

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Citrus

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Report Highlights:

Italy's MY 2014/15 (November/October) orange production is expected to drop by 24 percent compared to the previous campaign due to the lack of rain and the Citrus Tristeza Virus (CTV) that has infected approximately 32,000 hectares of orange groves in the provinces of Catania and Siracusa (Sicily).

Italy's MY 2014/15 tangerine production is expected to decrease by approximately 15 percent compared to the previous campaign.

Italy

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	88,282
Area Harvested	81,270	87,505	85,804
Production	1,730,000	1,800,000	1,363,000
Imports	222,936	155,642	200,000
Total Supply	1,952,936	1,955,642	1,563,000
Exports	126,584	117,891	110,000
Fresh Dom. Consumption	1,517,352	1,517,751	1,145,000
For Processing	309,000	320,000	308,000
Total Distribution	1,952,936	1,955,642	1,563,000

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

PRODUCTION

Italy's MY 2014/15 (November/October) orange production is expected to drop by 24 percent compared to the previous campaign due to the lack of rain and the Citrus Tristeza Virus (CTV) that has infected approximately 32,000 hectares of orange groves in the provinces of Catania and Siracusa (Sicily). The *Tarocco* variety is expected to register a 40 percent drop. The quality peaked around March 20 both in terms of sugar content and color. 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 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	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	36,130
Area Harvested	34,546	35,367	34,810
Production	792,000	789,000	672,000
Imports	90,892	80,288	93,000
Total Supply	882,892	869,288	765,000
Exports	89,477	76,991	73,000
Fresh Dom. Consumption	740,415	715,297	644,960
For Processing	53,000	77,000	47,040
Total Distribution	882,892	869,288	765,000

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 expected to decrease by approximately 15 percent compared to the previous campaign. Italy's MY 2014/15 (November/October) clementine production is forecast to decrease by approximately 19 percent (540,000 MT 668,000 MT in 2013/14), while mandarin production is expected to increase by 9 percent (132,000 MT compared to 121,000 MT in 2013/14). 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 a reduced supply 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 previous year, mainly because of reduced volumes 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	2012	2013	2014
	Estimates 2012/2013	Estimates 2013/2014	Forecast 2014/2015
	Post Data	Post Data	Post Data
Area Planted	25,703	26,644	25,651
Area Harvested	21,023	21,376	20,811
Production	411,000	412,000	404,000
Imports	99,227	91,270	97,000
Total Supply	510,227	503,270	501,000
Exports	40,297	44,062	42,000
Fresh Dom. Consumption	403,930	374,208	386,280
For Processing	66,000	85,000	72,720
Total Distribution	510,227	503,270	501,000

Sources: Italian industry; ISTAT; GTA

PRODUCTION

Italy's MY 2014/15 (November/October) lemon production is expected to slightly decrease by 2 percent. Quality is expected to be good. 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 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 imports.

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	275
Production	7,500	7,500	7,000
Imports	28,604	28,992	29,020
Total Supply	36,104	36,492	36,020
Exports	2,638	3,015	2,600
Fresh Dom. Consumption	33,466	33,477	33,420
For Processing	0	0	0
Total Distribution	36,104	36,492	36,020

Sources: Italian industry; ISTAT; GTA

PRODUCTION

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

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.