

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Citrus

Approved By:

Christine Sloop

Prepared By:

Ornella Bettini

Report Highlights:

Italy's MY 2015/16 (November/October) orange production is expected to recover significantly from the previous campaign thanks to ideal weather conditions. Moreover, the introduction of new varieties and rootstocks of great quality and resistant to the Tristeza virus enabled Italy to extend the production calendar. Quality is expected to be excellent. Italy's MY 2015/16 (November/October) tangerine production is expected to remain steady. Italy's MY 2015/16 (November/October) lemon production is expected to remain flat.

General Information:

Italy

Oranges

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

Oranges	2013	2014	2015
	Estimates 2013/2014	Estimates 2014/2015	Forecast 2015/2016
	Post Data	Post Data	Post Data
Area Planted	88,784	86,200	86,840
Area Harvested	87,221	84,530	84,291
Production	1,800,000	1,360,000	1,900,000
Imports	156,377	214,085	145,000
Total Supply	1,956,377	1,574,085	2,045,000
Exports	120,260	119,565	125,000
Fresh Dom. Consumption	1,516,117	1,212,420	1,581,800
For Processing	320,000	242,100	338,200
Total Distribution	1,956,377	1,574,085	2,045,000

Sources: Italian industry; ISTAT (Italian Institute of Statistics); GTA (Global Trade Atlas)

PRODUCTION

Italy's MY 2015/16 (November/October) orange production is expected to recover significantly from the previous campaign thanks to ideal weather conditions. Moreover, the introduction of new varieties and rootstocks of great quality and resistant to the Tristeza virus enabled Italy to extend the production calendar. Quality is expected to be excellent. MY 2014/15 orange production dropped by 24.3 percent from MY 2013/14 due to the lack of rain and the Citrus Tristeza Virus (CTV) that infected approximately 32,000 hectares of orange groves in the provinces of Catania and Siracusa (Sicily). Sicily and Calabria are the main orange-producing areas, accounting for 59 and 22 percent of total production, respectively. *Tarocco*, *Moro*, *Sanguinello*, *Naveline*, and *Valencia* are the chief orange varieties grown in Italy. Moreover, *Ippolito* and *Meli* varieties are gaining popularity.

CONSUMPTION

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

Italy's MY 2014/15 orange imports increased by 37 percent compared to the previous year, mainly because of increased volumes from Spain (+47 percent), the leading supplier to the Italian orange

market, accounting for approximately 67 percent of total imports. In MY 2014/15, Italy exported 119,565 MT of oranges, mainly to Germany (30,858 MT), Switzerland (17,324 MT), Austria (12,782 MT), and France (10,637 MT).

Orange Juice

Table 2: Production and Processing (MT)

Orange Juice	2013	2014	2015
	Estimates 2013/2014	Estimates 2014/2015	Forecast 2015/2016
	Post Data	Post Data	Post Data
Delivered to Processors	320,000	242,100	338,200
Production	22,400	16,947	23,674

Sources: Italian industry

According to latest industry estimates, Italy is forecast to process approximately 338,200 MT of oranges in MY 2015/16 to produce 23,674 MT of concentrate. The total volume of oranges channeled to processing depends on crop quality and quantity of oranges destined for the fresh market, both domestic and foreign.

Tangerines

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

Tangerines	2013	2014	2015
	Estimates 2013/2014	Estimates 2014/2015	Forecast 2015/2016
	Post Data	Post Data	Post Data
Area Planted	35,868	35,514	35,921
Area Harvested	34,920	34,772	34,365
Production	789,000	866,000	859,000
Imports	80,644	98,714	102,000
Total Supply	869,644	964,714	961,000
Exports	77,323	88,119	85,000
Fresh Dom. Consumption	715,321	815,975	815,870
For Processing	77,000	60,620	60,130
Total Distribution	869,644	964,714	961,000

Sources: Italian industry; ISTAT; GTA

PRODUCTION

Italy's tangerine production consists of over 80 percent seedless clementines and nearly 20 percent mandarins. Italy's MY 2015/16 (November/October) tangerine production is expected to remain steady. The decrease in clementine production by approximately 4.3 percent (708,000 MT in MY 2015/16 compared to 740,000 MT in MY 2014/15) is expected to be compensated by the 20 percent

growth in the mandarin production (151,000 MT in MY 2015/16 compared to 126,000 MT in MY 2014/15). Calabria, Sicily, and Apulia are Italy's main tangerine-producing areas, accounting for 50, 23, and 14 percent of total production, respectively. *Comune* or *Oroval* and *Monreal* are the leading clementine varieties grown in Italy. *Avana* and *Tardivo di Ciaculli* are the chief mandarin varieties.

CONSUMPTION

Most tangerines are consumed fresh. Italians consume large quantities of clementines and mandarins during winter holidays when the bulk of production hits the market.

TRADE

Italy's MY 2014/15 tangerine imports reached 98,714 MT, an increase of 22 percent from MY 2013/14, mainly thanks to increased volumes from Spain (+21 percent), the leading supplier to the Italian tangerine market, representing 84 percent of total imports. In MY 2014/15, Italy exported approximately 88,119 MT of tangerines, 14 percent more than the previous year, mainly because of increased quantities to Poland (+38 percent) and Romania (+25 percent), the leading destinations for Italian tangerines, accounting for 17 and 11 percent of total exports, respectively.

Lemons

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

Lemons	2013	2014	2015
	Estimates 2013/2014	Estimates 2014/2015	Forecast 2015/2016
	Post Data	Post Data	Post Data
Area Planted	26,145	25,924	25,466
Area Harvested	20,967	20,584	20,620
Production	412,000	429,000	430,000
Imports	91,830	126,399	126,000
Total Supply	503,830	555,399	556,000
Exports	44,707	39,640	39,980
Fresh Dom. Consumption	374,123	438,539	438,620
For Processing	85,000	77,220	77,400
Total Distribution	503,830	555,399	556,000

Sources: Italian industry; ISTAT; GTA

PRODUCTION

Italy's MY 2015/16 (November/October) lemon production is expected to remain flat. Quality is expected to be better than the past year. Moreover, no insect problems and the abundant rainfall made the lemons even juicier. Sicily produces more than 86 percent of Italy's lemons. *Femminello Commune* (*F. Zagara Bianca*, *F. Siracusano*, *F. S. Teresa*), *Monachello*, and *Interdonato* are the main lemon varieties grown in Italy.

CONSUMPTION

Italy's lemon production is mostly destined for the fresh market.

TRADE

Italy's MY 2014/15 lemon imports reached 126,399 MT, mostly from Spain and Argentina, accounting for 57 and 21 percent of total imports, respectively. In MY 2014/15, Italy exported 39,640 MT of lemons, a decrease of 11 percent compared to the previous year, mainly because of reduced volumes to Germany (-25 percent), the leading destination for Italian lemons, accounting for 30 percent of total exports.

Grapefruits

Table 5: Production, Supply, and Demand (MT)

Grapefruits	2013	2014	2015
	Estimates 2013/2014	Estimates 2014/2015	Forecast 2015/2016
	Post Data	Post Data	Post Data
Area Planted	327	324	324
Area Harvested	277	274	274
Production	7,500	5,400	7,500
Imports	28,990	29,627	29,000
Total Supply	36,490	35,027	36,500
Exports	3,071	2,809	3,100
Fresh Dom. Consumption	33,419	32,218	33,400
For Processing	0	0	0
Total Distribution	36,490	35,027	36,500

Sources: Italian industry; ISTAT; GTA

PRODUCTION

Italy's MY 2015/16 (November/October) grapefruit production is expected to reach 7,500 MT.

TRADE

Italy's MY 2014/15 grapefruit imports reached 29,627 MT, mainly from South Africa (11,613 MT), Israel (4,271 MT), and Spain (3,440 MT). In MY 2014/15, Italy exported 2,809 MT of grapefruits, mainly to Slovenia and France.

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