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GAIN Report

Global Agricultural Information Network

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Citrus Annual

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Report Highlights:

Argentina's MY 2012/2013 lemon production is forecast to increase to 1.45 MMT due to favorable weather conditions, compared to the previous year. Orange, tangerine, and grapefruit production is estimated to decrease to 340,000 MT, 200,000 MT, and 80,000 MT, respectively, due to severe frosts in early June 2012 (for orange and tangerine). A decrease in area devoted for grapefruit production is expected, following a global trend. Lemon exports are expected to remain static at 265,000 MT, despite larger production, as exporting fresh lemons has been increasingly turning into an unprofitable activity due to high costs and a

stable dollar compared to the local currency. Orange and tangerine exports are projected to decrease significantly to 40,000 MT and 45,000 MT, respectively, as a result of smaller production and lack of price competitiveness, and grapefruit exports are expected to remain unchanged. Domestic consumption for all citrus, except lemons, is estimated to decrease.

Executive Summary:

Favorable weather conditions for fresh lemons caused Post to increase production to 1.45 MMT (MY) 2012/2013, compared to 1.3 MMT the previous year. However, a decrease is expected in fresh orange, tangerine, and grapefruit production to 340,000 MT, 200,000 MT, and 80,000 MT, respectively, due to the effect of severe frosts in June 2012 (for orange and tangerine), and less area devoted for grapefruit production. Lemon exports are estimated to remain stable at 265,000 MT for lemon. The Argentine lemon industry has a voluntary program, "All Lemon," that regulates the volume of fresh lemons for export to ensure quality and price stability. However, Argentine industry sources indicate that they would have the capacity to export up to 350,000 MT if market conditions were favorable. Orange and tangerine exports are forecast to decrease to 40,000 MT and 45,000 MT, respectively, due to smaller production and reduced competitiveness, and grapefruit exports will remain stable. Except for lemons, lower production for sweet citrus is expected to lower domestic consumption. However, in the coming seasons, domestic consumption of sweet citrus is expected to increase. Increased domestic cost of production, due to high inflation, is making Argentine citrus less competitive on the international market. It is expected that higher volumes of fruit, particularly oranges and tangerines, will stay in the domestic market.

On December 5, 2012, the GOA filed a case at the World Trade Organization (WTO) against the United States. Argentina seeks access for fresh lemon exports to the United States from its Northeast region (Catamarca, Jujuy, Salta, and Tucuman). Currently, Argentine lemons are not admissible to the United States because of quarantine pest concerns.

Commodities:

Lemons, Fresh

Oranges, Fresh

Tangerines/Mandarins, Fresh

Grapefruit, Fresh

Production:

For MY 2012/2013, fresh lemon production is estimated to rebound to 1.45 MMT, compared to the previous year, due to favorable weather conditions in the main growing region of Argentina, resulting in improved yields. Fresh lemon production for MY 2011/2012 is expected to increase to 1.3 MMT, up 100,000 MT from previous USDA official estimates. Lemon trees and fruit are expected to recuperate from the effects of the severe frosts of July 2011 and the drought of January-March 2012, resulting in higher yields than previously expected. As a consequence of the drought, the fruit quality was excellent as dry weather favors plant health conditions. In addition, harvest was delayed about 40 days due to excess rains at the beginning of the harvesting season (March-April). Lemon production for MY 2010/2011 was increased to 1.55 MMT, compared to previous USDA official estimates, due to latest revisions made by the private sector.

Fresh orange, tangerine, and grapefruit production for MY 2012/2013 is expected to decrease to 340,000 MT, 200,000 MT, and 80,000 MT, respectively. For oranges and tangerines, production went down due to the effects of the severe frosts of early June 2012. It is estimated that the plants will not fully recuperate until 2014. Area devoted for grapefruit production has been decreasing in the past few years due to less global demand for this type of fruit.

Fresh orange and tangerine production for MY 2011/2012 is forecast to increase to 565,000 MT for oranges and 290,000 Mt for tangerines, compared to previous official USDA estimates. Production for both fruit decreased drastically from the previous year due to the drought, followed by the frost of June 2012. Grapefruit production is revised down from 160,000 MT to 100,000 MT, compared to previous estimates, as area planted to grapefruit is going down and being replaced with sugar cane and soybeans. Latest revisions from private sources for MY 2010/2011 increased production of oranges and tangerines to 850,000 MT and 450,000, respectively, and grapefruit production remained at 160,000 MT.

Main lemon varieties grown in Argentina are as follows: Genova and Eureka; main orange varieties: Naventina, Salustiana, Washington Navel, Navel Late, Valencia Seedless, and Valencia Late; main tangerine varieties: Clementina, Clemenvilla, Ellendale, Malvasio, Montenegrina, Murcott, Ortanique, Satsuma, Okutsu; main grapefruit varieties: Marsh Seedless, Star Ruby, and Red Ruby (Source: Federcitrus). Overall, the citrus sweet varieties that have been expanding faster are seedless varieties, such as Tango for oranges, and Clementines and Clemenules for tangerines.

One of the main concerns affecting the citrus sector in Argentina is increasing production costs during the past few years (especially, labor, inputs, energy, inland and ocean freight), as a result of a high inflation rate (between 20-25 percent) which, combined with the relatively stable value of the dollar, represents a significant loss of competitiveness for local exporters. (The salary increase reached 21 percent in 2012 and, in 2013, it is projected to range between 25-28 percent). Intermittent strikes by both SENASA and customs inspectors have disrupted trade over the past few years.

During the past few years, the Government of Argentina (GOA) reduced gas supplies to major industrial operations in the country to assure household gas supplies during winter. In the Province of Tucuman, main lemon growing region in the country, gas supplies were significantly reduced in the past. Gas supplies are expected to continue to be scarce as no major gas investments are being planned to overcome this energy problem. Gas is mostly used in lemon processing between May and September. The Governor of Tucuman Province requested that the province be exempted from gas rationing during the processing season. Although this is becoming an increasingly serious problem, so far, the local industry has not been significantly affected. A few of the leading lemon industries have developed operations which recycle industry waste into gas. However, the industry is far from becoming self-sufficient in gas supplies.

Area Planted

Area planted to lemons has increased slightly to 49,000 ha for 2011/2012, compared to the previous year and it is expected to continue to expand marginally to 49,500 ha in 2012/2013, especially in the Provinces of Salta and Jujuy. During the past few years, in the Province of Tucuman, lemon production used to compete with sugar cane (for bioethanol production). Currently, ethanol producers are facing environmental contamination issues, and the sugar industry has not been making significant investments due to the decrease of sugar international prices and high production costs. Lemon production also competes, although to a lesser extent, with urban expansion and soybean production, which has grown in marginal areas. According to private sources, the Argentine lemon sector is not expected to expand significantly through land investment but through the incorporation of new genetic material, which would improve yields.

During 2011/2012 and 2012/2013, area planted to oranges and tangerines is estimated to decrease to 48,000 MT and 34,700 MT, respectively, due to the severe frosts which destroyed citrus plants that will not be replaced. Moreover, the economic and financial crisis makes the business less profitable to the citrus sector reducing investment in land and plant replacement. The overall trend is that, most of the area in NEA (North East of Argentina) where damaged citrus trees were removed and will not be replaced, will be devoted for forestation. The area in NOA (North West of Argentina) where orange and grapefruit trees are not being replaced is being devoted for sugar cane and soybean production. Area planted to grapefruit is projected to decrease to 6,300 ha in 2011/2012 and it is expected to continue to go down, as grapefruit production competes with other more profitable crops.

Processing

For MY 2012/2013, fresh lemon for processing is projected to increase to 1.1 MMT, compared to the previous year, due to larger production. Fresh lemon for processing in MY 2011/2012 is estimated to increase to 963,000 MT, compared to previous official estimates, as a result of larger production than previously expected. For MY 2010/11, it was revised up to 1.2 MMT, as a result of larger production. Many producers chose to harvest smaller-sized fruit, which were devoted for processing, leaving larger sizes in the plants to obtain fruit suitable to the needs of more demanding export markets.

Fresh orange, tangerine, and grapefruit for processing in MY 2012/2013 is estimated to decrease to 70,000 MT, 35,000 MT, and 28,000 MT, respectively, due to smaller production. For MY 2011/2012, orange for processing is expected to increase to 105,000 MT, compared to previous official estimates, as a result of larger production than originally expected and smaller domestic consumption. Tangerine and grapefruit for processing are forecast to decrease to 40,000 MT and 42,000 MT, respectively. For tangerines, less fruit was devoted for processing due to larger exports and domestic consumption and, for grapefruit, it was due to smaller production.

In 2010/2011, orange and tangerine for processing was increased to 166,000 MT and 145,000 MT, respectively, compared to previous USDA official estimates, as a result of larger fruit supply than expected, as per latest estimate revisions by the private sector. Grapefruit for processing remained at 86,000 MT.

Over 50 percent of total lemon production in Argentina is processed by four plants, of which three are located in the Province of Tucuman, and one in the Province of Salta. In addition, there are about 35 high-tech packing citrus plants which are approved for export by the Argentine sanitary authorities.

Investment

Investment in land devoted for lemon production is expected to continue to expand marginally, especially in the Provinces of Salta and Jujuy. In addition, two new packing and processing plants became operational this year in Tucuman. Investment is due to the potential opening of significant export markets for fresh lemon, such as the U.S. and China, and the expansion of leading beverage companies in Asia.

Despite the lack of profitability and the domestic economic crisis that the lemon sector is undergoing, larger producers continue to invest in new lemon trees to replace old trees. Tree replacement is carried out at an average annual rate of 5 percent.

Consumption:

Fresh lemon domestic consumption does not typically vary much over time, unlike oranges and tangerines, which are often substituted by other types of fruit depending on the price. Lemon consumption in MY 2012/2013 is forecast to increase slightly to 80,000 MT, compared to the previous year, due to larger production. Consumption in MY 2011/2012 is estimated to remain stable at 70,000 MT. It is increased to 85,000 MT for MY 2010/2011, compared to previous USDA official estimates, due to larger production as per latest estimate revisions by the private sector.

Fresh orange, tangerine, and grapefruit domestic consumption is estimated to decrease for MY 2012/2013 to 230,000 MT, 120,000 MT, and 49,000 MT, respectively, as a result of less fruit supply, smaller exports (except for grapefruit) and less fruit for processing. Consumption in MY 2011/2012 is forecast to increase to 380,000 MT (for orange) and 150,000 MT (for tangerine), compared to previous official USDA estimates, due to larger fruit supplies than originally expected. Consumption is also expected to increase for oranges as a result of reduced exports, and it is projected to increase for tangerines due to less fruit for processing. Grapefruit consumption is projected to decrease to 55,000 MT as a result of smaller production.

In MY 2010/2011, orange and tangerine consumption was increased to 560,000 MT and 190,000 MT, respectively, compared to previous estimates, due to larger production, as per latest estimate revisions by the private sector. Grapefruit consumption increased slightly to 66,000 MT due to larger imports.

Estimated annual per capita citrus consumption is as follows:

Year	Lemon	Orange	Tangerine	Grapefruit
2009	0.94	13.23	4.52	2.56
2010	0.74	10.15	4.35	1.95
2011	1.59	16.72	7.15	1.82

Source: Federcitrus, based on own data and, data from the National Institute of Agricultural Technology (INTA, in Spanish), and Top Info Marketing S.A.

Trade:

Exports

Fresh lemon exports for MY 2012/2013 are projected to remain stable at 265,000 MT, compared to the previous year, despite increased production. According to private sources, in the Province of Tucuman, it is possible to produce 350,000 MT of premium-quality fresh lemon to supply export markets. However, the fresh lemon export business is not attractive due to extremely high costs and low competitiveness. This scenario is not expected to change in the near future unless international lemon prices increase significantly, or there is a devaluation of the local currency vis-à-vis the dollar. In addition, the "All Lemon" certification seal that has been developed by the Argentine lemon sector (see Promotion Section) regulates the volume of fresh lemons for export, based on quality, to avoid steep price decreases.

In MY 2012/2013, fresh oranges and tangerine exports are estimated to decrease to 40,000 MT and 45,000 MT, respectively, compared to the previous year, as a result of smaller production and because the local citrus sector does not expect any significant change in the economy that would increase their competitiveness in the international fruit market. Fresh grapefruit exports are expected to remain stable. Exports of this type of citrus fruit are negligible and domestic consumption is decreasing as grapefruit consumption is going down globally.

Fresh lemon exports for MY 2011/2012 are forecast to increase slightly to 267,000 MT, compared to previous USDA estimates. Exports are not expected to increase significantly, despite the increase of production, due to larger fruit sizes, which exceeded the size demanded by most export markets, and also as a consequence to reduced demand in the EU resulting from the economic crisis. Although the harvest was delayed about 40 days due to excess rains at the beginning of the harvesting season (March-April), this eventually became an advantage to Argentine lemons since the fruit arrived in Europe in May, when Spain had already sold most of its fruit, leaving Argentine lemons with virtually no competition.

Orange and grapefruit exports for MY 2011/2012 are projected to decrease to 80,000 MT and 3,000 MT, respectively, compared to previous official estimates, as a result of larger domestic consumption and more fruit devoted for processing (for oranges). Also, due to lack of competitiveness of the local fruit sector which favored selling the fruit in the domestic market. Moreover, there was larger fruit supply in competing countries. The decrease expected in grapefruit exports is due to a gradual decrease of international demand for this citrus fruit.

Fresh lemon exports for MY 2010/11 remained stable at 255,000 MT, compared to previous USDA estimates, despite larger production, due to increased competition from other producing countries in the Northern Hemisphere, such as Spain and Turkey, whose production has gone up. In addition, following the practice carried out in the past few years, relatively high volumes of fruit were devoted for processing as a result of the decision made by the industry to export only fresh lemons meeting higher quality standards, thus restricting the

export supply and preventing a steep decrease of international prices. This market strategy is working very well and expected to continue. Fresh orange and tangerine exports remained stable at 125,000 MT and 115,000 MT, respectively, despite larger production, as more fruit was devoted for domestic consumption and processing. Fresh grapefruit exports remained stable at 10,000 MT.

Argentina does not export fresh organic lemons, given that fruit undergoes a bleaching process, which is not allowed under organic certification standards. However, some lemon by-products are produced and exported as organic.

Argentine fresh citrus fruit are exported to over 80 markets. The main export destinations, by volume, in CY 2011 and January-September 2012 were as follows:

Fresh Citrus Fruit	Destination	Market Share %	
		2011	Jan-Sep 2012
Lemons	EU	70	70
	Russia	17	15
Oranges	EU	70	66
	Russia	9	6
Tangerines	EU	30	27
	Russia	40	42
Grapefruit	EU	86	74
	Russia	7	11

Source: FAS Buenos Aires, based on data from the Global Trade Atlas (GTIS)

For MY 2012/2013, no major export market diversification is expected for citrus fruit. The EU and Russian markets are not expected to expand significantly as no growth in population is projected, thus, demand is forecast to remain stable. In MY 2011/2012, fresh lemon exports to non-traditional markets increased due to reduced fruit supply from South Africa. However, the lemon sector does not expect exports to grow significantly to Asia and the Middle East as freight costs from South Africa are less expensive than from Argentina, thus South Africa has more competitive prices. Industry is now focused on opening the U.S. market. According to private sources, fresh lemon exports from Argentina to the U.S. would not exceed 20,000-25,000 MT per marketing, at first. In January-September 2012, the EU remained the largest export market for most types of Argentine citrus fruit: lemons (70 percent market share), oranges (66 percent), and grapefruit (74 percent); and the second largest market for fresh tangerines (27 percent). Russia was the second largest market for all citrus fruit, except tangerines, where Russia is the largest market accounting for an average of 42 percent of total Argentine tangerine exports, 15 percent of lemons, 6 percent of oranges, and 11 percent of grapefruit. Other markets which increased imports of Argentine lemons were Turkey, Azerbaijan, Saudi Arabia, Canada, and Hong Kong, among others.

Imports

Citrus imports are expected to remain negligible in MY 2012/2013. This trend is forecast to continue in the future as Argentina is a net citrus fruit exporting country, and especially with government food import restrictions, which have been in place in the past few years (see Policy Section).

Policy:

Import and Export Regulations

On December 22, 2008, President Cristina Fernandez de Kirchner announced a package of stimulus measures for the Argentine agricultural sector. The measures affecting fruit and vegetables were published in the Official Bulletin, Decrees Nos. 38/2008 and 40/2008, on December 31, 2008. They established that the export tax for pears, apples, peaches, citrus fruit, grapes, blueberries, strawberries, onions, frozen potatoes, beans and pulses were reduced by 50 percent (i.e. fresh deciduous fruit and stone fruit currently pay a 5 percent export tax, while citrus fruit and vegetables pay 2.5 percent).

The changes did not have a significant impact on overall fruit production. Export taxes for these products were already relatively low (5 percent to 10 percent). Part of Argentina's 2.5 percent export tax on citrus is rebated depending on the size of the container.

Export and import tariffs for all citrus types are as follows:

Export and Import Tariffs	
All Citrus Fruit (HTS codes: 080510, 080520, 080540, 080550)	
For countries outside MERCOSUR AREA	%
Import Tariff	10.00
Statistical Tax	0.50
Export Tax	2.50
Export Rebate for cases containing less than 16 kg.	5.00
Export Rebate for cases containing 16–20 kg.	4.05
Export Rebate for cases containing more than 20 kg.	2.70
For countries within MERCOSUR AREA	
Import Tariff	0.00
Statistical Tax	0.50
Export Tax	2.50
Export Rebate for cases containing less than 16 kg.	5.00
Export Rebate for cases containing 16–20 kg.	4.05
Export Rebate for cases containing more than 20 kg.	2.70

Source: FAS Buenos Aires based on data from Tarifar

The Argentine fruit sector is concerned about the numerous trade restrictions and requirements affecting imports which have been instituted by the GOA. These policies hamper producers in acquiring needed production and processing inputs, which must be replaced by locally-manufactured products at higher costs, and have also reduced citrus imports. Other measures require preapproval for imports weeks before beginning the importation process. Additional obstacles include the imposition of strict limits on foreign exchange transactions and restrictions against the payment of dividends and repatriation of profits, more widespread usage of non-automatic import licenses, and difficulties in obtaining certificates of country-of-origin for products to be imported.

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Phytosanitary Issues

Argentine phytosanitary authorities continue negotiations with China to reopen the market for Argentine fresh lemons. Trade was interrupted in 2005 when China established cold treatment for all citrus fruit, which damaged the fruit quality. The industry has been focusing on other export destinations pending negotiations with officials in China. Currently, the market is open to fresh “sweet” citrus varieties.

A few citrus diseases are still problematic for Argentine producers, including *Citrus Variegated Chlorosis* (CVC) and *Citrus Greening Disease* (*Huanglongbing* or HLB). APHIS has worked with SENASA to develop a Pest Risk Assessment (PRA) and a set of risk mitigation measures to allow the United States to safely import lemons from northwest Argentina, including Tucumán. APHIS and SENASA continue to work to advance this issue; however, APHIS and the U.S. citrus industry are concerned about CVC and how to address the risk of introducing CVC via seeds in commercially imported lemons.

Citrus Greening: On July 4, 2012, APHIS/IS Buenos Aires was officially informed that a case of HLB was recently reported in one infected tangerine tree in Puerto Deseado, Province of Misiones (NEA region of Argentina – close to the border with Brazil). The infected tree was destroyed as a precautionary action. In addition, SENASA (Argentine phytosanitary authorities) intensified the surveillance for citrus species in the area with sampling in 150 premises with negative results for both: symptoms and vector (*Diaphorina citri*) of the disease. SENASA stated that, since the location is not a citrus commercial area, and it is surrounded by national parks, it is likely that this was an illegal introduction from Brazil. Based on the above, SENASA still maintains its HLB-free status.

Marketing:

Prices

International (FOB) Prices for Fresh Citrus Fruit

Fresh lemon FOB prices during the beginning of the marketing season of 2012 were high as shipments were delayed since the harvest was delayed over a month due to heavy rains. As a result, Argentine lemons entered the European market when Spanish lemons had already been sold out, which increased prices for the Argentine citrus fruit. However, they fell down by the end of the season. Fresh orange FOB prices were lower than the previous season, due to larger fruit supply from competitors, and overall, fresh tangerine FOB prices were higher than the previous year. Grapefruit prices went down especially by the end of the marketing year.

The highest FOB price for lemons during January-September 2012 was \$839/MT (March); for oranges, \$492/MT (June); for tangerines, \$908/MT (July); and for grapefruit, \$590/MT (April).

Lemon	FOB Prices (\$/MT)			
	2009	2010	2011	Jan-Sep 2012
January	713	--	700	--
February	604	--	--	--
March	778	978	915	839
April	589	620	644	688
May	556	671	666	712
June	602	742	689	703
July	633	724	716	705
August	657	783	688	705
September	642	698	679	759
October	566	700	--	n/a
November	--	667	--	n/a
December	--	700	--	n/a
Average	634	728	712	n/a

Source: FAS Buenos Aires based on GTIS trade data

Orange	FOB Prices (\$/MT)			
	2009	2010	2011	Jan-Sep 2012
January	--	--	--	--
February	--	--	--	--
March	--	--	--	--
April	194	155	114	--
May	440	483	495	364
June	494	498	531	492
July	478	471	506	441
August	485	457	519	439
September	455	422	486	400
October	384	381	357	n/a
November	205	232	116	n/a
December	--	--	--	n/a
Average	392	387	391	n/a

Source: FAS Buenos Aires based on GTIS trade data

Tangerine	FOB Prices (\$/MT)			
	2008	2009	2010	Jan-Sep 2012
January	333	1,000	--	--
February	1013	821	894	832
March	785	774	806	818
April	733	763	779	806
May	749	766	818	816

June	760	768	837	826
July	749	771	838	908
August	742	746	842	890
September	721	742	827	838
October	655	695	754	n/a
November	--	100	--	n/a
December	--	--	--	n/a
Average	724	722	822	n/a

FAS Buenos Aires based on GTIS trade data

Grapefruit	FOB Prices (\$/MT)			
	2009	2010	2011	Jan-Sep 2012
January	--	--	--	--
February	1,200	--	--	--
March	598	700	723	--
April	546	546	541	590
May	571	521	525	524
June	533			
July	584	478	477	433
August	572	582	600	377
September	513	667	---	212
October	--	--	--	n/a
November	--	--	--	n/a
December	--	--	--	n/a
Average	640	566	565	n/a

Source: FAS Buenos Aires based on GTIS trade data

Wholesale Prices for Fresh Citrus Fruit

Lemon	Domestic Wholesale Prices (\$/MT)			
	2009	2010	2011	Jan-Sep 2012
January	366	1,020	1,070	800
February	352	1,150	1,166	878
March	350	950	970	800
April	328	680	646	621
May	258	490	436	577
June	222	470	392	491
July	221	460	392	427
August	261	490	375	466
September	357	560	389	470
October	470	660	442	n/a
November	742	675	555	n/a
December	737	953	666	n/a
Average	389	773	625	n/a

Source: Buenos Aires Central Market

Orange	Domestic Wholesale Prices (\$/MT)			
	2009	2010	2011	Jan-Sep 2012

January	217	280	308	309
February	229	280	338	322
March	276	340	366	423
April	310	340	448	412
May	298	350	434	396
June	301	320	380	361
July	295	310	345	404
August	299	300	312	410
September	339	280	336	416
October	350	293	380	n/a
November	373	300	397	n/a
December	382	313	369	n/a
Average	306	309	368	n/a

Source: Buenos Aires Central Market

Tangerine	Domestic Wholesale Prices (\$/MT)			
	2009	2010	2011	Jan-Sep 2012
January	n/a	360	422	386
February	n/a	350	366	282
March	n/a	350	331	348
April	296	330	305	285
May	305	330	331	328
June	320	340	352	315
July	332	330	350	313
August	330	310	347	379
September	345	290	340	497
October	400	283	342	n/a
November	389	295	433	n/a
December	442	398	369	n/a
Average	351	301	357	n/a

Source: Buenos Aires Central Market

Grapefruit	Domestic Wholesale Prices (\$/MT)			
	2009	2010	2011	Jan-Sep 2012

January	365	510	541	757
February	NA	550	965	769
March	NA	520	793	781
April	403	490	515	670
May	313	440	478	600
June	301	400	473	478
July	306	390	422	435
August	288	370	401	431
September	336	350	380	429
October	340	343	407	n/a
November	371	440	424	n/a
December	377	595	576	n/a
Average	340	450	531	n/a

Source: Buenos Aires Central Market

Domestic Retail Prices for Fresh Citrus Fruit

Citrus Fruit	\$/kg
Lemon (premium)	3.07
Lemon (standard)	1.75
Orange (Navel)	2.06
Orange (Valencia)	0.98
Tangerine (Clementina)	--
Tangerine (Nova)	--
Tangerine (Murcott)	2.06
Tangerine (Dancy)	--
Tangerine (Ellendale)	--
Grapefruit (Marsh)	0.82
Grapefruit (Ruby)	2.78
US\$1 = AR\$4.85 (December 7, 2012)	

Source: FAS Buenos Aires based on supermarket prices

Promotion

“ALL LEMON Tested & Certified for Export” is the Argentine quality seal which certifies the quality of about 85 percent of lemons devoted for export. Currently, this program, created in 2009, carries out audits to the 15 leading lemon producers and exporters in Argentina. Its primary goal is to develop and establish quality standards to be applied by lemon companies, which are committed to export a strictly selected product. Lemons identified under ALL LEMON parameters must comply with:

- High juice content
- Resistance and durability
- Firmness
- Freshness
- Uniform format
- Balanced color
- Skin in optimal condition
- Traceability and safety.

Production, Supply and Demand Data Statistics:

Lemons/Limes, Fresh Argentina	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Jan 2011		Market Year Begin: Jan 2012		Market Year Begin: Jan 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	48,600	48,600	49,000	49,000		49,500
Area Harvested	45,000	45,000	45,500	45,500		46,000
Bearing Trees	14,000	14,000	14,500	14,500		14,500
Non-Bearing Trees	1,000	1,000	1,000	1,000		1,000
Total No. Of Trees	15,000	15,000	15,500	15,500		15,500
Production	1,500	1,550	1,200	1,300		1,450
Imports	1	1	0	0		0
Total Supply	1,501	1,551	1,200	1,300		1,450
Exports	255	255	260	267		265
Fresh Dom. Consumption	80	85	70	70		80
For Processing	1,166	1,211	870	963		1,105
Total Distribution	1,501	1,551	1,200	1,300		1,450
HECTARES, 1000 TREES, 1000 MT						
Oranges, Fresh Argentina	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Jan 2011		Market Year Begin: Jan 2012		Market Year Begin: Jan 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post

Area Planted	48,900	48,900	48,900	48,500		48,000
Area Harvested	46,500	46,500	46,500	47,000		46,500
Bearing Trees	23,000	23,000	23,000	22,800		22,500
Non-Bearing Trees	2,000	2,000	2,000	1,950		1,900
Total No. Of Trees	25,000	25,000	25,000	24,750		24,400
Production	800	850	500	565		340
Imports	1	1	0	0		0
Total Supply	801	851	500	565		340
Exports	125	125	90	80		40
Fresh Dom. Consumption	550	560	340	380		230
For Processing	126	166	70	105		70
Total Distribution	801	851	500	565		340

HECTARES, 1000 TREES, 1000 MT

Tangerines/Mandarins, Fresh Argentina	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Apr 2011		Market Year Begin: Apr 2012		Market Year Begin: Apr 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	35,600	35,600	35,600	35,200		34,700
Area Harvested	33,500	33,500	33,500	34,000		33,500
Bearing Trees	18,000	18,000	18,000	17,800		17,500
Non-Bearing Trees	2,000	2,000	2,000	1,950		1,900
Total No. Of Trees	20,000	20,000	20,000	19,750		19,400
Production	400	450	250	290		200
Imports	0	0	0	0		0
Total Supply	400	450	250	290		200
Exports	115	115	80	100		45
Fresh Dom. Consumption	175	190	100	150		120
For Processing	110	145	70	40		35
Total Distribution	400	450	250	290		200

HECTARES, 1000 TREES, 1000 MT

Grapefruit, Fresh Argentina	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Jan 2011		Market Year Begin: Jan 2012		Market Year Begin: Jan 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	6,400	6,400	6,350	6,300		6,250
Area Harvested	6,000	6,000	6,000	5,900		5,850
Bearing Trees	1,500	1,500	1,500	1,450		1,400
Non-Bearing Trees	50	50	50	50		45
Total No. Of Trees	1,550	1,550	1,550	1,500		1,445
Production	160	160	160	100		80
Imports	1	2	0	0		0
Total Supply	161	162	160	100		80
Exports	10	10	10	3		3
Fresh Dom. Consumption	65	66	65	55		49
For Processing	86	86	85	42		28
Total Distribution	161	162	160	100		80

HECTARES, 1000 TREES, 1000 MT

