

season update

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MARKETS – SEPTEMBER 2006 REPORT

The summer navel season is coming to an early end with some pack-houses finished and others looking to finish early-mid October.

With the low volumes and now low acids in the fruit it appears there will be no navel storage program this season.

A small volume of Valencia's have been harvested and packed from week 37 but size and maturity is disappointing. Growers have a decision to make on holding their fruit until the juice processor price kicks in, or pick earlier to save on watering costs.

Ellendale mandarins have all but finished from Southern growers, and Honey murcotts are expected to start in week 39.

Market conditions for all fruit has been strong as all Southern Hemisphere citrus growing countries experienced various weather conditions that reduced the crop volume.

As a result prices for larger sizes have gone up, but sales of smaller fruit have been slow with some price pressure.

LEMONS

Domestic

Early September saw Sydney oversupplied with lemons from local growers forcing prices down from previous \$40/ctn sales

Strong demand continues for large lemons with sales into chains up to \$32.00/ctn, but small sizes are struggling.

Export

Demand from Hong Kong and Japan was quite strong but they were looking for light colour lemons and most of the fruit was too highly coloured. Some shipments may be made but most exporters were erring on the side of safety and not shipping so as to avoid quality issues and claims.

ELLENDALES

Domestic

Market has remained firm with consistent orders.

Export

Strong demand continued from USA, New Zealand and UK markets with good returns. USA prices are USD2.50-3.00 above season 2005, with a higher (40%) count 70 (68-72mm) allowed this season.

NAVEL

Domestic

Sales into chains continued strongly with Shelf ready trays selling around \$23.00. Prices for bags were low and varied from \$1.40-1.70. Late in the month marketed firmed for all navels as supplies ran short.

Export

The final vessel for USA sailed end week 36 with over 3000 pallets of navels on board. There is strong demand for all sizes and for the first time ever we were able to ship 140 pallets of count 113, together with an unlimited volume of count 88 (previously restricted to 10-15%). This was due to the shortage of large fruit and

should not be considered an option for the future. Average prices were up USD1-5.00/ctn over 2005, but final return will be dictated by the exchange rate.

The Asia markets were looking for large class 1 fruit, but were virtually only receiving small class 1 and second grade large fruit as supplies dried up.

Programs to UK/Europe were also shorted, as was Korea and China but this was more to do with protocols. Japan was a strong market especially for fruit from the fruitfly-free region of South Australia.

Source: Australian Horticultural Exports Association (AHEA)