

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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POLICY

Voluntary Public

Date: 11/4/2014

GAIN Report Number: IT14106

Italy

Post: Rome

Citrus Annual 2014

Report Categories:

Citrus

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Report Highlights:

Italy's MY 2014/15 (November/October) orange production is forecast to be lower than the previous campaign. *Blonde* varieties are forecast to register a 10 percent decrease (15-20 percent in Sicily in the *early* areas), while *Blood* oranges are forecast to drop 30 percent, especially the *late* varieties. Overall, fruit quality is expected to be good. Italy's MY 2014/15 tangerine production is forecast to decrease by approximately 10 percent compared to the previous campaign. Italy's MY 2014/15 (November/October) lemon production is forecast to significantly increase by 14 percent. Quality is expected to be excellent.

Oranges

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

Oranges	2012	2013	2014
	Estimates 2012/2013	Estimates 2013/2014	Forecast 2014/2015
	Post Data	Post Data	Post Data
Area Planted	83,514	89,628	89,628
Area Harvested	81,270	87,505	87,402
Production	1,730,000	1,800,000	1,700,000
Imports	223,566	164,000	182,000
Total Supply	1,953,566	1,964,000	1,882,000
Exports	126,083	118,000	114,000
Fresh Dom. Consumption	1,518,483	1,526,000	1,460,000
For Processing	309,000	320,000	308,000
Total Distribution	1,953,566	1,964,000	1,882,000

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

PRODUCTION

Italy's MY 2014/15 (November/October) orange production is forecast to be lower than the previous campaign. *Blonde* varieties are forecast to register a 10 percent decrease (15-20 percent in Sicily in the *early* areas), while *Blood* oranges are forecast to drop 30 percent, especially the *late* varieties. Overall, fruit quality is expected to be good. 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.

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

In MY 2013/14, Italy exported 118,000 MT of oranges, mainly to Germany, Switzerland, Austria, and France. Italy's MY 2013/14 orange imports reached approximately 164,000 MT, mainly from Spain and South Africa.

Orange Juice

Table 2: Production and Processing (MT)

Orange Juice	2012	2013	2014
	Estimates 2012/2013	Estimates 2013/2014	Forecast 2014/2015
	Post Data	Post Data	Post Data
Delivered to Processors	309,000	320,000	308,000
Production	21,630	22,400	21,560

Sources: Italian industry

According to latest estimates, Italy is forecast to process approximately 308,000 MT of oranges in MY 2014/15 to produce 21,560 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	2012	2013	2014
	Estimates 2012/2013	Estimates 2013/2014	Forecast 2014/2015
	Post Data	Post Data	Post Data
Area Planted	35,515	36,314	36,314
Area Harvested	34,546	35,367	35,080
Production	792,000	789,000	710,000
Imports	90,811	82,000	90,000
Total Supply	882,811	871,000	800,000
Exports	89,421	76,000	70,000
Fresh Dom. Consumption	740,390	718,000	680,300
For Processing	53,000	77,000	49,700
Total Distribution	882,811	871,000	800,000

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 2014/15 tangerine production is forecast to decrease by approximately 10 percent compared to the previous campaign. Italy's MY 2014/15 (November/October) clementine production is forecast to decrease by approximately 10 percent (600,000 MT compared to 668,000 MT in 2013/14), so as mandarin production (110,000 MT compared to 121,000 MT in 2013/14). Quality is

expected to be better than the past year for both clementines and mandarins. Calabria, Sicily, and Apulia are the 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 main 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

In MY 2013/14, Italy exported approximately 76,000 MT of tangerines, mainly to Poland, Romania, Slovenia, Austria, and Hungary. Italy's MY 2013/14 tangerine imports reached 82,000 MT. Spain is the leading supplier to the Italian tangerine market, representing 85 percent of total imports.

Lemons

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

Lemons	2012	2013	2014
	Estimates 2012/2013	Estimates 2013/2014	Forecast 2014/2015
	Post Data	Post Data	Post Data
Area Planted	25,703	26,644	26,644
Area Harvested	21,023	21,376	23,400
Production	411,000	412,000	470,000
Imports	97,451	86,000	80,000
Total Supply	508,451	498,000	550,000
Exports	39,452	44,800	47,000
Fresh Dom. Consumption	402,999	368,200	427,800
For Processing	66,000	85,000	75,200
Total Distribution	508,451	498,000	550,000

Sources: Italian industry; ISTAT; GTA

PRODUCTION

Italy's MY 2014/15 (November/October) lemon production is forecast to significantly increase by 14 percent. Quality is expected to be excellent. 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

In MY 2013/14, Italy exported 44,800 MT of lemons, mainly to Germany, Greece, and Austria. Italy's MY 2013/14 lemon imports reached 86,000 MT, mostly from Spain and Argentina, accounting for 51 and 26 percent of total imports, respectively.

Grapefruits

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

Grapefruits	2012	2013	2014
	Estimates 2012/2013	Estimates 2013/2014	Forecast 2014/2015
	Post Data	Post Data	Post Data
Area Planted	312	327	327
Area Harvested	262	277	270
Production	7,500	7,500	7,000
Imports	28,604	30,284	30,400
Total Supply	36,104	37,784	37,400
Exports	2,583	2,677	2,300
Fresh Dom. Consumption	33,521	35,107	35,100
For Processing	0	0	0
Total Distribution	36,104	37,784	37,400

Sources: Italian industry; ISTAT; GTA

PRODUCTION

Italy's MY 2014/15 (November/October) grapefruit production is forecast to decrease by 6.7 percent.

TRADE

In MY 2013/14, Italy exported 2,677 MT of grapefruits, mainly to Slovenia, France, the Netherlands, and Croatia. Italy's MY 2013/14 grapefruit imports reached 30,284 MT, mainly from South Africa, Turkey, Israel, and Cyprus.

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