freshfel
EUROPEAN FRESH PRODUCE ASSOCIATION

SHAFFE
Southern Hemisphere Association of Fresh Fruit Exporters

Minutes of Freshfel-SHAFFE Citrus Teleconference
13 October 2014

Freshfel-SHAFFE Secretariat

13 October 2014

Introduction:

- The discussion will by no means involve matters or topics which could influence market prices or volumes and that the exchange of data and information is strictly limited to matters which do not interfere with competition or anti-trust legislation.
- The minutes and data from the meeting will be made publicly available to ensure the transparency of the discussion also for non-members. This discussion is in line with the European Commission (DG AGRI) policy on market transparency and information of its expert group.
- The teleconference reviewed first the forecasts for production in Northern Hemisphere countries, followed by a review of the current situation on key markets based on the Southern Hemisphere season outlook in the main Southern Hemisphere markets.
- Participants included representatives from Spain, Israel, United States and Australia. Input was also received from Italy, Greece, Cyprus and Argentina.
- Data are compiled by through industry sources. They might therefore differ from official statistics (FAOSTAT-EUROSTAT)

A summary of the Northern Hemisphere season 2014/2015

Production and export forecasts for the countries, like Morocco, Egypt and Turkey were calculated by Freshfel – SHAFFE secretariat.

In red: TBC

ORANGES	Production 2007/2008	Production 2008/2009	Production 2009/2010	Production 2010/2011	Production 2011/2012	Production 2012/2013	Production 2013/2014	Prod. Forecast 2014/2015	Variation (13/14)/(14/15)
SPAIN	2.705.000	3.462.571	2.756.042	2.997.000	3.045.000	3.345.000	3.509.000	3.446.000	-2%
CYPRUS	29.200	23.360	24.000	24.000	24.000	24.000	24.720	25.000	1%
ITALY	2.293.500	1.500.000	2.293.500	1.950.000	2.300.000	1.950.000	1.953.000	1.360.000	-30%
GREECE	930.500	802.000	860.000	685.000	700.000	914.000	960.000	870.000	-9%
TOTAL EUROPEAN COUNTRIES	**5.958.200**	**5.787.931**	**5.933.542**	**5.656.000**	**6.069.000**	**6.233.000**	**6.446.720**	**5.701.000**	**-12%**
MOROCCO	732.400	790.000	710.000	875.000	976.000	763.000	962.500	870.000	-10%
TURKEY	1.173.000	1.630.000	1.630.000	1.660.000	1.752.200	1.700.000	1.731.800	1.630.000	-6%
EGYPT	1.800.000	1.620.000	1.700.000	1.700.000	2.350.000	2.350.000	2.600.000	2.500.000	-4%
ISRAEL	115.000	173.000	140.000	73.500	105.000	65.000	69.000	122.500	78%
TOTAL OTHER MED COUNTRIES	**3.820.400**	**4.213.000**	**4.180.000**	**4.308.500**	**5.183.200**	**4.878.000**	**5.363.300**	**5.122.500**	**-4%**
TOTAL MED BASIN	**9.778.600**	**10.000.931**	**10.113.542**	**9.964.500**	**11.252.200**	**11.111.000**	**11.810.020**	**10.823.500**	**-8%**
FLORIDA	6.948.122	6.633.783	5.458.073	5.727.506	5.988.780	5.453.995	4.270.119	4.408.918	3%
CALIFORNIA	2.109.203	1.581.902	1.956.116	2.231.673	2.388.164	2.224.871	2.041.166	2.061.577	1%
TEXAS	69.245	56.252	63.038	75.144	57.928	72.992	72.502	80.504	11%
ARIZONA	12.927	8.505	0	0	0	0	0	0	-
TOTAL USA (USDA citrus forecast)	**9.139.497**	**8.280.442**	**7.477.227**	**8.034.323**	**8.434.872**	**7.751.857**	**6.383.786**	**6.550.999**	**3%**
TOTAL	**18.918.097**	**18.281.373**	**17.590.769**	**17.998.823**	**19.687.072**	**18.862.857**	**18.193.806**	**17.374.499**	**-5%**

EASY PEELERS	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015	Variation
SPAIN	2.040.000	2.229.626	2.021.023	2.197.000	2.395.000	2.094.000	2.196.000	2.086.000	-5%
CYPRUS	61.300	49.040	50.000	55.000	51.000	43.350	43.350	44.300	2%
ITALY	702.700	527.000	702.700	850.000	770.000	622.500	760.000	685.000	-10%
GREECE	64.910	58.500	62.000	100.000	127.500	120.000	150.000	145.000	-3%
TOTAL EUROPEAN COUNTRIES	**2.868.910**	**2.864.166**	**2.835.723**	**3.202.000**	**3.343.500**	**2.879.850**	**3.149.350**	**2.960.300**	**-6%**
MOROCCO	471.600	531.000	570.000	781.000	763.000	675.000	839.300	800.000	-5%
TURKEY	495.000	650.000	600.000	787.500	790.000	800.000	826.100	850.000	3%
EGYPT	660.000	594.000	625.000	625.000	731.000	731.000	724.000	725.000	0%
ISRAEL	133.000	130.000	150.000	135.000	175.000	153.000	139.000	225.000	62%
TOTAL OTHER MED COUNTRIES	**1.759.600**	**1.905.000**	**1.945.000**	**2.328.500**	**2.459.000**	**2.359.000**	**2.528.400**	**2.600.000**	**3%**
TOTAL MED BASIN	**4.628.510**	**4.769.166**	**4.780.723**	**5.530.500**	**5.802.500**	**5.238.850**	**5.677.750**	**5.560.300**	**-2%**
FLORIDA	298.237	212.848	228.497	247.321	222.079	174.724	154.312	151.046	-2%
CALIFORNIA	227.930	227.930	336.792	359.245	440.892	530.703	591.938	653.173	10%
ARIZONA	13.608	8.505	11.907	10.886	8.165	8.165	8.165	8.981	10%
TOTAL USA (USDA citrus forecast)	**539.775**	**449.283**	**577.196**	**617.452**	**671.135**	**713.592**	**754.415**	**813.200**	**8%**
TOTAL	**5.168.285**	**5.218.449**	**5.357.919**	**6.147.952**	**6.473.635**	**5.952.442**	**6.432.165**	**6.373.500**	**-1%**

LEMONS	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015	Variation
SPAIN	552.192	945.562	673.075	930.512	990.000	830.000	994.000	970.000	-2%
CYPRUS	17.500	14.000	15.000	16.500	18.300	18.300	25.254	25.254	0%
ITALY	546.600	655.920	655.920	575.000	620.000	595.000	412.000	290.000	-30%
GREECE	46.500	30.500	40.000	25.000	47.000	50.000	55.000	55.000	0%
TOTAL EUROPEAN COUNTRIES	**1.162.792**	**1.645.982**	**1.383.995**	**1.547.012**	**1.675.300**	**1.493.300**	**1.486.254**	**1.340.254**	**-10%**
MOROCCO (Other citrus)	35.000	39.000	40.000	80.000	80.000	75.000	82.500	80.000	-3%
TURKEY	500.000	550.000	750.000	860.000	1.000.000	900.000	726.000	700.000	-4%
EGYPT	335.000	301.500	320.000	320.000	320.000	320.000	323.000	320.000	-1%
ISRAEL	64.000	45.000	55.000	43.500	55.200	65.000	74.000	73.500	-1%
TOTAL OTHER MED COUNTRIES	**934.000**	**935.500**	**1.165.000**	**1.303.500**	**1.455.200**	**1.360.000**	**1.205.500**	**1.173.500**	**-3%**
TOTAL MED BASIN	**2.096.792**	**2.581.482**	**2.548.995**	**2.850.512**	**3.130.500**	**2.853.300**	**2.691.754**	**2.513.754**	**-7%**
CALIFORNIA	510.200	723.933	723.933	762.035	836.878	857.290	775.643	775.643	0%
ARIZONA	51.709	103.419	75.841	90.718	30.617	73.482	73.482	81.647	11%
TOTAL USA (USDA citrus forecast)	**561.909**	**827.352**	**799.774**	**852.753**	**867.495**	**930.772**	**849.125**	**857.290**	**1%**
TOTAL	**2.658.701**	**3.408.834**	**3.348.769**	**3.703.265**	**3.997.995**	**3.784.072**	**3.540.879**	**3.371.044**	**-5%**

GRAPEFUITS	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015	Variation
SPAIN	46.194	50.814	52.000	53.070	51.800	53.000	59.000	75.000	27%
CYPRUS	28.600	22.800	23.000	23.000	20.200	18.180	21.816	20.800	-5%
ITALY	0	0	0	0	0	0	48.000	0	-100%
GREECE	7.300	6.500	7.000	1.000	7.000	6.000	7.000	7.000	0%
TOTAL EUROPEAN COUNTRIES	**82.094**	**80.114**	**82.000**	**77.070**	**79.000**	**77.180**	**135.816**	**102.800**	**-24%**
MOROCCO	0	0	0	0	0	0	0	0	-
TURKEY	245.000	170.000	300.000	270.000	354.300	300.000	235.500	230.000	-2%
EGYPT	0	0	0	0	60.000	60.000	58.000	60.000	3%
ISRAEL	235.000	220.000	215.000	188.000	247.000	210.700	224.000	185.000	-17%
TOTAL OTHER MED COUNTRIES	**480.000**	**390.000**	**515.000**	**458.000**	**661.300**	**570.700**	**517.500**	**475.000**	**-8%**
TOTAL MED BASIN	**562.094**	**470.114**	**597.000**	**535.070**	**740.300**	**647.880**	**653.316**	**577.800**	**-12%**
FLORIDA	1.025.572	836.650	782.673	761.468	769.519	749.108	638.885	612.350	-4%
CALIFORNIA	158.031	145.875	136.758	148.778	163.293	183.705	163.293	163.293	0%
TEXAS	217.724	199.580	203.209	228.610	195.952	249.022	232.693	234.734	1%
ARIZONA	3.039	760	0	0	0	0	0	0	-
TOTAL USA (USDA citrus forecast)	**1.404.366**	**1.182.865**	**1.122.640**	**1.138.856**	**1.128.765**	**1.181.835**	**1.034.871**	**1.010.377**	**-2%**
TOTAL	**1.966.460**	**1.652.979**	**1.719.640**	**1.673.926**	**1.869.065**	**1.829.715**	**1.688.187**	**1.588.177**	**-6%**

TOTAL CITRUS	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015	Variation
SPAIN	5.343.386	6.688.573	5.502.140	6.177.582	6.481.800	6.322.000	6.758.000	6.577.000	-3%
CYPRUS	136.600	109.200	112.000	118.500	113.500	103.830	115.140	115.354	0%
ITALY	3.542.800	2.682.920	3.652.120	3.375.000	3.690.000	3.167.500	3.173.000	2.335.000	-26%
GREECE	1.049.210	897.500	969.000	811.000	881.500	1.090.000	1.172.000	1.077.000	-8%
TOTAL EUROPEAN COUNTRIES	**10.071.996**	**10.378.193**	**10.235.260**	**10.482.082**	**11.166.800**	**10.683.330**	**11.218.140**	**10.104.354**	**-10%**
MOROCCO	1.239.000	1.360.000	1.320.000	1.736.000	1.819.000	1.513.000	1.884.300	1.750.000	-7%
TURKEY	2.413.000	3.000.000	3.280.000	3.577.500	3.896.500	3.700.000	3.519.400	3.410.000	-3%
EGYPT	2.795.000	2.515.500	2.645.000	2.645.000	3.461.000	3.461.000	3.705.000	3.605.000	-3%
ISRAEL	547.000	568.000	580.000	520.000	582.200	493.700	506.000	606.000	20%
TOTAL OTHER MED COUNTRIES	**6.994.000**	**7.443.500**	**7.825.000**	**8.478.500**	**9.758.700**	**9.167.700**	**9.614.700**	**9.371.000**	**-3%**
TOTAL MED BASIN	**17.065.996**	**17.821.693**	**18.060.260**	**18.960.582**	**20.925.500**	**19.851.030**	**20.832.840**	**19.475.354**	**-7%**
TOTAL USA (USDA citrus forecast)	**11.645.547**	**10.739.942**	**9.976.837**	**10.643.384**	**11.102.268**	**10.578.055**	**9.022.197**	**9.231.866**	**2%**
TOTAL	**28.711.543**	**28.561.635**	**28.017.097**	**29.523.966**	**32.027.768**	**30.429.085**	**29.855.037**	**28.707.220**	**-4%**

Northern Hemisphere forecast

Summary Northern Hemisphere:

- Overall the production in the Northern Hemisphere is due to decline by approximately 4%. As a result, the total citrus production in the Northern Hemisphere in 2014/205 will reach 28.7 million T. By category oranges will be down 5% to reach 17.3 million T, soft citrus down by 1% to reach 6.3 million T. Lemons will decrease by 5% at 3.3 million T, while grapefruit will be down by 6% reaching a volume of 1.6 mln T.
- The decline of production is more significant in the EU (-10%) than in other Mediterranean countries basin (-3%), leading to a shorter production in the Mediterranean by 7% compared to the previous season. In the USA the production is up by 2%, despite the on-going severe implication of citrus greening in Florida.

EU Mediterranean countries

Italy:

- Production trends 2014/2015
  - For oranges the trends will differ according to the varieties. it is expected that red oranges might be reduced by 40 to 60 % depending of regions/orchards. This decrease is however done in comparison to the very high production of the last season; in regard to Navel and Washington Navel, the expected decrease is estimated to be between 20 to 30%; all together the production of oranges might be around 30%lower than last year.
  - For lemons, the decrease is expected to be of 30% less than last season.
  - In regard to soft citrus, mandarins should be 20% less while the production of clementines would be stable
- Size of fruit is very good.

Spain:

Season (data in mln tn)	SOFT CITRUS	ORANGES	LEMONS	GRAPEFRUIT	TOTAL
2012-2013	2.094	3.345	830	53	6.322
2013-2014	2.196	3.509	994	59	6.758
2014-2015	2.086	3.446	970	72	6.574
Dif %13 vs 14	***-5,01%***	***-1,80%***	***-2,41%***	***+22,56%***	***-2,70%***

2013/2014 (data in mln tn)	Soft Citrus	Orange	Lemon	Grapefruit
Production	2.196	3.509	994	59
Domestic fresh	301	911	172	5
Intra trade (EU only)	1.368	1.372	530	45
Processing	220	900	237	7
Export (third countries)	155	156	55	2

2014/2015 (data in mln tn)	Soft Citrus	Orange	Lemon	Grapefruit
Production	2.086	3.446	970	75
Domestic fresh	320	930	172	7
Intra trade (EU only)	1.400	1.450	493	55
Processing	200	850	270	10
Export (third countries)	150	150	35	3

- **Lemons**: early start of the season by approximately 10 days. As a result of favourable weather conditions, fruit are of good quality and good size. Production of Fino increased by 10% while of Verna decreased by 15%. Good interest from processing industry. Due to frost in Argentina last season, Spanish lemons kept competitive price. The price will remain good as there are no stocks in Europe of Argentinean lemons.
- **Soft citrus**: picking of fruit started one week earlier than usually. Due to favourable weather conditions fruit are of normal size, good colouring and low impact of diseases.
- **Oranges**: early start of season, by approximately 1 week. Due to good weather conditions the quality of fruit is good.
- **Grapefruit**: big competition from Turkey and other markets.

- Generally good sizes of citrus fruit are surprising, considering strong drought that Mediterranean countries have experienced. However the first autumn rains (60-100 l) have been very beneficial.
- Although Russia represented only 2% of total Spanish citrus exports the situation remains worrying – unbalanced situation in other EU markets, competition among types of citrus fruit.

Greece:

2013/2014 (data in tones)	Soft Citrus	Orange	Lemon	Grapefruit
Production	150.000	960.000	55.000	7.000
Intra trade (EU only)	30.000	200.000	2.000	1.300
Export (third countries)	60.000	140.000	5.000	1.000

2014/2054 (data in tones)	Soft Citrus	Orange	Lemon	Grapefruit
Production	145.000	870.000	55.000	7.000

- Production: reduced volume of production for the variety of 'Navalina “and “Navel“ in all production areas of the country. However fruit quality is very good and greater than the rates in the large sizes of fruits. Reduced production in the variety of "Clementine". Regarding the variety of 'Nova', it is observed that in all areas of the production volume is slightly increased compared with the previous year, while increased production seems to have the variety “Ortanik".
- On the quality of the fruit, all evolve smoothly, and have not been reported until now problems.
- The weather conditions are favorable for citrus this year. Cool summer and autumn rains helped the fruit to evolve very well.
- Significant loss hail has not been made, and according to the observations of the producers is early this year.
- In the EU market at this period there are not big quantities of citrus from the South Hemisphere, which is good for the products but until the harvest is starting at the end of November there is no clear view of the market. This year for citrus is "weird" and that's why the embargo of Russia overturns some data. Specifically, we do not know how will move the Spanish citrus the sector and what pressure of it to European markets. All these create a "new commercial environment" from what we knew in previous years, so we cannot draw firm conclusions about the evolution of this year's citrus.

Cyprus:

- **Lemons**: exports are expected to decrease by about 25% as there were a lot of lemons consumed in the local market during the summer because of shortage of Argentinean imported lemons.
- **Grapefruit** (red and white): more or less similar quantities as last season, perhaps a small drop in production of about 5%.

- **Nova**: production slightly higher but exports expected to be about the same as some growers may take advantage of the proposed scheme of the EU for withdrawals from the market because of the Russian embargo (about 500 tons of Nova are expected to be withdrawn from the market).
- **Mandora**: the situation is uncertain. Total production more or less the same as last season but the exports are expected to be greatly affected because of the Russian embargo. There is a scheme for withdrawals of 19200 tons of citrus out of which about 18.000 are expected to be for Mandora. It is expected that many growers will participate in that scheme as exporters cannot guarantee a high return to them, so exports may be down up to 50% which represents more or less the percentage of Mandora exported to Russia.
- **Valencia**: still early to say much about Valencia as the season starts late March. But we do not expect significant changes to the production or export quantities from the last seasons.

Other (non-EU) Mediterranean countries

Israel:

2013/2014 (data in tones)	Soft Citrus	Orange	Lemon	Grapefruit
Production	139,000	69,000	74,000	224,000
Domestic fresh	37,000	46,000	65,000	13,000
Processing	24,000	16,000	3,000	134,000
Export (third countries)	78,000	7,000	6,000	77,000

2014/2054 (data in tones)	Soft Citrus	Orange	Lemon	Grapefruit
Production	225,000	122,500	73,500	185,000
Domestic fresh	97,500	78,000	64,500	10,000
Processing	25,500	25,500	2,000	98,000
Export (third countries)	102,000	19,000	6,500	77,000

- In general for all citrus fruit this season the crop is 20% higher than season 2013/14. The crop is above average.
- Soft citrus had a very heavy fruit set. Growers had to thin, even twice by hand, in order to get commercial sizes. The production of soft citrus has increased more than 60%, after overcoming last year's blow.
- Still far from real winter climatic conditions.
- Last year's crop was below average and suffered from extreme winter storm at mid December 2013.
- Production of grapefruits is tending down, because of poor demand and low prices. Quantities for fresh fruit shall remain the same, while processing quantities shall significantly decrease.
- Good weather conditions with low impact of diseases influenced good fruit quality.
- Increasing consumption of citrus fruit, but decreasing of grapefruit.

Morocco:

- The Moroccan production data were not yet officially released at the time of the Teleconference and should however be shortly confirmed. A two-week precocity is announced for this season.
- However from different trade source, it is estimated that the production conditions in the north (Berkane region) were satisfactory, leading to good volume of easy peelers. The increase in that region could reach 10%
- In the Souss however, the climatic conditions were more problematic, namely given drought and heat wave as well as alternate production cycle for some orchards. As a result the production of oranges might decline compared to last year by up to 30% in that region

- In order to prevent some quality issue experienced last year on the Russian market, EACCE is setting up with exporters reinforced criteria, with a later start of the exports to that destination to secure a greater maturity level of the fruit.
- The first Clementine shipments are due at the beginning of week 42.

Egypt:

- Despite being a key player in citrus in the Mediterranean region and several contacts with the sector, statistics and forecast for Egypt are not available at the current time! The group will continue its efforts to develop contact with reliable information.

Turkey:

- Pending official confirmation of production data from Turkish Mediterranean Exporters Union, only partial information is available
- The first shipments of citrus already started, one week earlier that the previous campaign for lemons. This is also influenced by the "empty" international lemon market and the demand in Russia. Up to week 41 already 50.000 T of lemons were exported , more than 20% (11.000 T) to Russia
- Mixed information are available about the lemon crop. Some indication refers to adverse climatic conditions (which are also affecting other crop in Turkey – such as apples) and were indication that citrus crop in Adana/Mersin might be lower than last year by up to 30%. This is however not matching with the larger and earlier shipment. Consequently, the crop might be rather similar to the one f last year
- Other regions might be under more favourable conditions, namely the Izmir region.

United States of America

General Comment: The USA Citrus Forecast in the context of the severe draught in California and Citrus Greening in Florida and in Texas. Both of these factors can have a dramatic impact on the 2014/2015 campaign.

California/Arizona:

- **Oranges**: The Navel crop is up 3% at 81 million cartons, and that compares to 85 million in 2012/13 and 91 million in 2011/12. Sizing is small and maturity values are two weeks early. The forecast does not take into account acreage that has been abandoned because of draught. The Valencia crop is down 9%, but it is too early to make a judgment on condition.
- **Clementines/Mandarins**: Easy peelers are up by10% this year, and 50% above the 2011/12 crop as new plantings come into full bearing cycles. We can expect aggressive marketing and strong sales penetration of eastern markets.
- **Grapefruit**: No change from last year's 8 million cartons.
- **Lemons**: Production will be about the same as last season, about 42 million cartons or 765,000 MT. Price structures have been very firm this summer and they are only now beginning to moderate.

Florida:

- **Oranges**: Overall orange production is up 3% at 108 million boxes. This compares to an 8 year average of 140 million boxes. Private forecasts put the crop at 89 million field boxes. The Navel orange forecast is1.5 million boxes, down 22% and the smallest crop since listed as a separate variety in Florida. Growing conditions have been ideal since the start of the citrus March bloom.
- **Tangerines**: No significant change at 5.8 million cartons.
- **Grapefruit**: Production is down by 4% at 30 million cartons and down 20% since the 2011/12 crop. This is of course the impact of citrus greening.

Texas:

- **Oranges**: No significant change in production.
- **Grapefruit**: No change at 11.5 million cartons.

Key Factors: Monitoring "Fruit Drop"; the Impact of Nutritional Feeding Programs; the Rate of re-plantings; and, research directions to control Citrus Greening.

Southern Hemisphere season

Australia:

2014 (in tonnes)	ORANGES	SOFT CITRUS	GRAPEFRUITS	LEMONS
PRODUCTION	451000	109000	11500	26250
DOMESTIC MARKET	115000	75000	11300	24000
PROCESSING	215000	-	-	500
EXTERNAL TRADE	121000	34000	182	1668

- Favourable weather and water supply is contributing to a good crop
- Many of the navel orange plantings are reaching full production.
- Mandarin supplies are increasing from both southern and northern regions.
- High volumes of market preferred sizes were a key advantage in 2014 generating better returns.
- China demand was strong until September then slowed.
- Japan remains the leading market for oranges.
- US trade concluded around 22 per cent lower than last year.
- Australian dollar has fallen 20% (against USD) in past year and has aided export trade.
- Strong demand in China and other Asian markets.

Argentina:

Season 2014 (in tonnes)	ORANGES	SOFT CITRUS	GRAPEFRUITS	LEMONS
PRODUCTION	600.000	260.000	60.000	650.000
DOMESTIC MARKET	360.000	140.000	30.000	40.000
PROCESSING	197.000	39.000	29958	458.000
EXTERNAL TRADE	43000	81000	42	152.000

- Normal climatic conditions and normal fruit quality.
- Processing Trends unchanged.
- Trade Outlook:
  - Negotiations import tariffs.
  - Continuing import licenses in certain markets
  - Opening new markets, without significant trade agreements.
- Consumption: outstanding challenged to increase consumption in the domestic market.
- No changes in Argentina's official policies.

- General macroeconomic conditions continue to affect the competitiveness of all types' exports. Therefore exports are lower than in previous years.
- The exchange rate has been substantial variations between the official rate and the unofficial.
- Internal costs are rising. Especially the labor costs.
- In the same way the rest of other cost item.
- Import licenses in some markets, like as Indonesia.
- Argentine government continues delaying indirect tax refunds to exporters.
- The negative consequences of this official policy will continue to deepen.

South Africa

Here are some of the latest input for the export season from South Africa

- Difficult conditions in the EU have resulted in 14% less South African citrus going into that market.
  - Both Valencia and navel volumes decreased by 14%;
  - Grapefruit volumes decreased by 33%.
  - Soft citrus volumes to EU increased slightly (2%)
  - Lemon volumes increase by 29% (in 2013 very little lemons were exported to EU).
  - South Africa stopped packing for the EU from end week 36 (except for Pest Free Areas and soft citrus); PPECB figures show that 12% less oranges have been shipped to EU (since end week 36) than during the same period last year
- This can be compared to an export volume decrease (from South Africa to all markets) of 3%;
  - Grapefruit down 16%,
  - Navels down 1% and Valencia down 5%
  - Lemons increased by 22%
  - Soft citrus increased by 15%.
- The decreased volumes to EU were taken up by Asia where total volumes increased by 29% (from 240 000 to 315 000 tons).
  - Grapefruit volumes to Asia increased by 10%,
  - Lemon and soft citrus volumes doubled
  - Navel volumes increased by 44% and Valencia's by 15%.
- Middle East (330 000 tons), northern America (105 000 tons) and Africa (15 000 tons) export volumes all remained static.
- Similar to the EU, Eastern European volumes also decreased – by 10%; grapefruit down 10%; navels down 31%; soft citrus down 13% and Valencia down 4%. Lemons increased by 2%.

To Week 41 **Million 15 Kg Cartons**	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction (Packed)	Final Packed
SOURCE: PPECB	2012	2013	2014	2013	2014	2014	2014	2013
Grapefruit	13.1m	17.9 m	15.6 m	17.8 m	14.8 m	16.5 m	15.6 m	17.9 m
Soft Citrus	7.6 m	8.4 m	9.9 m	8.4 m	9.6 m	9.2 m	10.1 m	8.4 m
Lemons	10.5 m	10.5 m	13.1 m	10.5 m	12.9 m	12.1 m	13.5 m	10.6 m
Navels	24.6 m	25.4 m	26 m	25.4 m	26 m	25.8 m	26 m	25.4 m
Valencia	45.2 m	49.7 m	48.6 m	45.1 m	42.5 m	49.5 m	48.6 m	51.4 m
Total	101 m	111.9 m	113.2 m	107.2 m	105.8 m	113.1 m	113.8m	113.7 m

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