

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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POLICY

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Citrus Annual 2015

Report Categories:

Citrus

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Report Highlights:

Italy's MY 2015/16 (November/October) orange production is forecast 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. Italy's MY 2015/16 (November/October) tangerine production is forecast to decrease by approximately 12 percent compared to the previous campaign due to severe hailstorms that hit Sicily region in May, June, and August. MY 2015/16 clementine production is forecast to decrease by approximately 10.8 percent (660,000 MT compared to 740,000 MT in 2014/15), so as mandarin production that is expected to drop by 20.6 percent (100,000 MT compared to 126,000 MT in 2014/15).

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	86,372
Area Harvested	87,221	84,530	85,083
Production	1,800,000	1,360,000	1,950,000
Imports	155,642	220,000	145,000
Total Supply	1,955,642	1,580,000	2,095,000
Exports	117,891	120,300	125,000
Fresh Dom. Consumption	1,517,751	1,217,600	1,624,850
For Processing	320,000	242,100	345,150
Total Distribution	1,955,642	1,580,000	2,095,000

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

PRODUCTION

Italy's MY 2015/16 (November/October) orange production is forecast 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 forecast to be excellent. MY 2014/15 orange production dropped by 24.4 percent than 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 2013/14 orange imports decreased by 30 percent (155,642 MT) compared to the previous year, mainly because of reduced volumes from Spain (-33 percent), the leading supplier to the Italian orange market, accounting for approximately 62 percent of total imports. In MY 2013/14, Italy

exported 117,891 MT of oranges, mainly to Germany (35,469 MT), Switzerland (17,309 MT), Austria (12,968 MT), and France (10,787 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	345,150
Production	22,400	16,947	24,160

Sources: Italian industry

According to latest estimates, Italy is forecast to process approximately 345,150 MT of oranges in MY 2015/16 to produce 24,160 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	36,990
Area Harvested	34,920	34,772	35,722
Production	789,000	866,000	760,000
Imports	80,288	97,000	100,000
Total Supply	869,288	963,000	860,000
Exports	76,991	87,000	70,000
Fresh Dom. Consumption	715,297	815,380	736,800
For Processing	77,000	60,620	53,200
Total Distribution	869,288	963,000	860,000

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 forecast to decrease by approximately 12 percent compared to the previous campaign due to severe hailstorms that hit Sicily region in May, June, and August. MY 2015/16 clementine production is forecast to decrease by approximately 10.8 percent (660,000 MT compared to 740,000 MT in 2014/15), so as mandarin

production that is expected to drop by 20.6 percent (100,000 MT compared to 126,000 MT in 2014/15). 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

Italy's MY 2013/14 tangerine imports reached 80,288 MT, a decrease of approximately 12 percent from MY 2012/13, mainly due to reduced volumes from Spain (-14 percent), the leading supplier to the Italian tangerine market, representing 85 percent of total imports. In MY 2013/14, Italy exported approximately 76,991 MT of tangerines, 14 percent less than the previous year, mainly because of fewer quantities to Poland (-42 percent) and Romania (-27 percent), the leading destinations for Italian tangerines, accounting for 14 and 10 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	24,795
Area Harvested	20,967	20,584	21,067
Production	412,000	429,000	420,000
Imports	91,270	115,000	110,000
Total Supply	503,270	544,000	530,000
Exports	44,062	39,000	35,000
Fresh Dom. Consumption	374,208	427,780	419,400
For Processing	85,000	77,220	75,600
Total Distribution	503,270	544,000	530,000

Sources: Italian industry; ISTAT; GTA

PRODUCTION

Italy's MY 2015/16 (November/October) lemon production is forecast to slightly decrease by 2 percent than the previous campaign. 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 2013/14 lemon imports reached 91,270 MT, mostly from Spain and Argentina, accounting for 55 and 21 percent of total imports, respectively. In MY 2013/14, Italy exported 44,062 MT of lemons, an increase of 9 percent compared to the previous year, mainly thanks to increased volumes to Germany (+12 percent), the leading supplier to the Italian lemon market, accounting for 35 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	6,000
Imports	28,992	28,020	27,900
Total Supply	36,492	33,420	33,900
Exports	3,015	3,100	3,200
Fresh Dom. Consumption	33,477	30,320	30,700
For Processing	0	0	0
Total Distribution	36,492	33,420	33,900

Sources: Italian industry; ISTAT; GTA

PRODUCTION

Italy's MY 2015/16 (November/October) grapefruit production is forecast to reach 6,000 MT.

TRADE

Italy's MY 2013/14 grapefruit imports reached 28,992 MT, mainly from South Africa (9,948 MT), Turkey (4,981 MT), Israel (4,562 MT), and Cyprus (3,555 MT). In MY 2013/14, Italy exported 3,015 MT of grapefruits, mainly to Slovenia, the Netherlands, Croatia, 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