

**Minutes of Freshfel-SHAFFE Citrus Teleconference
22 April 2014**



Freshfel-SHAFFE Secretariat

24 April 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 Southern Hemisphere countries, followed by a review of the current situation on key markets based on the Northern Hemisphere season outlook in the main Northern Hemisphere markets.
- Participants included representatives from South Africa, Argentina, Uruguay, USA and Turkey, with market representatives from Spain. Input was also received from Chile, Peru, Spain, Turkey and Italy. Apologies from Australia.

A summary of the Southern Hemisphere season 2013

Production and export forecasts for the countries, like Australia and Chile, were calculated by Freshfel – SHAFTE secretariat based on the indications provided by the representatives (marked in red).

PERU											
Production	2007	2008	2009	2010	2011	2012	2013	2014	Var 2014/2013	Var 2014/Av 03/12	Average 2003/2013
Oranges	342.868	372.601	389.600	391.234	380.000	416.269	445.632	468.000	5,02%	26,80%	369.073
Mandarins/tangelos	190.400	205.187	184.400	292.852	250.000	280.057	303.600	325.000	7,05%	48,62%	218.678
Lemons/Limes	269.343	241.590	232.300	222.032	220.000	221.406	261.360	260.000	-0,52%	9,80%	236.796
Grapefruit	4.400	4.478	4.000	4.000	4.000	4.650	5.115	5.200	1,66%	23,89%	4.197
Total	807.011	823.856	810.300	910.118	854.000	922.382	1.015.707	1.058.200	4,18%	27,69%	828.744
Export	2007	2008	2009	2010	2011	2012	2013	2014	Var 2014/2013	Var 2014/Av 03/12	Average 2003/2013
Oranges	7.730	14.415	3.100	7.538	9.893	7.464	9.574	10.000	4,45%	79,68%	5.565
Mandarins/tangelos	37.278	48.556	46.400	58.575	65.323	78.717	85.321	94.000	10,17%	100,92%	46.784
Lemons/Limes	896	1.201	1.500	2.131	2.473	2.286	1.583	2.000	26,34%	60,16%	1.249
Grapefruit	115	0	0	278	394	779	972	1.000	2,88%	319,21%	239
Total	46.019	64.172	51.000	68.522	78.083	89.246	97.450	107.000	9,80%	98,75%	53.836

URUGUAY											
Production	2007	2008	2009	2010	2011	2012	2013	2014	Var 2014/2013	Var 2014/Av 03/12	Average 2003/2013
Oranges	186.000	105.000	113.000	154.210	135.180	156.237	128.896	160.000	24,13%	13,66%	140.775
Mandarins	38.000	20.000	34.000	121.445	93.407	120.097	99.080	120.000	21,11%	92,41%	62.366
Lemons	118.000	130.000	75.000	37.656	38.215	39.965	32.971	40.000	21,32%	-45,40%	73.255
Grapefruit	4.000	4.000	4.000	1.897	3.570	2.480	2.046	1.000	-51,12%	-78,55%	4.663
Total	346.000	259.000	226.000	315.208	270.372	318.779	262.993	321.000	22,06%	14,21%	281.059
Export	2007	2008	2009	2010	2011	2012	2013	2014	Var 2014/2013	Var 2014/Av 03/12	Average 2003/2013
Oranges	85.299	69.124	64.000	82.612	68.571	45.070	52.623	75.000	42,52%	4,63%	71.679
Mandarins/tangelos	45.000	38.277	36.000	51.991	38.397	34.663	36.557	48.000	31,30%	20,12%	39.961
Lemons/Limes	13.786	14.511	14.000	15.669	14.120	13.856	12.075	17.000	40,79%	21,59%	13.982
Grapefruit	1.264	265	300	34	355	182	150	150	-0,10%	-82,98%	881
Total	145.349	122.177	114.300	150.306	121.443	93.771	101.405	140.150	38,21%	10,79%	126.504

ARGENTINA											
Production	2007	2008	2009	2010	2011	2012	2013	2014	Var 2014/2013	Var 2014/Av 03/12	Average 2003/2013
Oranges	1.098.139	942.541	898.732	833.486	1.130.074	933.526	600.000	600.000	0,00%	-31,91%	881.128
Mandarins	486.979	410.630	401.543	423.737	554.640	373.970	250.000	260.000	4,00%	-38,18%	420.565
Lemons	1.516.972	1.362.190	1.425.529	1.113.375	1.400.000	1.456.069	1.325.000	750.000	-43,40%	-45,65%	1.379.838
Grapefruit	264.955	243.695	237.479	188.820	172.382	132.196	60.000	60.000	0,00%	-69,90%	199.355
Total	3.367.045	2.959.056	2.963.283	2.559.418	3.257.096	2.895.761	2.235.000	1.670.000	-25,28%	-42,03%	2.880.886
Export	2007	2008	2009	2010	2011	2012	2013	2014	Var 2014/2013	Var 2014/Av 03/12	Average 2003/2013
Oranges	198.351	133.849	142.016	161.784	129.518	83.673	50.000	50.000	0,00%	-62,29%	132.592
Mandarins/tangelos	99.239	91.995	114.345	119.867	118.302	95.565	80.000	90.000	12,50%	1,04%	89.077
Lemons/Limes	358.526	395.791	253.976	259.831	244.105	272.450	275.000	200.000	-27,27%	-35,67%	310.900
Grapefruit	29.187	32.378	17.721	10.999	10.484	2.606	1.300	1.300	0,00%	-93,52%	20.057
Total	685.303	654.013	528.058	552.481	502.409	454.294	406.300	341.300	-16,00%	-38,24%	552.625

SOUTH AFRICA										
Production	2007	2008	2009	2010	2011	2012	2013	2014	Var 2014/2013	Var 2014/Av 03/12
Oranges	1.349.075	1.326.473	1.322.525	1.525.509	1.362.890	1.454.444	1.609.092	1.638.725	1,84%	24,23%
Mandarins	486.979	380.000	375.218	158.726	166.948	184.142	164.623	179.487	9,03%	-45,78%
Lemons	185.915	185.915	178.805	229.943	232.472	239.309	235.923	269.390	14,19%	33,02%
Grapefruit	384.219	360.553	436.407	340.927	395.237	390.899	447.691	444.852	-0,63%	16,27%
Total	2.406.188	2.252.941	2.312.955	2.255.105	2.157.547	2.268.794	2.457.329	2.532.454	3,06%	13,30%
Export	2007	2008	2009	2010	2011	2012	2013	2014	Var 2014/2013	Var 2014/Av 03/12
Oranges	933.798	971.483	868.521	1.045.254	951.417	1.076.896	1.152.399	1.130.155	-1,93%	23,04%
Mandarins/tangelos	101.369	110.135	101.726	113.034	103.564	114.000	126.633	138.067	9,03%	28,19%
Lemons /Limes	110.243	143.703	129.930	144.829	161.317	155.000	159.408	182.020	14,18%	39,31%
Grapefruit	214.620	192.597	210.186	187.056	236.612	195.000	267.737	251.329	-6,13%	21,98%
Total	1.360.030	1.417.918	1.310.363	1.490.173	1.452.910	1.540.896	1.706.177	1.701.571	-0,27%	24,85%

Average 2003/2013
1.319.103
331.032
202.522
382.607
2.235.263
Average 2003/2013
918.515
107.708
130.656
206.039
1.362.918

AUSTRALIA										
Production	2007	2008	2009	2010	2011	2012	2013	2014	Var 2014/2013	Var 2014/Av 03/12
Oranges	430.000	419.000	450.000	350.000	460.000	380.000	430.000	451.500	5,00%	-4,66%
Mandarins	105.000	115.000	117.000	115.000	110.000	100.000	104.000	109.200	5,00%	7,96%
Lemons	30.000	31.000	30.000	30.000	28.000	28.000	25.000	26.250	5,00%	4,41%
Grapefruit	12.000	9.000	9.000	11.000	8.000	7.000	11.000	11.550	5,00%	39,49%
Total	577.000	574.000	606.000	506.000	606.000	515.000	570.000	598.500	5,00%	-1,58%
Export	2007	2008	2009	2010	2011	2012	2013	2014	Var 2014/2013	Var 2014/Av 03/12
Oranges	128.322	107.040	130.000	91.311	112.102	137.858	140.000	147.000	5,00%	23,75%
Mandarins/tangelos	27.440	30.704	33.000	22.745	35.650	33.596	35.000	36.750	5,00%	24,14%
Lemons /Limes	722	917	920	433	297	446	500	525	5,00%	-34,75%
Grapefruit	415	248	400	474	364	867	1.000	1.050	5,00%	105,07%
Total	156.899	138.909	164.320	114.963	148.413	172.767	176.500	185.325	5,00%	23,79%

Average 2003/2013
473.545
101.147
25.142
8.280
608.114
Average 2003/2013
118.785
29.604
805
512
149.706

CHILE										
Production	2007	2008	2009	2010	2011	2012	2013	2014	Var 2014/2013	Var 2014/Av 03/12
Oranges	148.000	150.000	152.000	220.000	225.000	226.000	230.000	207.000	-10,00%	19,65%
Mandarins	26.000	28.000	30.000	59.000	64.000	68.000	63.750	60.500	-5,10%	57,05%
Lemons	169.000	170.000	172.000	225.000	228.000	232.000	230.000	230.000	0,00%	21,28%
Grapefruit	8.000	9.000	10.000	8.000	8.000	8.000	8.000	8.000	0,00%	8,64%
Total	351.000	357.000	364.000	512.000	525.000	534.000	531.750	478.575	-10,00%	17,15%
Export	2007	2008	2009	2010	2011	2012	2013	2014	Var 2014/2013	Var 2014/Av 03/12
Oranges	25.634	28.349	34.000	52.645	63.238	69.078	70.439	63.395	-10,00%	68,23%
Mandarins/clementines	24.930	19.205	26.000	41.110	47.681	57.149	63.495	60.300	-5,03%	94,18%
Lemons /Limes	44.853	43.595	45.000	45.585	47.289	39.759	33.414	33.414	0,00%	-10,29%
Grapefruit	3.910	1.000	2.500	1.503	1.373	1.210	1.003	1.003	0,00%	-38,98%
Total	99.327	92.149	107.500	140.843	159.581	167.196	168.351	151.516	-10,00%	40,78%

Average 2003/2013
173.000
38.523
189.636
7.364
408.523
Average 2003/2013
37.683
31.054
37.248
1.644
107.629

TOTAL SH										
Production	2007	2008	2009	2010	2011	2012	2013	2014	Var 2014/2013	Var 2014/Av 03/12
Oranges	3.554.082	3.315.615	3.325.857	3.474.439	3.693.144	3.566.476	3.443.620	3.525.225	2,37%	5,02%
Mandarins	1.333.358	1.158.817	1.142.161	1.170.760	1.238.995	1.126.266	985.053	1.054.187	7,02%	-10,08%
Lemons	2.289.230	2.120.695	2.113.634	1.858.006	2.146.687	2.216.749	2.110.254	1.575.640	-25,33%	-25,23%
Grapefruit	677.574	630.726	700.886	554.644	591.189	545.225	533.852	530.602	-0,61%	-12,51%
Total	7.854.244	7.225.853	7.282.538	7.057.849	7.670.015	7.454.716	7.072.779	6.658.729	-5,85%	-8,06%
Export	2007	2008	2009	2010	2011	2012	2013	2014	Var 2014/2013	Var 2014/Av 03/12
Oranges	1.379.134	1.324.260	1.241.637	1.441.144	1.334.739	1.420.039	1.475.035	1.475.550	0,03%	14,84%
Mandarins	335.256	338.872	357.471	407.322	408.917	413.690	427.006	467.117	9,39%	35,72%
Lemons	529.026	599.718	445.326	468.478	469.601	483.797	481.980	434.959	-9,76%	-12,10%
Grapefruit	249.511	226.488	231.107	200.344	249.582	200.644	272.162	255.832	-6,00%	11,54%
Total	2.492.927	2.489.338	2.275.541	2.517.288	2.462.839	2.518.170	2.656.183	2.626.862	-1,10%	11,63%

Average 2003/2013
3.356.624
1.172.310
2.107.189
606.466
7.242.589
Average 2003/2013
1.284.820
344.188
494.839
229.371
2.353.218

In red: TBC

Southern Hemisphere forecast

Summary Southern Hemisphere:

- Overall the **production** in the Southern Hemisphere is due to decline due to the frost affecting the lemon production in the North West of Argentina. As a result, the total citrus production in the Southern Hemisphere will reach in 2014 6.6 million T down from 7 million T last year. This represents a decline by 5%. By category oranges will be up be 2,3 % to reach 3,5 million T , soft citrus up by 7% to be slightly above 1 million T. Lemons will decrease by 25% at 1,5 million T ,while grapefruit will be only 0,6% down at 530.000 T .
- In regard to **export** the decline for all citrus will only be by 1% and will reach 2,6 million T. While oranges exports should be stable at 1.475.000 T , soft citrus will jump by more than 9% at 467.000 T. Lemons exports will decrease by 9% at 434.000 T and grapefruit by 6% at 255.000 T.

South Africa:

- Southern African citrus industry exports will be similar to last year. Although the overall estimate remains steady; there are some significant changes in some of the citrus sectors. Lemons show the biggest increase of 14%; while grapefruit shows the biggest decline of 6%. Soft citrus also shows an increase of 9%. The orange sector remains stable with navels increasing 2% and valencias decreasing by 4%.
- Quality remarks: oranges, lemons and grapefruit expected to be bigger size this year, while soft citrus of normal size. Quality is expected to be good, mainly due to quite favorable climatic conditions which reduced the impact of possible diseases. However Senwes (Northern) area (lemons and Navels) were affected by wind and hail.
- South Africa dedicated this year particularly big effort on CBS control. At the end of April the Standing Committee of Plant Health of the European Commission will take decision on import controls and measures to be taken to prevent CBS in the European Union.
- Variety: continues trend to late Mandarin and Navel types
- General expectations are good, citrus fruit are early in the season; but the threat to EU market creates uncertainty. Developing market in Far and Middle East.

2014	ORANGES	SOFT CITRUS	GRAPEFRUITS	LEMONS
	in tonnes			
PRODUCTION	1 638 725	179 487	444 852	269 390
DOMESTIC MARKET	169 523	13 807	5 027	14 562
PROCESSING	339 047	27 613	188 497	72 808
EXTERNAL TRADE	1 130 155	138 067	251 329	182 020

Peru:

Production of oranges in 2014 will increase by 5%, of soft citrus by 7% and of grapefruits by 1.6%, while that of lemons will decrease by 0.5%.

Exports of all citrus fruit commodities will increase in 2014: Oranges by 4.4%, soft citrus by 10%, lemons by 26% and grapefruit by almost 3%/

2014	ORANGES	SOFT CITRUS	GRAPEFRUITS	LEMONS
	in tonnes			
PRODUCTION	468.000	325.000	5.200	260.000
EXTERNAL TRADE	10.000	94.000	1.000	2.000

Argentina:

- Production and trade outlook:
 - The initial forecast presented in Berlin in regard to the damage of the lemons production were even worsened; The lemon production is expected to reach only half of its usual potential , affecting usual volume place on the market and in particular the raw material for processing, which is as a result expected to be with high prices. The export of fresh will also decline and total volume for export should rather be at 200.000 T
 - The season for satsumas has started well, good quality, but climatic conditions are difficult. First exports were to the Russian markets. Return was positive so far despite the impact of the ruble devaluation. Export to Europe should not start before week 22 or 23 given the poor market conditions (oranges given influence/ weight of Egypt and South Africa) of the scarcity of products (lemons). Some exports are also considered to Asia, but the overall journey increased to ca 42 days to the main markets given new routes by shipping cie extending travel time by more than a week.
- Trade issues:
 - Negotiations on import tariffs – Mercosur-EU trade agreement. At the current moment the increase of the duty following the removal of the GSP is affecting competitiveness of Argentina as main competitors are not paying any duties
 - Exports to the EU will be limited due to the removal of GSP's low tariffs. As from the beginning of 2014 the duty has increased up to 16%, and that is 50 ct more per box.
 - Continuing import licenses in certain markets
 - Opening of new markets, without significant trade agreements.
 - Import licenses in some markets, like Indonesia
- Economic environment
 - Consumption: outstanding challenged to increase consumption in the domestic market.
 - General macroeconomic conditions continue to affect the competitiveness of all types of exports. Therefore exports are lower than in previous years. Spanish stocks will remain till end June.
 - The exchange rate has been substantial due to variations between the official rate and the unofficial. Due to the currency exchange domestic market is more attractive.
 - Internal costs are rising. Especially the labor costs. As well as the rest of other cost item.
 - Argentina's government continues delaying indirect tax refunds to exporters. The negative consequences of this official policy will continue to deepen.

2014	ORANGES	SOFT CITRUS	GRAPEFRUITS	LEMONS
	in tonnes			
PRODUCTION	600.000	260.000	60.000	750.000
DOMESTIC MARKET	350.000	135.000	40.000	50.000
PROCESSING	200.000	35.000	18.700	500.000
EXTERNAL TRADE	50.000	90.000	1.300	200.000

Australia:

- Production and export figures for Australia for the year 2014 are based on estimations received previously.

2014	ORANGES	SOFT CITRUS	GRAPEFRUITS	LEMONS
	in tonnes			
PRODUCTION	451.500	109.200	11.550	26.250
EXTERNAL TRADE	147.000	36.750	1.050	525

Uruguay:

- Official production data from the Ministry will be released in June. The data are primarily estimates from the industry. Overall, a good season is expected for the fresh industry with volume recovery in all citrus categories.
- Quality remarks: in general the quality of citrus fruit is good. For early easy peeler varieties, satsumas and nules medium sizes are expected. No impact on quality due to diseases. For early oranges, sizes seem good so far as the season has just started. So far climate only delayed the beginning of the season due to heavy rains and high humid conditions end March and first weeks of April. Climate conditions are stable now and harvest is trying to recover.
- Early oranges, Navelinas, show delay in harvesting more due to commercial than climate reasons (stocks in Spain mainly).
- Some asian markets have been closed for Uruguayan fruit. Uruguay is facing problems in Philippines and Indonesia, as these markets are closed until cold treatment protocol can be fulfilled.
- China protocol still pending. Market will still remain open during 2014 while the protocol can be adjusted before 2015.
- Preparing for the US market. 6000-8000 pallets with a wide range of varieties (easy peelers, oranges and lemons) will be shipped already next week, however in small volumes in order to check cold treatment. Philadelphia's port remains closed.

2014	ORANGES	SOFT CITRUS	GRAPEFRUITS	LEMONS
	in tonnes			
PRODUCTION	160.000	120.000	1.000	40.000
DOMESTIC MARKET	40.000	38.000	850	5.500
PROCESSING	45.000	24.000	-	17.500
EXTERNAL TRADE	75.000	48.000	150	17.000

Chile:

Production and export figures for Chile for the year 2014 are based on the received estimations.

2014	ORANGES	SOFT CITRUS	GRAPEFRUITS	LEMONS
	in tonnes			
PRODUCTION	207.000	60.500	8.000	230.000
EXTERNAL TRADE	63.395	60.300	1.003	33.141

Exports in 2012 & 2013			
Citrus fruit	2012	2013	% var.
Oranges	69.078	70.439	2%
Lemons	39.230	33.414	-15%
Clementines	34.759	31.844	-8%
Mandarins	22.390	31.651	41%
Grapefruit	1.210	1.003	-17%
Total	166.660	168.351	1%

- Navels are expected to decrease in volumes, especially on early Navels.
- Clementines should decrease in size and volumes due to prolonged droughts and the resulting scarcity of water for irrigation, especially in Region IV.

- Production of late mandarins should grow - at a lower growth rate than last season mainly due to young orchards coming into bearing and an increasing market demand.
- Lemons should remain stable since there are no significant changes in surfaces. Maybe a slight aging of orchards and very recent interest for new plantings
- Early spring frosts (last September, 2013) has damaged production volumes. Impact was a lot less fruit than initially expected, with no great loss in late mandarins, still hanging crops, and early flowering trees.
- Progression of season:
 - Season expected to start at a normal date: Clementines-Lemons - mid April, Navels - late May, late Mandarins - late August
 - Size: drought will affect sizes in some areas, specially Clementines in Region IV
 - Anticipated problems: drought in northern areas and Central Zone will have an effect on fruit sizes and production.
 - Trade issues: in Navels, Clementines and Late Mandarins, main market focus will be directed to US Programs.
- Local market: strong local market for lemons due to high domestic prices.
- Change in sector in Chile: Total area remains relatively stable; due to the lack of rains growers are planting fewer navel oranges, clementines and mandarins this year than last year, especially in Region IV. Probably lemons will take off due to high domestic prices.
- Impact exchange rate: better situation than last season, the US\$ rises Ch\$ 530. Last season was close to Ch\$ 470 per dollar and we see a slight relief of pressure on growers and exporters.

Northern Hemisphere season

The NH is to be contrasted:

- A difficult market situation in Europe influenced by tough competition, pressure of volume from Egypt, stagnating consumption (among other due to higher temperature in the North of Europe). Market is still with fruit in storage, and overall prices on the market were relatively low. Some improvements could however be noted after Easter
- Demand of the Russian market was good, but the market always remains uncertain. The devaluation of the roubles had also an impact.
- a more demand oriented situation in the USA , as a result of the frost experienced in California. This has not only lead to a more steady demand on the USA market , but also elsewhere (Asia) in market usually supplied by California

Spain:

Oranges:

- The 2013-2014 season has been quite difficult in general for navels oranges, given some quality issues and lower size than usual. Lower volume was registered compared to last year despite a good demand for produce including in Asia, as a result of the shortage from California after the frost.
- In regard to valencia late varieties, the campaign will start now with an unexpected decline of crop by 20% compared to the initial forecast leading to rising prices.

Mandarines:

- The shipment will be almost ending by the end of the month with the latest nadorcott, ortaniques and orri, which have volume slightly lower than last year. Despite quality and size slightly lower than last year, prices were almost similar.

Lemons:

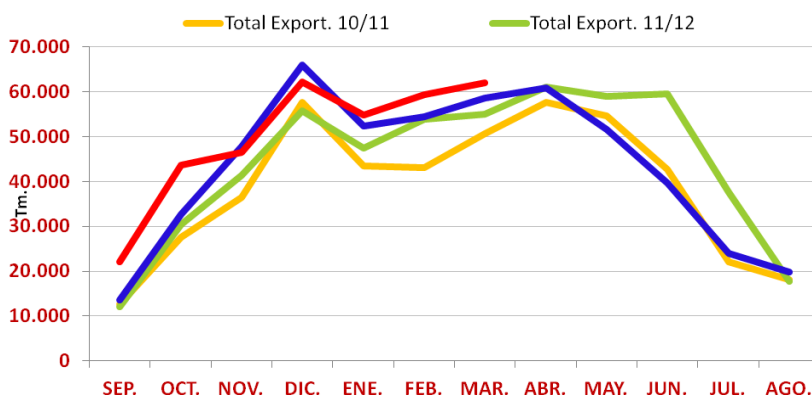
- Fino variety:

- Production of 690.000 of Fino lemon variety will be achieved. Fino is expected to be finished by end of April. Export volumes increased in 2014, mainly due to intra EU market, which is representing 91% of volume. Some shipments to Brazil and Canada.
- Difficulties in Russian market: stocks of Turkish lemons, ruble devaluation, uncertainties...
- Returns for growers are satisfactory.
- Export coasts are not so good due to pressure from clients.
- Stable retail prices, without changes all season.
- Increasing volumes in processing (Argentina is expected to reduce juice and oil production).
- Verna variety:
 - Production of 270.000 tonnes expected (+20% comparing to the season 2013).
 - The season will start on 1 May and will finish end July.
 - Good demand expectations as Argentina will start later.
 - Concerns due to CBS issue, especially due to arriving fruit from South Africa.

SPANISH LEMON 1 SEPT TO 31 MARCH (.000 tonnes)

	10/11	11/12	12/13	13/14	Dif. 13/14-12/13
EU EXPORTS.	254.761	272.189	298.715	319.417	7%
NON EU EXPORTS	16.444	23.138	26.464	30.780	16%
DOMESTIC	79.800	79.800	79.800	79.800	0%
LOSSES	17.550	18.756	20.249	21.500	6%
PROCESSING	174.384	172.654	87.903	138.914	58%
TOTAL	542.939	566.538	513.131	590.410	15%

TOTAL EXPORTS EU+NON EU MARKETS)



Italy:

- Oranges: season has been characterized by large quantity of small size product, difficult to be marketed in particular in January and February due to excessive offer. Part of this product has been sent to the squeezing factories; part is still now in the orchards and probably will not be harvested. Export volumes increased, however local Italian consumption has decreased
- For lemons, the season could be considered as normal in terms of quantity. Sizes are regular. Quantity in the average due to the strong spring winds caused damages to the fruits. More fruit available for squeezing factories. Export sales decreased. Better the domestic market.

2013/2014 (data in tones)	Soft Citrus	Orange	Lemon	Grapefruit
Production	798,000	2,050,000	412,000	7,500
Domestic fresh	349,000	935,000	255,000	2,800

Intra trade (EU only)	73,200	94,000	26,900	1,520
Processing	80,000	450,000	90,000	
Export (third countries)	2,200	22,300	2,200	

Turkey:

2013/2014 (data in tones)	Soft Citrus	Orange	Lemon	Grapefruit
Intra trade (EU only)	45.224.857	11.940.605	87.535.412	68.743.206
Export (third countries)	494.223.524	317.418.970	290.871.331	80.901.108

- In comparison to the same period of the previous season, there is an increase by 31% in soft citrus, by 39% in oranges, by 16% in lemons and by 15% in grapefruits.
- The citrus sector has not suffered from any disease problem this year.
- The quality has been quite satisfactory for all citrus varieties
- The most of the fruits have been under the normal size since the crops on the trees are more than the previous year.
- Citrus season of Turkey is about to finish. Only some grapefruits have remained to be shipped.

USA:

- Two factors have greatly influenced the citrus marketing campaign of 2013/2014 in the USA. They are the damaging impact of Citrus Greening in Florida and its potential to spread to California, and the successive days of freezing temperatures this winter in California. These factors have influenced fruit quality, sizing and production volumes.
- Yet an even greater threat is on the horizon with the continuing drought conditions in the Central Valley of California. Next year the impact could be significant, if there is not relief.
- Florida Citrus:
 - Orange Varieties: Projection: 4.5 million MT, 18% below last season's final production figure and lowest in 30 years. Fresh Valencia Oranges marketing will continue into June, but weekly volumes will be light. Fruit sizing has been small.
 - Grapefruit: Projection: 620,000 MT. The harvest is complete, but some sales will continue into early May. The crop is down by 12% from last season, and eating quality was below normal
 - Tangerines: Projection: 127,386 MT. Picking has stopped and commercial shipments are complete. This crop was down by 10%
- Texas Citrus:
 - Orange Varieties: Projection: 77,466 MT. There was a +12 increase but off a small base.
 - Grapefruit: Projection: 220,727 MT. The crop was normal with good sizing and eating qualities. Future concern with outbreak of Citrus Greening is receiving considerable publicity.
- California:
 - Orange Varieties: Projection: 2.0 million MT (1.5 million MT Navels).
 - The Navel Orange crop is down 1% from last season, but freeze damage continues to show up in the fruit. Sizing is to the smaller sizes, and the industry is making a good use of bags to move more fruit, although the trade is showing some resistance. The industry will try to market through May in order to move the late varieties.
 - The Valencia crop is about the same as last season, and picking has not started as the industry tries to complete the Navel crop. We expect some harvesting to start in May.
 - Grapefruit: Projection: 145, 500 MT. This is a normal crop, and the industry expects strong pricing.

- Lemons: Projection: 727,000 MT, (add 65,000 MT for the Arizona crop). This forecast is down by 5% from last year, but sizing is normal and limited impact from the freeze
- Tangerines and Mandarins: Projection: 470,000 MT. This crop is down 2% from last year, but in reality in the absence of the freeze this would have been a very large crop as new plantings start to yield high volumes.

- The Transition to Southern Hemisphere Fruit:

- Interesting market dynamics that will create supply gaps during May and into June.
- Soft citrus gaps should appear as we enter May, since California has limited supplies of Late Mandarins, and the quality is suspect.
- The balance of the Navel crop will be kept closer to home because freeze damage, and we can expect the trade to be looking for new crop from the Southern Hemisphere.
- Florida is not a factor at this point in the season.

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