

*European late  
easy peelers market*

## **Some good news at last!**

*Every passing year is different...and a very good job too! The late hybrid easy peelers are set for a record campaign in 2019-20, in terms of both volumes and prices! Which makes for a much-needed breather for the citrus growing sector, put under such strain by the calamitous 2018-19 season.*

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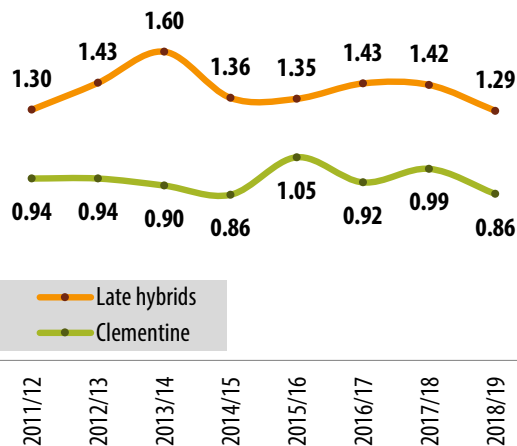
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## Review of 2018-19 – a cautionary tale

The easy peelers market was until last season pretty much getting an easy ride. Despite volumes to market doubling between 2014 and 2018, to reach 500 000 t, prices maintained a practically stable and excellent level (more than 50 % higher than the clementine, according to our indicators). Which was very handy for production, facing enormous and recurrent problems of lack of profitability with most of the earlier varieties. The catastrophic 2018-19 campaign put an end to what seemed almost like a sure bet. Despite volumes falling considerably, by nearly 50 000 t, our average rate indicator plunged to its lowest level ever recorded, approximately 10 % below the average level from recent years. This very poor performance should not be misinterpreted: it was due largely to the calamitous context of the 2018-19 citrus campaign, i.e. much more cyclical than structural. Nonetheless, it was a wake-up call, which should encourage production to take more care in how it plants these varieties: lateness is also synonymous with dependence on the context in the early and mid-season.

**Easy peelers - France - Indicator  
of campaign average import price**  
(in euro/kg | source: CIRAD)



## Overall late easy peelers supply up by approximately 20 % in Spain

The scenario for 2020 augurs much better, precisely because of the context. Since, regarding volumes, the combined supply of the three main supplier countries in this slot should set a new record level. In Spain, the young orchards entering their prime and entering production will more than counter-balance the alternate bearing effect, acute though this is (the Nules clementine harvest was the lowest of the decade). Production of Nadorcott, which remains by far the main variety of this group, should see a slight increase of approximately 3 %, to reach nearly 220 000 t. The harvests are of a similar level to 2018-19 in all the cultivation zones, including the big three (Valencia and Huelva, with approximately 50 000 t, and Murcia with approximately 35 000 t). Hence the exportable potential should be around 190 000 to 195 000 t, i.e. approximately 15 % more than last season, given the exportable share returning to a higher level (difficult market conditions and climate problems affecting quality in 2018-19). Orri is set for a similar rise, with an expected marketable potential of 60 000 t. Conversely, Tango is set for a much more significant increase, to overtake Orri for the first time, with market volumes of approximately 63 000 t (a rise of nearly 60 %, after a 2018-19 season marked by production losses).



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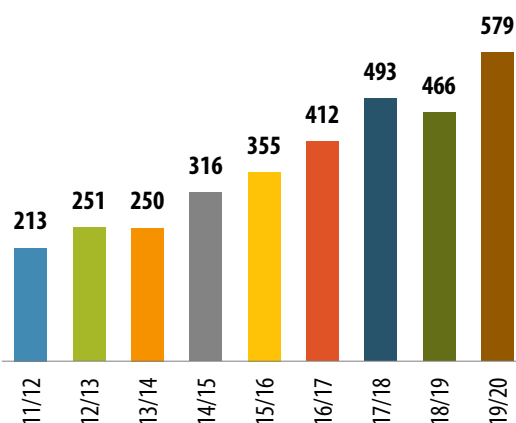
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## A record overall export level

Morocco should also see its late hybrid production rise to reach approximately 200 000 t, despite the major short-fall registered by the other varieties. Just as in Spain, the strong planting dynamic seen until recent years will more than offset the negative alternate bearing swing, and the effects of the heatwaves. Hence exports should be able to reach 165 000 to 175 000 t. This is a much higher level than in 2019 (up by nearly 50 %), though it only equals the 2018 record. Furthermore, it could be revised slightly downward according to certain operators, since the local market, which does not traditionally consume this variety, receives a very small supply, while producers need to quickly recoup their funds after a catastrophic 2018-19 campaign. The average sizing appears to be slightly larger than in 2019. The harvest of Israel's star variety is set for an average level, similar to 2019, at an estimated 120 000 t approximately. In this context the exportable potential is set to be close to 90 000 t (8 % above the 4-year average). Overall, the combined supply from the three main supplier countries should be around 575 000 t, a record level up by more than 20 % from last season. Nonetheless, this big rise is cause for celebration rather than concern.

### Late hybrid easy peelers - Export potential of EU supplier countries

(in 000 tonnes | professional sources)



### Late hybrid easy peelers – European Union supplier countries exports

000 tonnes	Varieties	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2019-20 trend
Morocco	Nadorcott	42	67	65	99	106	126	171	116	170	47 %
Spain	Nadorcott	122	135	132	150	157	156	183	166	191	15 %
	Orri					26	26	52	52	60	15 %
	Tango							25	40	63	58 %
Israel	Orri	49	49	53	67	65	104	62	92	95	3%
<b>Total</b>		<b>213</b>	<b>251</b>	<b>250</b>	<b>316</b>	<b>355</b>	<b>412</b>	<b>493</b>	<b>466</b>	<b>579</b>	<b>24 %</b>

Professional sources



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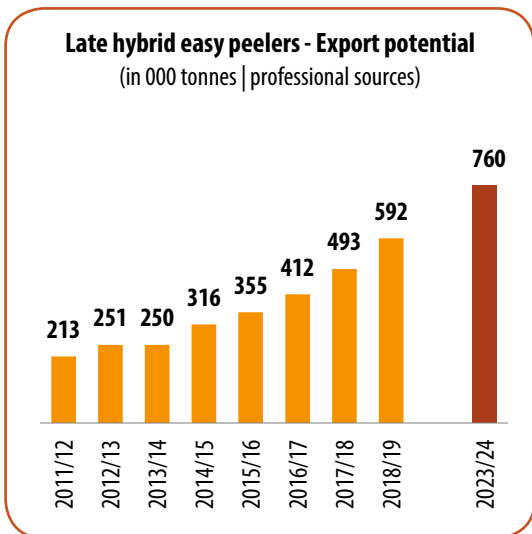
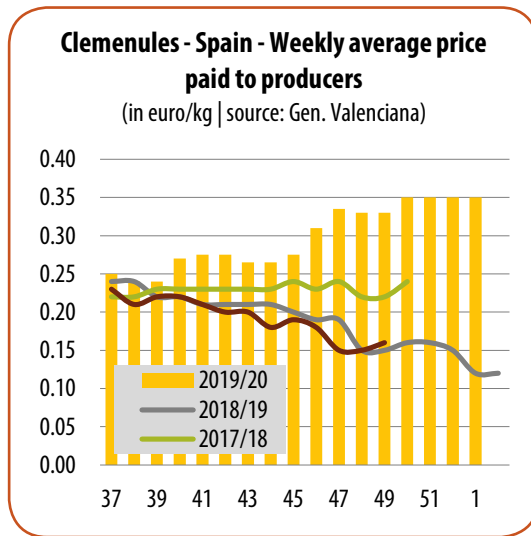
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## Context: a sudden leap from nightmare to dream!

The 2018-19 campaign showed the importance of the market context. And the 2020 campaign in no way resembles 2019, and is so clear that it could even be deemed ideal. The mid-season easy peeler campaigns (clementine and Clemenvilla) wound down early at the beginning of January, because of the major shortfall in the Spanish and Moroccan harvests. Furthermore, the trading period gained thanks to this early launch of the late hybrids campaign is a very lively period: easy peeler sales in January are as a general rule 50 % greater than in February. Hence we must not fear these large additional volumes this season, but rather be glad of them. The rate charged in early January for the last batches of the mid-season varieties, setting a record level of 20 to 30 % above average, are a good indicator of the price prospects for late hybrids until the end of this campaign (barring a climate accident and quality problems). This is more good news for the production sector of these three supplier countries, greatly weakened by a disastrous 2018-19 campaign.



## Caution in terms of the planting programmes

The vigorous expansion registered this season is not about to stop. True, there is no longer any significant expansion of surface areas for varieties such as Nadorcott in Spain and Morocco, or Orri in Israel. Indeed, the trend of uprooting the least profitable Orri orchards has continued in Israel (another 500 ha, after 500 ha in 2018, bringing down the cultivation area to 4 600 hectares). Spanish Tango has maintained an estimated cultivation area of between 3 000 and 3 500 ha. Conversely, the young orchards are a long way from reaching their full production capacity, especially in Spain and Morocco. Hence the harvest should gain another third by the middle of the decade (i.e. just under 200 000 t). Caution remains the watchword more than ever in terms of the planting programmes, especially since the last campaign showed that even sales of top-end varieties could be hampered by very heavily-laden campaigns ■

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### Late hybrid easy peelers – European Union main supplier countries

	Varieties	Areas	Latest export potential	Observation
Morocco	Nadorcott	7 560 ha (2019)	250 000 t	Cultivation area stabilised
Spain	Nadorcott	5 370 ha (2019)	200 000 t	Cultivation area stabilised
	Or	1 960 ha (2019)	70 000 t	Cultivation area stabilised
	Tango	3 000-3 500 ha	120 000 t	Cultivation area still expanding
Israel	Or	4 600 ha (2019)	115 000 t	Cultivation area stabilised
<b>Total</b>			<b>755 000 t</b>	

Professional sources





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