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Citrus

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Report Highlights:

MY 2012/13 (November/October) Italian orange production is forecast to decrease by 23 percent due to bad weather conditions in early spring. Italian tangerine and lemon planted areas have been decreasing progressively: higher input costs and lower prices have negatively affected crop profitability.

Oranges

Table 1: Production, Supply, and Demand (MT)

Oranges	2010	2011	2012
	Estimates 2010/2011	**Estimates 2011/2012**	**Forecast 2012/2013**
	Post Data	**Post Data**	**Post Data**
Area Planted	102,053	101,498	99,836
Area Harvested	100,252	99,569	98,029
Production	1,950,000	2,020,000	1,550,000
Imports	142,327	180,000	180,500
Total Supply	**2,092,327**	**2,200,000**	**1,730,000**
Exports	138,246	113,500	113,000
Fresh Dom. Consumption	1,654,081	1,796,500	1,392,000
For Processing	300,000	290,000	225,000
Total Distribution	**2,092,327**	**2,200,000**	**1,730,000**

Source: Unofficial estimates based on Italian industry; GTA

PRODUCTION

MY 2012/13 (November/October) Italian orange production is forecast to decrease by 23 percent due to bad weather conditions in early spring. Fruit size is good, but probably early varieties will be on delay in ripening, while late ones will be ready in advance. Quality is good. Sicily and Calabria are the main orange-producing areas, accounting for 59 and 22 percent respectively. “Tarocco” (“T.Comune”, “T.Galici”, “T.Gallo”, “T.Scirè”, “T.Nucellare”), “Moro” (“M.Comune” or “M.Nucellare”), “Sanguinello” (“S. Moscato Cuscunà” and “S. Moscato Nucellare”), “Sanguigno”, “Ovale” or “Calabrese”, “Biondo Commune”, “Navelina”, and “Washington Navel” are the chief varieties grown in Italy.

CONSUMPTION

MY 2012/13 Italian orange consumption is forecast to decrease by 22 percent. Most oranges are consumed fresh. “Blood” varieties (“Tarocco,” “Moro,” and “Sanguinello”) are used mainly for fresh consumption. Late varieties (“Ovale” and “Valencia”) are destined to both fresh market and processing industry.

TRADE

Germany, Switzerland, and Austria are the main destinations for Italian oranges. Spain and South Africa represent the major suppliers to the Italian market.

Orange Juice

Table 2: Production, Supply, and Demand (MT)

Orange Juice	2010	2011	2012
	Estimates 2010/2011	Estimates 2011/2012	Forecast 2012/2013
	Post Data	Post Data	Post Data
Deliv.To Processors	300,000	290,000	225,000
Production	22,000	20,300	15,750
Imports	16,593	16,000	16,500
Total Supply	**38,593**	**36,300**	**32,250**
Exports	36,812	35,754	31,400
Dom. Consumption	1,781	546	850
Total Distribution	**38,593**	**36,300**	**32,250**

Source: Unofficial estimates based on Italian industry; GTA

According to latest estimates, Italy is forecast to process about 225,000 MT of oranges in MY 2012/13 to produce 15,750 MT of concentrate. The total volume of oranges channeled to processing depends on crop quality and quantity of oranges destined to the fresh market, both domestic and foreign.

Tangerines

Table 3: Production, Supply, and Demand (MT)

Tangerines	2010	2011	2012
	Estimates 2010/2011	Estimates 2011/2012	Forecast 2012/2013
	Post Data	Post Data	Post Data
Area Planted	38,529	38,338	39,338
Area Harvested	37,305	37,102	38,067
Production	758,000	817,000	790,000
Imports	79,538	98,000	98,500
Total Supply	**837,538**	**915,000**	**888,500**
Exports	105,129	116,200	116,500
Fresh Dom. Consumption	683,409	752,800	732,000
For Processing	49,000	46,000	40,000
Total Distribution	**837,538**	**915,000**	**888,500**

Source: Unofficial estimates based on Italian industry; GTA

PRODUCTION

MY 2012/13 Italian tangerine production (83 percent seedless Clementines and 17 percent mandarins) is forecast to be 3 percent down from previous year. Italian tangerine planted area has been decreasing over the last few years: higher input costs and lower prices have negatively affected crop profitability. Calabria, Sicily, and Apulia are the main tangerine-producing areas, accounting for 50, 23, and 14 percent respectively. "Avana" and "Tardivo di Ciaculli" are the major mandarin varieties grown in Italy. "Comune" or "Oroval," and "Monreal" are the main Clementine varieties.

CONSUMPTION

MY 2012/13 Italian tangerine consumption is forecast to remain flat. Italians consume large quantities of Clementines and mandarins during winter holidays when the bulk of production hits the market. Most tangerines are consumed fresh.

TRADE

Poland, Slovenia, Hungary, and Germany are the leading destinations for Italian tangerines. Spain is the major supplier to the Italian tangerine market.

<u>Lemons</u>

Table 4: Production, Supply, and Demand (MT)

Lemons	2010	2011	2012
	Estimates 2010/2011	**Estimates 2011/2012**	**Forecast 2012/2013**
	Post Data	**Post Data**	**Post Data**
Area Planted	30,080	28,628	26,550
Area Harvested	25,832	24,348	23,365
Production	488,000	460,000	440,000
Imports	101,971	105,000	107,000
Total Supply	**589,971**	**565,000**	**547,000**
Exports	42,886	40,000	40,200
Fresh Dom. Consumption	437,085	440,000	426,800
For Processing	110,000	85,000	80,000
Total Distribution	**589,971**	**565,000**	**547,000**

Source: Unofficial estimates based on Italian industry; GTA

PRODUCTION

MY 2012/13 (November/October) Italian lemon production is forecast to decrease slightly by 4.3 percent. Quality is forecast to be good. Sicily produces more than 86 percent of Italy's lemons.

Lemon-producing area is progressively decreasing: higher input costs and lower prices have negatively affected crop profitability. “Femminello Commune” (“F. Zagara Bianca”, “F.Siracusano”, “F. S.Teresa”), “Monachello,”and “Interdonato” are the main lemon varieties grown in Italy. Farmers are forecast to deliver 80,000 MT of lemons to the processing industry.

CONSUMPTION

MY 2012/13 Italian lemon consumption is forecast to be 3 percent down from previous year. Italian lemon production is mostly destined for the fresh market.

TRADE

Italian lemons are sold mainly to Germany. Spain and Argentina are the major suppliers to the Italian lemon market.

Grapefruits

Table 5: Production, Supply and Demand (MT)

Grapefruits	2010 Estimates 2010/2011 Post Data	2011 Estimates 2011/2012 Post Data	2012 Forecast 2012/2013 Post Data
Area Planted	303	303	303
Area Harvested	253	253	253
Production	7,500	7,000	7,000
Imports	31,402	26,000	25,800
Total Supply	**38,902**	**33,000**	**32,800**
Exports	6,992	2,000	2,000
Fresh Dom. Consumption	31,910	31,000	30,800
For Processing	0	0	0
Total Distribution	**38,902**	**33,000**	**32,800**

Source: Unofficial estimates based on Italian industry; GTA

PRODUCTION

MY 2012/13 (November/October) Italian grapefruit production is forecast to remain stable.

CONSUMPTION

MY 2012/2013 Italian grapefruit consumption is expected to remain flat.

TRADE

Germany, France, and Poland represent the main destinations for Italian grapefruit exports. South Africa and Israel are Italy's major suppliers of grapefruit.

Abbreviations and definitions used in this report

MY   Marketing year
Oranges, Tangerines, Lemons, Grapefruit, Orange Juice: November/October

HS Codes
Oranges: 080510
Tangerines: 080520
Lemons: 080550
Grapefruit: 080540
Orange juice: 200911-200912-200919

MT Metric ton = 1000 kg
Ha hectare; 1 ha = 2.471 acres
EU European Union