

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY  
USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT  
POLICY

Voluntary  Public

**Date:** 6/7/2013

**GAIN Report Number:** IT1332

## Italy

**Post:** Rome

### Citrus Semi-Annual 2013

**Report Categories:**

Citrus

**Approved By:**

Christine Sloop

**Prepared By:**

Ornella Bettini

**Report Highlights:**

MY 2012/13 (November/October) Italian orange production is expected to decrease by 15 percent compared to the previous season, due to adverse weather conditions in early spring 2012. Italian lemon planted area has been decreasing progressively due to higher input costs and lower prices which have negatively affected crop profitability.

## Oranges

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

Oranges	2010	2011	2012
	Estimates 2010/2011	Estimates 2011/2012	Forecast 2012/2013
	Post Data	Post Data	Post Data
Area Planted	102,053	101,498	99,836
Area Harvested	100,252	99,569	98,029
Production	1,950,000	2,300,000	1,950,000
Imports	142,329	177,827	180,000
<b>Total Supply</b>	<b>2,092,329</b>	<b>2,477,827</b>	<b>2,130,000</b>
Exports	138,248	112,843	112,300
Fresh Dom. Consumption	1,654,081	2,074,984	1,702,700
For Processing	300,000	290,000	315,000
<b>Total Distribution</b>	<b>2,092,329</b>	<b>2,477,827</b>	<b>2,130,000</b>

Source: Unofficial estimates based on Italian industry; GTA (Global Trade Atlas)

### **PRODUCTION**

MY 2012/13 (November/October) Italian orange production is expected to decrease by 15 percent compared to the previous season, due to adverse weather conditions in early spring 2012. Production of red oranges registered a decline of 30-35 percent (40-45 percent for late varieties). However, fruit size is good and the quality is excellent. Sicily and Calabria are the main orange-producing areas, accounting for 59 and 22 percent respectively. *Tarocco* (*T.Comune*, *T.Galici*, *T.Gallo*, *T.Scirè*, *T.Nucellare*), *Moro* (*M.Comune* or *M.Nucellare*), *Sanguinello* (*S. Moscato Cuscunà* and *S. Moscato Nucellare*), *Sanguigno*, *Ovale* or *Calabrese*, *Biondo Commune*, *Navelina*, and *Washington Navel* are the chief varieties grown in Italy.

### **CONSUMPTION**

MY 2012/13 Italian orange consumption is expected to decrease by approximately 19 percent driven by reduced availability for the fresh market based on consistent demand for processing and decreased production. 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 2011/12, Italy exported 112,843 MT of oranges, mainly to Germany (34,598 MT), Austria (16,194 MT), and Switzerland (15,682 MT). In MY 2011/12, Italy's orange imports reached 177,827 MT, mainly from Spain (117,037 MT) and South Africa (30,599 MT).

### Orange Juice

**Table 2: Production, Supply, and Demand (MT)**

Orange Juice	2010	2011	2012
	Estimates 2010/2011	Estimates 2011/2012	Forecast 2012/2013
	Post Data	Post Data	Post Data
Deliv.To Processors	300,000	290,000	315,000
Production	22,000	20,300	22,050
Imports	16,684	16,150	16,000
<b>Total Supply</b>	<b>38,684</b>	<b>36,450</b>	<b>38,050</b>
Exports	36,859	36,000	37,550
Dom. Consumption	1,825	450	500
<b>Total Distribution</b>	<b>38,684</b>	<b>36,450</b>	<b>38,050</b>

Source: Unofficial estimates based on Italian industry; GTA

According to latest estimates, Italy is forecast to process about 315,000 MT of oranges in MY 2012/13 to produce 22,050 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	2010	2011	2012
	Estimates 2010/2011	Estimates 2011/2012	Forecast 2012/2013
	Post Data	Post Data	Post Data
Area Planted	38,529	38,338	39,338
Area Harvested	37,305	37,102	38,067
Production	850,000	770,000	622,500
Imports	79,538	95,376	95,850
<b>Total Supply</b>	<b>929,538</b>	<b>865,376</b>	<b>718,350</b>
Exports	105,129	116,685	117,000
Fresh Dom. Consumption	775,409	702,691	551,350
For Processing	49,000	46,000	50,000
<b>Total Distribution</b>	<b>929,538</b>	<b>865,376</b>	<b>718,350</b>

Source: Unofficial estimates based on Italian industry; GTA

### **PRODUCTION**

MY 2012/13 Italian tangerine production, which consists of over 80 percent seedless clementines and nearly 20 percent mandarins, is expected to decrease by 19 percent from the previous year, as a consequence of heavy rains that affected Clementine production in January 2013. Meanwhile, Mandarin production is expected to register an increase of 10 percent.

Quality is good for both Clementines and Mandarins. Calabria, Sicily, and Apulia are the main tangerine-producing areas, accounting for 50, 23, and 14 percent respectively. *Avana* and *Tardivo di Ciaculli* are the major mandarin varieties grown in Italy. *Comune* or *Oroval*, and *Monreal* are the main Clementine varieties.

### **CONSUMPTION**

MY 2012/13 Italian tangerine consumption is expected to decline driven Reduced availability for the fresh market based on consistent demand for processing and decreased production. Italians consume large quantities of Clementines and mandarins during winter holidays when the bulk of production hits the market. Most tangerines are consumed fresh.

## TRADE

In MY 2011/12, Italy exported 116,685 MT of tangerines, mainly to Poland (28,188 MT), Romania (11,066 MT), and Hungary (10,568 MT). MY 2011/12 Italy's tangerine imports reached 95,376 MT. Spain is the leading supplier to the Italian tangerine market, representing 87 percent (82,914 MT) of total imports.

## Lemons

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

Lemons	2010	2011	2012
	Estimates 2010/2011	Estimates 2011/2012	Forecast 2012/2013
	Post Data	Post Data	Post Data
Area Planted	30,080	28,628	26,550
Area Harvested	25,832	24,348	23,365
Production	575,000	620,000	595,000
Imports	101,971	110,710	111,100
<b>Total Supply</b>	<b>676,971</b>	<b>730,710</b>	<b>706,100</b>
Exports	42,886	38,433	38,000
Fresh Dom. Consumption	524,085	607,277	553,100
For Processing	110,000	85,000	115,000
<b>Total Distribution</b>	<b>676,971</b>	<b>730,710</b>	<b>706,100</b>

Source: Unofficial estimates based on Italian industry; GTA

## PRODUCTION

MY 2012/13 (November/October) Italian lemon production is expected to decrease slightly by 4 percent, but quality is expected to be good. Sicily produces more than 86 percent of Italy's lemons. Lemon-producing area is progressively decreasing: higher input costs and lower prices have negatively affected crop profitability. *Femminello Commune (F. Zagara Bianca, F. Siracusano, F. S. Teresa)*, *Monachello*, and *Interdonato* are the main lemon varieties grown in Italy. Farmers are expected to deliver 115,000 MT of lemons to the processing industry.

## CONSUMPTION

MY 2012/13 Italian lemon consumption is expected to decline 8.9 percent from the previous year. Italian lemon production is mostly destined for the fresh market.

## TRADE

In MY 2011/12, Italy exported 38,433 MT of lemons, mainly to Germany (13,406 MT) and Greece (6,004 MT). MY 2011/12 Italy's lemon imports reached 110,710 MT, mostly from Spain (51,608 MT) and Argentina (37,574 MT).

## Grapefruits

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

Grapefruits	2010	2011	2012
	Estimates 2010/2011	Estimates 2011/2012	Forecast 2012/2013
	Post Data	Post Data	Post Data
Area Planted	303	303	303
Area Harvested	253	253	253
Production	7,125	7,122	7,000
Imports	31,402	28,050	27,900
<b>Total Supply</b>	<b>38,527</b>	<b>35,172</b>	<b>34,900</b>
Exports	6,992	1,875	1,800
Fresh Dom. Consumption	31,535	33,297	33,100
For Processing	0	0	0
<b>Total Distribution</b>	<b>38,527</b>	<b>35,172</b>	<b>34,900</b>

Source: Unofficial estimates based on Italian industry; GTA

## PRODUCTION

MY 2012/13 (November/October) Italian grapefruit production is expected to remain stable.

## CONSUMPTION

MY 2012/2013 Italian grapefruit consumption is expected to remain flat.

## TRADE

In MY 2011/12, Italy exported 1,875 MT of grapefruits, mainly to France (510 MT) and Slovenia (444 MT). MY 2011/12 Italy's grapefruit imports reached 28,050 MT, mainly from South Africa (8,994 MT) and Israel (6,532 MT).

## **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