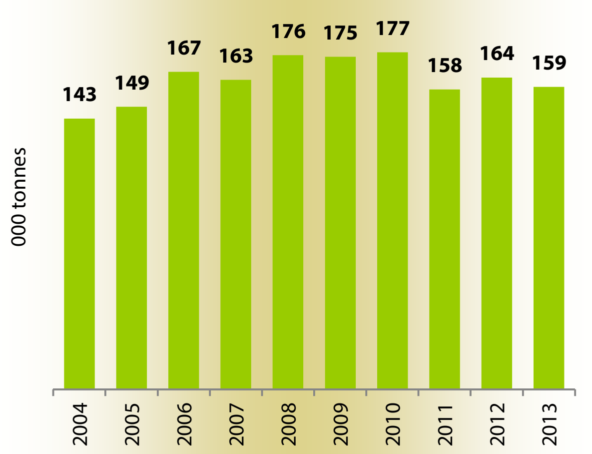
Small citrus — Southern Hemisphere Export potential estimates			
in tonnes	2014	Comparison	
		2013	2010-2013 average
South Africa	138 000	+ 9 %	+ 20 %
Argentina	90 000	+ 2 %	- 15 %
Peru	94 000	+ 23 %	+ 42 %
Uruguay	48 000	+ 29 %	+ 18 %
Total	**370 000**	**+ 12 %**	**+ 13 %**

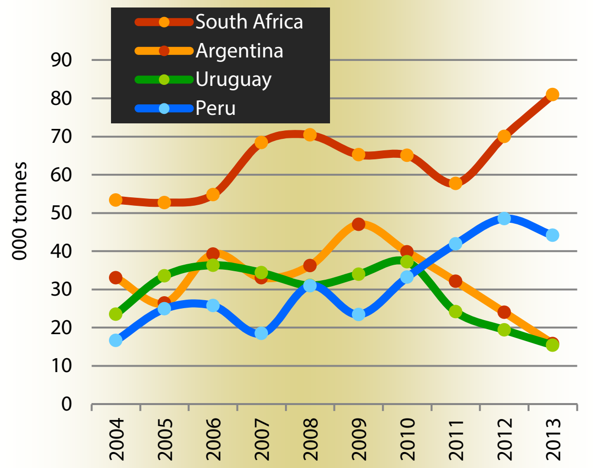
Professional sources, Shaffe

Counter-season small citrus - EU-28 Imports



Source: Eurostat

Counter-season small citrus - EU-28 Main suppliers



Source: Eurostat

Counter-season small citrus — European Union — Imports										
in tonnes	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Total, of which	**142 647**	**148 776**	**167 143**	**162 971**	**175 929**	**175 157**	**177 400**	**157 853**	**164 109**	**159 344**
South Africa	53 378	52 683	54 790	68 412	70 389	65 261	65 100	57 755	70 030	80 939
Peru	33 023	26 403	39 271	33 022	36 243	47 020	39 800	32 130	24 025	15 818
Argentina	23 548	33 519	36 336	34 359	31 046	33 948	37 200	24 160	19 431	15 421
Uruguay	16 611	24 924	25 728	18 469	30 981	23 414	33 200	41 925	48 536	44 139
Australia	10 925	6 770	7 618	6 950	4 886	2 249	1 400	1 560	1 314	1 012
Chile	2 584	3 288	2 059	93	441	378	200	102	310	112
Brazil	756	456	710	652	926	2 214	500	220	463	1 903

Source: Eurostat