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Report Highlights:

In 2001/02 fresh orange production is 45,000 MT higher than last year's crop, but tangerine and lemon production are both lower. The estimate for the production of orange juice concentrate in 2000/01 is lower and as a consequence both production and stocks are lowered from previous estimates. Brazilian orange juice concentrate enters the Greek market as transshipments from other European posts; at current prices Greek OJC is competitive.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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I. Situation & Outlook - Narrative

Production

The 2001/02 fresh orange production is presently forecast to be close to 1,020,000 MT or 45,000 MT, higher than last year's crop, which is estimated at 975,000 MT. Weather conditions this season have been characterized by significant fluctuations in temperature. High temperatures in May coupled with a lack of precipitation that continued through late October resulted, with the exception of oranges, in substantial reductions of both tangerines and lemons. Tangerine production for the 2001/02 season is presently forecast at about 75,000 MT while that of lemons is estimated at about 115,000 MT.

Orange juice concentrate production (65 Brix basis) during the 2000/01 season was revised downwards to 15,350 MT from the estimate included in the previous semi-annual report GR-1007 of May 8, 2001 due to a smaller tonnage of oranges delivered to processors than expected, totaling 277,000 MT. As a result of the smaller production, stocks of OJC dropped to 334 MT. Present forecasts for the 2001/02 OJC production stands at about 14,700 MT with stocks remaining at low levels. The price paid to growers for oranges delivered for processing during the 2000/01 year ranged from 33 to 37 drs/kg (8.5 to 9.5 cents/kg) as compared to 34 to 38 drs/kg (10.2 to 11.4 cents/kg) a year earlier due to the higher fruit supply.

The average yield of OJC during the 2000/01 season was close to 18 kgs of oranges (mostly navel and common varieties) needed to produce one kilogram OJC (basis 65 Brix) compared to 23 kgs of oranges the prior year. That very significant difference in yield is due to the very good quality of oranges delivered for processing.

Trade

In spite of the keen competition that the Greek citrus industry is facing from the other Mediterranean countries, especially Spain, the 2000/01 export season reached record levels, in the case of oranges, due to the following reasons: a) Increased value of the dollar, b) the earliness of the crop c) improvement in the economic situation of Eastern European and neighbouring countries and d) abolishment of the required certificate from the importing countries. Export of oranges totaled 371,000 MT, tangerines 34,000 MT and lemons 32,000 MT during the 2000/01 MY as compared to 267,000 MT, 30,000 MT and 24,000 MT respectively for the three citrus fruits the prior year. The timing of the citrus exports by variety were given in detail in our last year's annual report GR-0032 of Nov. 15, 2000 p3.

As stated in past reports, because of its large production levels, Brazil effectively controls the international market of OJC (65 Brix). While little of the Brazilian OJC is exported directly to Greece large quantities are shipped to EU destinations via Rotterdam and Hamburg. During CY 2000, imports entering the EU at these ports totaled 9,204 MT of a total imported tonnage of 19,351 MT, while imports from the US dropped to only 584 MT. Comparable CY 1999 figures were 10,800 MT, 21,307 MT and 1,005 MT respectively.

The Brazilian price for OJC (65 Brix) has recently increased to about \$1,100/MT due to a Brazilian crop which is reduced by about 15 percent. Comparable Brazilian product prices of a year ago ranged between \$750 to \$850 per MT. At these current prices Greek OJC (65 Brix basis) is competitive.

Policy

The general opinion has been that EU Reg. Numbers 2200/96 and 2202/96 had negatively affected citrus growers through 2001. The EU issued Reg No 2699/2000 on Dec.4, 2000 to revise a number of provisions covered by prior regulations. These provisions are: a) The withdrawal of fresh citrus for the 2001/02 season is set at 10 percent of the tonnage marketed through groups of growers. This is further reduced to 5 percent for the period 2002/03. b) Sets national quotas for quantities of citrus to be processed in relation to a total community quota. The total community quota for oranges is now increased from 1,189,000 MT to 1,500,236 MT; for tangerines from 320,000 MT to 384,000 MT; and for lemons from 444,000 MT to 510,600 MT. For Greece specifically the national quotas are set at 280,000 MT for oranges; 5,217 MT for tangerines; and 27,976 MT for lemons. These new quotas are to become effective as of this 2001/02 season.

The final EU aid received by citrus growers in 2000/01 for citrus (oranges, tangerines and lemons) to be processed, is as follows:

Oranges (EU Reg No2242/2000 Oct. 10, 2000)		
Multi-year contracts	EUR 7.96/100 Kgs	7.0 cents/kg
Annual contracts	EUR 6.92/100 Kgs	6.1 cents/kg
Individual producers	EUR 6.23/100 Kgs	5.5 cents/kg

Tangerines (EU Reg No2241/2000 Oct. 10, 2000)		
Multi-year contracts	EUR 8.15/100 Kgs	7.2 cents/kg
Annual contracts	EUR 7.09/100 Kgs	6.3 cents/kg
Individual producers	EUR 6.38/100 Kgs	5.6 cents/kg

Lemons (EU Reg No1148/2000 May 29, 2000)		
Multi-year contracts	EUR 6.78/100 Kgs	6.0 cents/kg
Annual contracts	EUR 5.89/100 Kgs	5.2 cents/kg
Individual producers	EUR 5.30/100 Kgs	4.7 cents/kg

These aid prices paid to growers reflect drops of 30 percent for oranges, 29 percent for tangerines and 36 percent for lemons from those provided in EU Reg. No 2202/96. The latter were calculated based on deliveries to processors which over the previous three years, averaged excesses over levels established by the EU.

Consumption

Domestic fresh consumption data shown in the PS & D tables include farm use, losses (waste) as well as withdrawal tonnages, in addition to fresh sales. The analysis of these figures for oranges, tangerines, and lemons for the 1999/00, 2000/01 and an estimate for 2001/02 in metric tons are as follows:

	1999/00	2000/01	2001/02
Oranges (MT)			
Fresh sales	232,000	251,000	271,000
Waste, Farm Use & losses	68,000	69,000	70,000
Withdrawal from Market	94,000	8,000	20,000
TOTAL Domestic Consumption	394,000	328,000	361,000
Tangerines (MT)			
Fresh sales	46,000	44,000	40,000
Waste, Farm Use & losses	4,000	5,000	3,000
Withdrawal from Market	1,000	0	0
TOTAL Domestic Consumption	51,000	49,000	43,000
Lemons (MT)			
Fresh sales	87,000	90,000	88,000
Waste, Farm Use & losses	13,000	6,000	5,000
Withdrawal from Market	0	0	0
TOTAL Domestic Consumption	100,000	96,000	93,000

Domestic per capita consumption of orange and lemon juices in Greece is quite stable and ranges between 10.5 and 11.0 liters of single strength orange juice and about 0.9 to 1.0 liter of single strength lemon juice.

Revised production analysis by principal varieties for the three major citrus fruits (oranges, tangerines and lemons) for the past two years are as follows:

	1999/00	2000/01
Oranges		
Washington Navels	642,000	595,000
Navelina	68,000	62,000
Valencia	150,000	160,000
Common	130,000	110,000
All Other	50,000	48,000
TOTAL	1,040,000	975,000

Tangerines		
Clementines	60,000	66,000
Common	17,400	11,000
Satsuma - Encore - All Other	7,600	8,000
TOTAL	85,000	85,000
Lemons		
Maglene	69,000	72,000
Karystini	23,000	24,000
Adamopoulou-Santa Teresa	9,000	9,000
All Other	24,000	25,000
TOTAL	125,000	130,000

The average wholesale prices for the 2000/01 year for oranges, tangerines and lemons in the Athens Central Market fluctuated as follows:

	Oct-Nov 00	Dec 00-Mar 01	Apr-May 01	June-July 01	Aug-Oct 01
Drachmas per kilogram					
Oranges					
Navels	120-130	100-130	130-180	-	200
Navels from Crete	-	150-160	150-250	250	-
Valencia	100	110-120	110-170	200-250	270-350
Tangerines					
Clementines	180-250	170-300	-	-	350
Common	200	160-280	-	-	-
Lemons					
Domestic	130-200	130-140	140	140-150	150-180
Imported	250-300	-	-	220-300	220-280

Exchange Rates

Oct.-Nov.2000	\$1.00 = 397.018 Drachmas
Dec.2000 – Mar.2001	\$1.00 = 371.931 Drachmas
Apr. – May 2001	\$1.00 = 385.896 Drachmas
Jun. – July 2001	\$1.00 = 397.615 Drachmas
Aug. – Oct. 2001	\$1.00 = 376.181 Drachmas

Farm gate prices for oranges, tangerines and lemons for the 2000 year are not yet available from the Ministry of Agriculture. The 1999 farm gate prices carried by the same source are as follows:

Farm Gate Prices for Citrus for 1999		
	Drs/Kg	\$/Kg
Oranges	49.70	0.136
For Fresh consumption	54.25	0.149
For Processing	31.00	0.085
Tangerines (Total Average)	98.18	0.269
Lemons (Total Average)	56.84	0.156
For Fresh Consumption	60.20	0.165
For Processing	25.70	0.070

Indicative average export FOB prices for citrus fruits during the 2000/01 season ranged within the following levels:

Export FOB Prices for 2000/01 Dollars per M. Ton		
	To EU Destinations	To Non EU Destinations
Oranges	285-340	240-290
Tangerines	575-800	260-430
Lemons	470-600	300-360

Exchange Rates

1999	\$1.00=305.85 Drachmas
2000	\$1.00=362.28 Drachmas
2001 (Jan-Nov)	\$1.00=380.12 Drachmas

PS&D Table, Fresh Oranges

PSD Table						
Country	Greece					
Commodity	Fresh Oranges				(HECTARES)(1000 TREES)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		09/1999		09/2000		09/2001
Area Planted	37800	39250	39250	39750	0	40000
Area Harvested	37000	38500	38600	39100	0	39500
Bearing Trees	16500	16530	16550	17200	0	17380
Non-Bearing Trees	360	400	380	290	0	220
TOTAL No. Of Trees	16860	16930	16930	17490	0	17600
Production	1040	1040	900	975	0	1020
Imports	1	1	1	1	0	1
TOTAL SUPPLY	1041	1041	901	976	0	1021
Exports	270	267	260	371	0	380
Fresh Dom. Consumption	391	394	341	328	0	361
Processing	380	380	300	277	0	280
TOTAL DISTRIBUTION	1041	1041	901	976	0	1021

1/Includes quantities withdrawn

Export Trade Matrix, Fresh Oranges

Export Trade Matrix			
Country	Greece		
Commodity	Fresh Oranges		
Time period		Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Holland	17495	Holland	12622
Germany	31794	Germany	14416
Austria	10386	Austria	5659
Sweden	5390	Sweden	1974
U.K.	4467	U.K.	1819
Other EU	12127	Other EU	3723
>Sub Total EU	81659	>Sub Total EU	40213
		Hungary	30708
		Romania	27837
		Bulgaria	22425
Total for Others	81659		121183
Others not Listed	182441		126720
Grand Total	264100		247903

Import Trade Matrix, Fresh Oranges

Import Trade Matrix			
Country	Greece		
Commodity	Fresh Oranges		
Time period		Units:	MT
Imports for:	1999		2000
U.S.		U.S.	
Others		Others	
Holland	635	Italy	117
Spain	409	Other EU	201
Germany	471	>Sub Total EU	318
Other EU	234	Argentina	658
>Sub Total EU	1749	Uruguay	150
Total for Others	1749		1126
Others not Listed	1		39
Grand Total	1750		1165

PS&D Table, Juice Orange

PSD Table						
Country	Greece				Degrees Brix	
Commodity	Juice, Orange				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		09/1999		09/2000		09/2001
Deliv. To Processors	380	380	300	277	0	280
Beginning Stocks	44	44	3044	3044	1844	334
Production	16500	16500	16300	15350	0	14700
Imports	11000	11000	8500	8500	0	10000
TOTAL SUPPLY	27544	27544	27844	26894	1844	25034
Exports	6000	6000	6500	7560	0	5500
Domestic Consumption	18500	18500	19500	19000	0	19000
Ending Stocks	3044	3044	1844	334	0	534
TOTAL DISTRIBUTION	27544	27544	27844	26894	0	25034

Export Trade Matrix, Juice Orange

Export Trade Matrix			
Country	Greece		
Commodity	Juice, Orange		
Time period		Units:	MT
Exports for:			1
U.S.	5	U.S.	7
Others		Others	
Holland	2476	Holland	3398
Germany	662	Germany	1592
U.K.	121	U.K.	1134
Other EU	139	Spain	523
>Sub Total EU	3398	Other EU	240
FYROM	943	>Sub Total EU	6887
Bulgaria	280	FYROM	634
		Albania	252
		Bulgaria	198
Total for Others	4621		7971
Others not Listed	824		658
Grand Total	5450		8636

Import Trade Matrix, Juice Orange

Import Trade Matrix			
Country	Greece		
Commodity	Juice, Orange		
Time period		Units:	MT
Imports for:	1999		2000
U.S.	1005	U.S.	584
Others		Others	
Holland	7562	Holland	5484
Germany	3278	Germany	3720
France	2247	France	1160
Spain	3820	Spain	4475
Other EU	379	Other EU	261
>Sub Total EU	17286	>Sub Total EU	15100
Bulgaria	1978	Bulgaria	2597
Cyprus	683	Cyprus	907
Brazil	281	Brazil	132
Total for Others	20228		18736
Others not Listed	74		31
Grand Total	21307		19351

PS&D Table, Fresh Tangerines

PSD Table						
Country	Greece					
Commodity	Fresh Tangerines				(HECTARES)(1000 TREES)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		09/1999		09/2000		09/2001
Area Planted	6020	6400	6800	6950	0	7000
Area Harvested	5960	6200	6400	6550	0	6800
Bearing Trees	2935	3000	3100	3050	0	3170
Non-Bearing Trees	35	50	50	150	0	90
TOTAL No. Of Trees	2970	3050	3150	3200	0	3260
Production	85	85	80	85	0	75
Imports	0	0	0	0	0	0
TOTAL SUPPLY	85	85	80	85	0	75
Exports	30	30	33	34	0	30
Fresh Dom. Consumption	50	51	43	49	0	43
Processing	5	4	4	2	0	2
TOTAL DISTRIBUTION	85	85	80	85	0	75

Export Trade Matrix, Fresh Tangerines

Export Trade Matrix			
Country	Greece		
Commodity	Fresh Tangerines		
Time period		Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Germany	3385	Holland	2744
Other EU	36	Germany	3153
>Sub Total EU	7024	Italy	258
Bulgaria	3909	Other EU	158
FYROM	4413	>Sub Total EU	6313
Serbia	2385	FYROM	6673
Poland	2190	Albania	5936
Hungary	1565	Bulgaria	4599
Albania	4605	Poland	2736
Holland	2282	Serbia	2216
Total for Others	24770		28473
Others not Listed	4019		4250
Grand Total	28789		32723

Import Trade Matrix, Fresh Tangerines

Import Trade Matrix			
Country	Greece		
Commodity	Fresh Tangerines		
Time period		Units:	MT
Imports for:	1999		2000
U.S.		U.S.	
Others		Others	
Holland	67	Holland	19
Spain	61	Italy	17
Other EU	53	Other EU	6
>Sub Total EU	181	>Sub Total EU	42
		Argentina	163
Total for Others	181		205
Others not Listed	12		3
Grand Total	193		208

PS&D Table, Fresh Lemons

PSD Table						
Country	Greece					
Commodity	Fresh Lemons				(HECTARES)(1000 TREES)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		09/1999		09/2000		09/2001
Area Planted	12200	12200	12300	12500	0	12600
Area Harvested	12000	12000	12200	12400	0	12500
Bearing Trees	3900	3900	4000	4200	0	4250
Non-Bearing Trees	200	200	170	70	0	50
TOTAL No. Of Trees	4100	4100	4170	4270	0	4300
Production	125	125	136	130	0	115
Imports	11	11	11	11	0	20
TOTAL SUPPLY	136	136	147	141	0	135
Exports	24	24	25	32	0	30
Fresh Dom. Consumption	100	100	108	96	0	93
Processing	12	12	14	13	0	12
TOTAL DISTRIBUTION	136	136	147	141	0	135

Export Trade Matrix, Fresh Lemons

Export Trade Matrix			
Country	Greece		
Commodity	Fresh Lemons		
Time period		Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Ukraine	1826	Germany	881
FYROM	4707	France	745
Serbia	3359	Austria	180
Romania	4026	Other EU	175
Bulgaria	4566	>Sub Total EU	1981
Other EU	1901	Bulgaria	6137
>Sub Total EU	8045	FYROM	5193
Italy	3240	Romania	4886
Germany	2340	Serbia	3604
U.K.	564	Ukraine	2405
Total for Others	26529		24206
Others not Listed	8895		9500
Grand Total	35424		33706

Import Trade Matrix, Fresh Lemons

Import Trade Matrix			
Country	Greece		
Commodity	Fresh Lemons		
Time period		Units:	MT
Imports for:	1999		2000
U.S.		U.S.	
Others		Others	
Holland	1594	Italy	1207
Germany	969	Spain	1375
Spain	1563	Holland	711
Other EU	995	Other EU	299
>Sub Total EU	5121	>Sub Total EU	3592
Argentina	5531	Argentina	9225
Total for Others	10652		12817
Others not Listed	126		21
Grand Total	10778		12838

PS&D Table, Juice Lemons

PSD Table						
Country	Greece					
Commodity	Juice, Lemon				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		09/1999		09/2000		09/2001
Deliv. To Processors	12000	12000	14000	13300	0	12000
Beginning Stocks	446	446	0	0	0	0
Production	730	730	850	806	0	730
Imports	200	200	300	100	0	100
TOTAL SUPPLY	1376	1376	1150	906	0	830
Exports	0	0	0	0	0	0
Domestic Consumption	1376	1376	1150	906	0	830
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	1376	1376	1150	906	0	830