



**C.L.A.M.**

**LIAISON COMMITTEE FOR MEDITERRANEAN CITRUS**

**MEDITERRANEAN CITRUS FORECAST 2014/2015**

**European Commission  
GREX Citrus Fruit  
6 /11/ 2014 Brussels**

**Leyre Abásolo  
Secretary General**

## METHODOLOGY

The C.L.A.M. Annual General Assembly was held 16-17 October 2014 .

In general the **Mediterranean countries** provided their updated information for Season 2013/2014 and Forecast 2014/2015.:Spain, France; Italy, Greece, Cyprus, Israel, Turkey, Tunisia, Morocco. Algeria ( Source: FAO). Gaza ( Historical estimates).

Some exceptions:

**Morocco** ( Missing some details about export destinations 2013/2014 )  
(missing greater detailed forecast 2014/2015)

**Tunisia** (Forecast 2014/2015 will be available in the coming weeks, data is 2013/2014)

**Egypt** (Missing season 2013/2014 and Forecast 2014/2015) (data is 2012/2013)

# MEDITERRANEAN CITRUS FRUIT

C.L.A.M. PREVISIONS 2014-2015 (000 TONNES)

TOTAL AGRUMES	Totaux	France	Espagne	Maroc (*)	Algérie (*)	Tunisie (*)	Italie	Israël	Chypre	Grèce	Turquie	Egypte (*)	Gaza (*)
Production	21.212,6	30,0	6.487,8	2.203,5	568,4	354,4	2.503,0	604,0	265,2	1.059,0	3.349,4	3.719,6	68,3
Exportation	8.111,9	27,0	3.751,0	583,8	-	21,4	229,0	202,5	79,9	423,0	1.573,2	1.182,4	38,7

(\*) Maroc et Tunisie: Campagne 2013-2014. Egypte: Campagne 2012-2013. Algérie: FAO. Gaza: Estimations historiques)

**MEDITERRANEAN CITRUS PRODUCTION** hit a record season in 2013/2014 with 22,5 million tons. In season 2014/2015 the crop should **decrease by 3.3%** to **21,3 million tons** but it will remain among the three greatest ever known seasons. Warm temperatures in Europe to date. *The decreases (-1,8% in Spain, -10% in Greece and -24% in Italy) do not offset the progressions (+4% by Turkey, +13% Cyprus, +20% Israel)*

**MEDITERRANEAN CITRUS EXPORTS** intentions for season 2014/2015 are **8,1 million tons** representing a slight increase by **1.3%** vs . season 2013/2014 (foreseen fewer losses and releases to the processing industry than in previous season). Season started with low competition of SH produce. *On the rise will be Turkey +5%, Italy +16% (despite the decrease in production) and Israel +21%* . Spain is to remain almost stable ( -0,3%) **and it will be lower for Greece (-6%) and Cyprus (-11%).**

**N.B. Morocco: See slide for Morocco**

# SPAIN

➤ **Production forecast 2014/2015 6.5 mio tons (-2% vs 13/14).** Decrease for Easy Peelers is -4% ( Satsuma crop to drop by 40%), but clementine and hybrids harvest to remain stable. Decrease for oranges -5% ( Early Navel and Late varieties of oranges to be affected by a similar level of decrease). Lemon crop to fall by 10%. Season 13/14 harvest 7.2 mio tons was between the 2 strongest harvests ever registered.. Orange harvest surpassed 3.9 mio tons with still increasing significance of the young plantations of Navel Late (planted until the end of last decade). Retreats and losses led to unprecedented releases to the processing industry. Harvest was also strong for lemons exceeding 1 mio tons. Easy peelers remained stable.

➤ **Exports forecast 14/15 almost 3.8 mio tons (-4% vs 13/14).** Orange exports to remain stable but those of easy peelers -8% and lemon -10%. Season 13/14 exports 3.8 mio tons ( - 3% vs 12/13 but = 11/12) ( Oranges -10%, Easy Peelers -2%). Most consignments destined to the EU 28 markets (90% share). Main far distance markets Russia and US but exports decreased. Strong growth of exports to Canada ( no California fruit), the Persian Gulf and Asia – specially China).

# ITALY

➤ Production forecast 2014/2015 2.5 mio tons ( - 24% vs 13/14 ) ( weakest production level since the 90's ) due to uprooting because of intensification of Tristeza and to drought, although also there are improvement in the grades and fruit quality . Excellent quality for lemons. Season 2013/2014 was “small” and difficult (Tristeza virus Etna ashes..). Sector restructuring in favor of new varieties blood orange cultivars and those of easy peelers. Greater sector institutional organization.

For **oranges** we see an aggravation of the usual alternation phenomenon. **White orange** varieties production decrease by approx 10%; although the fall is stronger in Sicily where in the early varieties areas it would reach 15%-20%. For the **colored orange** variety, the Sicilian peculiar PGI Red Orange of Sicily, estimates point at a sharp fall by approx. 30% versus previous season; especially in the areas of late varieties .

**Clementine** harvest to decrease on average by about 10%. Some areas + 30% whereas other areas would see strong decreases. **Lemon** harvest to increase by 15% vs. and this to be concentrated from January to April whereas during the remaining time period lower than average volumes are expected .

➤ Exports forecast 14/15 229 th tn ( + 16% vs 13/14 ) a good year started with low competition from SH and is expected good demand – supply balance with impact on the prices for the whole sector and a growing interest from the new markets.

# TURKEY

➤ **Production 2014/2015 at 3.3 mio tons ( +5% vs 3.2 mio tons in 13/14 and thus continuing the increase trend experienced in the previous seasons)**

**This will be driven by growth of the EP crop ( +20%) and that of lemon ( +5%) despite decreases in oranges (-3%) and grapefruit ( -12%).** In past seasons the country has been planting Easy Peelers varieties. *See effects of recent hail in Antalya.*

➤ **The Export 2014/2015 at 1.6 mio tons shows similar increase trend to production ( EP + 15%, Oranges +5%, lemon stable, grapefruit -10%).** This will consolidate the rising trend of exports which last season hit a new record with 1.5 mio tons ( +29% vs 12/13) and unprecedented levels for EP, oranges and grapefruit. **Russian market** for lemon was good but there were difficulties for grapefruit (communication campaign against grapefruit e.g. TV ). In general other difficulties are Russian supermarkets emerging sourcing directly from Turkey and Pakistan competition.

# MOROCCO

➤ At the time of our General Assembly ASPAM was still finishing the census in Gharb region where many new plantations are located but their estimate was a fall by 10% -14% for the country's crop. The **Ministry for Agriculture 31 Oct 2014 published Production 2014/2015 : at 1.9 mio tons ( - 14.2% vs 2.2 mio tons record season 13/14** which was due to entering into production of new plantations and extensions under the Maroc Plan Vert).

➤ **Export 2014/2015** ASPAM estimates made during 1st half of October 2014 stated a **Decrease by -10% -15% vs. 13/14 depending on the varieties**. Last season explosion of EP exports offset the structural trend of drop in orange exports. Sector recent institutional reorganization aiming towards greater coordination, logistics and new markets. Exports (clementine) have started with 1 month delay vs previous season so as not to overflow the Russian market. Intention to increase consignments to the EU market (clementine quota far from fulfilled) . Previous season destinations shares (54% Russia and Western Europe 30%, Canada and the USA 7% each).

# ISRAEL

➤ **Production 2014/2015 to reach highest level in past 10 years.** All citrus families increasing save for grapefruit. Easy Peelers sharp growth due to the hail Dec 2013 severly touched the easy peelers - specially Or orchards -in the past season. A strong growth means the comeback to average production for the oranges. Some uprooting of grapefruit orchards due to bad prices for producers for the third season in a row.

➤ **Export intentions 2014/2015 follow same evolution as production.** Continuation of **diversification markets** to detriment of EU ( Russia to absorb 20% of the potential. Far destinations will continue to slightly develop specially those towards the USA and some Asian countries like South Korea and Japan. The Chinese market remains closed.



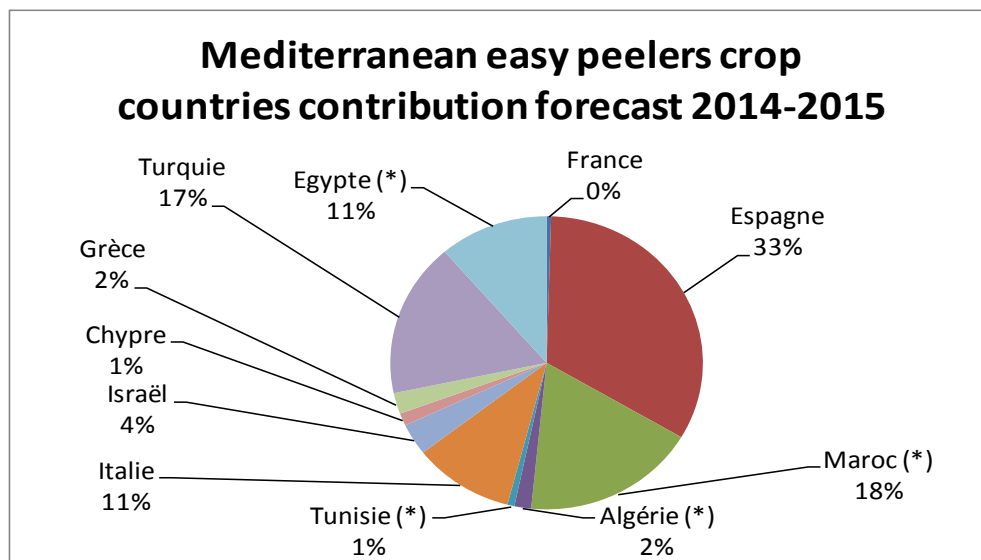
# MEDITERRANEAN EASY PEELERS

## CLAM PREVISIONS 2014-2015 (000 TONNES)

PETIT FRUIT	Totaux	France	Espagne	Maroc (*)	Algérie (*)	Tunisie (*)	Italie	Israël	Chypre	Grèce	Turquie	Egypte (*)	Gaza (*)
Production	6.415,6	30,0	2.117,1	1.162,3	111,0	46,5	672,0	223,0	88,6	148,0	1.092,1	725,0	-

(\*) Maroc et Tunisie: Campagne 2013-2014. Egypte: Campagne 2012-2013. Algérie: FAO. Gaza: Estimations historiques)

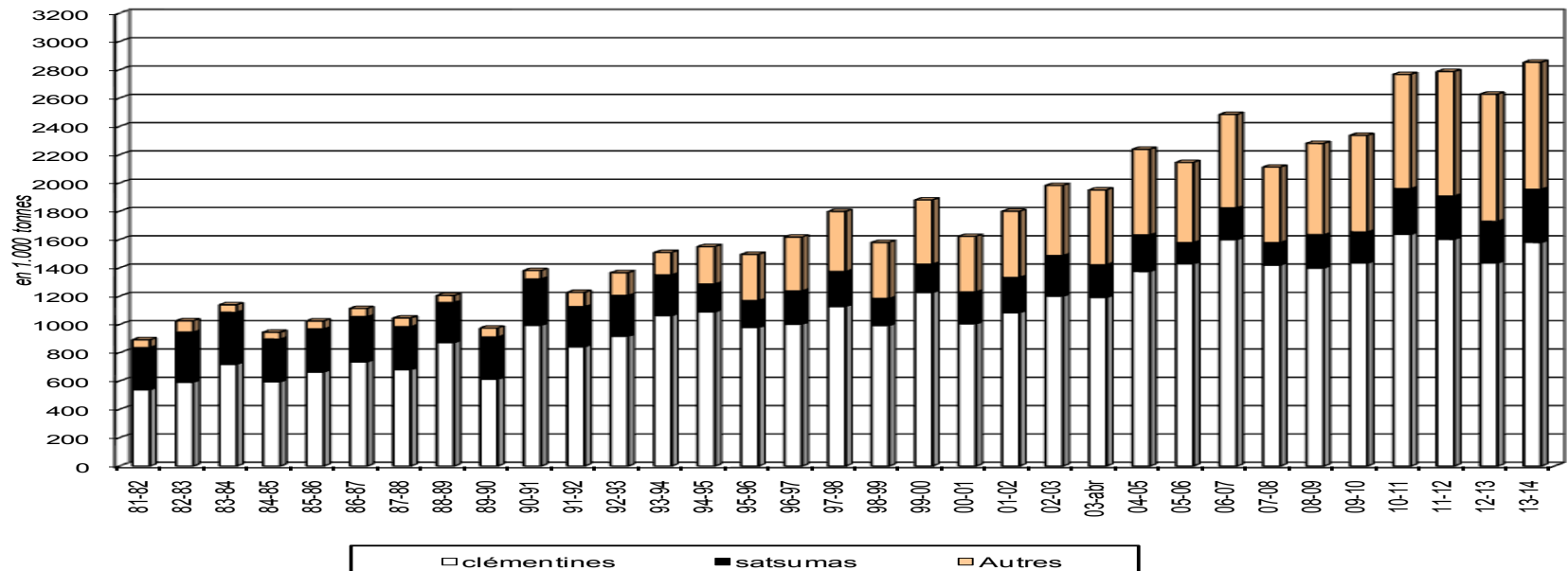
**MEDITERRANEAN EASY PEELERS CROP 2014/2015 = 6.4 million tons (+1.6 % vs 2013/2014) (+17.4 % vs 2012-2013).** Countries increase vs previous season (+9% Cyprus , +20% Turkey and +60% Israel – damages hail in previous season) **except for (- 4 % Spain, - 12 % Italy)** (\*)Morocco Season 2013-2014 and Egypt Season 2012-2013



# MEDITERRANEAN EASY PEELERS

**MEDITERRANEAN EASY PEELERS EXPORTS 2014/2015 almost 3 million tons (2.97 mio tons) growing +4.1 % vs 2.85 mio tons in season 2013/ 2014 (+13 % in 2012-2013). It will be a record season (even above previous season which was also record) (all things equal for Morocco and Egypt).**

## PETITS AGRUMES Exportations du Bassin Méditerranéen



# MEDITERRANEAN EASY PEELERS

## CLAM PREVISIONS 2014-2015 (000 TONNES)

PETIT FRUIT	France	Espagne	Maroc (*)	Tunisie (*)	Italie	Israël	Chypre	Grèce	Turquie	Egypte (*)
Exportation	27,0	1.550,0	480,0	0,03	58,0	100,0	26,7	84,0	620,8	25,4

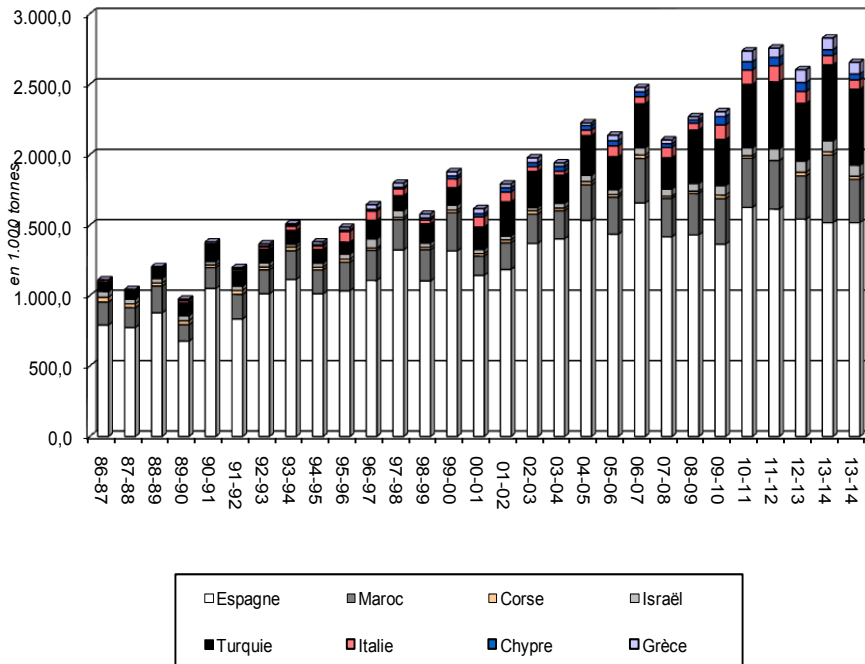
(\*) Maroc et Tunisie: Campagne 2013-2014. Egypte: Campagne 2012-2013. Algérie: FAO. Gaza: Estimations historiques)

### Countries easy peelers exports 2014-2015 vs. 2013-2014 :

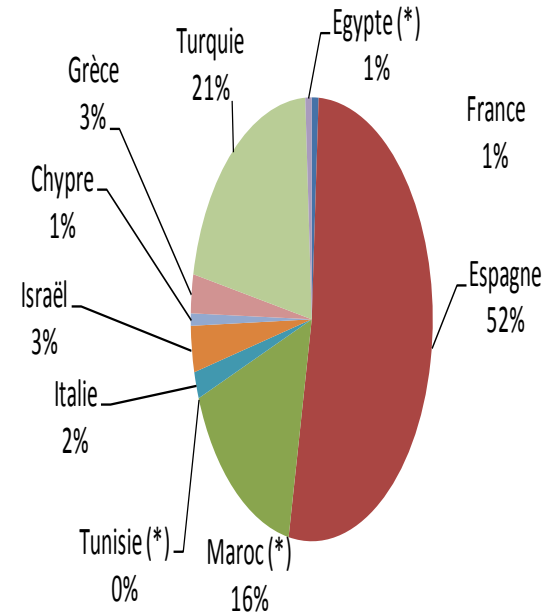
- Spain +2.1%, Greece 1.4%, Turkey +15%, France +21% and Israel +28%
- Italy - 12% and Cyprus -37%.
- Morocco Season 2013-2014.
- Egypt Season 2012-2013

# MEDITERRANEAN EASY PEELERS

## PETITS AGRUMES Exportations par origine



## Mediterranean easy peelers exports countries contribution forecast 2014-2015

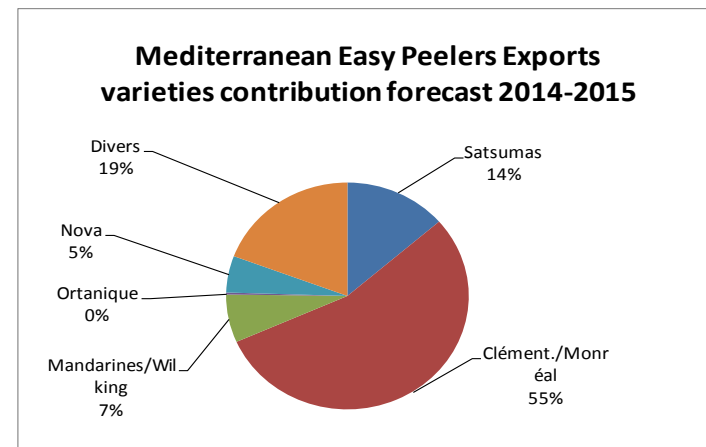


# MEDITERRANEAN EASY PEELERS

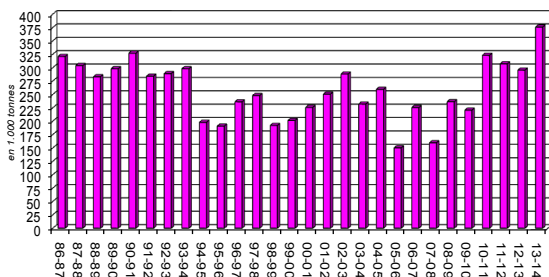
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EXPORTATION PETITS FRUITS VARIETES ( 000 tn)	Prev 2014-20	2013-2014 (*)	Difference
Satsumas	405,0	375,8	29,2
Clément./Montréal	1626,9	1579,9	47,0
Mandarines/Wilking	203,0	251,3	-48,3
Ortanique	8,4	7,4	1,0
Nova	155,2	184,4	-29,2
Divers	573,4	454,8	118,6
<b>TOTAL PETITS FRUITS</b>	<b>2972,0</b>	<b>2853,6</b>	<b>118,3</b>

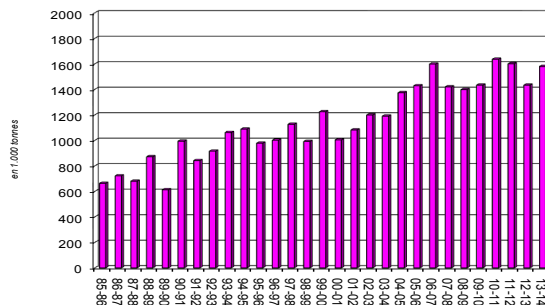
(\*) Maroc et Tunisie 2013-2014. Egypte 2012-2013



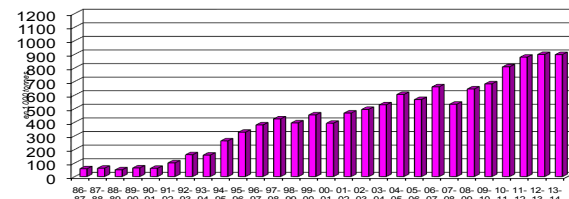
**Satsumas**  
Exportations du Bassin Méditerranéen



**Clémentines**  
Exportations du Bassin Méditerranéen



**Autres Petits Fruits**  
Exportations du Bassin Méditerranéen



**Satsuma: New record season after 323 th tn in 2010-2011.**

**Clementine / Monreal: Second record season after 1.636 th tn in 2010-2011**

**Others: Very close to previous season which was a record season**

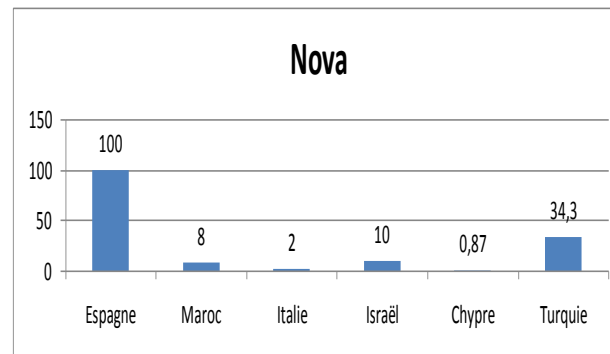
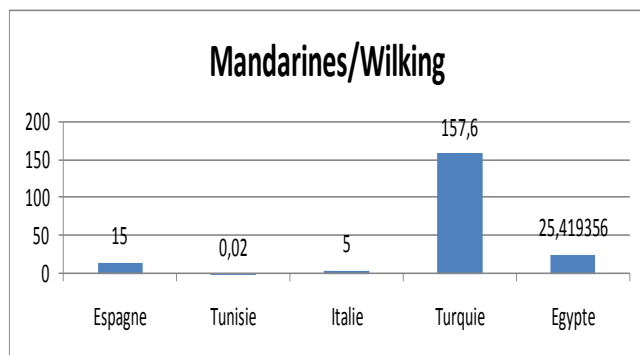
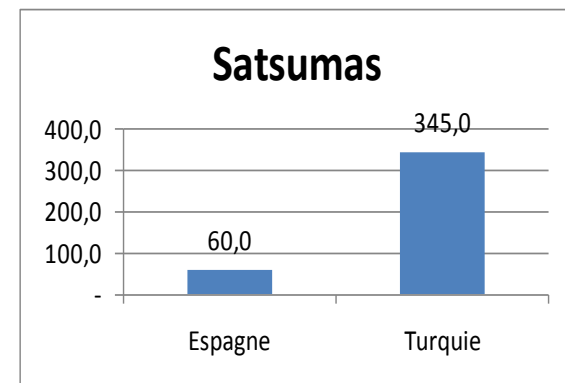
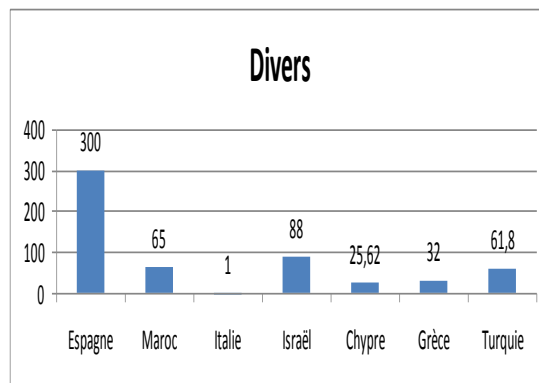
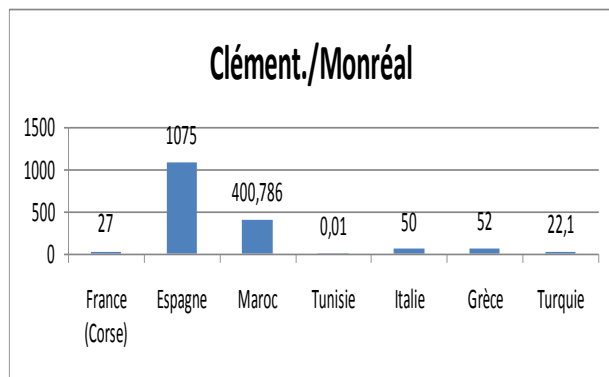
**( mandarins and nova decrease and others – mainly hybrids- increase)**

# MEDITERRANEAN EASY PEELERS

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EXPORTATION PETITS FRUITS VARIETES Prev. 2014-2015 (000 tn)	Totaux (*)	France (Corse)	Espagne	Maroc	Algérie	Tunisie	Italie	Israël	Chypre	Grèce	Turquie	Egypte	Gaza
Satsumas	405,0	-	60,0	-	-	-	-	-	-	-	345,0	-	-
Clément./Montréal	1.626,9	27,0	1.075,0	400,8	-	0,0	50,0	-	-	52,0	22,1	-	-
Mandarines/Wilking	203,0	-	15,0	-	-	0,0	5,0	-	-	-	157,6	25,4	-
Ortanique	8,4	-	-	6,2	-	-	-	2,0	0,2	-	-	-	-
Nova	155,2	-	100,0	8,0	-	-	2,0	10,0	0,9	-	34,3	-	-
Divers	573,4	-	300,0	65,0	-	-	1,0	88,0	25,6	32,0	61,8	-	-
<b>TOTAL PETITS FRUITS</b>	<b>2.972,0</b>	<b>27,0</b>	<b>1.550,0</b>	<b>480,0</b>	<b>-</b>	<b>0,0</b>	<b>58,0</b>	<b>100,0</b>	<b>26,7</b>	<b>84,0</b>	<b>620,8</b>	<b>25,4</b>	<b>-</b>

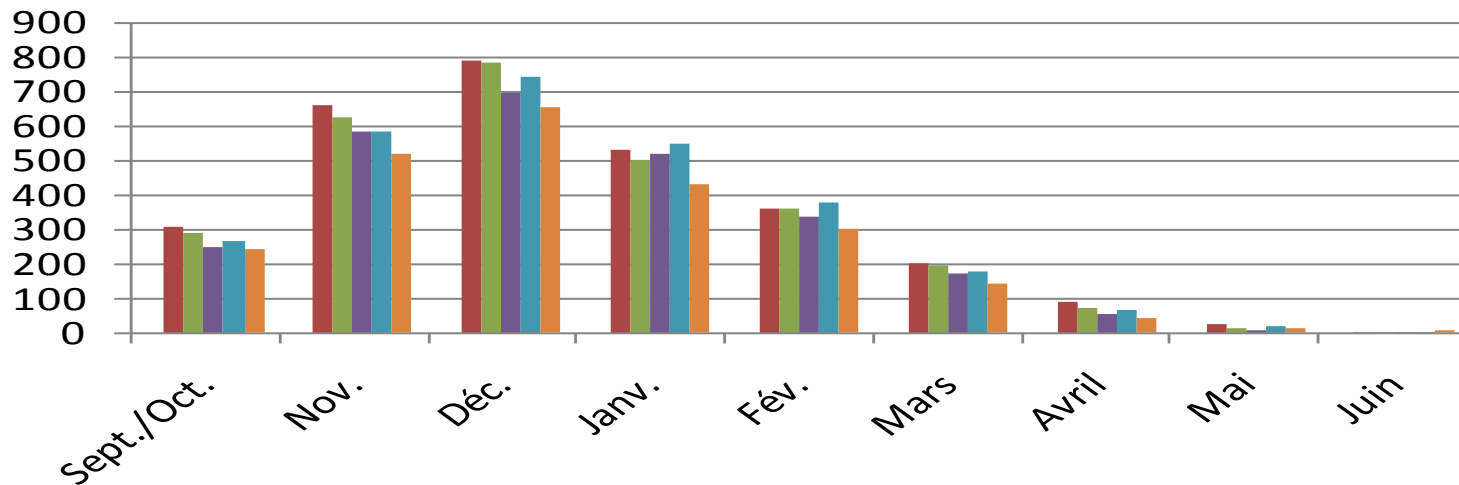
(\*) Maroc 2013-2014 et Egypte 2012-2013



# MEDITERRANEAN EASY PEELERS

MEDITERRANEAN EASY PEELERS EXPORT CALENDAR ( 000TN)	Sept./Oct.	Nov.	Déc.	Janv.	Fév.	Mars	Avril	Mai	Juin	
Forecast 14/15	309,3	661,7	787,7	527,9	362,6	205,2	89,3	24,8	3,2	
Season 13/14	292,9	624,0	781,2	500,2	359,5	196,4	76,1	18,2	3,8	
Season 12/13	249,0	582,0	697,0	518,0	338,0	173,0	56,0	9,0	3,0	
Season 11/12	265,1	581,2	742,0	548,0	376,3	179,3	69,9	18,0	3,4	
Season 10/11	239,7	516,9	651,8	431,1	299,2	141,7	39,2	8,5	4,5	

**Mediterranean Easy Peelers Exports Calendar  
Starting from Season 2014-2015 until Season 2010-2011**

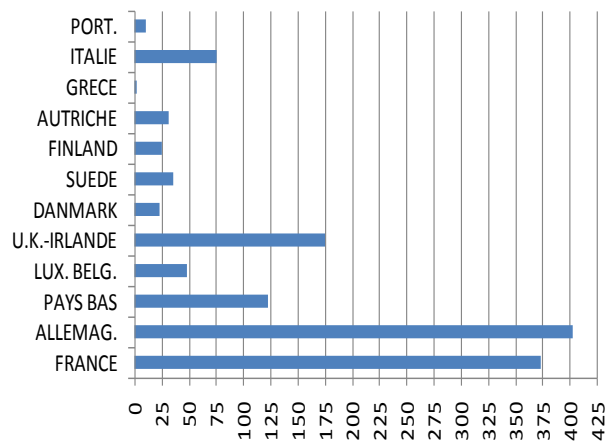


# MEDITERRANEAN EASY PEELERS

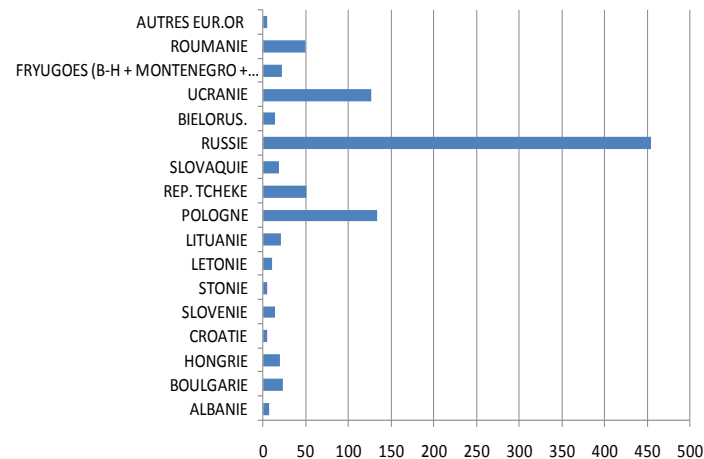
MEDITERRANEAN EASY PEELERS EXPORTS 2013-2014	TOTAL EXPORTE	TOT.HORS EUR.OCC.	U.S.A.	CANADA	MOYEN ORIENT	AUTRES (= Reste du monde)	EUR ORIENTALE 12 NA INCLUS	TOTAL EUR.OCC.	NORVEGE	SUISSE	TOTAL U.E. 15
Satsuma	375,9	286,1	0,0	0,0	39,9	1,4	244,8	80,5	0,0	2,3	78,2
Clémentine	1.414,1	544,2	50,0	34,8	20,5	4,8	434,0	867,1	17,7	21,2	828,1
Montréal	0,1	0,1	0,0	0,0	0,0	0,0	0,1	0,0	0,0	0,0	0,0
Mandarine	250,2	166,4	0,0	0,1	95,8	4,0	66,5	79,9	0,1	0,2	79,7
Wilking	1,0	1,0	0,0	0,0	0,9	0,0	0,1	0,0	0,0	0,0	0,0
Ortanique	5,7	5,4	0,0	0,0	0,3	0,2	4,9	0,3	0,0	0,0	0,3
Nova	178,9	61,9	1,0	1,0	3,0	3,3	53,6	116,7	0,0	0,1	116,6
Divers	457,6	226,1	4,0	14,3	20,9	10,3	176,6	230,5	3,1	3,1	224,3
<b>TOTAL P.FRUIT</b>	<b>2.683,5</b>	<b>1.291,3</b>	<b>55,0</b>	<b>50,3</b>	<b>181,4</b>	<b>24,0</b>	<b>980,6</b>	<b>1.375,0</b>	<b>20,9</b>	<b>26,9</b>	<b>1.327,2</b>
<b>SHARE OF TOTAL EASY PEELERS EXPORTS</b>		<b>48%</b>	<b>2%</b>	<b>2%</b>	<b>7%</b>	<b>1%</b>	<b>37%</b>	<b>51%</b>	<b>1%</b>	<b>1%</b>	<b>49%</b>

N.B. Morocco and Egypt 2012-2013

**MEDITERRANEAN EASY PEELERS EXPORTS 2013-2014  
DESTINATIONS (EU 15 MARKETS) (000TN)**



**MEDITERRANEAN EASY PEELERS EXPORTS 2013-2014  
EASTERN EUROPE ( 13 NMS INCLUDED)  
(000TN)**

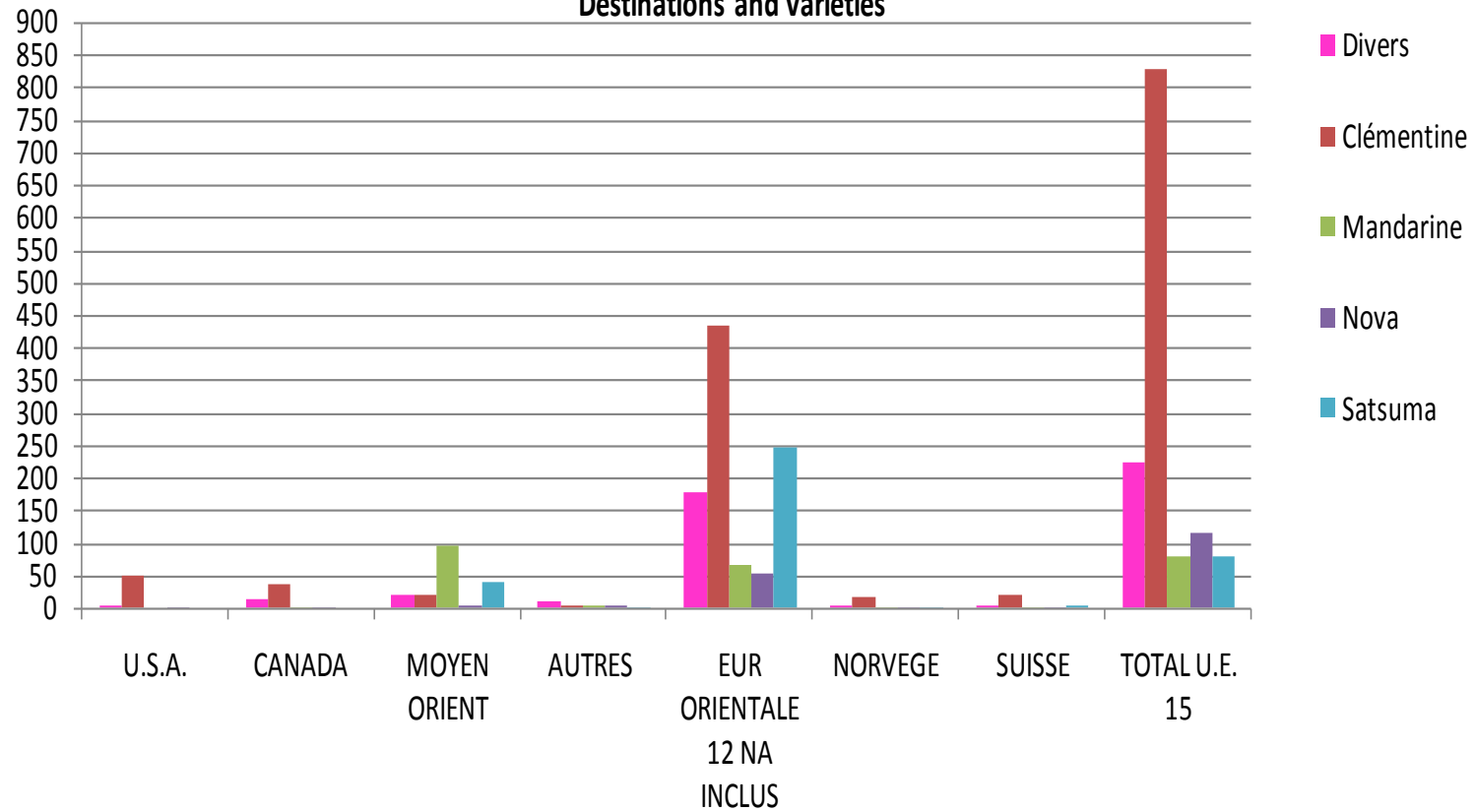




# MEDITERRANEAN EASY PEELERS

Mediterranean easy peelers exports 2013-2014

Destinations and varieties



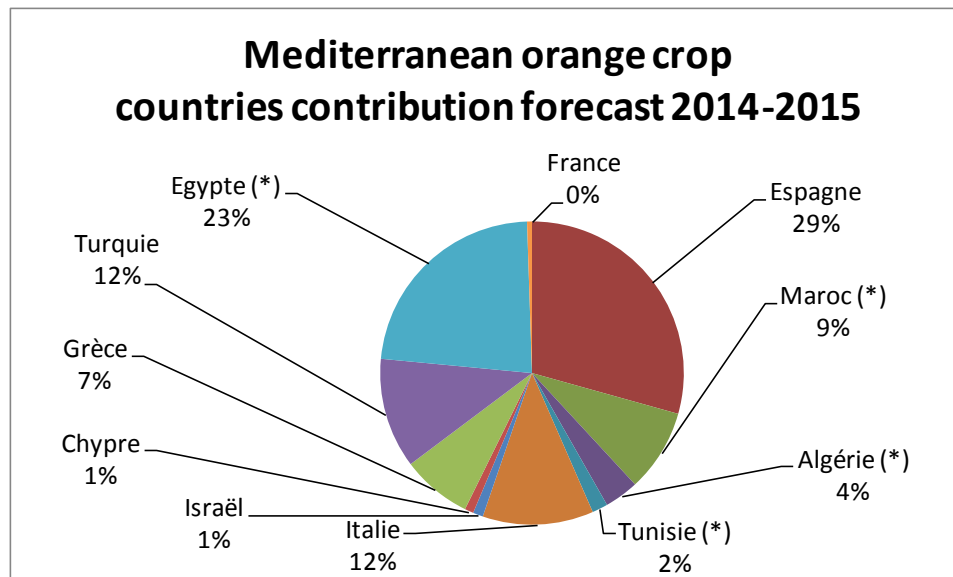
# MEDITERRANEAN ORANGES

## CLAM PREVISIONS 2014-2015 (000 TONNES)

ORANGES	Totaux	France	Espagne	Maroc (*)	Algérie (*)	Tunisie (*)	Italie	Israël	Chypre	Grèce	Turquie	Egypte (*)	Gaza (*)
Production	11.374,3	-	3.336,5	999,9	415,0	190,1	1.344,0	122,5	106,8	850,0	1.337,0	2.613,2	59,4
Exportation	3.700,2	-	1.577,0	98,1	-	18,9	117,0	19,0	22,1	330,0	371,9	1.109,2	37,0

(\*) Maroc et Tunisie: Campagne 2013-2014. Egypte: Campagne 2012-2013. Algérie: FAO. Gaza: Estimations historiques)

**MEDITERRANEAN ORANGE CROP 2014/2015 = 11.3 million tons (-7% vs 2013/2014) (-2% vs 2012-2013). The decreases (-5% Spain, -3% Turkey, -12% Greece) do not offset the increases (+16% Cyprus and +78% Israel – damages hail in previous season)**



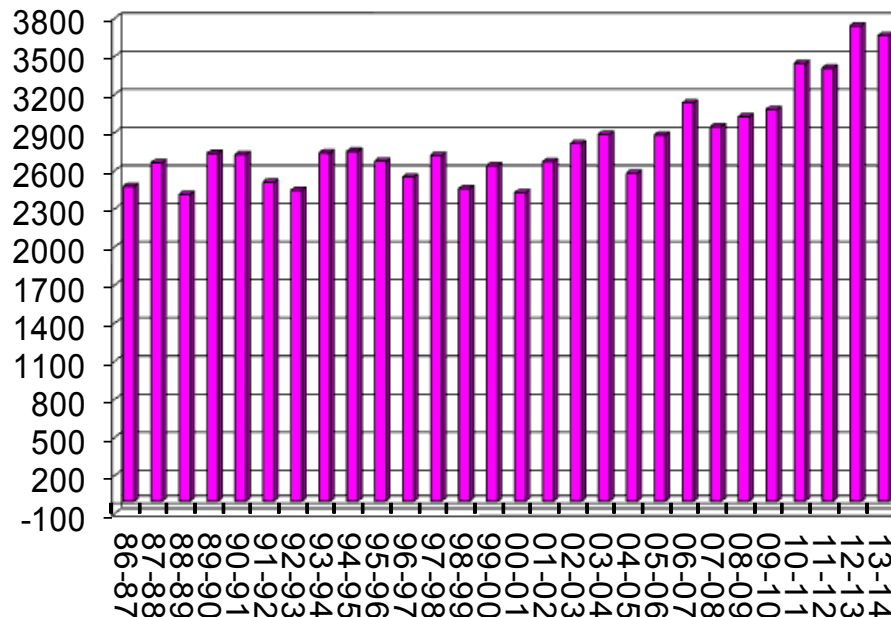
# MEDITERRANEAN ORANGES

**MEDITERRANEAN ORANGE EXPORTS 2014/2015 = 3.6 million tons growing +1 % vs . season 2013/ 2014. It will be the second historical recorded season only below 2012/2013 .Fewer losses and releases to the processing industry than in previous season.**

## ORANGES

Exportations du Bassin Méditerranéen

en 1.000 tonnes



# MEDITERRANEAN ORANGES

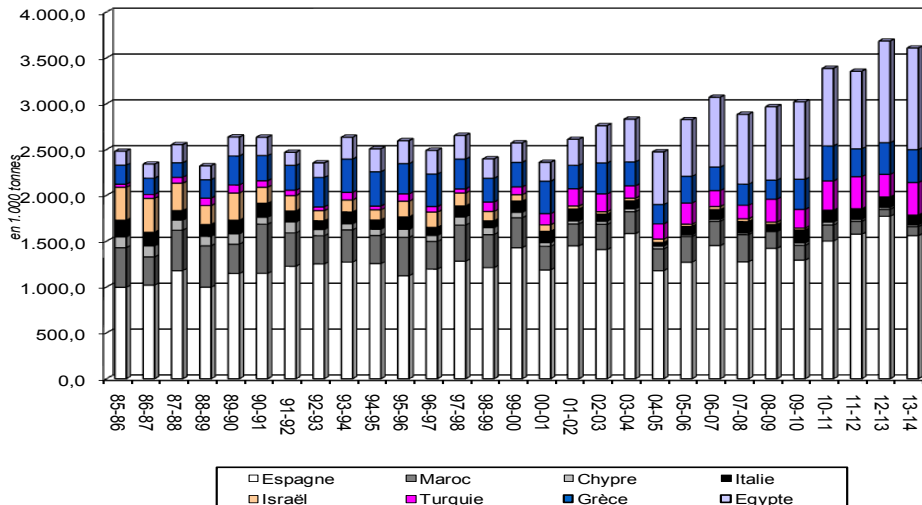
CLAM PREVISIONS 2014-2015 (000 TONNES)

ORANGES	Totaux	France	Espagne	Maroc (*)	Algérie (*)	Tunisie (*)	Italie	Israël	Chypre	Grèce	Turquie	Egypte (*)	Gaza (*)
Exportation	3.700,2	-	1.577,0	98,1	-	18,9	117,0	19,0	22,1	330,0	371,9	1.109,2	37,0

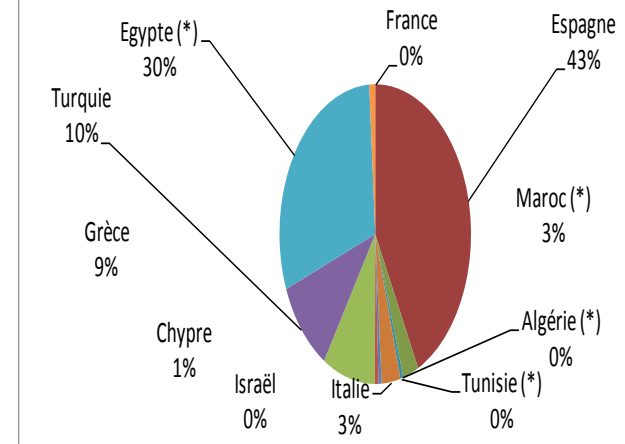
(\*) Maroc et Tunisie: Campagne 2013-2014. Egypte: Campagne 2012-2013. Algérie: FAO. Gaza: Estimations historiques)

All countries increase ( Spain +1%, Turkey + 5%, Cyprus +13%, Italy +18% and Israel +175% ) except Greece (-8%) and probably Morocco

**ORANGES**  
Exportations par origine



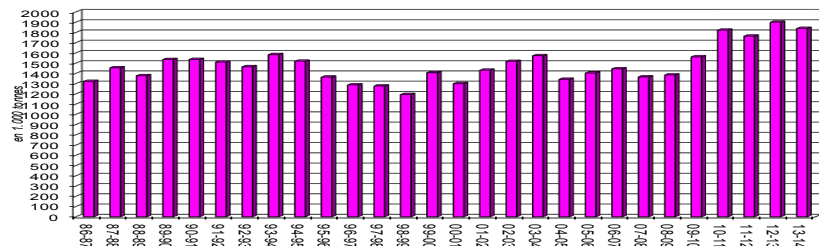
**Mediterranean orange exports**  
countries contribution forecast 2014-2015



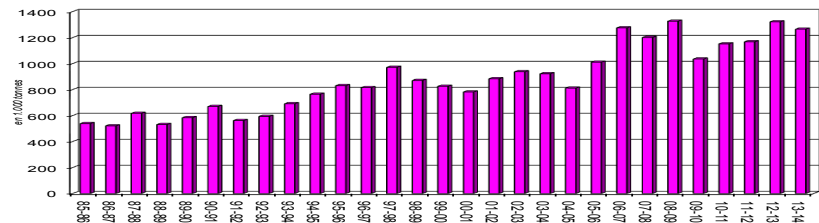
# MEDITERRANEAN ORANGES

EXPORTATIONS ORANGES PAR VARIETE: MEDITERRANEE (000 TN)	Prev 2014-2015	% Total	Saison 2013-2014	Diff. ( 000 tons)	Diff. ( %)
<b>Navels (Naveline + Navel)</b>	<b>1869</b>	<b>51%</b>	<b>1840</b>	<b>29</b>	<b>2%</b>
Salustiana	17	0%	128	-112	-87%
Shamouti	44	1%	34	10	29%
<b>Blondes Comm.</b>	<b>240</b>	<b>6%</b>	<b>77</b>	<b>163</b>	<b>211%</b>
<b>Moro-Tarocco</b>	<b>90</b>	<b>2%</b>	<b>123</b>	<b>-33</b>	<b>-27%</b>
Maltaise	18	0%	72	-54	-75%
Sanguinelli	10	0%	18	-8	-44%
Autres sanguines	47	1%	4	43	1092%
Verna	6	0%	24	-18	-75%
Ovale	0	0%	21	-21	-100%
<b>Tardives ( Navel Late + Lane Late + Valencia Late)</b>	<b>1314</b>	<b>36%</b>	<b>1265</b>	<b>49</b>	<b>4%</b>
Amères	47	1%	47	0	0%
<b>TOTAL ORANGES</b>	<b>3700</b>	<b>100%</b>	<b>3663</b>	<b>37</b>	<b>1,0%</b>

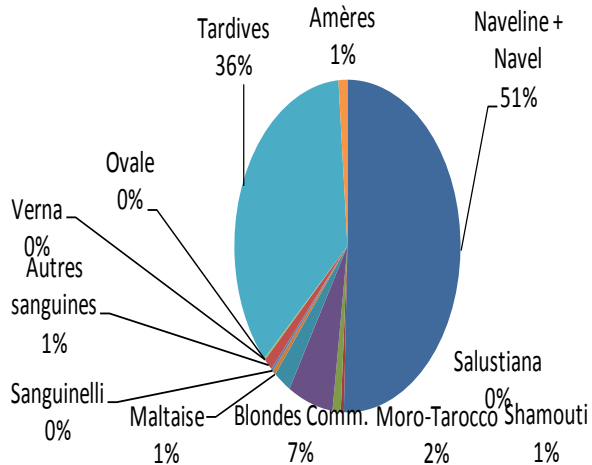
**Navels**  
Exportations du Bassin Méditerranéen



**Tardives**  
Exportations du Bassin Méditerranéen



## Mediterranean Orange Exports varieties contribution forecast 2014-2015

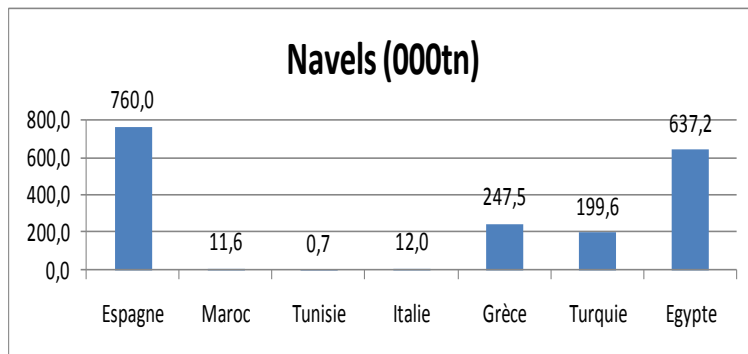


# MEDITERRANEAN ORANGES

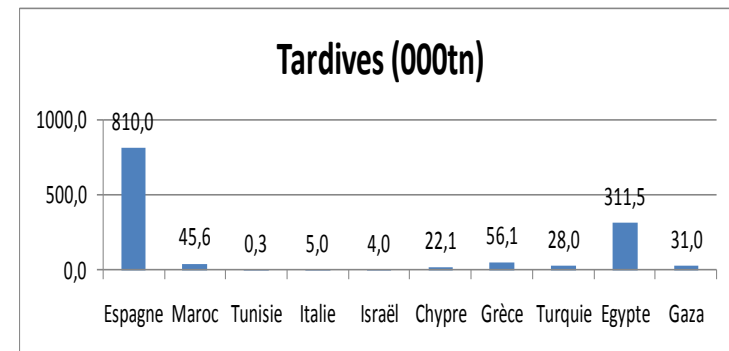
EXPORTATION ORANGES VARIETES PREVISION 2014-2015 ( 000 tn)	Totaux	France (Corse)	Espagne	Maroc	Algérie	Tunisie	Italie	Israël	Chypre	Grèce	Turquie	Egypte	Gaza(1)
Navels (navel-naveline)	1.868,6	-	760,0	11,6	-	0,7	12,0	-	-	247,5	199,6	637,2	-
Salustiana	16,6	-	-	16,6	-	-	-	-	-	-	-	-	-
Shamouti	43,6	-	-	-	-	-	-	15,0	-	-	22,6	-	6,0
Blondes Comm.	240,0	-	-	-	-	-	-	-	-	26,4	99,4	114,2	-
Moro-Tarocco	90,0	-	-	-	-	-	90,0	-	-	-	-	-	-
Maltaise	17,9	-	-	-	-	17,9	-	-	-	-	-	-	-
Sanguinelli	10,0	-	-	-	-	-	10,0	-	-	-	-	-	-
Autres Sanguines	46,5	-	-	24,3	-	-	-	-	-	-	22,2	-	-
Verna	6,0	-	6,0	-	-	-	-	-	-	-	-	-	-
Ovale	-	-	-	-	-	-	-	-	-	-	-	-	-
Tardives	1.313,6	-	810,0	45,6	-	0,3	5,0	4,0	22,1	56,1	28,0	311,5	31,0
Améres	47,3	-	1,0	-	-	-	-	-	-	-	-	46,3	-
<b>TOTAL ORANGES</b>	<b>3.700,1</b>	<b>-</b>	<b>1.577,0</b>	<b>98,1</b>	<b>-</b>	<b>18,9</b>	<b>117,0</b>	<b>19,0</b>	<b>22,1</b>	<b>330,0</b>	<b>371,8</b>	<b>1.109,2</b>	<b>37,0</b>

N.B Morocco and Tunisia are data 2013-2014. Egypt is data 2012-2013.

## Forecast 2014-2015



## Forecast 2014-2015

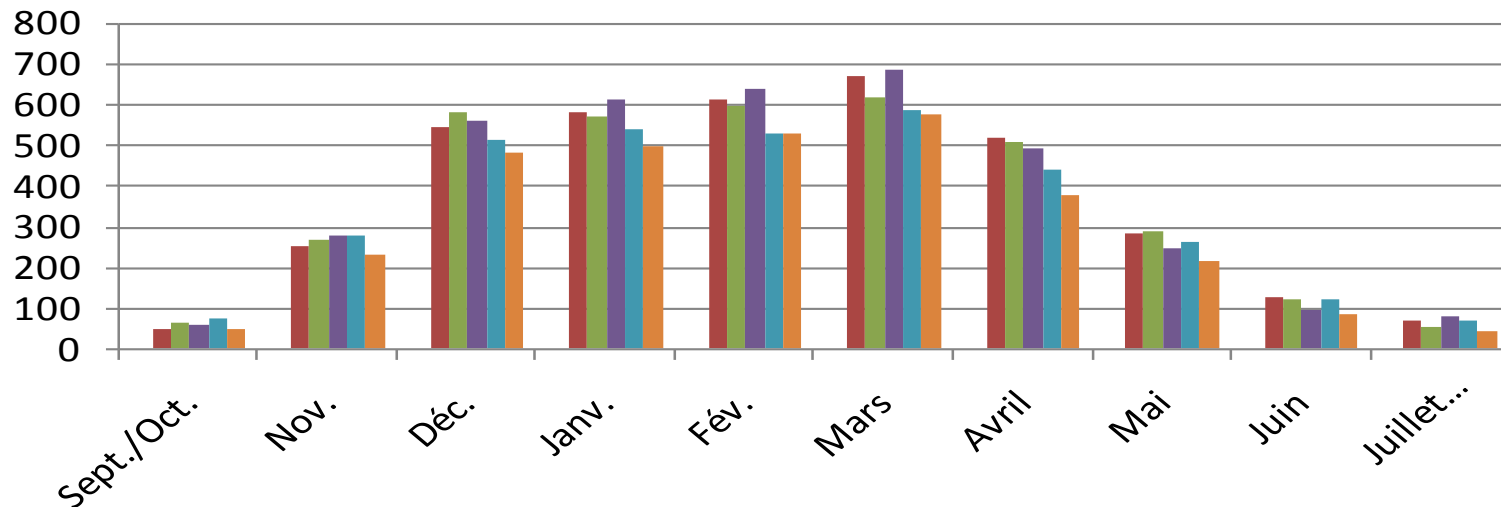


# MEDITERRANEAN ORANGES

MEDITERRANEAN ORANGE EXPORT CALENDAR ( 000TN)	Sept./Oct.	Nov.	Déc.	Janv.	Fév.	Mars	Avril	Mai	Juin	Juillet /Aout
Forecast 14/15	49,5	251,6	544,4	581,6	610,4	668,8	516,9	281,2	125,6	65,6
Season 13/14	60,6	268,4	581,1	567,8	598,3	616,4	508,4	285,7	119,0	54,7
Season 12/13	55,0	277,0	561,0	612,0	638,0	685,0	491,0	248,0	93,0	76,0
Season 11/12	73,4	274,8	513,0	539,9	530,2	583,4	439,1	262,8	122,9	67,3
Season 10/11	48,1	230,0	479,7	496,4	530,6	575,0	377,3	216,0	85,4	43,6

MEDITERRANEAN ORANGE EXPORT CALENDAR ( 000TN)	Sept./Oct.	Nov.	Déc.	Janv.	Fév.	Mars	Avril	Mai	Juin	Juillet /Aout
Forecast 14/15	1%	7%	15%	16%	17%	18%	14%	8%	3%	2%
Season 13/14	2%	7%	16%	16%	16%	17%	14%	8%	3%	1%
Season 12/13	1%	7%	15%	16%	17%	18%	13%	7%	2%	2%
Season 11/12	2%	8%	15%	16%	16%	17%	13%	8%	4%	2%
Season 10/11	2%	7%	16%	16%	17%	19%	12%	7%	3%	1%

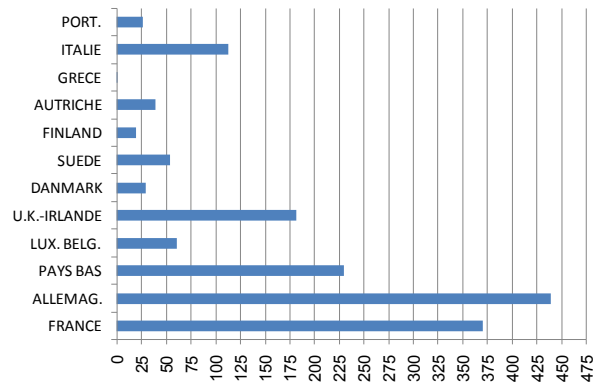
**Mediterranean Orange Exports Calendar**  
**Starting from Season 2014-2015 until Season 2010-2011**



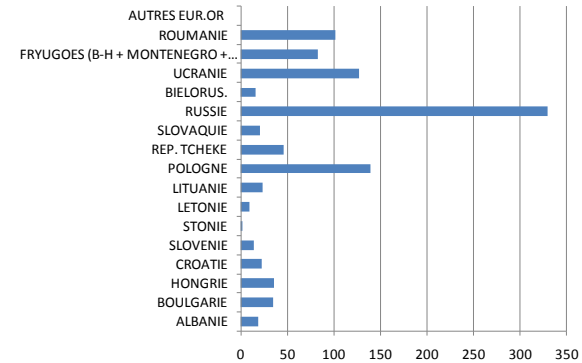
# MEDITERRANEAN ORANGES

MEDITERRANEAN ORANGE EXPORTS 2013-2014	TOTAL EXPORTE	TOT.HORS EUR.OCC.	U.S.A.	CANADA	MOYEN ORIENT	AUTRES (Reste du monde)	EUR ORIENTALE 12 NA INCLUS	TOTAL EUR.OCC.	NORVEGE	SUISSE	TOTAL U.E. 15
Naveline	697,4	113,5	0,0	5,7	15,3	13,1	79,4	583,2	8,3	13,3	561,6
Navel	1.117,2	984,1	0,2	0,4	356,1	94,9	532,5	131,6	1,1	0,4	131,3
Salustiana	121,0	26,8	0,0	3,4	0,3	0,2	22,9	95,9	0,4	0,7	94,8
Shamouti	33,7	26,8	0,0	0,0	11,4	2,0	13,4	5,9	0,2	0,0	5,8
Div.Bl.Fines	94,7	94,1	0,0	0,2	56,8	11,7	25,3	0,2	0,0	0,0	0,2
Blondes Comm.	122,7	106,9	0,0	0,0	49,4	14,3	43,1	15,9	0,1	0,0	16,0
Moro-Tarocco	72,1	12,1	0,2	0,2	0,0	0,0	11,7	60,0	0,7	12,1	47,2
Maltaise	17,9	3,2	0,0	0,0	0,0	3,2	0,0	14,7	0,0	0,0	14,7
Sanguinelli	3,9	0,9	0,0	0,0	0,0	0,0	0,9	3,0	0,1	0,4	2,5
Whas.Sanguine	18,5	14,7	0,0	0,1	0,1	0,2	14,3	3,1	0,0	0,0	3,1
Divers sang. Fines	21,2	20,8	0,0	0,1	7,5	2,3	10,9	0,4	0,0	0,0	0,4
Sanguine com.	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0
Verna	4,6	0,1	0,0	0,1	0,0	0,0	0,0	4,5	0,0	0,0	4,5
Ovale	4,8	1,3	0,0	0,0	0,0	0,0	1,3	3,5	0,1	0,8	2,6
Navel Late	584,1	132,7	0,0	8,2	19,2	29,1	76,2	451,1	9,3	7,0	434,8
Lane Late	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0
Val.Late	676,9	423,3	0,0	4,0	183,5	48,6	187,1	252,7	0,5	4,0	248,8
Améres	47,2	40,6	0,0	0,0	20,0	5,8	14,8	6,9	0,0	0,0	7,0
<b>TOTAL ORANGES</b>	<b>3.637,9</b>	<b>2.001,9</b>	<b>0,4</b>	<b>22,4</b>	<b>719,7</b>	<b>225,5</b>	<b>1.033,9</b>	<b>1.632,5</b>	<b>20,8</b>	<b>38,7</b>	<b>1.575,2</b>
<b>SHARE OF TOTAL EXPORTS</b>		<b>55%</b>	<b>0%</b>	<b>1%</b>	<b>20%</b>	<b>6%</b>	<b>28%</b>	<b>45%</b>	<b>1%</b>	<b>1%</b>	<b>43%</b>

MEDITERRANEAN ORANGE EXPORTS 2013-2014  
DESTINATIONS (EU 15 MARKETS) (000TN)

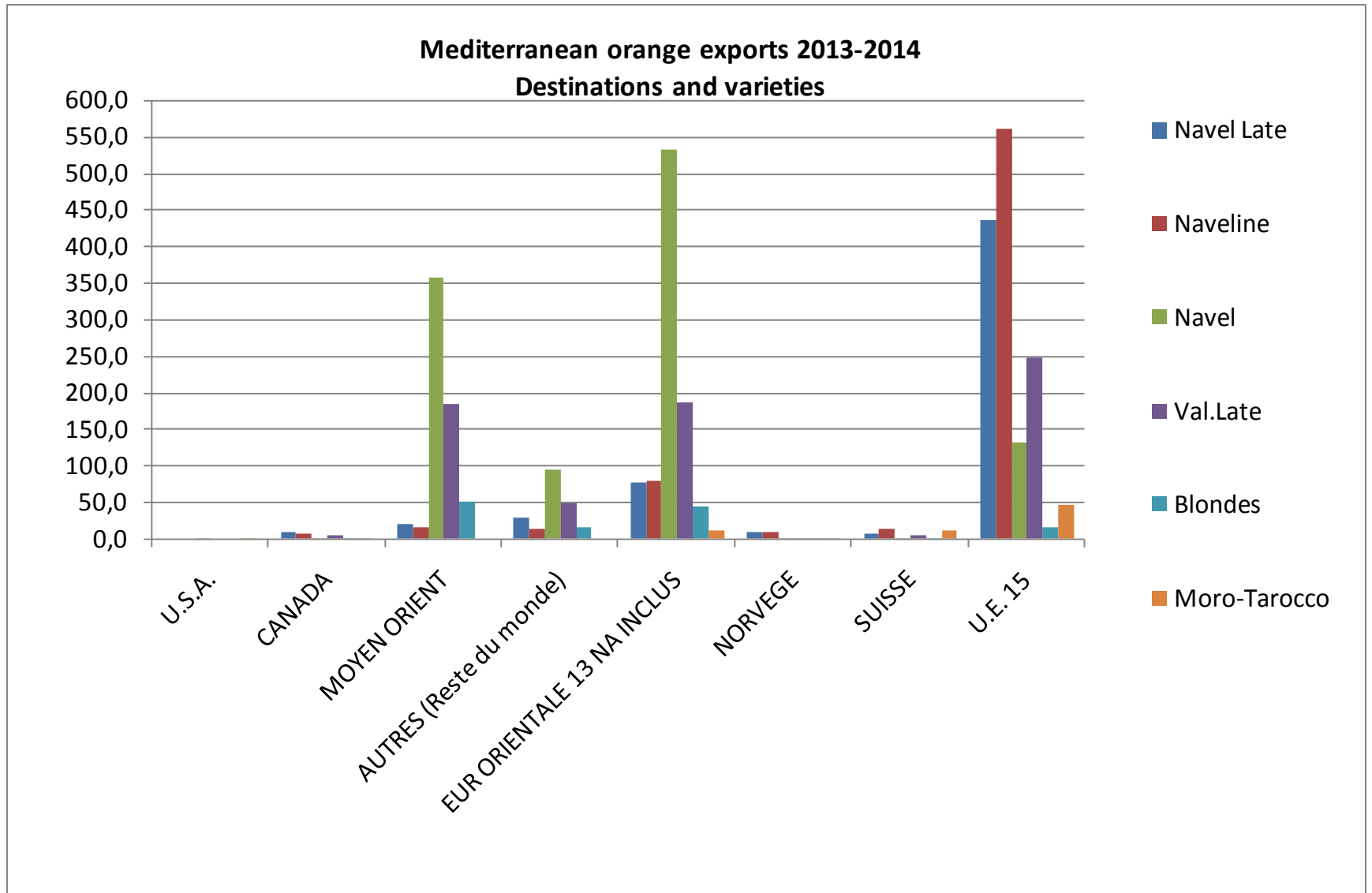


MEDITERRANEAN ORANGES EXPORTS 2013-2014  
EASTERN EUROPE (13 NMS INCLUDED)  
(000TN)



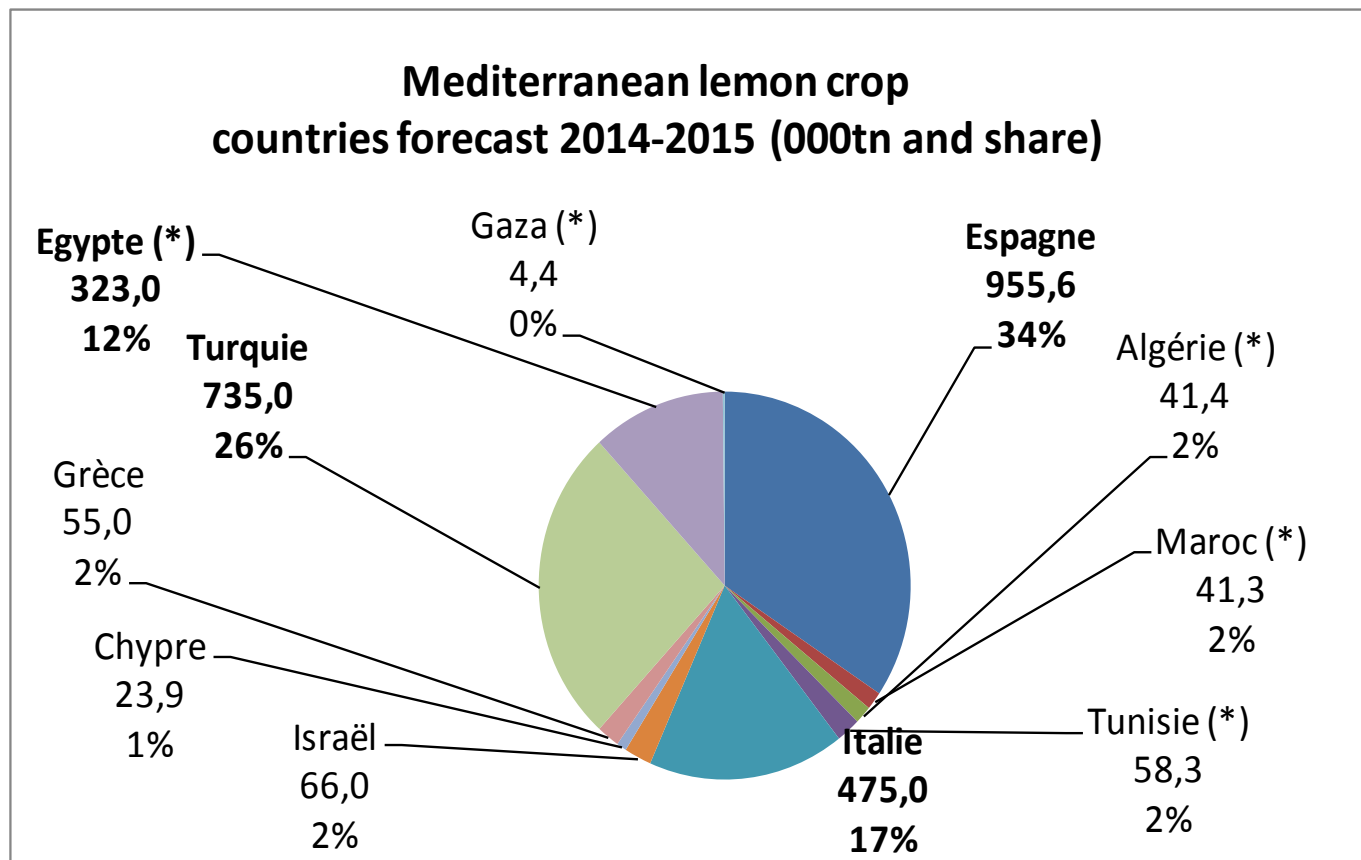


# MEDITERRANEAN ORANGES



# MEDITERRANEAN LEMON

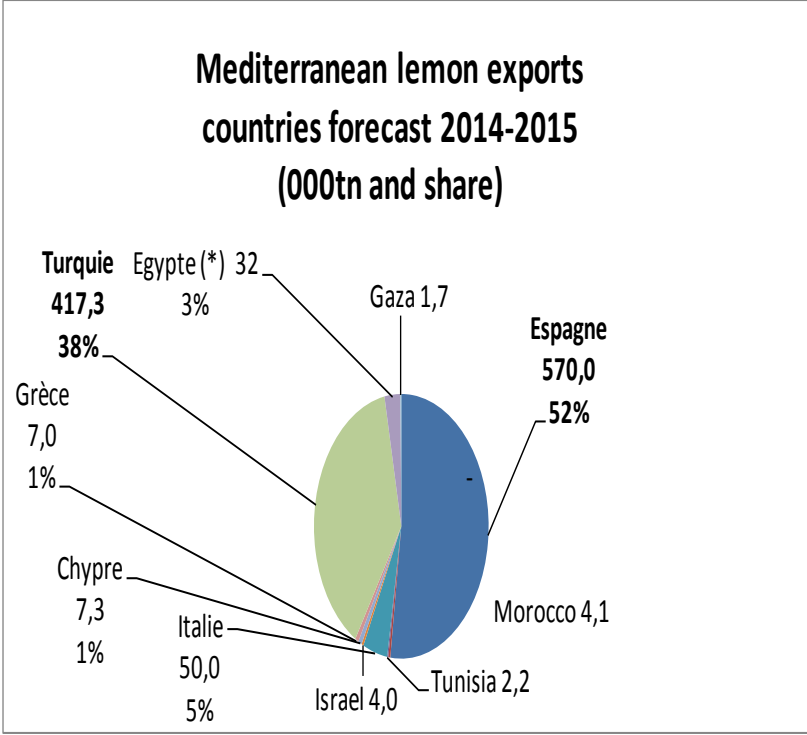
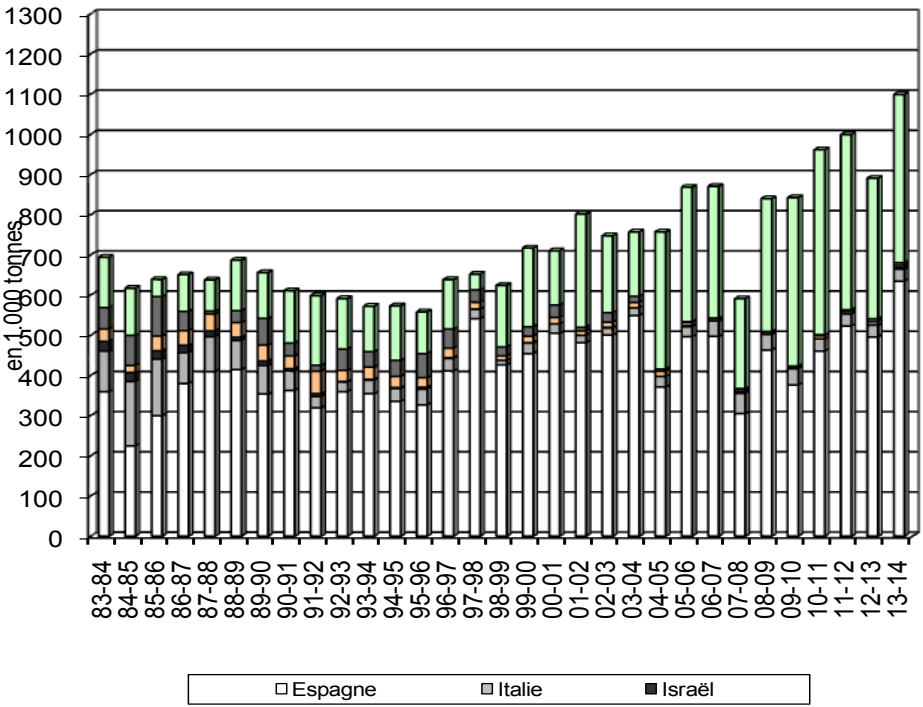
**MEDITERRANEAN LEMON CROP 2014/2015 = 2.8 million tons (+ 4,7 % vs 2013/2014) (+13 % vs 2012-2013). Increases for the main producers (+18 % Spain, +5 % Turkey). Decrease in Italy (-12%)**



# MEDITERRANEAN LEMON

**MEDITERRANEAN LEMON EXPORTS 2014/2015 = 1.1 million tons (-4 % vs 2013/2014 which was a record season) (+18 % vs 2012/2013).**

CITRONS  
Exportations par origine



# MEDITERRANEAN LEMON

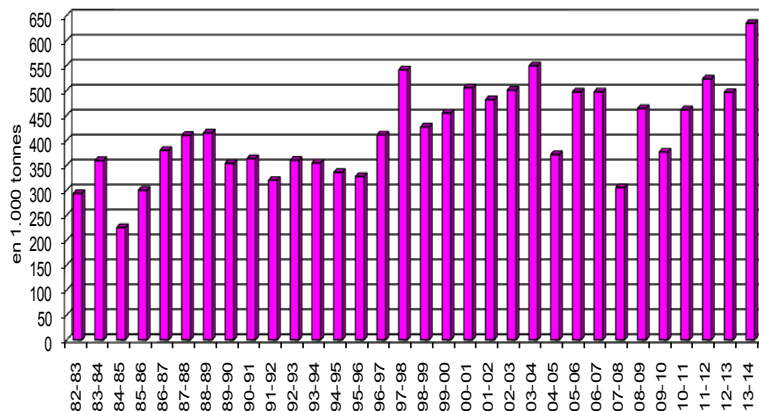
## Foreseen evolution for the main exporters:

Spain (570 th tn) -10 % vs 2013/2014 which was the record season with 634 th tn. But 15% above 2012/2013 and also above 2011/2012.

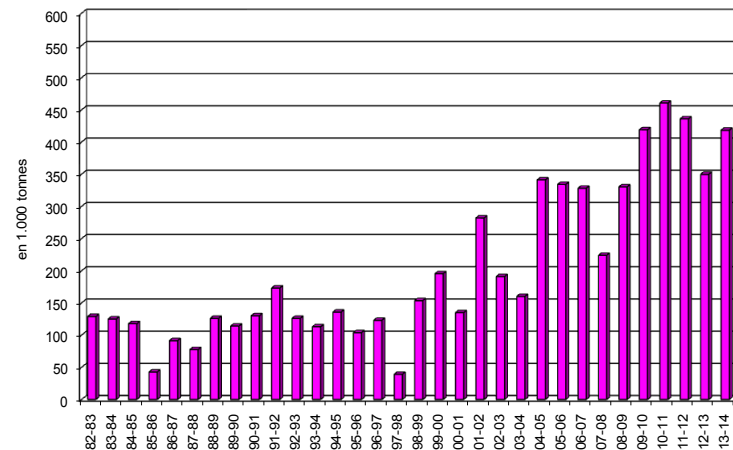
Turkey (417 th tn) -1 % vs 2013/2014 Increase + 18% vs 2012/2013 and it will not reach record seasons 461 th tn 2010/2011 and 436 th tn 2011/2012.

Increase in Italy ( +64% vs 2013/2014 and +72% vs 2012/2013)

EXPORTATIONS D'ESPAGNE  
Citrons



EXPORTATIONS DE TURQUIE  
Citrons

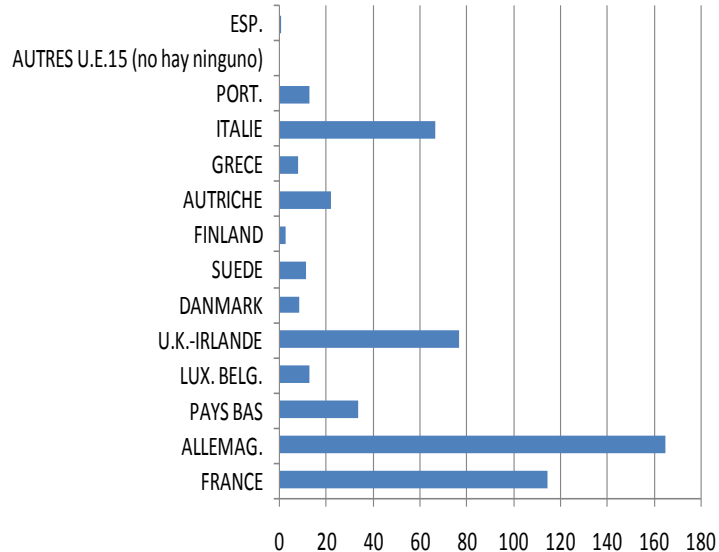


# MEDITERRANEAN LEMON

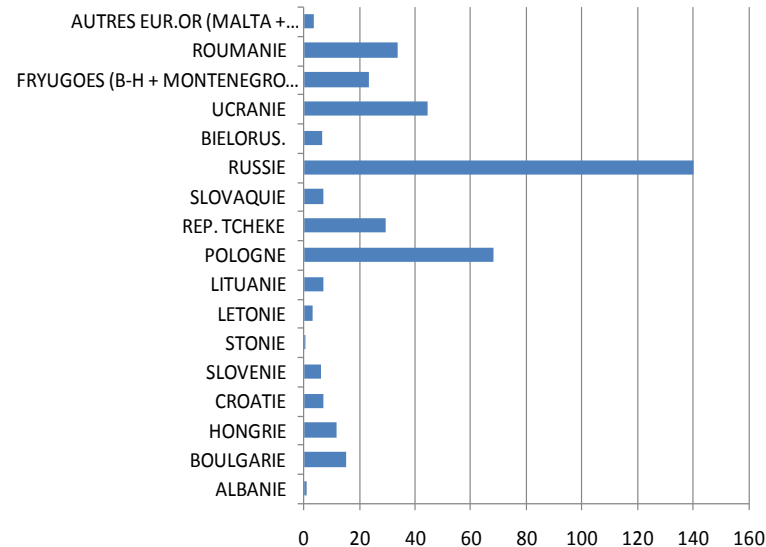
MEDITERRANEAN LEMON EXPORTS 2013-2014 destinations (000TN)	U.S.A.	CANADA	MOYEN ORIENT	AUTRES	EUR ORIENTALE 12 NA INCLUS	NORVEGE	SUISSE	TOTAL U.E. 15
(000tn)	2,0	8,7	139,3	34,5	407,1	2,3	9,3	533,8
Share of total lemon exports	0%	1%	12%	3%	36%	0%	1%	47%

## MEDITERRANEAN LEMON EXPORTS 2013-2014

EU 15  
(000TN)



## MEDITERRANEAN LEMON EXPORTS EUROPE ORIENTALE ( EU NMS INCLUDED ) ( 000TN)



# MEDITERRANEAN GRAPEFRUIT

## CLAM PREVISIONS 2014-2015 (000 TONNES)

GRAPEFRUITS	Totaux	France	Espagne	Maroc (*)	Algérie (*)	Tunisie (*)	Italie	Israël	Chypre	Grèce	Turquie	Egypte (*)	Gaza (*)
Production	569,9	-	75,9	-	1,0	-	8,0	185,0	46,0	6,0	185,3	58,2	4,5

(\*) Maroc et Tunisie: Campagne 2013-2014. Egypte: Campagne 2012-2013. Algérie: FAO. Gaza: Estimations historiques

**MEDITERRANEAN GRAPEFRUIT CROP 2014/2015 = 570 .000 tons ( -8% % vs 2013/2014) ( -7% % vs 2012-2013). The main producers Turkey and Israel will both be at a level of 185 th tn. Decreases in Turkey ( -12% vs 13/14 and -17% vs 12/13) and in Israel ( -17% vs 13/14 and -12% vs 12/13). Spain with 80 th tn ( +29% vs 13/14 and +19% vs 12/13). Cyprus 46 th tn ( +2.5 % vs 13/14 and +17% vs 12/13)**

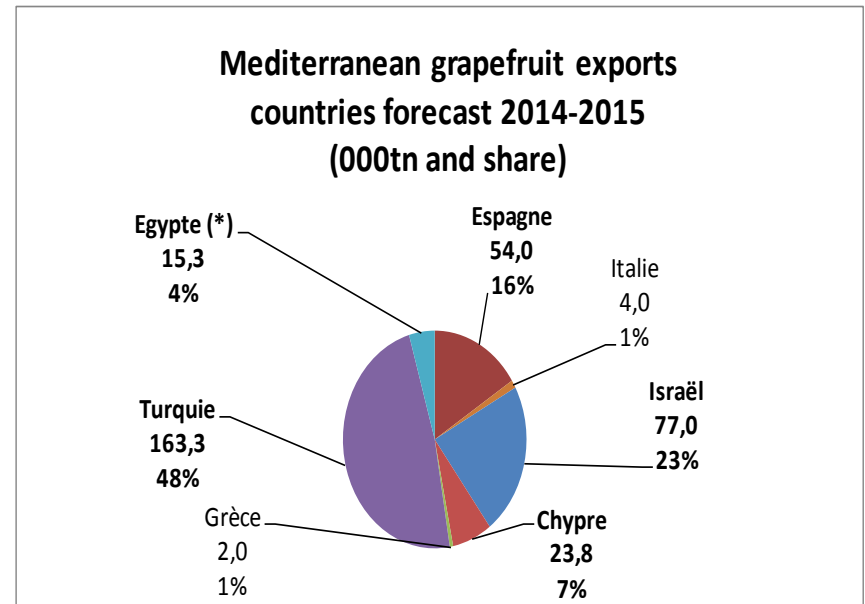
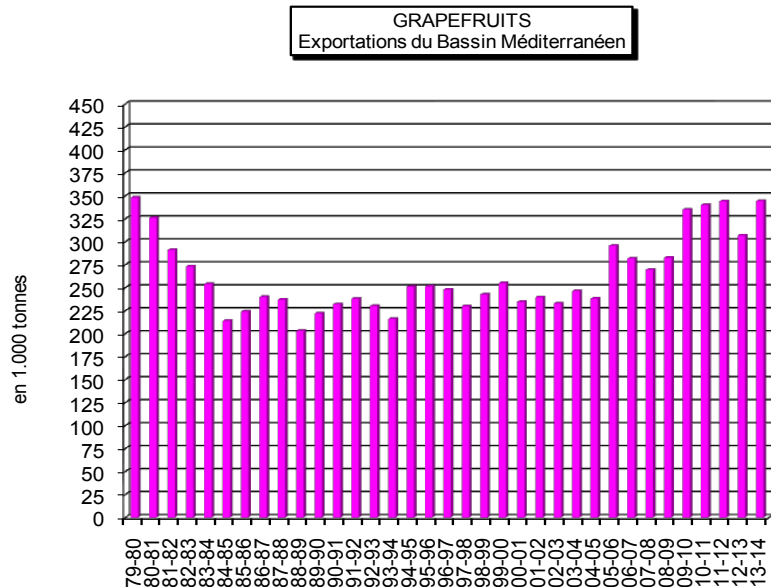
# MEDITERRANEAN GRAPEFRUIT

CLAM PREVISIONS 2014-2015 (000 TONNES)

GRAPEFRUITS	Totaux	France	Espagne	Maroc (*)	Algérie (*)	Tunisie (*)	Italie	Israël	Chypre	Grèce	Turquie	Egypte (*)	Gaza (*)
Exportation	339,4		54,0				4,0	77,0	23,8	2,0	163,3	15,3	

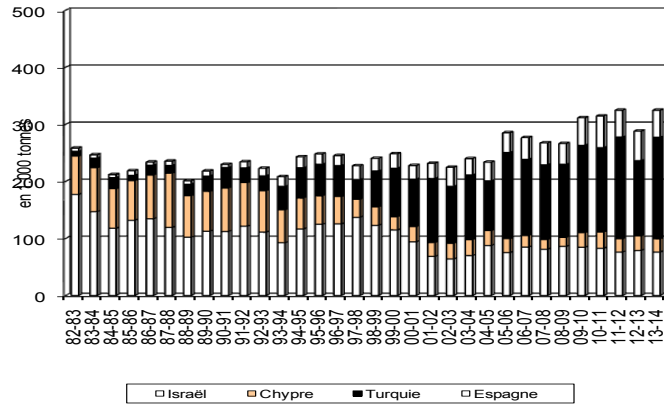
(\*) Maroc et Tunisie: Campagne 2013-2014. Egypte: Campagne 2012-2013. Algérie: FAO. Gaza: Estimations historiques

**MEDITERRANEAN GRAPEFRUIT EXPORTS 2014/2015 = 339 .000 tons (-3 % vs 2013/2014) (+10 % vs 2012-2013).** Main exporter is Turkey 182 th tn (-10% vs 13/14) (+21% vs 12/13) followed by Israel 76 th tn (+ 0,5 % vs 13/14) (-2.4% vs 12/13) , Spain 47 th tn (+14% vs 13/14) (+5% vs 12/13) , Cyprus 23 th tn (+2.5% vs 13/14) and Egypt 15 th tn ( in 12/13).

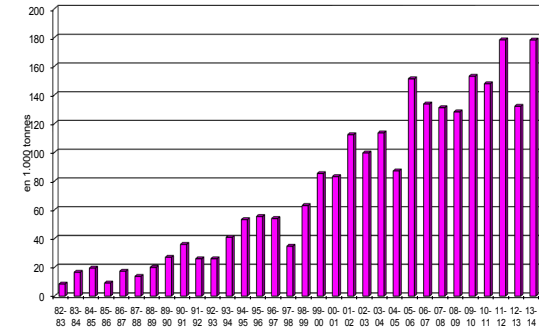


# MEDITERRANEAN GRAPEFRUIT

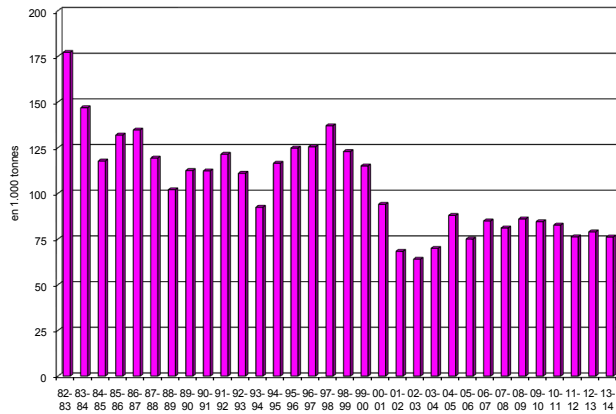
GRAPEFRUITS  
Exportations par origine



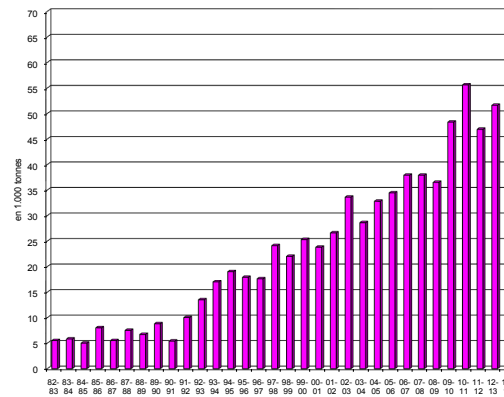
EXPORTATIONS DE TURQUIE  
Grapefruits



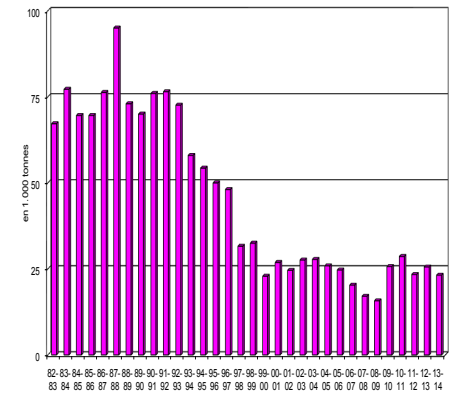
EXPORTATIONS D'ISRAËL  
Grapefruits



EXPORTATIONS D'ESPAGNE  
Grapefruits



EXPORTATIONS DE CHYPRE  
Grapefruits



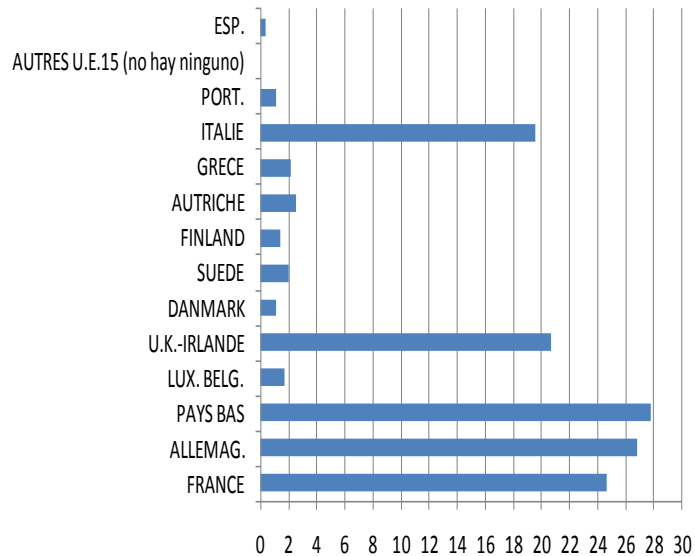


# MEDITERRANEAN GRAPEFRUIT

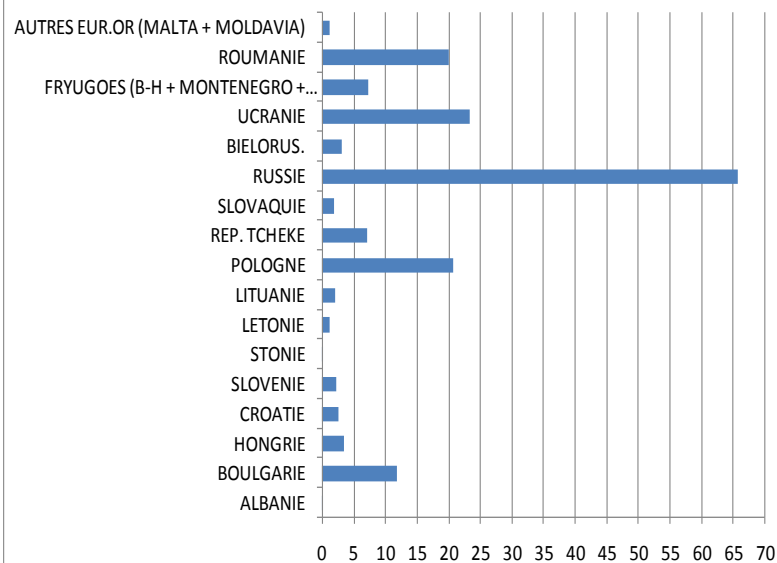
MEDITERRANEAN GRAPEFRUIT EXPORTS 2013-2014 destinations (000TN)	U.S.A.	CANADA	MOYEN ORIENT	AUTRES	EUR ORIENTALE UE NA INCLUS	NORVEGE	SUISSE	TOTAL U.E. 15
(000tn)	0,6	0,9	21,4	15,8	174,4	0,2	0,2	131,8
Share of total lemon exports	0%	0%	6%	5%	51%	0%	0%	38%

## MEDITERRANEAN GRAPEFRUIT EXPORTS 2013-2014

EU 15  
(000TN)



## MEDITERRANEAN GRAPEFRUIT EXPORTS 2013-2014 EUROPE ORIENTALE ( EU NEW MS INCLUDED ) ( 000TN)



**C.L.A.M.**

**PUBLICATIONS**

- MEDITERRANEAN BASIN CITRUS PRODUCTION & EXPORTS SEASON 2013/2014
- MEDITERRANEAN BASIN CITRUS PRODUCTION & EXPORTS FORECAST 2014/2015

**Thank you**