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Report Highlights:

The Spanish 2000/2001 citrus crop is forecast to reach 4.9 million tons, about 15.4 percent lower than last year. Tangerine production is forecasted to be about 25 percent lower than a year earlier. Exports are expected to decrease due to lower domestic output.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Madrid [SP1], SP

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EXECUTIVE SUMMARY

Spain's total 2000/01 citrus crop is forecast to reach 4.91 million tons, about 15.4 percent lower than last year, with orange, tangerine and lemon production expected to decrease about 10, 25 and 10 percent, respectively. Earlier estimates (early September) estimated the Valencia area crop at about six percent lower than the 1999/2000 crop. The decrease is due to the following factors: a) lack of water in the reservoirs and not enough rains; b) the normal fluctuation in the production cycle of the orchards; c) tristeza, or "quick decline" disease, was once again a problem in Spain's citrus crop; d) irregular blooming of Clemenules tangerine variety; e) small sizes due to lack of water. During the second half of October 2000, heavy rains in the Valencia and Murcia regions (Levant area) filled the reservoirs in the Jucar and Segura watersheds, and no water shortages are expected during the next crop. These rains will help to increase fruit sizes of late varieties during the current campaign, but farmers were worried that some fruit in this crop might get rotten in the trees due to high humidity. Total area devoted to citrus production remains relatively constant, with some orange area being replaced by tangerine groves. Production in Valencia (about 66 percent of output) continues to account for the majority of Spain's citrus crop, followed by Andalucia and Murcia.

Trade sources indicate that the citrus rootstock that experienced a higher demand during the most recent campaigns were "Clemenules", Navelinas and Lane-Late. Clemenules accounts for about 20 percent of total demand, with 1.5 million plants during the 1998/99 campaign.

Total Spanish citrus exports during calendar year 1999 were 2.8 million metric tons, slightly below the previous year. About 80 percent is exported to other EU countries. With the lower expected crop, total citrus exports are forecast to decrease about eight percent in 2000/01.

As Spain is a major citrus producer and exporter, U.S. citrus exporters have few market opportunities in Spain. Orange juice consumption, however, continues to grow, and U.S. juice exporters may find opportunities in Spain.

NOTE: Current exchange rate is 193 pesetas/\$1.00
1 ECU = 166.38 pesetas - \$0.86.

PRODUCTION

Fresh Oranges

The 2000/01 orange crop is forecast at 2.55 million metric tons, about ten percent lower than the previous season. The expected decrease in production can be mainly attributed to the lack of water availability in the Spanish Levant area, the tristeza, as well as to the normal fluctuation in the production cycle of the orchards. Rains in mid-October 2000, will improve soil conditions for the next year's crop (2001/02), and help increase the size of some varieties and quality of the fruit. Nevertheless, there are concerns that due to the heavy rains some fruit of this crop will suffer due to the high humidity. Producer prices for 2000/01 Navelina orange in October ranged from 400 to 450 pesetas per "arroba" of 12.8 kilograms, the same as during the previous season. Tristeza and the drought hampered the citrus production. Spain continues to produce primarily table-type orange varieties, notably Navel oranges, which comprise approximately two-thirds of Spain's orange exports. Production of other varieties, with the exception of the Valencia Late and Salustiana, continues to decline, and are being replaced by tangerines.

Fresh Tangerines

The 2000/01 tangerine crop is estimated at 1.55 million metric tons, a 25 percent decrease from the previous year. Clementine is still the most important tangerine variety, accounting for about 60 percent of the total tangerine production. Like the orange crop, the tangerine crop this year suffered from dry weather conditions. Reportedly fruit quality is good, but size is small due to lack of rains. Producer prices for 2000/01 tangerines currently range from 300 to 350 pesetas for early Satsumas, and 650 to 700 pesetas for Clemenules per "arroba" of 12.8 kilograms. At the beginning of the previous season prices ranged from 400 to 700 pesetas per "arroba".

Fresh Lemons

The 2000/01 lemon crop is estimated at 803,000 metric tons, about ten percent below the previous year, although official estimates (August 2000) were more optimistic and pegged production at 938,500 metric tons. Nevertheless, the lemon orchards are recovering following the dry years of the mid-'90s. Producer prices for 2000/01 Fino lemons currently range from 40 to 60 pesetas per kilo compared to 40 to 50 pesetas per kilogram the previous season.

Other Fresh Citrus

Only bitter oranges are included under the "Other Citrus" category. The 2000/01 bitter orange output is estimated at 14,000 metric tons, slightly below than the previous year due to the normal fluctuation in the production cycle.

Orange Juice

An estimated 700,000 metric tons, about the same level as during the previous year, of fresh oranges were delivered to processors in 1999/00, resulting in 45,500 tons of orange juice (65 Brix). Deliveries during 2000/01 are expected to be higher due to the higher demand for the final product. In Spain, oranges are not grown specifically for juice production. Oranges for juice are primarily those that have been rejected for fresh consumption. Like the orange production, most orange juice plants are located in the Valencia region and some in Andalucia (2.9 kilograms of fresh oranges yield 1Kg of single strength orange juice, 16 kilograms yield 1 Kg. of concentrated orange juice.)

Crop Area

The data in the table below and in the PS&Ds are based on a survey taken in 1997, the last official data published. However, area under citrus production has not changed significantly in the most recent three years. Total area in the Valencia area has not changed significantly, the main increase in area planted to citrus is in Andalucia region, Sevilla and Huelva provinces. The most notable change has been a slight increase in tangerine and lemon area and a decline in that for oranges. The success of Spain's tangerine sector in recent years has led to producers replacing orange groves with tangerines. New early and late season tangerine varieties are replacing traditional varieties, as the export and domestic market pay comparatively higher prices for these types of tangerines. Farmers' sources indicate that the citrus area in the Levant region has increased by 35 percent during the last 16 years. The estimated area devoted to citrus crops is presented in the table below.

Spain's Citrus Area - 1997						
Hectares						
	Sweet Oranges	Tangerines	Lemons	Grapefruits **	Other* Citrus**	TOTAL
Valencia	83,828	89,516	14,225			
Murcia	9,400	1,657	22,141			
Andalucia	32,885	5,539	6,533			
Catalonia	3,168	4,220	70			
Balearic Is.	2,753	274	284			
Others	997	44	282			
TOTAL	133,031	101,250	43,535	992	1,368	280,176

* Includes: Bitter Oranges, Limes and Other Citrus Fruits.

** No production by region data available, 1996 data.

CONSUMPTION

Total citrus consumption for 2000/01 is expected to be similar to a year earlier, although production is lower, due to a steady demand of fresh fruits, which couples with promotional campaigns to increase consumption. Fresh orange consumption, accounts for 27 percent of total fruit consumed in Spain and more than half of the citrus fruit consumed. Among other citrus fruits, bitter oranges are produced mainly for processing into marmalades and other preparations. About 80 percent is used in the domestic market and the rest is exported. Faced with strong competition from other beverages, orange juice consumption is the favorite juice and it is still forecast to grow in 2000/01. Orange juice represents about 35 percent of the local fruit juice market. Total annual per capita consumption of orange juice is estimated at about 6 liters.

TRADE

Fresh Oranges

Orange exports are estimated to have increased during the 1999/2000 marketing year due to higher domestic supplies. During the first seven months of marketing year 1999/00 (November-1999/May-2000), orange exports totaled 1,322,949 metric tons. Based on that pace, exports are estimated to have reached about 1.6 million tons, about 24 percent above the previous season's exports. Exports in 2000/01 are forecast to decrease due to expectations for a shorter crop. Spain's traditional markets are Germany, France, Netherlands, Italy and Poland. Orange exports generally begin in October and continue through the following September, with about 40 to 50 percent exported in October and December, and progressively declining thereafter.

In calendar year 1999, Spain imported 112,985 metric tons of fresh oranges, almost double than during 1998. Spanish consumers demand fresh citrus throughout the year, and it is necessary to import oranges from other countries when the Spanish crop is over. Most of these imports were from South Africa, Uruguay, Brazil and Argentina. Imports are forecast to increase in 2000/01 in line with the lower production expectations and a continuous demand throughout the year.

Fresh Tangerines

During the first seven months of marketing year 1999/2000 (November-99/May-2000), tangerine exports totaled 1,161,131 metric tons. Based on that pace, exports are estimated to have reached about 1.4 million metric tons, about 22 percent higher than during the previous season. Due to an expected lower domestic availability, in 2000/01 exports are forecast to decrease. In calendar year 1999, Spain exported 1,077,428 metric tons of tangerines, about 13 percent below the previous year. Spain's tangerine exports to the United States amounted to 69,042 metric tons, representing a 154 percent increase from the previous year's exports of 27,119 metric tons. In terms of overall supply and demand, imports are relatively insignificant.

Fresh Lemons

During the first seven months of marketing year 1999/2000 (November-99/May-2000), lemon exports totaled 351,706 metric tons. Based on that pace, exports are estimated to have reached about 480,000 metric tons, about six percent above the previous season. Due to expectations for a decrease in the crop, lemon exports in

2000/01 are expected to be lower. The bulk of exports continue to be destined for other EU countries. In calendar year 1999, Spain exported 416,656 metric tons, 22 percent below the previous year. Exports to the United States in calendar year 1999 were 8,142 metric tons, about 35 percent lower than the previous year.

In calendar year 1999, Spanish lemon imports were 33,329 metric tons, 78 percent above the previous year. Most of the lemons imported came from Argentina (24,400 tons).

Fresh Other Citrus

About 736 metric tons of bitter oranges were exported during calendar year 1999, while only 104 metric tons were imported. Trade in this product is forecast to remain minimal in 2000/01.

Orange Juice

Orange juice exports during 2000/01 are forecast to be similar to the previous campaign. In order to be consistent with the figures in the P,S&D table where production is based on 65 degrees Brix, other figures have been estimated using this parameter. About 50 percent of the total tonnage imported is concentrated orange juice, and the remaining is "single strength," while a large percentage of orange juice exported, mainly to other EU countries, is "single strength".

POLICY

E.U Regulation 1169/97 established rules for implementing Council Regulation 2202/96, which introduced a Community aid scheme for producers of certain citrus fruits. During the 1997/98 marketing year, the new Citrus Common Market Organization came into effect. The system provides a subsidy to growers who deliver their crops to processors, replacing the old minimum price and processing subsidy. Subsidies are only available on a fixed quantity of fruit delivered. E.U 2202/96 established a processing threshold for oranges of 1,189,000 tons. If the average for a consecutive three year period exceeds the limit, the subsidy will be cut proportionally (1% cut for each 1% increase).

EC Regulation 2242/00, dated October 10, 2000, reduces the 2000/2001 processing aid for oranges because the maximum quantity available for processing subsidies was exceeded. Based on the three previous marketing years, it was established that the processing threshold was exceeded by 358,233 tons. As a result, the amount of aid for oranges as outlined in the Annex to Regulation 2202/96 for the 2000/2001 marketing year must be reduced by 30 percent.

The amount of aid for oranges delivered for processing for the 2000/2001 marketing year shall be EUR 7.96/100 Kg, EUR 6.92/100 Kg, and EUR 6.23/100 Kg for multiannual contracts, annual contracts, and individual producers, respectively.

MARKETING

As a major citrus producer, Spain offers few opportunities for U.S. orange, tangerine or lemon exporters. Spain does play an important role as a U.S. competitor, particularly in Europe, where Spain's fruit is generally more price competitive. Potential does exist for U.S. frozen concentrated orange juice exports, but U.S. exporters would face stiff competition from other orange juice producing countries, particularly Brazil and Israel. Brazil currently dominates the import market, mainly in the form of unsweetened concentrates (6 to 1 concentration for the most part), which are blended with domestic products to improve their quality and reduce costs. Nonetheless, U.S. citrus processors/exporters have possible market opportunities in citrus blends. Tetra-pack containers, jars, and tin cans are the principal containers used in marketing orange juice in Spain. Starting in January, import demand for juice generally runs for about 10 months, with approximately 70 percent imported between January and June.

In an effort to increase consumption and exports of oranges and clementines, about 1,900 million pesetas will be spent in a promotional campaign. The participants are Intercitrus, which represents the citrus sector; ICEX, Spain's agency responsible for export promotion; and the Autonomous Government of Valencia. Farmers and citrus traders will contribute 0.30 peseta/Kg, with the remaining funds coming from the government agencies. The EU countries where the generic campaign (1,200 million pesetas) will take place are Belgium, Netherlands, Austria, Denmark, Finland, Sweden, Ireland and Spain. The campaign promoting Spanish origin citrus (700 million pesetas), financed by the citrus sector, ICEX and the Valencia Autonomous Government will take place in Germany, France, United Kingdom, Poland, Czech Republic and Hungary. Intercitrus together with the ICEX are working on a campaign to promote tangerines in seven cities in the United States, total cost of this campaign will be 140 million pesetas.

P,S&D, Fresh Oranges

PSD Table						
Country	Spain					
Commodity	Fresh Oranges				(HECTARES)(1000 TREES)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		11/1998		11/1999		11/2000
Area Planted	136000	136000	136000	136000	0	137000
Area Harvested	121100	121100	122000	122000	0	125000
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	2442	2442	2710	2828	0	2545
Imports	112	112	45	110	0	115
TOTAL SUPPLY	2554	2554	2755	2938	0	2660
Exports	1286	1286	1400	1600	0	1300
Fresh Dom. Consumption	570	570	640	638	0	640
Processing	698	698	715	700	0	720
TOTAL DISTRIBUTION	2554	2554	2755	2938	0	2660

Trade Matrix - Exports - Fresh Oranges

Export Trade Matrix			
Country	Spain		
Commodity	Fresh Oranges		
Time period	Calendar Year	Units:	Metric Tons
Exports for:	1998		1999
U.S.	86	U.S.	11,785
Others		Others	
Germany	333,505	Germany	273,679
France	316,075	France	240,015
Netherlands	158,976	Netherlands	117,956
Poland	90,235	Italy	69,439
United Kingdom	79,880	United Kingdom	65,793
Belgium	72,372	Poland	68,627
Italy	68,091	Belgium	57,012
Czech Republic	37,442	Portugal	34,923
Portugal	31,312	Czech Republic	25,341
Sweden	29,872	Switzerland	18,264
Total for Others	1217760		971049
Others not Listed	145,503		124,554
Grand Total	1363349		1107388

Trade Matrix - Imports - Fresh Oranges

Import Trade Matrix			
Country	Spain		
Commodity	Fresh Oranges		
Time period	Calendar Year	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
South Africa	15,780	South Africa	40,708
Argentina	13,654	Uruguay	21,153
Uruguay	13,274	Brazil	15,657
France	2,484	Argentina	14,217
Netherlands	2,159	Netherlands	7,457
Germany	1,908	Zimbabwe	3,095
Swaziland	1,776	France	2,925
Italy	1,248	Swaziland	2,180
Total for Others	52283		107392
Others not Listed	5177		5593
Grand Total	57460		112985

P,S&D Fresh Tangerines

PSD Table						
Country	Spain					
Commodity	Fresh Tangerines				(HECTARES)(1000 TREES)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		11/1998		11/1999		11/2000
Area Planted	102000	102000	102500	102500	0	103500
Area Harvested	87000	87000	87500	87500	0	88000
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	1760	1760	2070	2070	0	1550
Imports	5	5	2	2	0	10
TOTAL SUPPLY	1765	1765	2072	2072	0	1560
Exports	1146	1146	1400	1400	0	1100
Fresh Dom. Consumption	360	360	392	392	0	350
Processing	259	259	280	280	0	110
TOTAL DISTRIBUTION	1765	1765	2072	2072	0	1560

Trade Matrix - Exports - Fresh Tangerines

Export Trade Matrix			
Country	Spain		
Commodity	Fresh Tangerines		
Time period	Calendar Year	Units:	Metric Tons
Exports for:	1998		1999
U.S.	27,119	U.S.	69,042
Others		Others	
Germany	358,090	Germany	300,221
France	248,111	France	204,875
United Kingdom	125,383	United Kingdom	115,003
Netherlands	89,947	Netherlands	70,964
Poland	74,202	Poland	56,624
Italy	55,788	Belgium	33,413
Belgium	44,692	Czech Republic	24,620
Czech Republic	37,287	Switzerland	24,398
Switzerland	33,149	Austria	17,096
Austria	23,326	Denmark	16,943
Total for Others	1089975		864157
Others not Listed	120,314		144229
Grand Total	1237408		1077428

Trade Matrix - Imports - Fresh Tangerines

Import Trade Matrix			
Country	Spain		
Commodity	Fresh Tangerines		
Time period	Calendar Year	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
Netherlands	2,093	Uruguay	872
Uruguay	677	South Africa	712
Morocco	389	Portugal	292
Italy	306	Brazil	242
United Kingdom	246	France	167
		Germany	165
		Italy	94
		Argentina	68
Total for Others	3711		2612
Others not Listed	505		584
Grand Total	4216		3196

P,S&D Fresh Lemons

PSD Table						
Country	Spain					
Commodity	Fresh Lemons				(HECTARES)(1000 TREES)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		11/1998		11/1999		11/2000
Area Planted	43900	43900	43900	43900	0	43500
Area Harvested	42500	42500	43000	43000	0	42500
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	878	878	899	892	0	803
Imports	33	33	10	25	0	30
TOTAL SUPPLY	911	911	909	917	0	833
Exports	451	451	569	480	0	410
Fresh Dom. Consumption	230	230	125	230	0	223
Processing	230	230	215	207	0	200
TOTAL DISTRIBUTION	911	911	909	917	0	833

Trade Matrix - Exports - Fresh Lemons

Export Trade Matrix			
Country	Spain		
Commodity	Fresh Lemons		
Time period	Calendar Year	Units:	Metric Tons
Exports for:	1998		1999
U.S.	12,475	U.S.	8,142
Others		Others	
Germany	104,130	Germany	87,857
France	86,721	France	79,674
Poland	76,036	Poland	56,758
Netherlands	59,875	Italy	45,180
Italy	49,857	United Kingdom	33,608
United Kingdom	31,008	Netherlands	26,140
Belgium	14,411	Switzerland	10,380
Switzerland	11,853	Belgium	9,517
Czech Republic	11,665		
Total for Others	445556		349114
Others not Listed	70,902		59,400
Grand Total	528933		416656

Trade Matrix - Imports - Fresh Lemons

Import Trade Matrix			
Country	Spain		
Commodity	Fresh Lemons		
Time period	Calendar Year	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
Argentina	15,760	Argentina	24,400
Netherlands	840	Uruguay	4,437
France	768	South Africa	1,385
Uruguay	687	Germany	1347
		Netherlands	655
		France	425
		Italy	235
Total for Others	18055		32884
Others not Listed	651		445
Grand Total	18706		33329

P,S&D - Fresh Citrus, Other

PSD Table						
Country	Spain					
Commodity	Fresh Citrus,Other				(HECTARES)(1000 TREES)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		11/1998		11/1999		11/2000
Area Planted	700	700	700	700	0	700
Area Harvested	670	670	670	670	0	670
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	14	14	15	15	0	14
Imports	0	0	0	0	0	0
TOTAL SUPPLY	14	14	15	15	0	14
Exports	1	1	1	1	0	1
Fresh Dom. Consumption	0	0	0	0	0	0
Processing	13	13	14	14	0	13
TOTAL DISTRIBUTION	14	14	15	15	0	14

Trade Matrix - Exports - Fresh Citrus, Other

Export Trade Matrix			
Country	Spain		
Commodity	Fresh Citrus, Other		
Time period	C.Y.	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
EU Countries	300	Italy	323
		France	207
		Netherlands	139
		Germany	30
		United Kingdom	20
Total for Others	300		719
Others not Listed			17
Grand Total	300		736

Trade Matrix - Imports - Fresh Citrus, Other

Import Trade Matrix			
Country	Spain		
Commodity	Fresh Citrus, Other		
Time period	C.Y.	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
Israel	21	Ecuador	40
EU Countries	5	Netherlands	24
		France	23
		Brazil	7
		South Africa	5
Total for Others	26		99
Others not Listed			5
Grand Total	26		104

P,S& D - Orange Juice

PSD Table						
Country	Spain			65	Degrees Brix	
Commodity	Juice, Orange				(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		11/1998		11/1999		11/2000
Deliv. To Processors	698	698	715	700	0	720
Beginning Stocks	5100	5100	200	1300	800	1300
Production	43600	45300	44680	45500	0	46800
Imports	25500	25500	30000	28000	0	27000
TOTAL SUPPLY	74200	75900	74880	74800	800	75100
Exports	56600	56600	54000	53300	0	52000
Domestic Consumption	17400	18000	20080	20200	0	21000
Ending Stocks	200	1300	800	1300	0	2100
TOTAL DISTRIBUTION	74200	75900	74880	74800	0	75100

Trade Matrix - Exports - Orange Juice

Export Trade Matrix			
Country	Spain		
Commodity	Juice, Orange		
Time period	Calendar Year	Units:	Metric Tons
Exports for:	1998		1999
U.S.	89	U.S.	7
Others		Others	
France	111,370	France	39,553
Germany	12,679	Germany	5,006
United Kingdom	6,138	Portugal	1,850
Portugal	3,496	United Kingdom	1,642
		Denmark	517
Total for Others	133683		48568
Others not Listed	9,307		1995
Grand Total	143079		50570

Trade Matrix - Imports - Orange Juice

Import Trade Matrix			
Country	Spain		
Commodity	Juice, Orange		
Time period	Calendar Year	Units:	Metric Tons
Imports for:	1998		1999
U.S.	1,303	U.S.	38
Others		Others	
Germany	29,607	Brazil	4,754
Portugal	17,428	Germany	2,795
Netherlands	6,448	Netherlands	2,144
Brazil	5,984	France	1,617
Mexico	3,005	Mexico	1,401
		Portugal	1,198
Total for Others	62472		13909
Others not Listed	8,838		3,941
Grand Total	72613		17888