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Citrus

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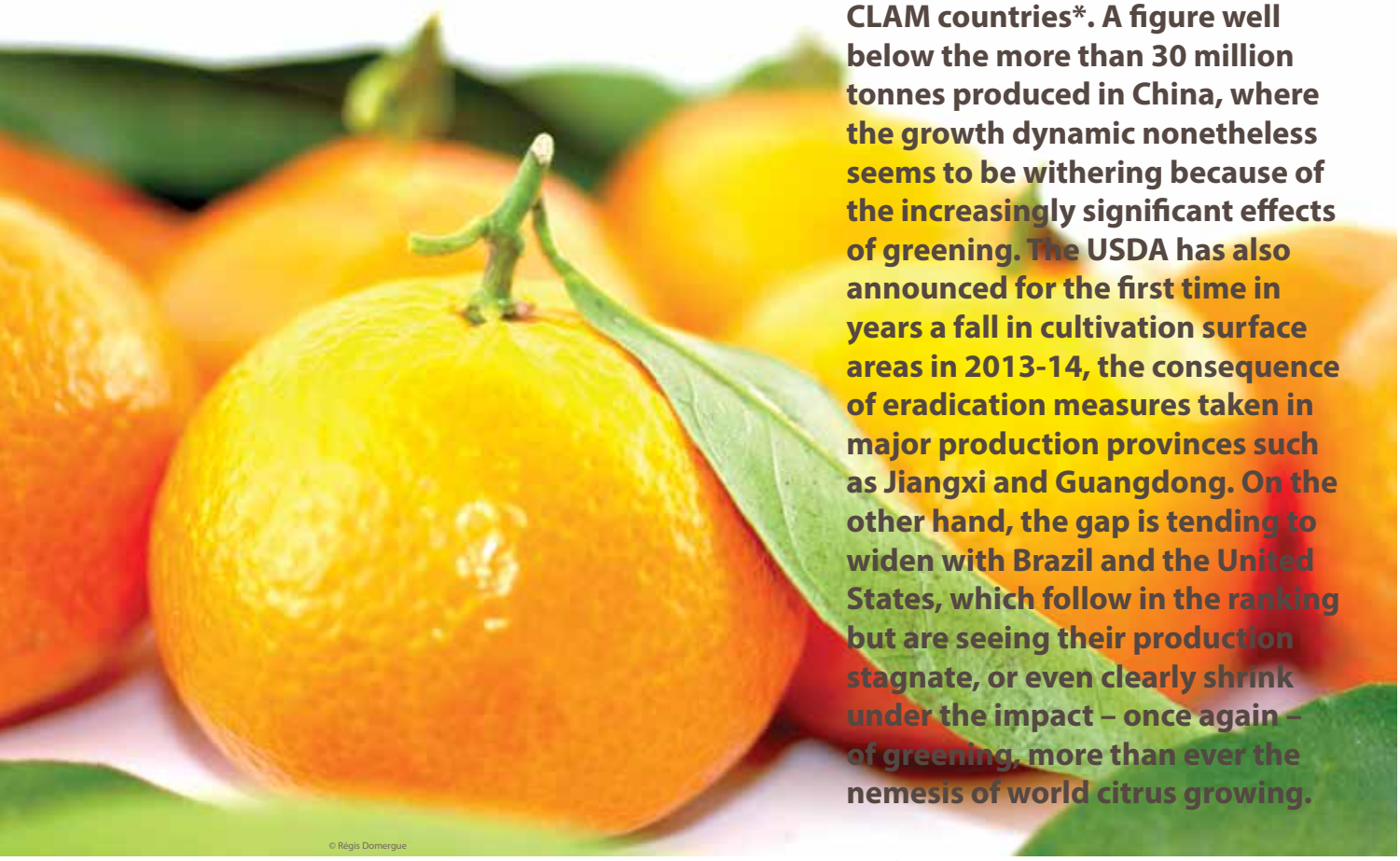
AGRICULTURAL RESEARCH FOR DEVELOPMENT

Mediterranean citruses 2014-15 harvest forecasts

Big production figures, but no record

The Mediterranean will undoubtedly remain the world's number two citrus production area in 2014-15. The harvest, set to register a small cyclical fall, should be slightly in excess of 23 million tonnes, of which just over 20.6 million tonnes from the CLAM countries*. A figure well below the more than 30 million tonnes produced in China, where the growth dynamic nonetheless seems to be withering because of the increasingly significant effects of greening. The USDA has also announced for the first time in years a fall in cultivation surface areas in 2013-14, the consequence of eradication measures taken in major production provinces such as Jiangxi and Guangdong. On the other hand, the gap is tending to widen with Brazil and the United States, which follow in the ranking but are seeing their production stagnate, or even clearly shrink under the impact – once again – of greening, more than ever the nemesis of world citrus growing.



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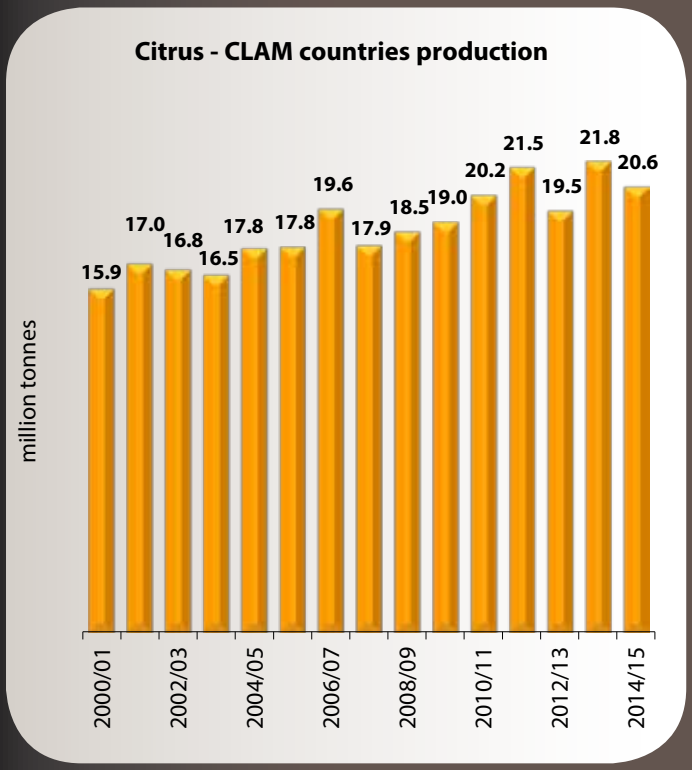
*Algeria, Cyprus, Egypt, Spain, France, Gaza, Greece, Israel, Italy, Morocco, Tunisia, Turkey

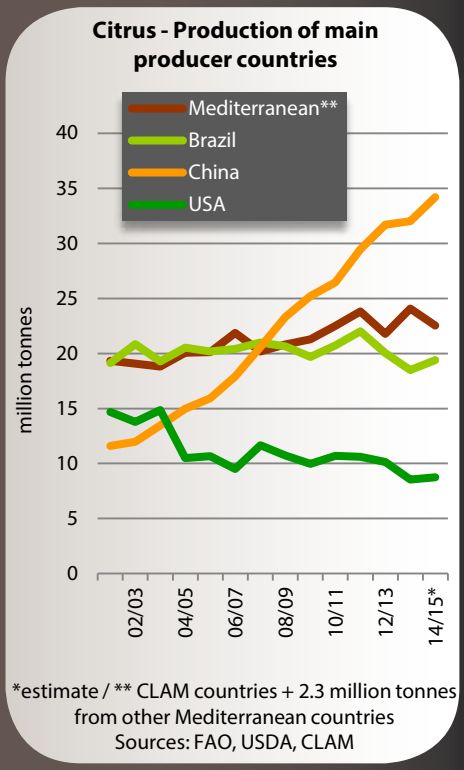
Citrus – CLAM countries production forecast

000 tonnes	2014-15	2013-14	2014-15 comparison with	
			2013-14	average of the 4 last years
Spain	6 862	7 171	- 4 %	- 2 %
Egypt	3 719	3 719	0 %	+ 4 %
Italy	2 499	3 250	- 23 %	- 21 %
Turkey	3 349	3 200	+ 5 %	+ 12 %
Morocco	1 907	2 203	- 13 %	+ 5 %
Greece	1 059	1 180	- 10 %	- 5 %
Israel	597	496	+ 20 %	+ 17 %
Tunisia	308	295	+ 4 %	+ 4 %
Cyprus	265	235	+ 13 %	+ 13 %
France	30	24	+ 23 %	+ 18 %
Total	**20 595**	**21 773**	**- 5 %**	**- 1 %**

Mediterranean citrus growing

- **Production approximately 22.8 million tonnes, of which 20.6 million tonnes is in CLAM countries**
- **18 % of world production estimated at 121 million tonnes**
- **World number 2 production zone after China (23 million tonnes)**

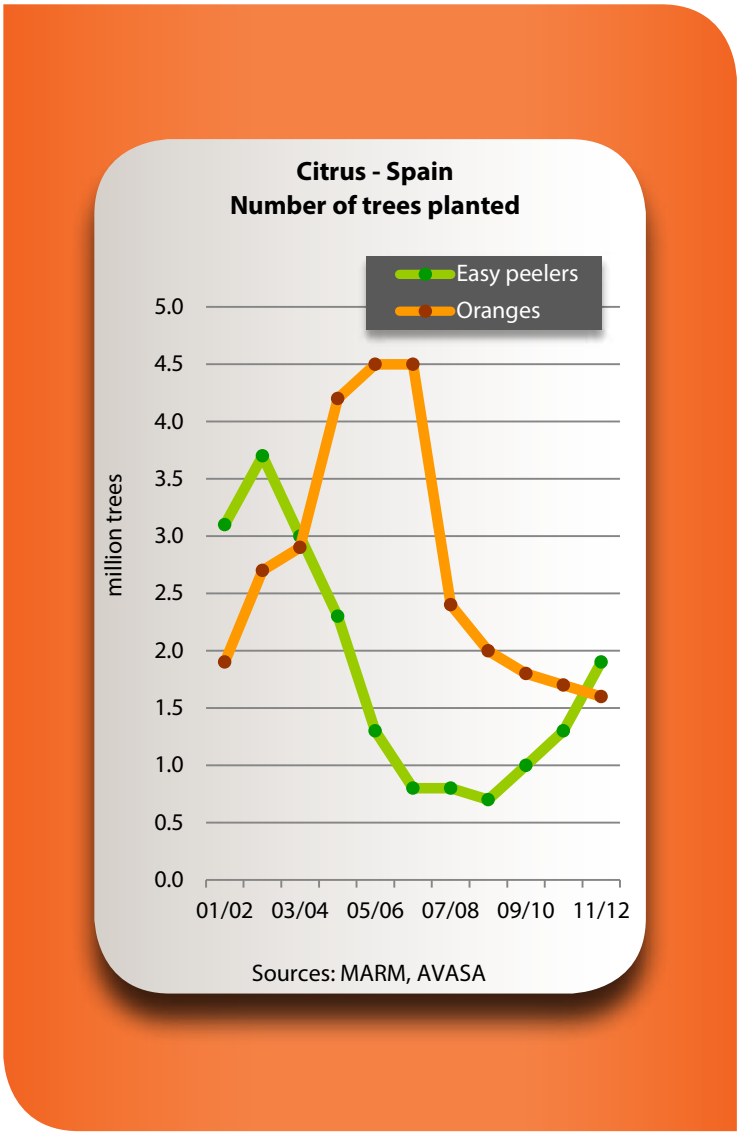


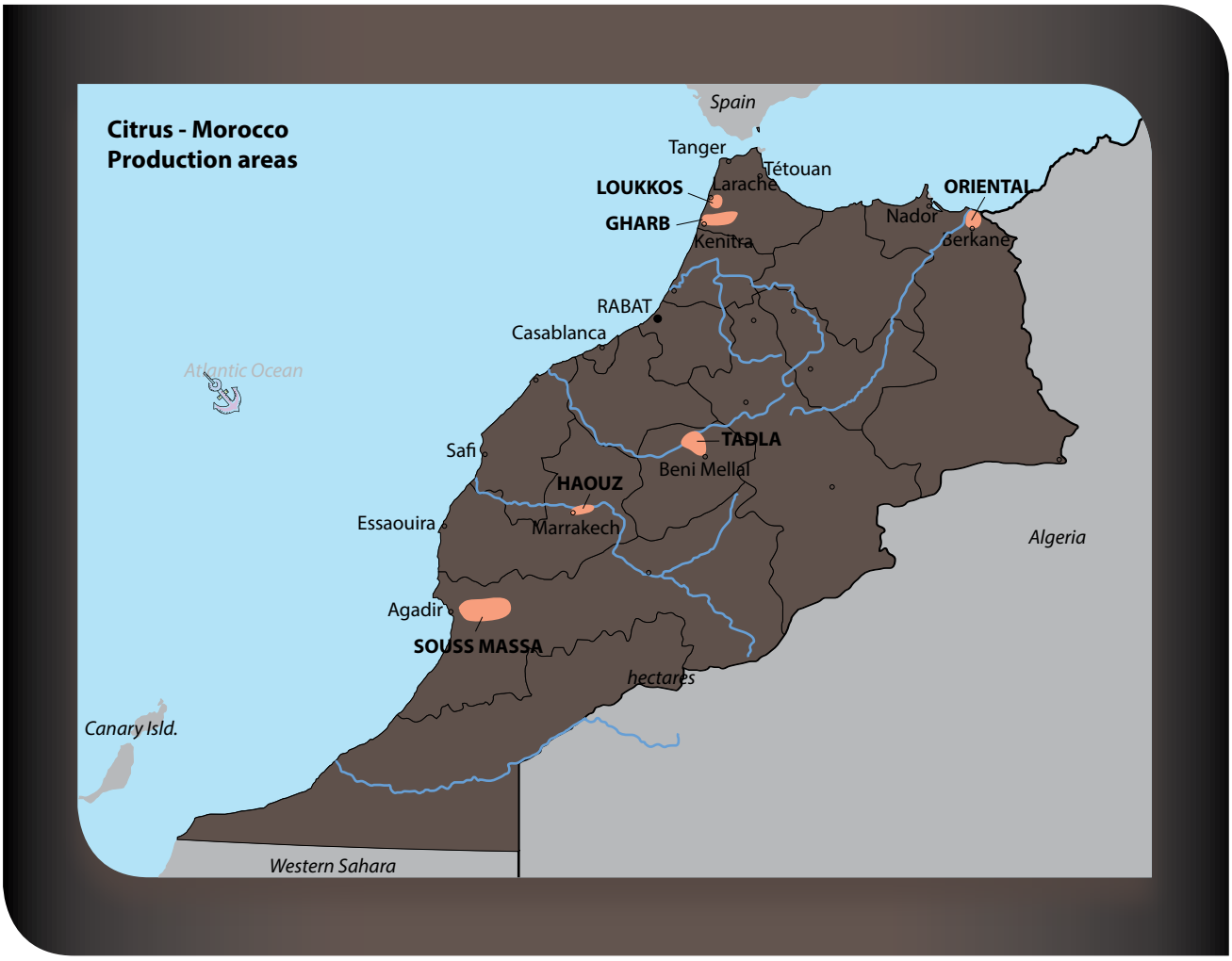


Spain

Another big season for a source near maturity

The region's main producer is again set for a big season. Estimated at approximately 6.5 million tonnes, the harvest is close to last season's, and is among the three or four biggest ever recorded. This level, which has seen no considerable changes for the past three or four seasons, also seems to confirm that the Spanish citrus growing industry is approaching maturity. According to the latest data available, sales of certified plants climbed slightly to 3.9 million plants in 2011-12, though they remained in the bottom bracket, and a very long way from the 6.5 to 7.0 million seen in 2006-07. Orange tree sales have continued to wane, with production set nonetheless to continue its upward trend for a few years because of the extensive late Navel planting carried out until 2005-06. This lack of interest from producers for the orange reflects the chronic weakness in the profitability of this citrus family, as the poor results of last season showed again. The slight upturn by easy peelers remains very hesitant. The mid-season slot remains saturated. Uprooting of Fortuna, overly sensitive to *alternaria*, is partly offsetting Nadorcott planting, whose production potential is now approximately 150 000 t. Producers remain cautious with respect to Tango, given the very high licence price and the lack of clarity on the outcome of the dispute on the parentage of this variety. Finally, they still lack at least one convincing variety on the buoyant spring slot, with no triploids really standing out to date. Will solutions emerge? Hard to say, but in any case there has been a real varietal tidal wave breaking since 2013, with more than 150 varieties available for producers, i.e. nearly 100 more than in 2011 and more than three times more than in the early 2000s.



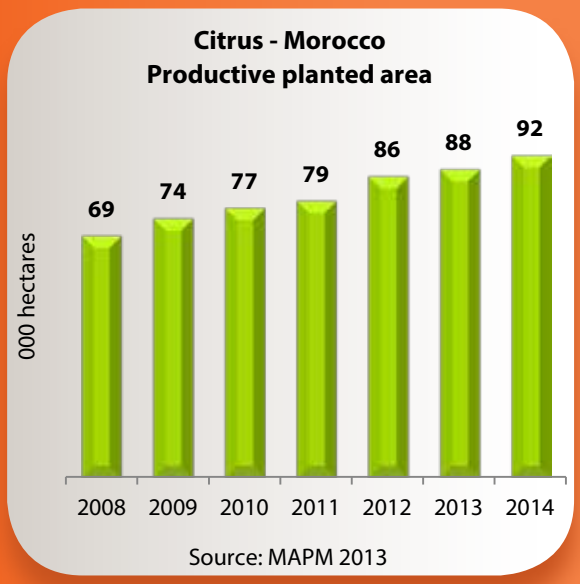


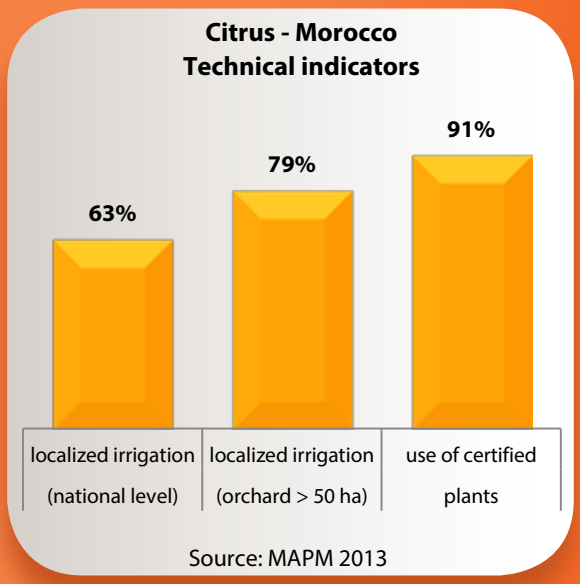
Morocco

The lessons of a difficult 2013-14 season

It is not the small cyclical downturn of 10 % in production which should be underlined, because of unfavourable weather in Souss. It is rather the size of the harvest, which will be nearly 2.0 million tonnes for the second time in its history. The effects of the "Maroc Vert" plan are clearly in place. 37 000 ha have been planted since 2007-08, i.e. more than 5 000 ha per year on average! The easy peelers cultivation area has literally exploded, growing by approximately 27 000 ha, due to large-scale planting of clementines (the traditional Fine, but also earlier cultivars such as Nules or Sidi Aïssa, or later cultivars such as Nour) and Afourer (cultivation area currently 5 000 ha, i.e. an export potential of approximately 160 000 t). In parallel, yields have risen considerably, thanks to the spread of use of certified plants, and to better equipped orchards. Localised irrigation was set up over 61 000 ha in 2012-13, as opposed to 40 000 ha before the start of the plan in 2006-07. The equipment rate is even approaching 80 % in plantations of more than 50 ha.

The Moroccan industry was also quick to draw the lessons of a 2013-14 season which was a record in terms of volume, though so catastrophic in terms of price that certain producers are now close to bankruptcy, with ASPAM needing to intervene for *Crédit Agricole* to agree to ease the lending conditions. A new structure, the Citrus Coordination Committee, has been set up to ensure "a quality turnaround" and export regulation. This body holds genuine inspection power, upheld by EACCE, which manages it and monitors it, along with the producers (ASPAM) and packers. Quality standards have been established (minimum juice content 40 %, minimum Brix 10°, minimum maturity index 8 and degreening limited to 5 days), and the export calendar has been put back in step with the physiological state of the fruits, by setting the official start date of the season as 13 October instead of 13 September. Furthermore, a market monitoring and weekly volume scheduling system has been set up.





Easy peelers – Morocco Evolution of cultivation area		
hectares	**2006**	**2013**
Total	**34 140**	**60 457**
Clementines	**30 287**	**53 475**
Fine	17 381	30 961
Nules	3 403	8 372
Nour	5 678	7 596
Sidi Aissa	3 021	5 197
Marisol	803	1 349
Others	**3 853**	**6 982**
Nadorcott	722	4 641
Nova	652	730
Ortanique	569	513
Others	1 910	1 098

Source: MAPM 2013

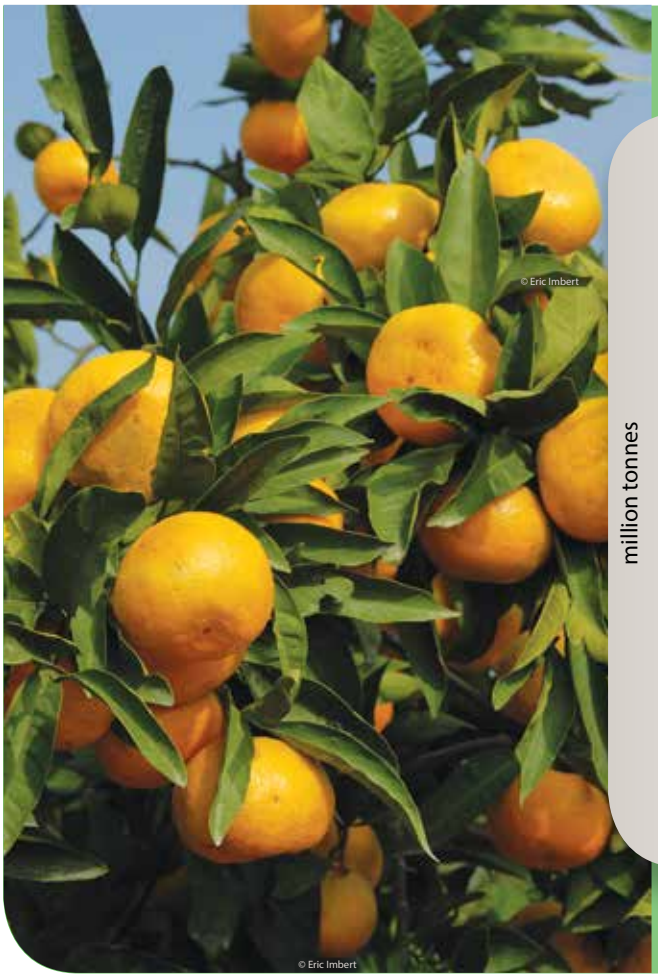
Orange – Morocco Evolution of cultivation area		
hectares	**2006**	**2013**
Total	**41 729**	**52 694**
Navel	16 025	19 777
Maroc Late	21 480	23 922
Blood	2 506	3 250
Salustiana	1 226	1 089
Others	492	4 656

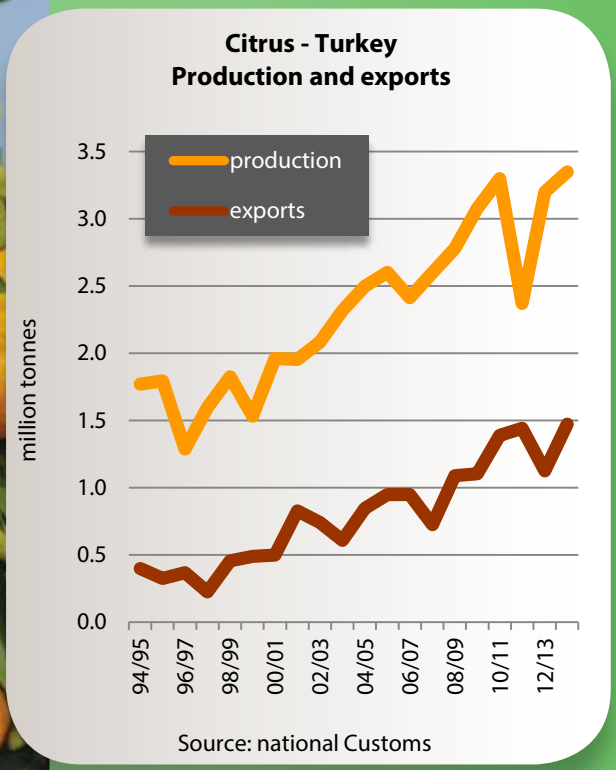
Source: MAPM 2013

Turkey

From record to record

Turkey keeps on stringing the records together. For the first time in its history, production should exceed 3.3 million tonnes in 2014-15. In the space of ten years, the harvest has increased by more than one million tonnes, enabling Turkey to hoist itself up to 3rd place in the ranking of the biggest Mediterranean producer countries, behind Spain and Egypt. Today, the growth is primarily due to the very rapid expansion of the easy peelers cultivation area, the varietal group now representing one third of the total harvest, as opposed to 20 % at the end of the last decade. And this expansion has not yet finished: cultivars mainly intended for East European markets, such as Okitsus or Satsumas (Mia Wase or later cultivars such as Bela and Dobashi Beni) are continuing to see considerable growth. However, other varieties aimed at establishing a broader footing on the Community market are also expanding (W. Murcott and Tango, with 500 ha already planted). The Citrus Promotion Group is investing in a strategic avenue, through three programmes with local research centres (Alata, Batem and Çukurova University). This approach, which is aimed above all at restoring added value, is all the more important since the developments on the Russian market are increasingly pressurising Russian exporters. With the Russian giants disappearing from the fruit import scene, the big supermarkets are increasingly sourcing directly, stipulating increasingly tough commercial conditions, the forerunners of a trend very familiar in Europe around thirty years ago. The historical weakness of the rouble and the tragic crisis spreading across Iraq, which had become a big market for Turkey in recent years, are doing nothing to help.





Italy

Toward large-scale restructuring?

"From Charybde to Scylla" is a local saying which could best sum up the current situation of Italian citrus growing. After the umpteenth calamitous season in terms of prices, 2014-15 production should register a major fall of more than 20 % from the previous season, and reach its lowest level since the late 1990s! This situation is not due solely to the cyclical climatic problems encountered in 2014. The structural lack of competitiveness of Italian citrus growing remains evident, as is illustrated by its trade balance, more negative every season for citruses, despite the scale of its production (third in the Mediterranean by volume). Production structure remains highly fragmented, although undeniable progress has been made. According to a 2010 survey, farms of less than 3 ha still represented more than one quarter of total surface areas. Yet above all, the spread of severe strains of tristeza is ravaging in particular the east of Sicily, on the great plain of Catania renowned for its blood oranges. While the situation at present seems increasingly gloomy, there is nonetheless some light at the end of the tunnel. The fight against the disease is being organised, and a highly ambitious conversion plan has begun to be set up. The objective is to apply a new turn in strategy, by replanting 30 000 ha of more competitive varieties on rootstocks tolerant to the disease (Tarocco clones that have been improved or able to extend the season, easy peelers developed locally, etc.). An initial allowance of 10 million euros has been granted, enabling approximately 1 000 ha to be treated. 50 million euros per year of Community funds should follow until 2020, with this project among the priorities of the 2014-2020 ERDF submitted by Sicily to the EU.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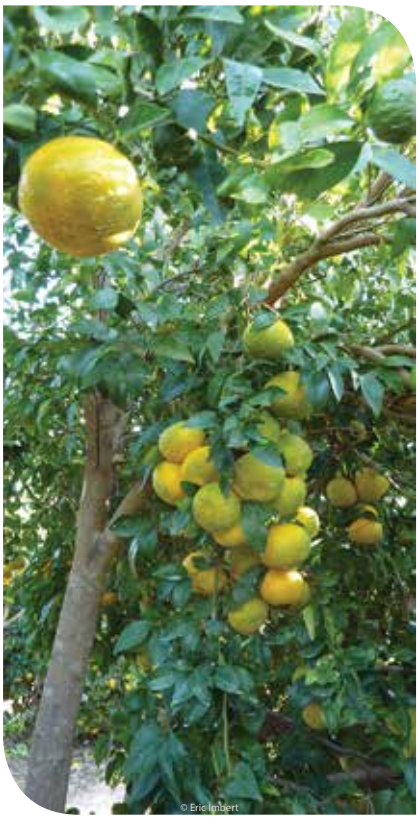
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Other Mediterranean producers

The harvest should return to normal in Israel, after two seasons marked by major climate problems. The in-depth reconstruction of the cultivation stock in recent years is apparent in the forecast, with in particular strong growth expected from volumes of Or and a very significant parallel fall in grapefruit volumes (see article). Production is also set for a good level in Cyprus, but below average in Greece.

A difficult context

The market context does not seem particularly favourable. Firstly, the apple could end up strongly competing with the other staples of the fruits section on European markets, such as the banana or citruses. The production is set to be large, and even very large in Northern and Eastern Europe. Furthermore, the loss of the Russian market could lead to a transfer of considerable volumes onto the Community market, particularly of Polish fruits. Finally, the "entry level" supplies of small-size apples could be more abundant, as the industrial apple market where these fruits are offloaded is saturated this season. Furthermore, while the direct impact of the Russian embargo on Community citruses seem rather moderate overall (see article), what will be the impact of the collapse of the rouble? Might volumes earmarked for this market not be transferred onto the Community market, for want of takers? Prices of imported food labels are soaring, with the Russian currency having lost 30 % against the dollar in one year ■

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Citrus – Mediterranean Basin – 2013-2014 production														
	000 tonnes	Total	France	Spain	Morocco	Algeria	Tunisia	Italy	Israel	Cyprus	Greece	Turkey	Egypt	Gaza*
Easy peelers	**Production**	**6 311.4**	**24.3**	**2 204.3**	**1 162.3**	**111.0**	**46.5**	**760.0**	**138.9**	**81.1**	**148.0**	**910.0**	**725.0**	**-**
	Domestic sales	**2 662.7**	-	299.0	667.0	111.0	46.5	521.0	37.0	15.9	44.7	300.0	620.6	-
	Industry	**432.4**	-	215.0	16.0	-	-	77.0	24.0	22.9	1.5	70.1	5.8	-
	Losses	**363.0**	2.0	172.9	-	-	-	96.0	-	-	19.0	-	73.1	-
	Export	**2 853.6**	22.3	1 517.4	480.0	-	-	65.6	77.9	42.2	82.9	539.9	25.4	-
Orange	**Production**	**12 638.0**	**-**	**3 914.2**	**999.9**	**415.0**	**190.1**	**1 935.0**	**68.9**	**92.4**	**970.0**	**1 380.0**	**2 613.2**	**59.4**
	Domestic sales	**6 645.5**	-	1 099.0	849.8	415.0	171.2	1 424.1	46.0	52.5	429.3	900.4	1 250.2	8.1
	Industry	**1 798.6**	-	1 104.0	52.0	-	-	320.0	16.0	20.3	135.0	118.2	18.8	14.3
	Losses	**531.0**	-	150.0	-	-	-	92.0	-	-	47.0	7.0	235.0	-
	Export	**3 662.9**	-	1 561.2	98.1	-	18.9	98.9	6.9	19.5	358.7	354.4	1 109.2	37.0
Lemon	**Production**	**2 906.8**	**-**	**1 057.0**	**41.3**	**41.4**	**58.3**	**545.0**	**64.3**	**16.6**	**55.5**	**700.0**	**323.0**	**4.4**
	Domestic sales	**1 301.7**	-	161.0	37.2	41.4	56.1	407.6	58.0	7.6	46.0	228.8	256.2	1.8
	Industry	**386.3**	-	240.0	-	-	-	85.0	3.0	3.9	0.5	50.4	2.6	0.9
	Losses	**76.9**	-	21.4	-	-	-	22.0	-	-	1.5	-	32.0	-
	Export	**1 141.9**	-	634.6	4.1	-	2.2	30.4	3.3	5.1	7.5	420.8	32.2	1.7
Grapefruit	**Production**	**616.8**	**-**	**58.7**	**-**	**1.0**	**-**	**10.0**	**223.6**	**44.9**	**6.0**	**210.0**	**58.2**	**4.5**
	Domestic sales	**80.7**	-	4.0	-	1.0	-	8.0	13.0	3.5	2.6	11.4	36.4	0.9
	Industry	**181.1**	-	7.2	-	-	-	-	134.0	18.2	0.8	16.8	0.5	3.6
	Losses	**6.7**	-	0.2	-	-	-	-	-	-	0.5	-	6.0	-
	Export	**348.4**	-	47.3	-	-	-	2.0	76.6	23.2	2.2	181.8	15.3	-
Others	**Production**	**112.8**	**-**	**13.2**	**-**	**-**	**59.5**	**30.0**	**9.8**	**-**	**-**	**-**	**0.3**	**-**
	Domestic sales	**80.3**	-	12.0	-	-	59.3	2.0	7.0	-	-	-	-	-
	Industry	**28.0**	-	-	-	-	-	28.0	-	-	-	-	-	-
	Losses	**1.2**	-	1.2	-	-	-	-	-	-	-	-	-	-
	Export	**3.3**	-	-	-	-	0.2	-	2.8	-	-	-	0.3	-
Total	**Production**	**22 585.8**	**24.3**	**7 247.4**	**2 203.5**	**568.4**	**354.4**	**3 280.0**	**505.5**	**235.0**	**1 179.5**	**3 200.0**	**3 719.6**	**68.3**
	Domestic sales	**10 770.9**	-	1 575.0	1 554.0	568.4	333.0	2 362.7	161.0	79.5	522.5	1 440.6	2 163.4	10.8
	Industry	**2 826.4**	-	1 566.2	68.0	-	-	510.0	177.0	65.4	137.8	255.5	27.7	18.8
	Losses	**978.8**	2.0	345.7	-	-	-	210.0	-	-	68.0	7.0	346.1	-
	Export	**8 011.6**	22.3	3 760.5	583.8	-	21.4	196.9	167.5	90.1	451.2	1 496.9	1 182.4	38.7

* estimate / Source: CLAM

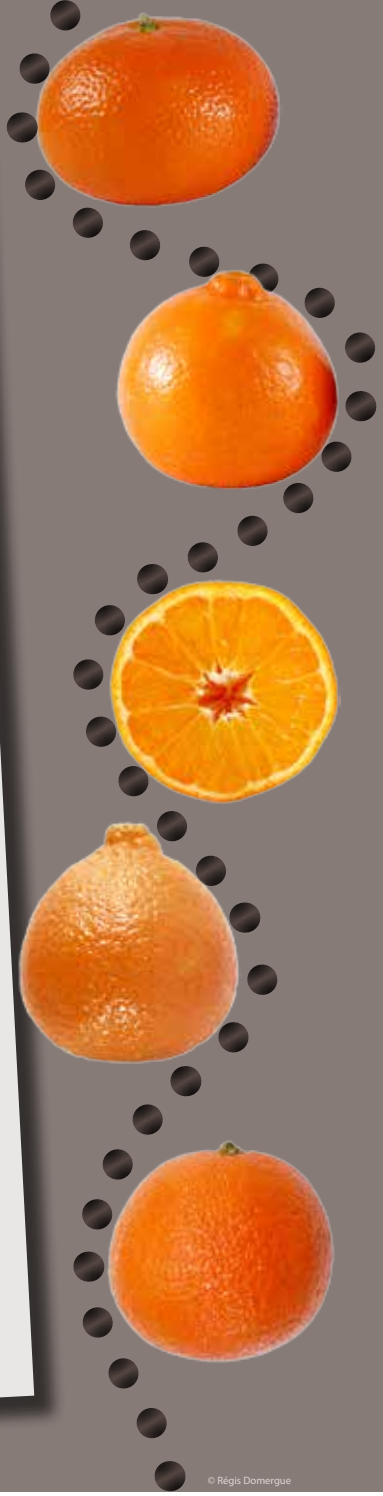
Citrus – Mediterranean Basin – 2014-2015 production forecast														
000 tonnes		Total	France	Spain	Morocco	Algeria	Tunisia	Italy	Israel	Cyprus	Greece	Turkey	Egypt	Gaza*
Easy peelers	**Production**	**6 037.5**	**30.0**	**1 897.3**	**1 004.0**	**111.0**	**46.5**	**672.0**	**223.0**	**88.6**	**148.0**	**1 092.1**	**725.0**	
	Domestic sales	2 714.8	-	290.0	605.0	111.0	46.5	476.0	97.5	17.2	50.0	401.0	620.6	-
	Industry	433	-	200.0	30.0	-	-	75.0	25.5	25.1	1.5	70.1	5.8	-
	Losses	178.5	3.0	7.3	-	-	-	63.0	-	19.6	12.5	-	73.1	-
	Export	2 710.9	27.0	1 400.0	369.0	-	0.03	58.0	100.0	26.7	84.0	620.8	25.4	-
Orange	**Production**	**11 242.5**	**-**	**3 336.5**	**868.0**	**415.0**	**190.1**	**1 344.0**	**122.5**	**106.8**	**850.0**	**1 337.0**	**2 613.2**	**59.4**
	Domestic sales	5 658.1	-	962.0	681.0	415.0	171.2	855.0	78.0	60.7	330.0	846.9	1 250.2	8.1
	Industry	1 434.3	-	704.0	40.0	-	-	320.0	25.5	23.5	170.0	118.2	18.8	14.3
	Losses	401	-	93.5	-	-	-	52.0	-	0.5	20.0	-	235.0	-
	Export	3 749.1	-	1 577.0	147.0	-	18.9	117.0	19.0	22.1	330.0	371.9	1 109.2	37.0
Lemon	**Production**	**2 766.6**	**-**	**955.6**	**29.0**	**41.4**	**58.3**	**475.0**	**66.0**	**23.9**	**55.0**	**735.0**	**323.0**	**4.4**
	Domestic sales	1 221.5	-	160.0	22.0	41.4	56.1	300.0	59.8	10.9	46.0	267.3	256.2	1.8
	Industry	367.2	-	220.0	-	-	-	85.0	2.2	5.6	0.5	50.4	2.6	0.9
	Losses	79.1	-	5.6	-	-	-	40.0	-	-	1.5	-	32.0	-
	Export	1 098.7	-	570.0	7.0	-	2.2	50.0	4.0	7.3	7.0	417.3	32.2	1.7
Grapefruit	**Production**	**575.9**	**-**	**75.9**	**6.0**	**1.0**	**-**	**8.0**	**185.0**	**46.0**	**6.0**	**185.3**	**58.2**	**4.5**
	Domestic sales	72	-	6.0	2.0	1.0	-	4.0	10.0	3.5	3.0	5.2	36.4	0.9
	Industry	147.1	-	9.0	-	-	-	-	98.0	18.7	0.5	16.8	0.5	3.6
	Losses	13.4	-	6.9	-	-	-	-	-	-	0.5	-	6.0	-
	Export	343.4	-	54.0	4.0	-	-	4.0	77.0	23.8	2.0	163.3	15.3	-
Others	**Production**	**74**	**-**	**2.7**	**-**	**-**	**59.5**	**4.0**	**7.5**	**-**	**-**	**-**	**0.3**	**-**
	Domestic sales	65.8	-	2.0	-	-	59.3	-	4.5	-	-	-	-	-
	Industry	4.5	-	-	-	-	-	4.0	0.5	-	-	-	-	-
	Losses	0.7	-	0.7	-	-	-	-	-	-	-	-	-	-
	Export	3	-	-	-	-	0.2	-	2.5	-	-	-	0.3	-
Total	**Production**	**20 696.3**	**30.0**	**6 268.0**	**1 907.0**	**568.4**	**354.4**	**2 503.0**	**604.0**	**265.2**	**1 059.0**	**3 349.4**	**3 719.6**	**68.3**
	Domestic sales	9 732.1	-	1 420.0	1 310.0	568.4	333.0	1 635.0	249.8	92.3	429.0	1 520.4	2 163.4	10.8
	Industry	2 386.1	-	1 133.0	70.0	-	-	484.0	151.7	72.9	172.5	255.5	27.7	18.8
	Losses	672.7	3.0	114.0	-	-	-	155.0	-	20.1	34.5	-	346.1	-
	Export	7 905.1	27.0	3 601.0	527.0	-	21.4	229.0	202.5	79.9	423.0	1 573.2	1 182.4	38.7

* estimate / Source: CLAM

Easy peelers

2014-15 is again set for a big season, symptomatic of the strong growth dynamic of this varietal group in the Mediterranean. For the second time in its history, production will exceed the symbolic 6 million-tonne mark, approaching the record set last season. However, the harvest of the regional champion, Spain, which on its own accounts for approximately one third of the total volumes produced in the region, is set to be somewhat smaller than last season and below average. A shortfall due to smaller production of early cultivars (clementines such as Clemenrubi or Oronules, and above all Satsuma), but also Clemenvilla, a variety representing a considerable proportion of the supply during the core season. Conversely, volumes of clementines like Nules will be as large as in 2013-14. Volumes of late varieties will continue to increase slightly, in particular thanks to a bigger season for Ortanique and above all Nadorcott. Moroccan production will also drop, though this is from a historic 2013-14 season when the effects of the "Maroc Vert" plan showed through for the first time. The expected rise in volumes in the Berkane region will not manage to compensate for the considerable fall from the Souss region. Nonetheless, with quantities estimated at approximately 1 million tonnes, the harvest for this source remains the second biggest ever recorded. A considerable shortfall is also expected in Italy, even further reducing its already extremely limited export capacity. While the West Mediterranean sources are exhibiting a downturn, the same cannot be said for the Eastern sources. The Israeli harvest will reach a historic level, with easy peelers for the first time becoming the country's number one citrus family, ahead of the grapefruit. The growth of Or production potential, concealed for the past two seasons by major climatic problems, should become tangible. A record harvest is also expected in Turkey, set to exceed the symbolic one million-tonne mark. The supply this season will remain largely dominated by early cultivars such as Satsuma, with the big surface areas of late cultivars planted in recent years not yet having entered production. The Cypriot Mandora harvest will return to average.

The very first part of the season went rather well on the West European markets. The abnormally high temperatures weighed down on demand, though the volumes available were extremely modest because of the Spanish shortfall. The situation gradually deteriorated from mid-October, with the switch to cultivars representing bigger volumes, such as Oronules. The blame this season once again lies with the still abnormally high temperatures, which had a negative impact on sales on the consumption markets, and on external quality in the production zones. This unfavourable climatic context, which remained in place in mid-November, could impede the always very sensitive core season period, when big volumes of Spanish Nules are still to be sold. The production shortfall of Clemenvilla may help counterbalance the delay to market already existing (evaluated at around ten days). Morocco's desire to limit shipments to Russia (130 000 t scheduled as opposed to figures of 200 000 t in 2013-14) could lead to more significant volumes of Fine clementine to the EU. For Spain, the absence of its Russian outlet should also be considered in this period, although modest quantities overall are involved (25 000 to 40 000 t, depending on the season). The supply level will be clearly on the rise during the last part of the season, in particular for top-of-the-range cultivars (large potential for Spanish Nadorcott, and most of all Israeli Or). Ortaniques may struggle to find their place on the market in this context, especially since Cyprus will need to reposition a large proportion of its supply on the Community market, in the absence of its Russian outlet (40 000 to 50 000 t).



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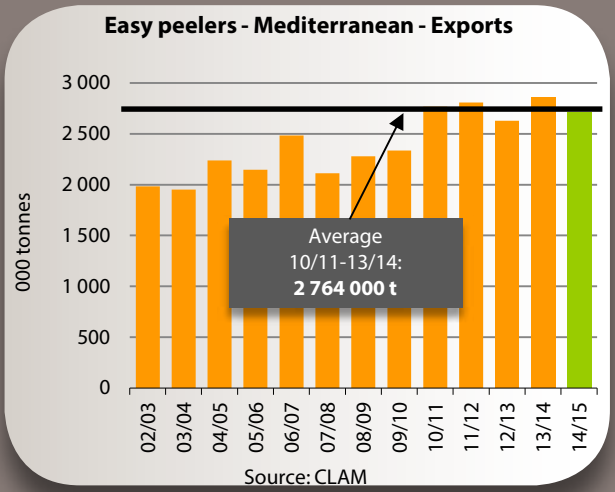
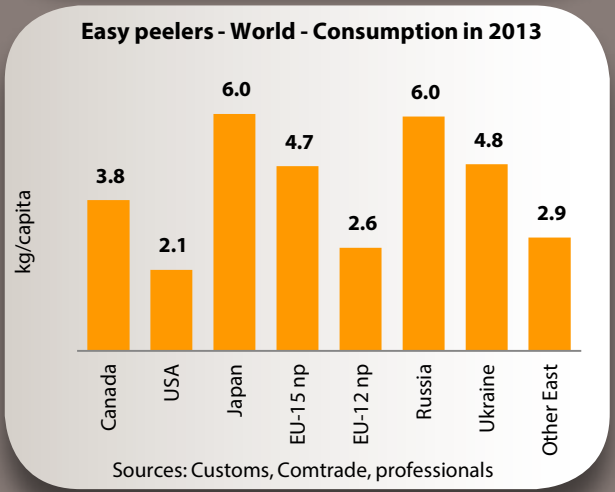
Still plenty from the West... and loads from the East

Mediterranean Easy peelers

- Growing exports between 2.6 and 2.8 million tonnes
- 63 % of world trade estimated at 4.1 million tonnes
- The world's leading export zone

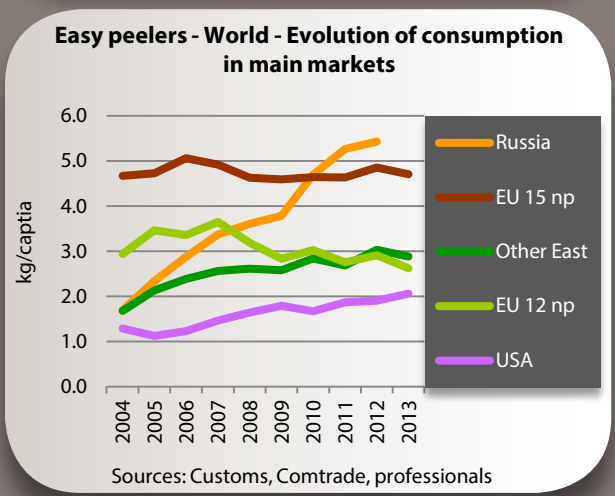




Easy peelers – Export forecast by CLAM countries

000 tonnes	2014-15	2013-14	average of the 4 last years	2014-15 comparison with 2013-14	2014-15 comparison with average
Spain	1 400	1 517	1 575	- 8 %	- 11 %
Morocco	369	480	370	- 23 %	0 %
Corsica	26	22	21	+ 17 %	+ 21 %
Israel	99	78	74	+ 26 %	+ 33 %
Turkey	551	540	469	+ 2 %	+ 17 %
Italy	78	66	91	+ 20 %	- 14 %
Cyprus	59	42	56	+ 40 %	+ 5 %
Greece	100	83	79	+ 21 %	+ 27 %
Egypt	25	25	28	- 2 %	- 12 %
Total	**2 707**	**2 854**	**2 764**	**- 5 %**	**- 2 %**

Source: CLAM

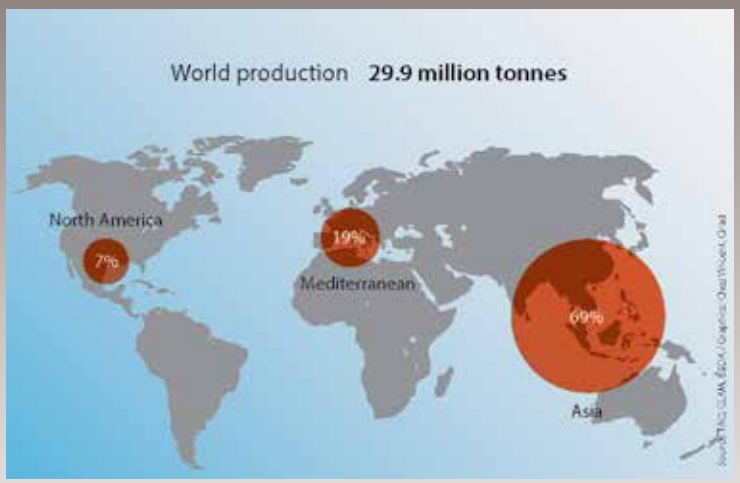


Easy peelers – World – Consumption

	2013 (kg)	Evolution (g) 2013/2012	Evolution (g) 2013/2009
Canada	3.8	+ 3	+ 138
United States	2.1	+ 151	+ 266
Japan	6.0	+ 384	- 749
EU-15 np	4.7	- 152	+ 110
EU-12 np	2.6	- 292	- 210
Russia	6.0	+ 536	+ 2 184
Ukraine	4.8	+ 887	+ 1 775
Other Eastern countries	2.9	- 147	+ 306

np: non producer countries / Sources: Customs, COMTRADE, professionals

EASY PEELERS - Production (2012-13)



Easy peelers - The 10 leading producer countries	
000 tonnes	**2012-2013**
China	17 000
Spain	2 174
Brazil	960
Japan	900
Iran	825
Italy	792
Egypt	725
South Korea	692
Morocco	662
Turkey	543

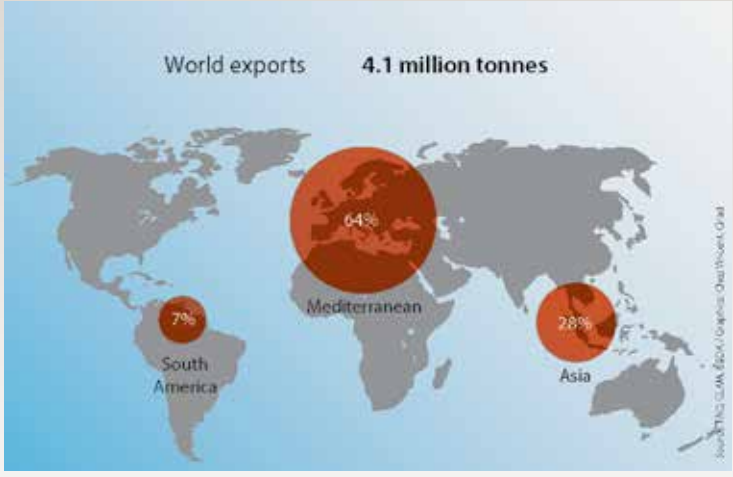
Sources: FAO, professionals

EASY PEELERS - Imports (2012-13)

Easy peelers - The 10 leading importer countries	
000 tonnes	**2012-2013**
Russia	838
Germany	768
France	704
United Kingdom	541
Netherlands	373
Poland	343
Ukraine	216
Italy	186
United Kingdom	150
Canada	130

Source: National Customs

EASY PEELERS - Exports (2012-13)



Easy peelers - The 10 leading exporter countries	
000 tonnes	**2012-2013**
Spain	1 541
China	733
Turkey	411
Pakistan	358
Morocco	307
South Africa	127
Greece	91
Italy	85
Peru	85
Argentina	80

Sources: national Customs, professionals

USA - Imports - Main supplier countries					
000 tonnes	2008-09	2009-10	2010-11	2011-12	2012-13
Total	**117.6**	**117.3**	**152.2**	**146.5**	**150.1**
Total N. Hemis., incl.	**83.1**	**67.5**	**86.3**	**66.9**	**65.3**
Spain	55.5	44.9	60.8	47.5	47.6
Morocco	18.6	15.1	20.9	16.2	11.5
Mexico	7.7	5.8	3.5	1.1	*3.9*
Israel	1.2	1.7	1.1	2.0	2.3
Total S. Hemis., incl.	**49.8**	**61.5**	**65.9**	**79.6**	**84.8**
Chile	27.3	35.5	43.3	53.5	60.2
Peru	10.6	14.6	14.3	17.2	19.6
South Africa	6.0	7.8	4.5	7.0	3.4
Australia	4.3	3.1	2.2	1.9	1.6
Local production (tangerine, tangelo)	**577**	**601**	**643**	**711**	**716**
California	337	359	385	472	526
Florida	229	229	247	232	182
Arizona	12	13	11	7	7

Source: US Customs, code 080520

Canada - Imports - Main supplier countries					
000 tonnes	2009	2010	2011	2012	2013
Total	**124.1**	**123.9**	**123.9**	**129.9**	**129.7**
Total N. Hemis., incl.	**106.5**	**105.9**	**103.2**	**104.5**	**104.9**
Morocco	50.3	45.4	38.6	37.3	33.8
China	32.0	29.7	28.5	28.7	33.4
USA	17.8	22.4	22.4	17.0	*20.2*
Spain	2.3	3.8	7.6	11.7	7.5
Japan	2.1	1.7	2.2	2.0	2.3
Total S. Hemis., incl.	**17.0**	**18.0**	**20.7**	**25.4**	**24.8**
Peru	4.4	6.5	8.9	11.1	10.5
South Africa	4.5	3.2	4.5	6.0	6.2
Argentina	2.6	3.1	3.0	3.5	3.0
Chile	2.4	2.7	2.3	2.5	2.3
Uruguay	1.6	1.1	1.6	1.4	1.9
Brazil	1.3	1.4	0.4	0.9	0.3

Source: COMTRADE, code 080520

European Union - Imports - Main supplier countries					
000 tonnes	2008-09	2009-10	2010-11	2011-12	2012-13
Total	**1 708.7**	**1 697.8**	**1 750.0**	**1 787.6**	**1 710.7**
Total N. Hemis., incl.*	**1 532.8**	**1 522.7**	**1 592.2**	**1 623.5**	**1 551.4**
Spain	1 262.3	1 157.6	1 295.7	1 317.7	1 279.8
Italy	47.3	91.7	75.1	89.5	75.1
Morocco	79.9	114.2	90.5	80.6	*64.0*
Israel	24.8	36.3	29.0	42.7	40.8
Greece	14.4	31.5	36.1	31.6	39.9
Turkey	80.9	64.3	50.3	45.4	36.7
Cyprus	11.5	13.6	8.1	6.4	7.0
Portugal	4.4	4.1	2.8	5.8	5.6
Pakistan	4.3	5.1	3.3	2.6	2.2
Egypt	1.5	2.3	1.1	1.2	0.3
Total S. Hemis., incl.	**175.2**	**177.4**	**157.9**	**164.1**	**159.3**
South Africa	65.3	65.1	57.8	70.0	80.9
Peru	23.4	33.2	41.9	48.5	44.1
Argentina	47.0	39.8	32.1	24.0	15.8
Uruguay	33.9	37.2	24.2	19.4	15.4
Australia	2.2	0.5	0.2	0.5	1.9

*Extra-EU imports and imports from EU producer countries (Spain, Italy, Greece) /
Source: EUROSTAT, code 080520

Other West European countries - Main markets					
000 tonnes	2008-09	2009-10	2010-11	2011-12	2012-13
Total	**1 708.7**	**1 697.8**	**1 750.0**	**1 787.6**	**1 710.7**
Switzerland	1 262.3	1 157.6	1 295.7	1 317.7	1 279.8
Norway	47.3	91.7	75.1	89.5	75.1
Iceland	79.9	114.2	90.5	80.6	*64.0*

Source: COMTRADE, code 080520

Russia - Imports - Main supplier countries					
000 tonnes	2009	2010	2011	2012	2013
Total	**533.4**	**660.4**	**739.5**	**762.8**	**838.1**
Total N. Hemis, incl.	**469.0**	**590.8**	**668.7**	**696.1**	**768.3**
Morocco	132.5	*167.7*	*198.7*	*191.8*	*222.2*
Turkey	134.6	162.7	186.9	158.8	200.6
China	79.0	66.7	66.0	87.1	*86.9*
Pakistan	43.5	82.9	77.1	91.3	80.3
Georgia	10.9	-	-	29.2	49.2
Spain	19.9	27.5	57.7	59.7	47.7
Israel	23.7	22.7	21.5	19.9	22.7
Cyprus	6.2	9.4	16.6	15.8	18.6
Greece	2.3	3.4	7.4	12.7	12.4
Iran	0.8	0.4	0.5	3.5	5.2
Total S. Hemis, incl.	**62.2**	**69.6**	**70.8**	**66.7**	**69.8**
Argentina	40.6	46.5	48.1	42.0	44.0
South Africa	11.1	14.1	13.2	13.0	14.1
Uruguay	3.2	5.8	5.6	7.0	8.0
Peru	1.0	3.2	3.9	4.7	3.7

Source: COMTRADE, code 080520

Ukraine - Imports - Main supplying countries					
000 tonnes	2009	2010	2011	2012	2013
Total, incl.	**136.2**	**157.6**	**181.8**	**175.7**	**215.7**
Spain	14.5	16.3	34.1	35.2	343.9
Turkey	54.9	75.3	85.5	70.0	114.6
Georgia	37.8	28.7	10.8	13.4	21.4
Pakistan	8.4	11.0	20.9	25.4	13.8
Italy	8.5	10.7	16.9	16.8	12.4
Greece	2.9	5.6	5.6	5.8	6.0
Israel	2.4	1.8	-	2.5	3.6
Egypt	1.7	1.7	1.7	1.9	3.5

Source: COMTRADE, code 080520

Other Central and East European countries - Main markets					
000 tonnes	2009	2010	2011	2012	2013
Total, incl.	**94.2**	**103.7**	**98.0**	**110.5**	**105.1**
Belarus	27.9	29.4	32.5	38.9	42.9
Serbia	22.1	27.3	23.0	24.4	21.1
Bosnia	16.5	18.7	16.2	17.3	13.8
Moldova	6.9	6.6	7.6	8.2	9.3
Macedonia	7.4	7.5	6.5	7.5	8.1
Albania	9.9	10.4	7.7	8.4	5.7
Croatia	3.3	3.8	4.7	5.8	4.3

Source: COMTRADE, code 080520

Japan - Imports - Main supplier countries					
000 tonnes	2009	2010	2011	2012	2013
Total	**9.0**	**10.9**	**21.3**	**20.3**	**15.6**
Total N. Hemis, incl.	**7.2**	**9.3**	**17.7**	**16.7**	**12.4**
USA	7.1	9.2	17.6	16.6	12.4
Israel	-	-	-	-	1.3
Taiwan	0.1	0.1	0.1	0.1	0.1
Total S. Hemis, incl.	**1.8**	**1.6**	**3.6**	**3.6**	**3.2**
Australia	1.2	1.0	2.3	2.1	2.5
New Zealand	0.5	0.3	0.9	1.0	0.6
Chile	0.2	0.3	0.5	0.3	0.1

Source: Japanese Customs, code 080520

South-East Asia - Main markets					
000 tonnes	2009	2010	2011	2012	2013
Total	**433.8**	**391.0**	**462.2**	**534.6**	**414.9**
Thailand	38.7	30.8	73.8	144.8	142.6
Indonesia	189.0	160.3	182.3	179.4	76.0
Philippines	56.6	41.8	46.7	72.6	57.6
Malaysia	65.9	75.3	72.8	59.3	44.6
China	36.5	31.2	36.1	29.5	41.9
Singapore	16.8	19.5	19.8	17.5	21.7
Vietnam	25.8	21.2	20.1	*21.0*	*21.0*
Sri Lanka	4.5	10.9	10.5	10.6	9.5

Source: COMTRADE, code 080520

Central Asia - Main markets					
000 tonnes	2009	2010	2011	2012	2013
Total	**49.3**	**52.2**	**79.0**	**80.7**	**102.2**
Kazakhstan	28.8	*40.0*	51.6	65.9	84.2
Kyrgyzstan	8.1	7.0	7.3	10.2	11.3
Armenia	3.0	2.6	10.1	3.7	4.8
Azerbaijan	9.5	2.6	10.1	0.9	1.9

Source: COMTRADE, code 080520

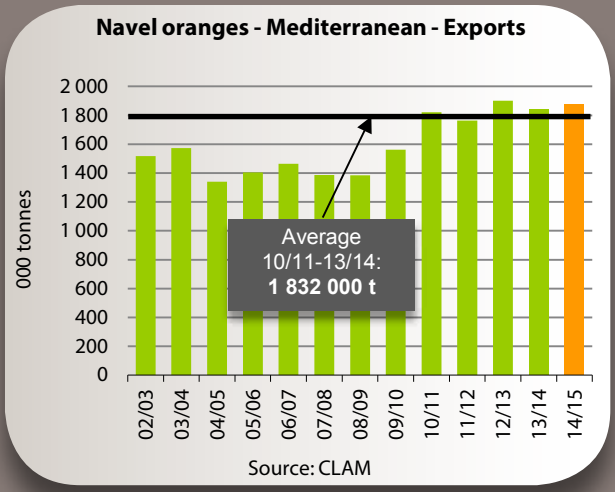
Persian Gulf - Main markets					
000 tonnes	2009	2010	2011	2012	2013
Total	**161.9**	**255.7**	**326.8**	**286.9**	**333.1**
Iraq	55.0	72.0	105.0	134.9	158.8
United Arab Emirates	17.2	17.3	50.0	50.0	85.0
Saudi Arabia	20.4	57.5	59.3	58.6	55.7
Kuwait	14.1	15.0	15.0	10.6	15.1
Qatar	3.5	4.9	5.0	9.1	6.1
Oman	11.5	11.2	23.0	7.6	4.6
Bahrain	3.7	3.7	3.9	*4.0*	*4.5*
Iran	36.5	74.2	65.6	12.1	3.3

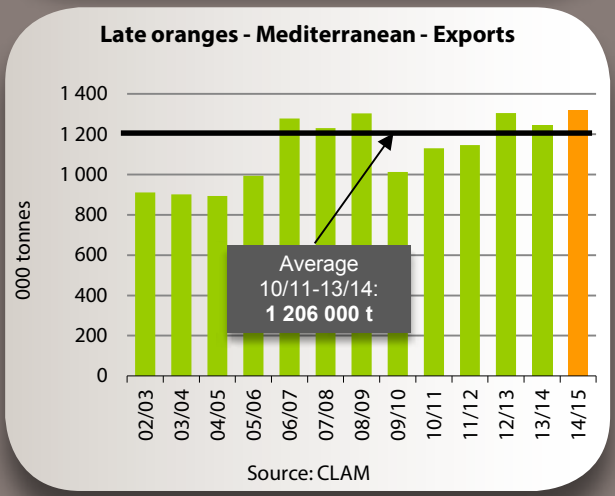
Source: COMTRADE, code 080520

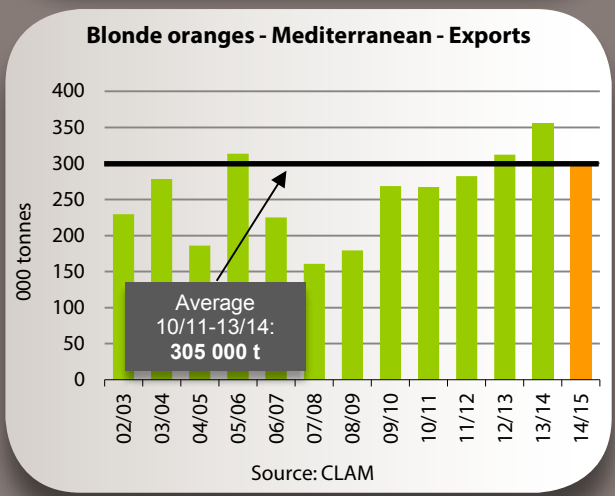
Orange

There will be a considerable production fall, though this is from a record 2013-14 season when Mediterranean volumes exceeded 12 million tonnes for the first time. A trend largely attributable to the region's number one Spain, whose harvest will stick very closely to the trend described above: production will remain big despite a lower level than last year's historic season of more than 7 million tonnes. The export potential should be greater still, even more than last season's, and the second biggest ever seen. Sorting rejects and industrial use should not reach the historic levels of 2013-14, with the size range set to be considerably higher, while the occurrence of quality problems of creasing or splitting of the epidermis ("clareta" or "rajado") should be less than last season. Hence the supply to the West European markets, three-quarters of which is provided by Spain, promises to be abundant throughout the season. Volumes, which had proven somewhat below average during the period from January to April because of the problems mentioned above, should return to a much higher level.

What about the volumes from the top-up sources? Egypt, the number two supplier to the EU in recent years during the winter season, with a market share of approximately 8 %, seems to have an average production. Conversely, a fall in exports is possible since the main asset of this source, namely its price competitiveness, could be less pronounced because of a very considerable increase in logistical costs (approximately 850 USD per tonne more, according to the Agricultural Export Council). The Italian harvest is registering a spectacular downturn of more than 30 %, plummeting to a level never recorded. Nonetheless, exporters hope to be able to maintain the export flow, limited in view of the production, to a normal level. Morocco, less and less involved in exports of this citrus family, because of an increasingly demanding and lucrative local market (less than 100 000 t of exports to all destinations in 2012-13 and 2013-14), should have a smaller production than last year.



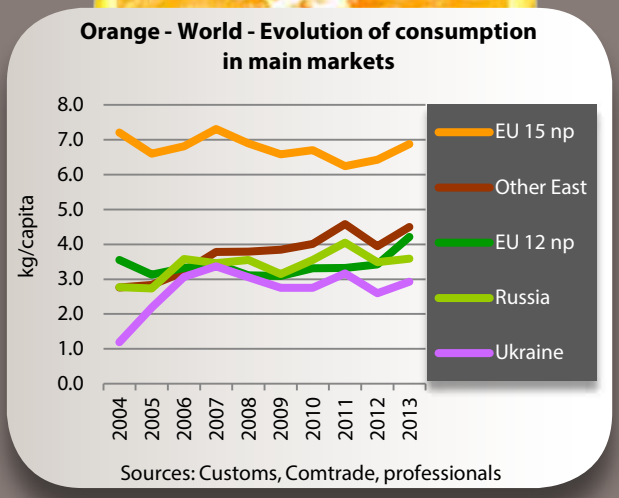


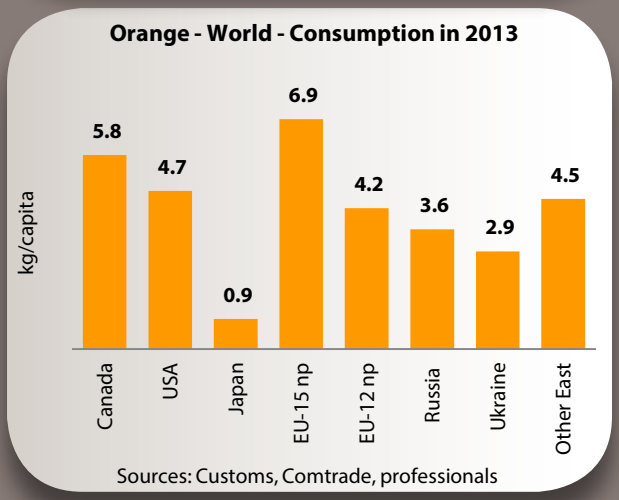


Export potential similar to last season, but quality and size range on the rise

Mediterranean orange

- Growing exports between 3.3 and 3.7 million tonnes
- 59 % of world trade estimated at 6.2 million tonnes
- The world's leading export zone





Orange – Export forecast by CLAM countries

000 tonnes	2014-15	2013-14	average of the 4 last years	2014-15 comparison with 2013-14	2014-15 comparison with average
Spain	1 576	1 560	1 602	+ 1 %	- 2 %
Morocco	147	98	122	+ 50 %	+ 20 %
Israel	19	7	10	+ 175 %	+ 92 %
Tunisia	19	18	20	+ 4 %	- 4 %
Turkey	372	354	318	+ 5 %	+ 17 %
Italy	117	99	106	+ 18 %	+ 10 %
Cyprus	22	20	24	+ 13 %	- 7 %
Greece	330	359	348	- 8 %	- 5 %
Egypt	1 063	1063	937	0 %	+ 13 %
Total	**3 665**	**3 578**	**3 486**	**+ 2 %**	**+ 5 %**

Source: CLAM

Orange – Export forecast by variety

000 tonnes	2014-15	2013-14	average of the 4 last years	2014-15 comparison with 2013-14	2014-15 comparison with average
Navel Navelina	1 877	1 839	1 832	+ 2 %	+ 2 %
Blonde	302	356	305	- 15 %	- 1 %
Blood	173	144	149	+ 20 %	+ 16 %
Late	1 319	1 243	1 206	+ 6 %	+ 9 %
Total	**3 665**	**3 578**	**3 486**	**+ 2 %**	**+ 5 %**

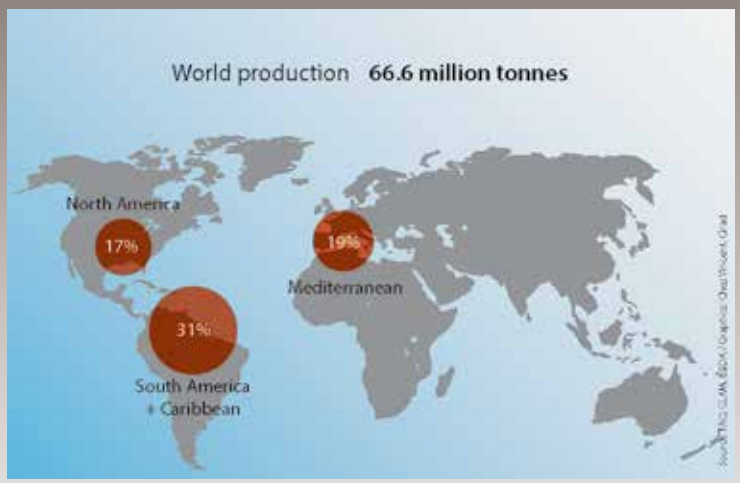
Source: CLAM

Orange – World – Consumption

	2013 (kg)	Evolution (g) 2013/2012	Evolution (g) 2013/2009
Canada	5.8	+ 74	+ 274
United States	4.7	- 114	+ 691
Japan	0.9	- 153	+ 132
EU-15 np	6.9	+ 454	+ 301
EU-12 np	4.2	+ 790	+ 1 121
Russia	3.6	+ 107	+ 442
Ukraine	2.9	+ 331	+ 176
Other Eastern countries	4.5	+ 546	+ 649

np: non producer countries / Sources: Customs, COMTRADE, professionals

ORANGE - Production (2012-13)



Orange - The 10 leading producer countries	
tonnes	**2012-2013**
Brazil	16 361 000
United States	7 502 000
China	7 000 000
India	5 000 000
Mexico	4 000 000
Spain	3 723 000
Egypt	2 613 000
Italy	1 730 000
Indonesia	1 611 000
South Africa	1 609 000

Sources: FAO, professionals

ORANGE - Imports (2013)

Orange - The 10 leading importer countries	
tonnes	**2013**
Germany	1 086 895
Netherlands	974 265
France	950 163
United Kingdom	576 643
Russia	503 937
Italy	405 150
Saudi Arabia	334 778
Poland	306 784
China	269 608
Spain	248 488

Source: national Customs

USA - Import - Main supplier countries					
tonnes	2009	2010	2011	2012	2013
Total	**89 933**	**106 839**	**104 335**	**118 895**	**138 869**
Total N. Hemis., incl.	**18 386**	**23 631**	**15 208**	**19 954**	**33 441**
Mexico	16 089	20 636	12 318	17 421	27 600
Morocco	25	61	0	0	3 189
Dominican Rep.	1 482	1 840	2 084	2 380	2 485
Total S. Hemis., incl.	**71 547**	**83 208**	**89 127**	**98 941**	**105 428**
Chile	20 312	33 393	44 933	51 510	58 856
South Africa	27 246	33 632	35 662	35 961	36 013
Australia	23 486	15 361	7 959	11 100	10 433
Peru	503	822	573	370	126

Source: US Customs

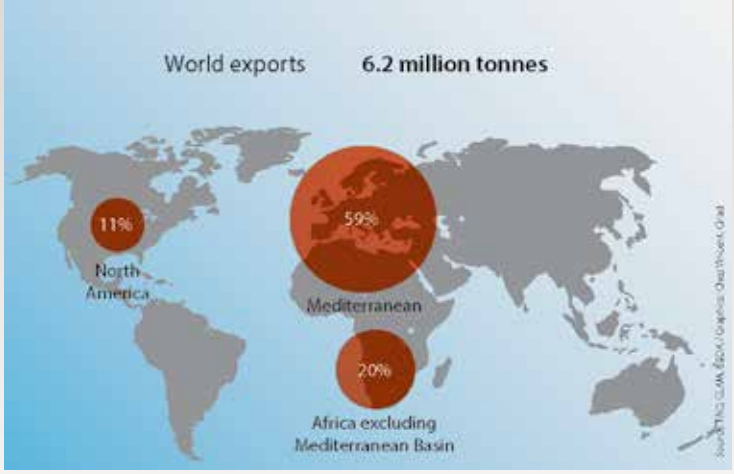
Canada - Imports - Main supplying countries					
tonnes	2009	2010	2011	2012	2013
Total	**185 932**	**200 795**	**208 119**	**194 473**	**197 951**
Total N. Hemis, incl.	**148 668**	**162 379**	**163 728**	**149 339**	**149 653**
Morocco	141 246	159 779	161 300	145 012	145 405
China	3 268	1 452	1 149	3 001	2 957
USA	2 195	230	272	453	677
Spain	1 709	591	563	466	335
Japan	251	327	444	407	279
Total S. Hemis., incl.	**36 498**	**37 392**	**43 588**	**44 467**	**47 367**
South Africa	27 128	26 828	33 094	36 297	38 504
Chile	2 297	3 754	4 928	3 562	4 013
Australia	3 840	3 708	3 255	3 107	3 563
Uruguay	2 032	834	821	457	940
Argentina	472	1 568	1 329	935	279
Others	766	1 024	803	667	931

Source: COMTRADE

Oceania - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**27 444**	**32 708**	**36 645**	**32 722**	**35 058**
Australia	15 165	19 481	24 023	19 223	20 794
New Zealand	12 279	13 227	12 622	13 499	14 264

Source: COMTRADE

ORANGE - Exports (2012-13)



Orange - The 10 leading exporter countries	
tonnes	**2012-2013**
Spain	1 771 000
South Africa	1 152 000
Egypt	1 017 000
USA	680 000
Greece	303 000
Turkey	243 000
Morocco	141 000
Italy	105 400
China	83 000
Argentina	50 000

Sources: national Customs, professionals

European Union - Imports - Main supplier countries					
tonnes	2008-09	2009-10	2010-11	2011-12	2012-13
Total	**2 269 862**	**2 421 149**	**2 266 123**	**2 513 265**	**2 687 113**
Total N. Hemis., incl.	**1 740 302**	**1 765 840**	**1 723 883**	**1 975 193**	**2 080 343**
Spain	1 233 935	1 097 480	1 146 248	1 382 095	1 464 457
Greece	120 811	221 229	195 743	196 100	214 532
Egypt	131 496	133 650	101 350	176 339	*178 600*
Italy	57 591	127 233	100 392	89 942	93 565
Morocco	90 430	92 965	99 281	46 570	46 628
Portugal	13 747	10 305	17 699	24 291	25 708
Tunisia	19 945	22 329	20 307	19 445	19 445
Turkey	32 912	17 400	10 695	13 338	13 449
Cyprus	4 861	7 135	8 020	7 444	7 587
Israel	22 833	17 836	11 101	6 436	6 434
Total S. Hemis., incl.	**529 560**	**655 309**	**542 240**	**538 071**	**606 770**
South Africa	333 211	416 018	338 664	396 015	433 637
Uruguay	59 293	71 279	57 610	36 012	50 268
Argentina	81 413	86 702	80 720	47 971	49 653
Zimbawe	13 517	23 705	11 645	19 257	28 903
Brazil	16 217	33 903	26 872	13 276	21 248
Peru	2 678	6 192	9 892	7 254	10 565
Swaziland	12 983	9 566	11 879	12 005	9 801
Chile	8 609	6 899	4 716	5 730	2 208

Source: EUROSTAT

Other West European countries - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**100 815**	**103 800**	**102 085**	**100 538**	**108 110**
Switzerland	61 689	64 424	62 758	62 924	68 025
Norway	37 509	37 730	37 484	35 644	37 985
Iceland	1 617	1 646	1 842	1 970	2 100

Source: COMTRADE

Russia - Imports - Main supplying countries					
000 tonnes	2009	2010	2011	2012	2013
Total	**443 549**	**498 799**	**568 339**	**489 149**	**503 937**
Total N. Hemis, incl.	**320 047**	**327 511**	**433 964**	**361 281**	**365 856**
Egypt	128 536	149 905	218 941	197 299	233 934
Turkey	85 378	76 931	102 458	69 888	66 381
Spain	6 007	15 099	22 404	25 008	27 518
Morocco	80 978	63 848	69 968	50 733	24 531
China	13 131	15 224	10 348	13 980	9 636
Greece	510	769	3 142	1 276	1 787
Syria	1 001	1 082	2 600	1 087	1 762
Total S. Hemis, incl.	**122 400**	**167 606**	**132 712**	**126 862**	**135 000**
South Africa	94 020	131 732	114 601	118 110	128 853
Uruguay	5 586	6 426	4 699	2 872	3 698
Zimbabwe	846	577	276	1 399	1 187

Source: COMTRADE

Ukraine - Imports - Main supplier countries					
tonnes	2009	2010	2011	2012	2013
Total	**125 762**	**124 849**	**143 659**	**117 953**	**133 185**
Total N. Hemis., incl.	**108 271**	**107 249**	**127 735**	**104 184**	**122 855**
Egypt	67 367	68 471	80 474	67 361	72 596
Turkey	33 648	29 715	36 793	25 633	38 637
Spain	4 065	6 070	7 324	8 259	10 790
Total S. Hemis., incl.	17 325	17 201	15 588	13 361	9 799
South Africa	14 385	15 880	14 640	12 758	8 609
Zimbabwe	256	382	64	438	1 082

Source: COMTRADE

Other East European countries - Main markets					
tonnes	2009	2010	2011	2012	2013
Total, incl.	**154 514**	**163 145**	**189 278**	**163 858**	**189 324**
Serbia	40 320	39 288	48 156	38 433	44 425
Belarus	21 478	24 701	23 999	26 904	36 386
Croatia	28 341	28 016	32 100	27 373	29 201
Bosnia	16 399	18 177	21 101	17 821	20 040
Albania	20 638	22 083	22 791	17 670	16 687
Georgia	6 018	5 051	8 669	9 329	12 629
Macedonia	8 309	9 971	13 032	11 392	11 913
Armenia	4 181	6 792	8 102	5 458	7 253
Montenegro	3 780	4 003	5 415	5 038	5 512
Moldova	5 049	5 063	5 913	4 440	5 278

Source: COMTRADE

Japan - Imports - Main supplier countries					
tonnes	2009	2010	2011	2012	2013
Total	**94 411**	**109 940**	**115 330**	**130 476**	**111 882**
Total N. Hemis., incl.	**66 811**	**75 469**	**83 626**	**97 304**	**74 976**
USA	66 792	75 393	83 589	97 304	74 942
Italy	19	76	37	-	34
Total S. Hemis, incl.	**27 582**	**34 441**	**31 704**	**33 172**	**36 906**
Australia	18 324	25 312	23 762	27 717	32 479
South Africa	7 370	7 106	7 258	4 930	4 085

Source: Japanese Customs

Central and South-East Asia - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**558 148**	**638 657**	**721 633**	**759 192**	**717 044**
China	246 028	273 953	309 583	292 309	269 608
South Korea	71 221	110 055	141 961	173 943	152 714
Malaysia	86 469	83 119	88 671	95 044	90 353
Singapore	40 542	41 743	43 138	43 460	45 026
Vietnam	10 460	10 147	7 079	8 000	38 071
India	9 872	10 045	24 770	32 566	34 242
Philippines	39 822	35 932	29 670	35 939	24 748
Indonesia	19 586	31 346	33 074	32 492	17 328
Kazakhstan	16 133	18 706	14 792	16 822	14 760
Azerbaijan	5 173	11 819	12 021	10 128	11 535
Thailand	8 536	7 293	9 877	12 516	10 994
Sri Lanka	4 305	4 499	6 996	5 973	7 665

Source: COMTRADE

Persian Gulf - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**1 005 643**	**1 045 578**	**1 061 067**	**1 081 488**	**1 104 195**
Saudi Arabia	303 642	332 473	360 597	*389 870*	*334 778*
United Arabia Emirates	178 549	180 000	*202 920*	*157 200*	*210 208*
Iran	152 000	136 407	184 287	*200 000*	*200 000*
Iraq	*218 169*	*236 226*	*147 131*	*176 737*	*180 211*
Kuwait	76 256	82 582	80 197	69 457	92 827
Oman	37 915	40 193	43 547	45 304	43 796
Qatar	20 000	23 427	25 332	27 891	27 528
Bahrain	19 112	14 270	17 055	15 029	14 847
Yemen	4 309	4 500	1 125	2 549	2 500

Source: COMTRADE

Mediterranean - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**66 433**	**66 055**	**94 271**	**101 658**	**111 283**
Jordan	16 400	28 664	26 482	36 485	35 435
Turkey	40 853	28 591	44 259	30 816	33 472
Algeria	9 180	8 800	8 531	19 357	27 376
Syria	19 000	10 186	15 000	15 000	15 000

Source: COMTRADE

Africa - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**51 191**	**63 017**	**54 650**	**58 855**	**48 836**
South Africa	1 699	1 255	808	378	19 292
Zambia	5 936	7 055	7 261	7 500	10 139
Kenya	3 872	5 282	5 460	6 000	6 000
Namibia	3 407	3 357	3 515	4 272	5 255
Sudan	22 885	29 048	29 158	29 839	3 000
Botswana	1 884	1 777	1 541	2 014	2 276
Senegal	1 460	2 041	1 202	1 534	1 881

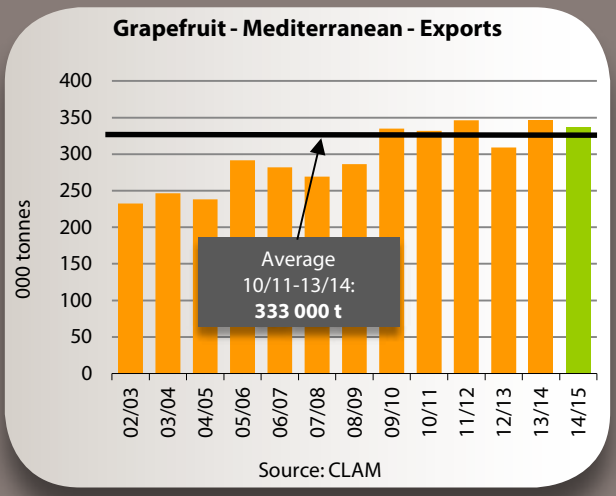
Source: COMTRADE

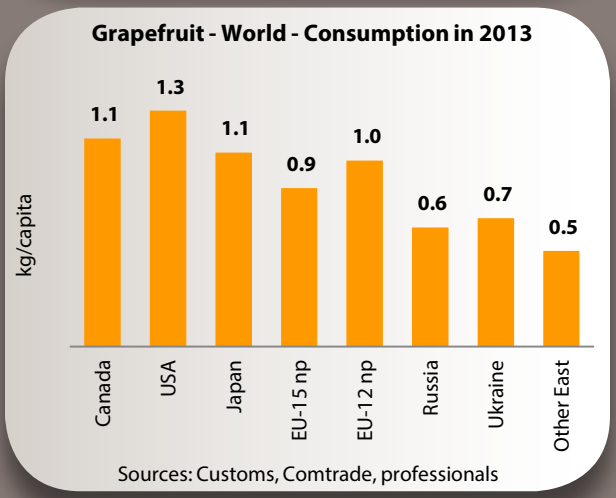
South America - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**236 018**	**257 694**	**276 625**	**305 017**	**280 974**
Costa Rica	71 880	55 016	74 284	84 001	66 637
Surinam	47 967	50 000	50 000	50 000	50 000
Guatemala	34 826	47 860	40 698	53 066	48 791
Paraguay	28 840	37 001	28 784	31 470	29 353
Mexico	10 939	22 535	25 132	35 501	27 912
El Salvador	19 000	22 824	23 000	21 693	27 898
Brazil	1 824	6 002	11 527	11 873	14 598
Ecuador	13 702	9 022	2 562	3 321	9 449
Nicaragua	6 847	2 631	1 352	1 431	2 695
Chile	193	2 659	889	1 456	2 571
Colombia	9 775	1 209	17 408	11 203	1 070

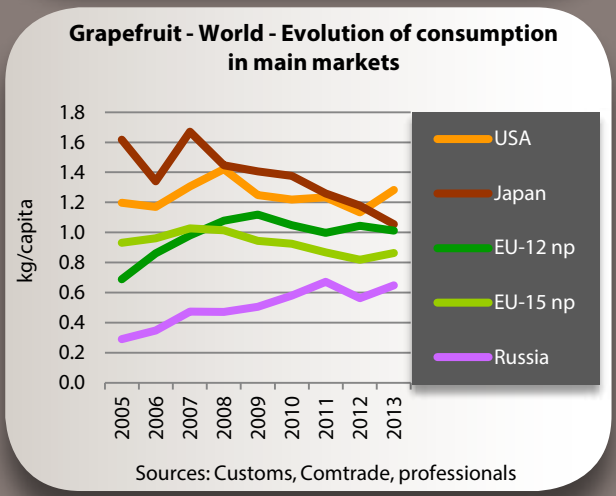
Source: COMTRADE

Mediterranean grapefruit

The 2013-14 season, economically catastrophic for the Mediterranean industry (as well as its South African counterpart) has left its marks. Prices were below average for ten months out of twelve on the fresh market from October 2013 to September 2014, reaching their lowest ebb during summer 2014. Furthermore, sales to the industrial sector were very often made at below cost-price levels. This was a difficult season of excess for a good many producers, who resolved to abandon the crop. This was the case in Israel, where 700 ha of Star Ruby were uprooted between 2013 and 2014 (i.e. 30 % of the cultivation area). It was also the case in Turkey, where significant surface areas seem to have suffered the same fate. This reduction in surface areas shows in the 2014-15 production forecasts for these two sources, which represent more than two thirds of the Mediterranean's total production. The fall of more than 10 % in their production potential should bring down the Mediterranean harvest to approximately 560 000 t, its lowest level since the middle of the last decade. Only the outsiders are registering stable production (Cyprus), or slightly above average (Spain). The increase must be put into context for the latter source, since while a 10 to 15 % increase is genuine and due to the expansion of the cultivation area from 2005 to 2010, the rest of the increase corresponds purely to adjustment of the official statistics. A clear market in early October, due to a much more limited Mexican presence than in 2013, and lower production pressure due to these major production structure adjustments, helped get the season off to a decent start. Let's hope that in the long run these drastic measures have put the supply back in step with a consumption in structural decline.







A new deal, after the season of excess

Mediterranean grapefruit

- Stable exports between 310 000 and 350 000 tonnes
- 42 % of world trade estimated at 730 000 tonnes
- The world's leading export zone

Grapefruit – Export forecast by CLAM country

000 tonnes	2014-15	2013-14	average of the 4 last years	2014-15 comparison with 2013-14	2014-15 comparison with average
Spain	54	47	49	+ 14 %	+ 9 %
Israel	77	77	79	+ 1 %	- 3 %
Cyprus	24	23	25	+ 3 %	- 3 %
Turkey	163	182	160	- 10 %	+ 2 %
Others	19	17	20	+ 12 %	- 4 %
Total	**337**	**346**	**333**	**- 3 %**	**+ 1 %**

Source: CLAM

Grapefruit – World – Consumption

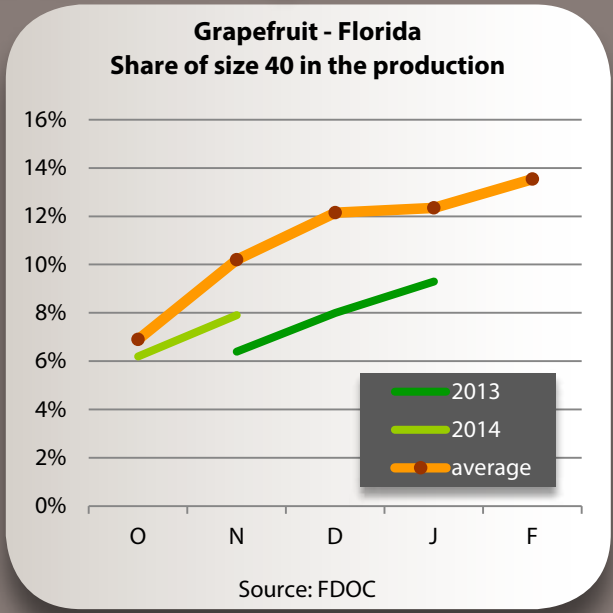
	2013 (kg)	Evolution (g) 2013/2012	Evolution (g) 2013/2009
Canada	1.1	- 82	- 214
United States	1.3	+ 151	+ 34
Japan	1.1	- 122	- 351
EU-15 np	0.9	+ 44	- 81
EU-12 np	1.0	- 31	- 106
Russia	0.6	+ 84	+ 142
Ukraine	0.7	+ 109	+ 319
Other Eastern countries	0.5	+ 99	+ 83

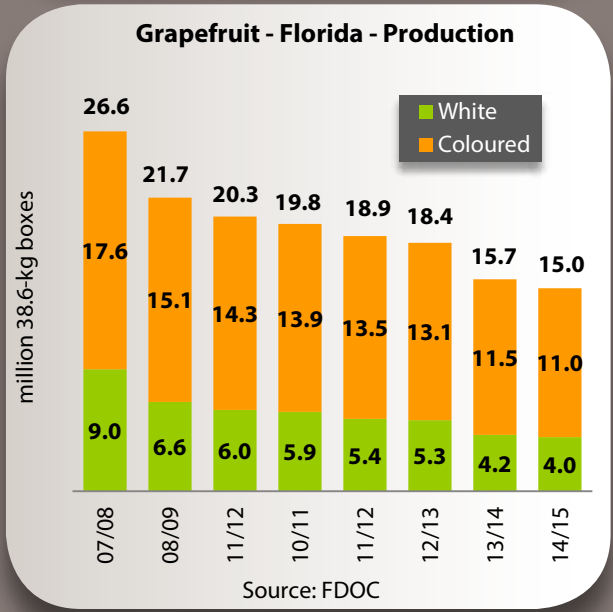
np: non producer countries / Sources: Customs, COMTRADE, professionals

Floridian grapefruit

Unsurprisingly, the USDA announced in early October another fall in Floridian production, extending a trend well established since the invasion and rapid spread of greening in Florida in 2005. With 15 million eighty five-pound field crates expected (i.e. approximately 580 000 tonnes), the harvest is down nearly 4 % on last season, reaching a new low point. If this forecast is confirmed, Floridian production will have lost 5 million boxes in five years, i.e. a quarter of its potential. And this initial estimate must not be considered too optimistic. The gap between the initial forecast and actual harvest has been approximately 2 million boxes for the past two seasons, with major fruit dropping during the autumn and winter because of the extreme fragility of the trees infected by the lethal bacterium. The fall in volumes available for the fresh market should be less drastic, with producers continuing to favour this outlet to the detriment of the processing sector, still less lucrative despite the high rates for concentrated juice on the international market. Nonetheless, it is very likely that the volumes intended for export will continue to follow the downward trend of recent seasons (losing 2 million boxes per season since 2009-10). The change, unfavourable for both European and Japanese importers, could hit hard. On the other hand, the small fruit size range still seemed to be quite a handicap in mid-November (volumes delivered to Europe established as at week 47 down more than 40 % from last season). The tests conducted by FDOC revealed an average size range up from last season, though still well below average. Conversely, as in previous seasons, the breakdown of volumes by market should remain more in favour of the EU than Japan. This market, where the economic cycle is still more difficult than in Europe, and where cosmetic aspects are vital, has slumped by half in four seasons, and now absorbs volumes a long way behind those of the EU.

Production and fruit size... at half-mast again





GRAPEFRUIT - Production (2012-13)

Grapefruit - The 8 leading producer countries	
tonnes	**2012-2013**
USA	1 092 000
South Africa	448 000
Mexico	350 000
Turkey	223 000
Israel	210 000
Sudan	196 000
Cuba	84 000
Argentina	60 000

Sources: FAO, professionals

GRAPEFRUIT - Imports (2012-13)

Grapefruit - The 8 leading importer countries	
tonnes	**2013**
Netherlands	336 883
France	152 186
Japan	134 091
Germany	119 326
Russia	90 900
Poland	87 965
United Kingdom	71 886
Canada	38 384

Source: national Customs

GRAPEFRUIT - Exports (2012-13)

Grapefruit - The 8 leading exporter countries	
tonnes	**2012-2013**
South Africa	268 000
USA	182 800
Turkey	132 000
Israel	79 000
Spain	52 000
Cyprus	26 000
Mexico	17 600
Egypt	15 000

Sources: national Customs, professionals

USA - Imports - Main supplier countries					
tonnes	2009	2010	2011	2012	2013
Total	**11 143**	**8 066**	**6 088**	**2 851**	**12 224**
Mexico	3 336	4 608	4 410	2 263	10 093
Israel	119	123	158	473	1 094
Bahamas	7 538	3 162	1 234	-	-
Others	20 312	33 393	44 933	51 510	58 856

Source: US Customs

Canada - Imports - Main supplier countries					
tonnes	2009	2010	2011	2012	2013
Total	**45 216**	**43 614**	**43 360**	**41 146**	**38 384**
Winter total, incl.	**39 552**	**38 512**	**35 915**	**33 972**	**30 158**
USA	38 152	37 212	35 277	33 054	29 517
Bahamas	874	396	137	-	-
Mexico	335	641	328	735	423
Thailand	192	262	173	183	218
Summer total, incl.	**5 220**	**4 488**	**6 472**	**5 396**	**8 226**
South Africa	4 589	4 288	6 374	5 267	8 136
Argentina	626	124	98	127	72
Chile	5	76	-	2	18

Source: COMTRADE

South America - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**11 222**	**11 652**	**4 511**	**9 612**	**3 792**
Mexico	9 118	9816	2 469	8 272	2 228
Argentina	2 104	1836	2 041	1 340	1 564

Source: COMTRADE

European Union - Imports - Main supplier countries					
tonnes	2008-09	2009-10	2010-11	2011-12	2012-13
Total	**386 530**	**373 288**	**372 610**	**335 061**	**323 264**
Total N. Hemis.*, incl.	**273 654**	**271 878**	**252 081**	**246 851**	**211 803**
Turkey	64 634	75 004	66 286	81 960	52 786
Spain	36 300	47 900	51 825	44 560	46 998
Israel	68 502	58 101	48 576	44 170	45 401
USA	64 548	55 132	52 721	45 988	40 676
Mexico	11 600	9 167	14 385	13 472	11 392
Cyprus	11 880	10 617	11 773	13 081	11 031
Honduras	9 478	6 063	1 109	76	73
Cuba	1 276	754	-	-	-
Others	5 436	9 140	5 406	3 544	3 446
Total S. Hemis., incl.	**112 876**	**101 410**	**120 529**	**88 210**	**111 461**
South Africa	88 616	78 897	94 006	75 412	104 725
Zimbabwe	1 947	2 053	2 228	1 360	2 414
Swaziland	6 707	9 906	14 986	8 480	2 328
Argentina	14 828	9 129	8 276	1 485	1 080
Chile	70	363	18	176	105
Mozambique	240	669	1 016	840	89
Uruguay	213	140	-	-	-
Others	255	251	-	457	721

*Extra-EU imports and imports from EU producer countries (Spain, Cyprus) /
Source: EUROSTAT

Other West European countries - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**9 880**	**8 767**	**8 393**	**8 786**	**8 661**
Switzerland	8 554	7 434	7 174	7 445	7 321
Norway	1 327	1 333	1 219	1 341	1 340

Source: COMTRADE

Russia - Imports - Main supplier countries					
000 tonnes	2009	2010	2011	2012	2013
Total	**71 262**	**81 491**	**94 274**	**79 075**	**90 900**
Total N. Hemis., incl.	**52 705**	**56 621**	**65 205**	**56 215**	**58 537**
Turkey	38 211	43 377	48 811	41 595	43 689
Israel	11 845	11 978	15 581	13 655	13 839
Morocco	544	365	122	660	612
Spain	891	691	678	303	365
USA	1 214	209	13	2	32
Total S. Hemis., incl.	**17 963**	**24 316**	**27 583**	**20 580**	**30 129**
South Africa	15 402	19 768	22 492	15 589	25 700
Mexico	1 004	2 704	3 016	4 020	3 303
Swaziland	298	631	910	622	888
Zimbabwe	481	188	262	81	183
Argentina	691	1 025	903	268	55
Others	593	554	1 486	2 280	2 234

Source: COMTRADE

Other East Europe countries - Main markets					
tonnes	2009	2010	2011	2012	2013
Total, incl.	**32 912**	**36 548**	**40 907**	**42 644**	**50 495**
Ukraine	17 344	20 807	25 691	26 786	31 734
Belarus	4 049	4 385	3 880	4 753	8 316
Serbia	4 569	4 255	4 154	4 322	3 745
Croatia	2 549	2 446	2 729	2 408	2 577
Moldova	1 636	1 703	1 655	1 597	1 755
Bosnia Herzegovina	1 679	1 852	1 695	1 581	1 285
Macedonia	1 086	1 100	1 103	1 197	1 083
Georgia	381	334	536	929	954
Montenegro	330	436	521	507	536
Albania	396	201	257	222	192

Source: COMTRADE

Japan - Imports - Main supplier countries					
tonnes	2008-09	2009-10	2010-11	2011-12	2012-13
Total	**180 378**	**166 075**	**168 438**	**149 567**	**134 091**
Total N. Hemis., incl.	**119 320**	**119 175**	**113 939**	**101 061**	**83 238**
USA	115 592	115 350	109 981	96 444	78 598
Israel	3 728	3 825	3 492	2 850	3 120
Turkey	-	-	465	1 639	1 520
Others	-	-	1	128	-
Total S. Hemis, incl.	**61 058**	**46 900**	**54 499**	**48 506**	**50 853**
South Africa	57 818	44 602	53 579	48 120	50 853
Swaziland	3 240	2 237	857	-	-
Chile	-	61	60	-	-

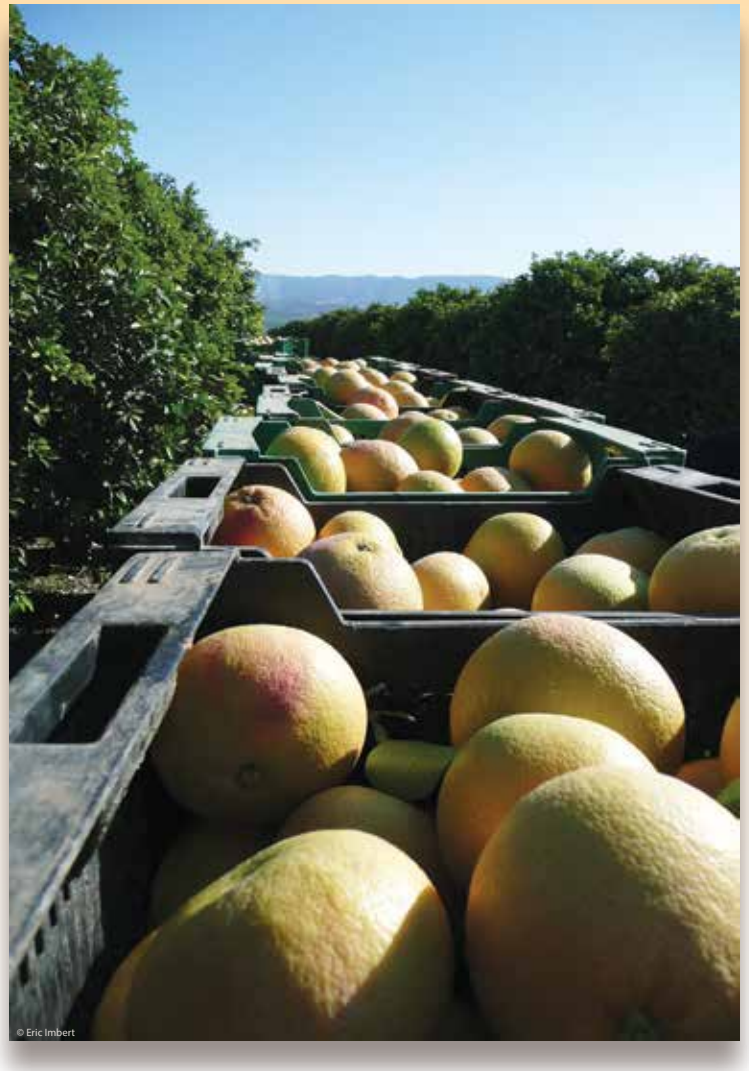
Source: Japanese Customs

Other Asian countries - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**33 483**	**36 838**	**42 592**	**42 242**	**42 743**
China	22 606	23 517	27 538	25 268	25 387
South Korea	5 724	7 861	9 337	10 452	11 580
Singapore	4 022	4 530	4 571	5 252	5 120
Malaysia	1 131	930	1 147	1 270	656

Source: COMTRADE

Persian Gulf - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**20 762**	**21 044**	**20 699**	**22 000**	**26 960**
United Arab Emirates	*9 000*	*8 891*	*7 698*	*7 164*	*10 572*
Saudi Arabia	*8 500*	8 457	9 904	21 510	10 562
Qatar	1 260	1 228	1 377	3 922	3 850
Kuwait	*2 002*	*2 468*	*1 720*	*2 345*	*1 976*

Source: COMTRADE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Lemon

Will 2014-15 be the benchmark season par excellence for the lemon? Production levels – all within average to the nearest 5 % – of the main Mediterranean producer countries would seem to indicate so. The Spanish harvest seems fine, with a level very similar to last season and slightly less than one million tonnes. The slight fall in production of the late variety Verna is being compensated for by an increase in Fino, which makes up practically all the supply at the beginning of the season. The size range appears to be at a better level than last season. Turkey, the number two producer in the region, just like Spain is set for an Interdonato and Kütdiken harvest very close to last year's and the average. Finally, Italian production should return to average, down approximately 15 % on last year's very big season. However, the concentration of the supply from January to April could be more marked than in previous seasons.

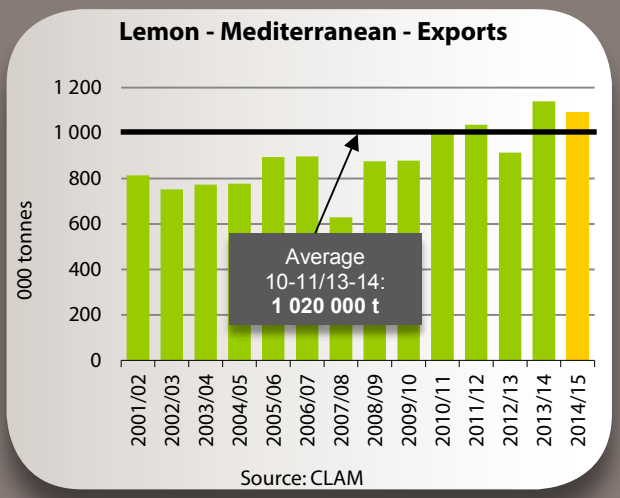
While production levels are nothing special, the market context is extremely favourable. Firstly, the season finished very early for the Southern Hemisphere, because of the near-historic weakness of Argentinean production (exports half those of a normal season). Hence the Northern Hemisphere sources were able to take over early, and enjoy a healthy head-start on the market (approximately 10 to 15 days for Spain). Secondly, the industrial market is very buoyant, once again because of the scarcity of the 2014 harvest in Argentina. Prices of derivatives are registering a record level corresponding to double those charged one year ago (approximately 5 000 USD for concentrated juice 400 gpl FOB Argentina, and nearly 55 000 USD into Rotterdam for essential oil). So this context should enable the fresh market to remain fairly tight, unless the collapse of the rouble leads Turkish exporters to switch some of the volumes earmarked for Russia back to the Community market.

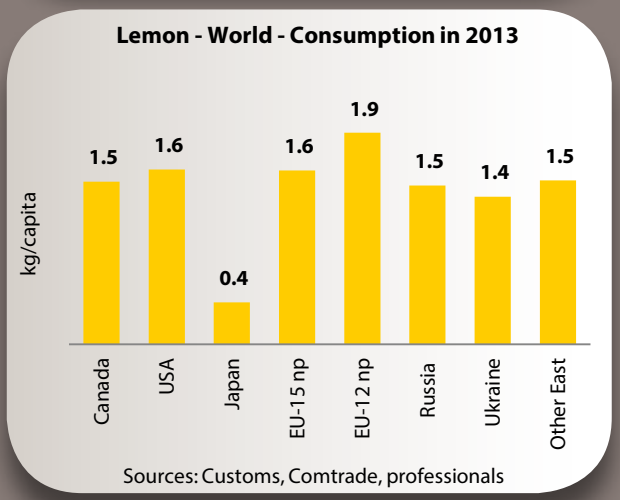
© Régis Domergue

An average season, though in a perfect setting... or nearly

Mediterranean lemon

- Growing exports between 0.9 and 1.1 million tonnes
- 63 % of world trade estimated at 1.6 million tonnes
- The world's leading export zone

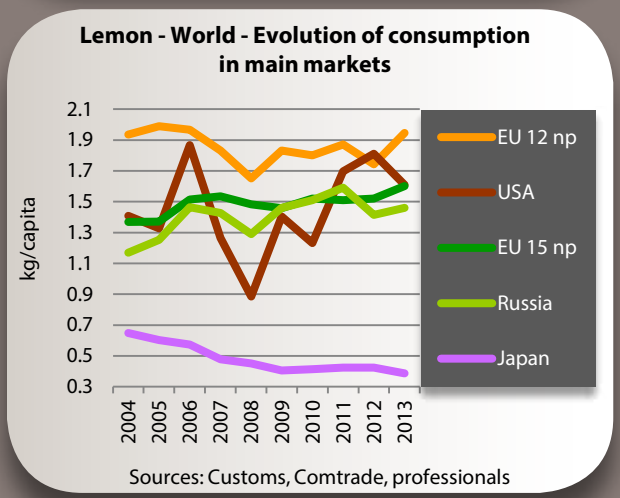




Lemon – Export forecast by CLAM country

000 tonnes	2014-15	2013-14	average of the 4 last years	2014-15 comparison with 2013-14	2014-15 comparison with average
Spain	570	635	529	- 10 %	+ 8 %
Cyprus	7	5	7	+ 43 %	+ 10 %
Turkey	417	421	415	- 1 %	+ 1 %
Greece	7	8	5	- 7 %	+ 39 %
Italy	50	30	30	+ 64 %	+ 67 %
Egypt	32	32	31	0 %	+ 5 %
Morocco	4	4	4	0 %	- 5 %
Total	**1 088**	**1 135**	**1 020**	**- 4 %**	**+ 7 %**

Source: CLAM

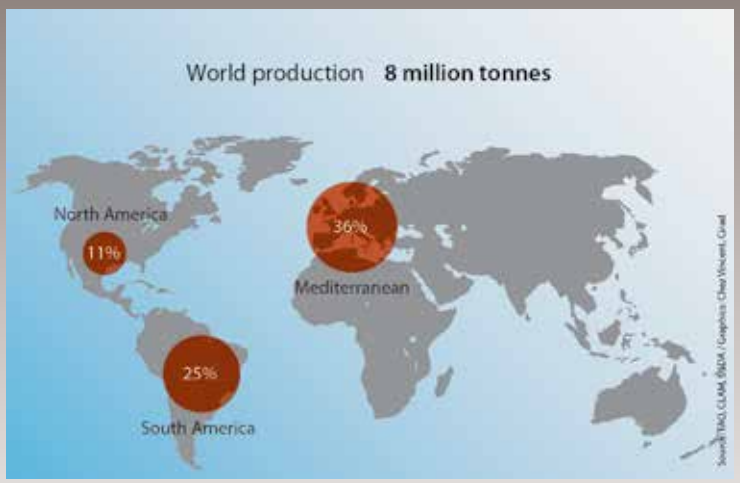


Lemon – World – Consumption

	2013 (kg)	Evolution (g) 2013/2012	Evolution (g) 2013/2009
Canada	1.5	+ 62	+ 352
United States	1.6	- 201	+ 205
Japan	0.4	- 36	- 17
EU-15 np	1.6	+ 80	+ 144
EU-12 np	1.9	+ 204	+ 115
Russia	1.5	+ 46	0
Ukraine	1.4	- 12	- 14
Other Eastern countries	1.5	+ 21	- 55

np: non producer countries / Sources: Customs, COMTRADE, professionals

LEMON - Production (2012-13)



Lemon - The 8 leading producer countries	
tonnes	**2012-2013**
Argentina	1 325 000
Spain	830 000
USA	827 000
Turkey	624 000
Italy	411 000
China	400 000
South Africa	236 000
Chile	230 000

Sources: FAO, professionals

LEMON - Imports (2012-13)

Lemon - The 8 leading importer countries	
tonnes	**2013**
Netherlands	359 529
Germany	301 900
France	271 128
United Kingdom	223 058
Italy	207 547
Russia	204 951
Poland	198 504
Spain	117 216

Source: national Customs

USA - Imports - Main supplier countries					
tonnes	2008-09	2009-10	2010-11	2011-12	2012-13
Total	**37 287**	**39 789**	**52 577**	**51 937**	**51 297**
Total N. Hemis, incl.	**20 402**	**23 184**	**33 603**	**33 603**	**29 013**
Mexico	16 954	22 286	23 413	31 014	28 056
Spain	3 159	609	835	1 510	389
Dominican Rep.	285	248	387	191	300
Total S. Hemis., incl.	**16 885**	**16 605**	**23 674**	**23 674**	**12 321**
Chile	16 821	16 333	23 413	17 020	11 829
Others	64	272	621	608	492

Source: US Customs

Canada - Imports - Main supplying countries					
tonnes	2009	2010	2011	2012	2013
Total	**38 450**	**38 677**	**43 980**	**48 645**	**50 752**
Total N. Hemis, incl.	**30 365**	**31 310**	**32 470**	**35 471**	**37 466**
USA	30 250	31 109	31 555	30 481	35 105
Spain	115	201	915	3 940	1 618
Turkey	20	88	306	1 050	743
Total S. Hemis., incl.	**7 724**	**6 787**	**11 013**	**12 216**	**12 706**
Argentina	6 213	4 606	7 381	9 299	7 263
South Africa	443	1 612	2 789	2 560	5 132
Chile	653	311	435	112	110
Australia	203	169	181	174	104

Source: COMTRADE

South America - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**13 911**	**18 391**	**29 557**	**15 536**	**13 926**
Chile	1 319	3 966	17 574	4 497	5 733
Brazil	918	1 248	1 954	2 381	2 712
Colombia	4 639	956	2 993	4 194	1 382
Mexico	453	602	2 398	1 419	1 214
Ecuador	819	4 088	2 356	1 823	1 169
Argentina	4 837	6 524	1 177	331	966
Costa Rica	511	536	802	731	550
Bolivia	415	471	302	160	200

Source: COMTRADE

LEMON - Exports (2012-13)

Lemon - The 7 leading exporter countries	
tonnes	**2012-2013**
Spain	496 000
Turkey	350 000
Argentina	275 000
South Africa	159 000
USA	108 000
Chile	33 400
Italy	29 000

Sources: national Customs, professionals

European Union - Imports - Main supplier countries					
tonnes	2008-09	2009-10	2010-11	2011-12	2012-13
Total	**828 036**	**780 827**	**787 381**	**828 096**	**738 399**
Winter total, incl.	**578 027**	**565 295**	**569 644**	**587 071**	**509 146**
Spain	439 194	372 445	412 568	442 573	402 382
Turkey	85 519	132 610	110 261	103 455	68 039
Italy	40 889	47 306	37 226	30 731	*30 984*
Greece	3 481	4 493	3 790	3 804	3 626
Cyprus	2 947	1 658	2 031	2 041	1 805
Portugal	1 007	1 154	942	2 571	1 334
Israel	730	1 099	373	187	377
Egypt	1 001	2 191	554	567	279
Morocco	3 184	1 785	1 771	1 119	196
Iran	63	85	73	12	84
USA	1	428	2	-	31
Summer total, incl.	**250 009**	**215 532**	**217 737**	**241 025**	**229 253**
Argentina	182 387	158 391	159 063	182 580	187 449
South Africa	45 633	44 532	45 233	41 385	25 363
Uruguay	10 762	8 064	8 280	9 959	9 194
Chile	9 275	3 211	3 217	5 751	6 333
Dominican Rep.	1 947	1 198	1 943	1 256	632
Brazil	5	136	-	92	249

Source: EUROSTAT

Other West European countries - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**23 329**	**24 199**	**25 172**	**26 327**	**27 677**
Switzerland	17 483	17 861	18 358	18 998	19 516
Norway	5 431	5 888	6 300	6 781	7 496
Iceland	415	450	514	548	665

Source: COMTRADE

Russia - Imports - Main supplier countries					
000 tonnes	2009	2010	2011	2012	2013
Total	**205 726**	**211 886**	**223 264**	**198 585**	**204 951**
Total N. Hemis, incl.	**145 109**	**144 290**	**156 085**	**137 942**	**131 080**
Turkey	106 890	117 255	131 314	101 648	109 248
Spain	29 664	16 989	17 801	28 964	16 509
China	2 478	4 995	2 866	3 837	3 682
Morocco	2 925	1 230	2 511	2 172	1 166
Egypt	985	1 412	1 400	601	189
USA	1 302	1 689	188	63	152
Israel	866	719	5	657	134
Total S. Hemis., incl.	**60 298**	**66 848**	**66 643**	**60 427**	**72 448**
Argentina	47 192	43 948	40 250	41 853	42 795
South Africa	12 929	20 960	26 094	18 438	28 387
Uruguay	177	1 939	299	136	1 266
Others	318	748	536	216	1 423

Source: COMTRADE

Ukraine - Imports - Main supplying countries					
tonnes	2009	2010	2011	2012	2013
Total	**62 787**	**60 102**	**62 188**	**62 319**	**61 754**
Total N. Hemis, incl.	**48 682**	**46 780**	**46 619**	**48 739**	**45 457**
Turkey	41 263	41 992	43 102	37 464	39 574
Spain	6 709	3 732	3 516	10 478	5 634
Egypt	619	848	1	722	236
Total S. Hemis., incl.	13 399	12 147	15 021	12 624	16 092
Argentina	12 193	8 741	11 241	9 619	12 274
South Africa	1 205	3 406	3 780	3 005	3 818
Others	706	1 175	548	956	205

Source: COMTRADE

Other East European countries - Main markets					
tonnes	2009	2010	2011	2012	2013
Total, incl.	**58 583**	**51 711**	**58 496**	**57 413**	**59 308**
Serbia	16 278	13 791	15 971	15 692	16 372
Croatia	12 218	11 025	12 399	12 037	11 499
Belarus	7 984	7 230	6 912	7 503	8 433
Bosnia	9159	7839	8 921	8 220	7 988
Macedonia	5 084	5 000	5 194	4 697	4 939
Georgia	1 441	1 265	2 871	3 141	4 263
Moldova	3 613	3 382	3 523	3 295	3 351
Albania	2 806	2 180	2 706	2 828	2 463
Montenegro	2 781	1 979	1 831	2 068	2 351

Source: COMTRADE

Japan - Imports - Main supplier countries					
tonnes	2009	2010	2011	2012	2013
Total	**51 422**	**52 618**	**53 781**	**53 834**	**49 229**
Total N. Hemis, incl.	**36 531**	**38 459**	**35 758**	**38 204**	**35 268**
USA	36 462	36 741	32 099	36 917	34 614
Mexico	69	1 718	3 659	1 287	654
Total S. Hemis., incl.	**14 475**	**14 159**	**18 022**	**15 562**	**13 920**
Chile	12 187	12 949	16 767	14 331	13 170
New Zealand	953	786	862	725	529
South Africa	1 335	424	393	506	221
Others	416	-	1	68	41

Source: Japanese Customs

Other Asian countries - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**66 570**	**67 838**	**74 996**	**81 691**	**91 974**
China	34 968	30 211	32 980	34 865	39 251
South Korea	5 147	5 631	7 398	10 664	13 950
Singapore	8 423	8 988	9 932	10 191	12 858
Azerbaijan	2 261	8 745	6 963	6 303	7 742
Malaysia	6 556	6 646	7 559	9 377	7 585
Kazakhstan	7 503	5 000	4 568	4 712	4 616
Indonesia	-	-	1 931	3 413	2 864
Philippines	854	1 277	1 430	1 390	1 610
Armenia	858	1 341	1 176	776	927
Kyrgyzstan	1 100	872	1 059	1 088	571

Source: COMTRADE

Persian Gulf - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**118 561**	**166 268**	**176 853**	**152 490**	**233 633**
Saudi Arabia	42 770	93 613	92 753	71 617	116 645
United Arab Emirates	*50 000*	*44 823*	*56 048*	*50 000*	*82 068*
Kuwait	*15 000*	*15 000*	*11 506*	*14 869*	*16 396*
Oman	2 214	2 284	3 289	6 516	7 253
Qatar	*5 000*	6 848	7 328	5 351	*6 406*
Bahrain	3 577	3 700	5 930	*4 137*	4 865

Source: COMTRADE

Mediterranean - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**25 858**	**31 023**	**34 570**	**34 984**	**31 921**
Jordan	5 093	7 983	11 469	10 022	14 304
Syria	16 289	19 618	19 909	17 504	8 225
Lebanon	451	891	616	821	4 516
Algeria	1 310	33	1 105	2 744	2 093
Turkey	1 808	1 722	670	3 093	1 983
Tunisia	906	777	800	800	800

Source: COMTRADE

Oceania - Main markets					
tonnes	2009	2010	2011	2012	2013
Total	**5 099**	**6 921**	**5 823**	**7 691**	**9 563**
Australia	4 209	6 241	4 988	6 189	8 242
New Zealand	890	680	835	1 502	1 321

Source: COMTRADE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