



Growing lemons in Australia- a production manual - Readers' Note

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<http://www.dpi.nsw.gov.au/agriculture/horticulture/citrus/lemon-manual>

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17. Marketing

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Photo by Greg Moulds
Australian lemons

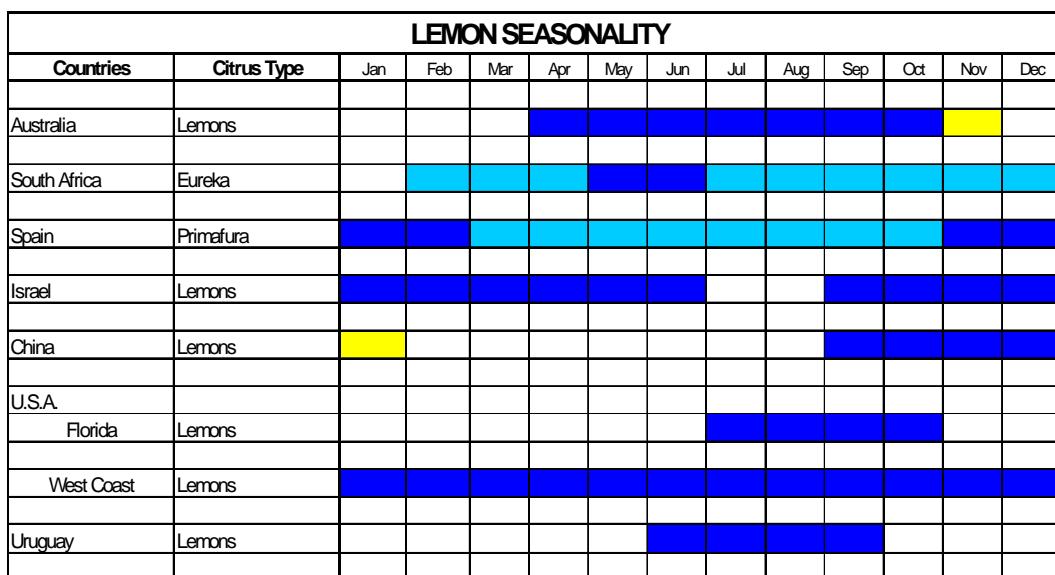
MARKET OPPORTUNITIES - DOMESTIC AND EXPORT

A report entitled, "*Identification of Export Markets for Australian Fresh Lemons*" was produced by Australian Business Limited in June 2002 for this project. (This report is available on the Australian Citrus Growers website.) It draws data from Horticulture Australia Ltd [HAL] and Australian Citrus Growers funded project CT 99027 entitled, "*Citrus Export Market Intelligence System*". For more information refer to these publications available from Horticulture Australia.

In summary, the report highlighted the seasonality of production, identified overseas market opportunities and Australia's competitors in the major lemon markets and presented prospects for the future. Canada was identified as a promising export opportunity, however longterm storage where lemons can be stored fresh for up to six months was not considered. This would allow existing large northern hemisphere producers like Spain and Turkey to supply to promising northern hemisphere markets like Canada.

LEMON SEASONALITY

As would be expected considerable discrepancies exist with defining seasonality given sub-regions, varieties and annual weather patterns. The following chart is an approximation only but useful in identifying our major seasonal competitors.



Colour
Peak
Off-peak
Cross-over



AUSTRALIAN DOMESTIC MARKET PRICES AND VOLUMES

The main production period in Australia is during winter and domestic market prices are at their lowest. The summer period is when Australian lemons are in short supply and some fruit is imported into the country (around 2,500 tonnes).

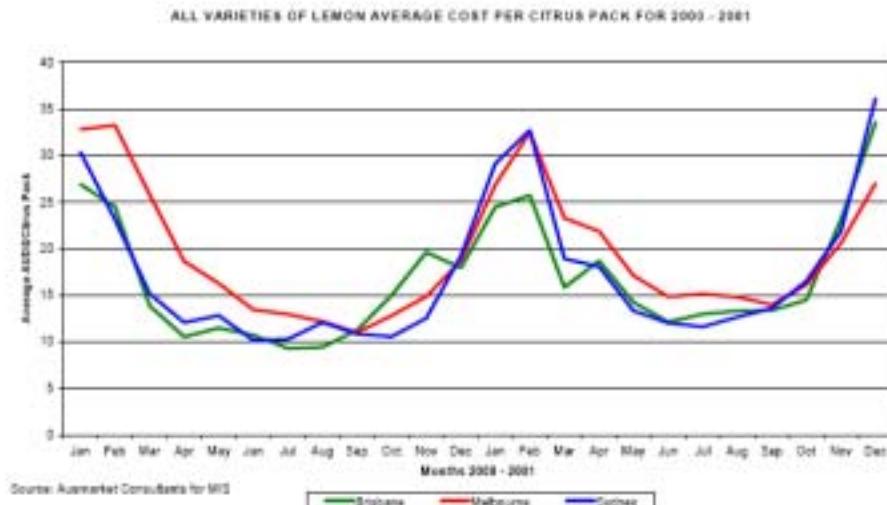


Photo by Greg Moulds
Queensland lemons



Photo by Greg Moulds
South Australian lemons

COMPETITORS

Lemon and Lime Production (Mt)	1999	2000
Argentina	1,042,657	1,171,498
Australia	29,294	32,384
Chile	110,000	116,600
South Africa	112,407	105,720
Spain	891,700	905,400
United States of America	677,670	762,040
Uruguay	46,834	48,000

Worldwide major lemon production

Source: FAO statistics (United Nations)

Argentina

Argentina is the world's largest producer of lemons and is a major lemon exporter (approx 200,000 tonnes) during the period April/May to August/September, probably a month earlier than Australia. Most exports are destined for Europe including Russia and Poland as well as Western European countries. Exports to Asia are relatively small at present with the major market being Hong Kong (some 4,000 tonnes). In August 2003 lemons (500t) were exported to Japan for the first time.

South Africa

South Africa as a major citrus grower exports substantial quantities of lemons (note statistics also include limes) with an export season of March/ April to August/September, not unlike Argentina and about a month earlier than Australia.

Spain

Spain is a major grower and exporter of lemons (note statistics are for lemons + limes) exporting half a million tonnes per year almost solely (apart from exports to USA) to west and east European markets. Production is year round but dips in the July to October period (Australia's major supply season).

USA

The USA grows lemons year round but supply is less around August to October. It is a major lemon exporter to Canada and the north east Asian markets of Japan, Korea, and Hong Kong. It supplies Australia in the lead up to and during the Christmas/New Year period.



Photo by Greg Moulds
Californian lemons



Photo by Greg Moulds
South African lemons



Photo by Greg Moulds
European lemons

SIX BEST PROSPECTS FOR EXPORT



Japan

The Japan market for imported lemons is substantial at 92,000 tonnes in 2000 and at higher levels in previous years.

- ***Quarantine & Phytosanitary Requirements*** - Specific varieties permitted with phytosanitary certificate, pre-shipment treatment and additional declaration. The declaration needs to certify that the citrus fruits covered by this certificate are apparently free from Mediterranean fruit fly and Queensland fruit fly.

Transit cold treatment is now approved by Japan, however, a Japanese inspector has to spend six months in Australia or an Australian inspector has to travel (in transit) to Japan. In Japan, normal import inspections still apply (as per usual for imported goods).

- ***Import Duty*** – Duty free. Consumption tax of 5% of duty paid value applies.

Current Suppliers

Major suppliers to the Japanese market are in order USA, Chile, South Africa, Australia, New Zealand, and Spain. Mexico supplied some 800 tonnes in 1998 but negligible quantities in 1999 and 2000. Argentina exported lemons to Japan for the first time in 2003. The USA dominates the market with a share in excess of 80%.

Seasonality of supply is reported as:

USA - year round (but weakest in August – October)
 Chile - June to November (peaking in July – September)
 South Africa - June to September/October
 Australia - June to October/November
 New Zealand - June to November
 Spain - March to July

The USA is supplying mainly from California with Eureka and Lisbon varieties. Chile is reported as supplying Eureka and Genova types.

Australia's Current Position

Australia exported some 1,100 tonnes of lemons to Japan in 1999/00 making it the largest export market by far (Hong Kong second with 647 tonnes) for Australian lemons.

These quantities however are quite small (< 2% market share) when considering Japan imported over 90,000 tonnes in year 2000. Australian exports to Japan have also been substantially larger (2,000 – 4,000 tonnes pa) in the mid – late 1990's.

Consumer Requirements

Preferred sizes are reported as 95's through to 165's (US size carton), no taste requirements (other than tastes like lemon), good yellow colour, smooth skin and good shape, pitting and bruising unacceptable.

USA sources report Japanese buyers prefer Eureka and Lisbon varieties and only top quality fruit – ‘fancy’ grade. “Buyers want the best and are willing to pay a premium” (Source: Asiafruit, March/April, 2000, p70).



Prices

Based on import statistics, average CIF import prices are generally around US\$1500 per tonne, but would seem to exceed this from around June/July/August through to November/December. Australian lemons have however consistently failed to achieve even the average market price in recent years and range from around US\$1100 to US\$1300 per tonne despite being imported during the months of highest prices. Australian prices during the supply season are the lowest of any supplier except South Africa with USA, Chile, and New Zealand all commanding significantly higher prices.

Prices achieved for Australian lemons would seem to suggest either a low quality/low demand product or price negotiation from a position of weakness or unpreparedness.

The Opportunity

The Japanese market for imported lemons exceeds 90,000 tonnes / US\$100 million per annum. Australia's current share is less than 2% on volume and even less on value. Despite relatively low selling prices compared with most other suppliers, Australia still achieves an average CIF price around US\$1200 (AUD\$ 2300) per tonne.

We believe Australia is capable of building both market share and average selling price. Supply of lemon imports into Japan seems lowest in September/October with supplies ex the USA seemingly at their seasonal low point. Average prices are also peaking around this period despite Australia's relative poor performance in this regard. Japanese consumers are however demanding high quality fruit and are reported as willing to pay for it.

Shipping times (17 days), frequencies, and costs from Australia to Japan should not be at a disadvantage compared to South Africa, New Zealand, or Chile. Improved shipping transit times from Chile to Japan are reported as now being 28 days. Potential threats could possibly come from Argentina and are the world's largest lemon producer.



China

The market for imported lemons in China is not very large, but is growing. In 1999 China imported 2,500 Metric tonnes of lemons and limes and in 2000 this figure doubled to close to 5,000 tonnes.

- ***Quarantine & Phytosanitary Requirements*** – Prior to China's entry to the World Trade Organisation (WTO) early in 2002, all citrus was prohibited into China, except for supply to the hotel trade. No PC required, but details of proposed imports have to be submitted to the port of inspection service of CAPQ (China Administration of Animal and Plant Quarantine) who will inspect them on arrival. We can obtain no advice whether this is still the case.
- ***Import Duty*** – Duty is 40% of the C.I.F. and then a further 13% V.A.T. calculated on this value. Tariffs can be expected to progressively reduce with WTO membership.

Current Suppliers

The major suppliers to the Chinese market are the United States and New Zealand. These two countries account for approximately 97% of China's

lemon and lime imports. South Africa exported 24 tonnes to China in 2000, which was less than 1% of the total, being all for hotel trade as South Africa has the same market access restrictions as Australia.

Data has shown that Thailand supplies approximately 160 tonnes of lemons and limes to China, but research has indicated these to be exclusively imports of limes.

Seasonality of supply is reported as:

USA – year round (but weakest between August and October)

New Zealand – June to November

South Africa – June to September/October

The USA is supplying mainly from California and Arizona with Eureka and Lisbon varieties. New Zealand is also supplying Lisbon varieties.

Australia's Current Position

Australia does not currently supply China with lemons. Pre-WTO membership quarantine restrictions prohibited Australia from sending citrus to China for anything other than hotel trade use. Similar restrictions applied to South Africa. We cannot ascertain the current position but believe such restrictions are no longer allowed. Considerable produce continues to enter China via Hong Kong and South African and Argentinean lemons (and probably Australian lemons) can be found at imported wholesale fruit markets in southern China after transportation from Hong Kong.

Consumer Requirements

Lemons are generally used in hotels and restaurants as garnishes for food and drinks. Wholesalers in China say that domestic lemons are used as an ingredient for a few traditional medicine recipes in the growing regions and according to the local lemon importers, buyers are mainly hotels, bars and restaurants. Because the main buyers are the 4 and 5 star hotels there are no problems accepting high prices for the best quality fruit. The domestic lemon quality is poor and the Beijing variety is closer to an orange than a lemon. Russia has been the main destination for China's lemon exports.

Prices

Prices reflect the popularity of good quality citrus and often good quality smuggled citrus. Over the last couple of years US lemons could cost, at market, anywhere between US\$15 and US\$25 per 15-20kg box, at the higher end of the price range. South African lemons are achieving no higher than US\$16 per 15 kilogram box.

The average price per Metric tonne of lemons imported to China in 2000 was approximately AUD\$850. The average from the United States was AUD\$900 and from New Zealand AUD\$800. South Africa claimed a higher price, over AUD\$1000, but this would be due to the low quantity supplied. The prices for lemons start to rise towards July and corresponding with the Australian season stay high until December, showing good incentive for Australian growers and distributors.

Interestingly, Australian navel oranges smuggled over from Hong Kong were achieving prices over US\$30 per 15 kilogram box at wholesale fruit markets in 1997.

The Opportunity

Currently the import market for lemons and limes in China would appear small on a global scale. With China entering the WTO and lightening their quarantine stance the market should open and potentially offer Australia growers quite tidy returns. From the experiences of those already selling citrus to the fruit wholesale markets, the returns have been quite reasonable whilst discussions with wholesalers and distributors suggest China is very keen to increase imports of Australian citrus.

Peak prices are found in the mid to later months of the year, right in the middle of the Australian season and the US seasonal low point. However, this is within the New Zealand season also, and New Zealand already has a large share of the market and has had for some years. Australia's main competitor to the market is South Africa, while Argentina could become a threat having some experience in China in the past five years.

Shipping to China is another advantage for Australia with a direct service from Brisbane to Shanghai taking 14 days on a weekly frequency run by Maersk Sealand. Numerous other lines sail weekly from Sydney taking 22 days to Shanghai.



Canada

The market for imported fresh lemons in Canada is substantial at some 34,000 Metric tonnes in 2000. Import levels have been steady in recent years and Canada grows little of its own requirements.

- ***Quarantine and Phytosanitary Requirements*** – Permitted with Phytosanitary Certificate.

As per information received from the Canadian Food Inspection Agency, Australian fresh citrus is permitted into Canada with no special requirements. The Canadian Fresh Fruit and Vegetables Regulations prescribe requirements for quality, packaging and labelling for citrus and these regulations need to be followed. The Canadian chemical (pesticides and herbicides) limits should also be observed. Licencing and Arbitration Regulations require all Canadian companies who deal in fresh products interprovincially or internationally to have a licence.

- ***Import Duty*** – Duty free with 15% G.S.T./P.S.T./H.S.T. based on duty paid value.

Current Suppliers

The major fresh lemon supplier to Canada is the United States holding nearly 70% of the market, Argentina has 20% and the other 10% is made up by Spain, South Africa and numerous insignificant players. The United States dominates Canada's fresh lemon trade all year round, but supply is weakest during the months between June and November.

Seasonality of supply is reported as:

USA – year round (but weakest between June and November)

Argentina – June through September



Spain – March to July (but maybe even January to July)

South Africa – June through October

The United States is reported as mainly supplying from California and Arizona with Eureka and Lisbon varieties. Argentina also is supplying Eureka. Spain is supplying Verna and some Fino, South Africa supplies Eureka.

Australia's Current Position

Australia does not currently export any fresh lemons to Canada and has not exported any fresh lemons of a sizeable amount in the past ten years.

During the financial year of 1992 (i.e.: July 1, 1992 – June 30, 1993) Canada imported 33 Metric tonnes of lemons and limes from Australia at a cost of US\$23,000.

Australia does have a history of citrus exports to Canada. Canada is a consistent destination for Australian navel oranges and mandarins each year. With Australia already transporting citrus to Canada this will prove helpful with determining shipping costs and timing.

Consumer Requirements

As the majority of lemons imported by Canada are of American origin, preferred sizes are 95's through to 165's (U.S. carton sizes), U.S. export grades. Most imports are of the Eureka variety, which shows the preference for the standard, smooth yellow lemon. However, from the amount of Spanish imports, there is a demand for the Verna and Fino varieties.

Prices

The average price per tonne for fresh lemon imports was approximately AUD\$1084 in 2000. The price for American fresh lemons was just below this at AUD\$1069 and Argentinean lemons just above at AUD\$1121.

Although Spain was only the number three supplier their price was the lowest at \$1007. Alternatively, South Africa who supplied only 825Mt charged approximately AUD\$1341 per tonne in 2000.

The Opportunity

The market for fresh lemon imports in Canada is a strong one. In 2000 Canada imported approximately 34,000 Metric tonnes of fresh lemons and a similar figure for 1999. Australia is not currently part of the market, but from experience with other citrus, prospects for exporting Australian lemons to Canada appear good.

Prices available in the Canadian market are above AUD\$1,000 per tonne. Prices peak between July and November, the period in which Australia can supply. This period is also during the United States' weak period whilst overall imports into Canada in September/October/November (the end of Australia's supply season) are below the monthly average.

Shipping times, like to the United States, are fairly long but viable especially to west coast markets such as Vancouver. South Africa has only recently entered the Canadian market and is now starting to increase exports substantially (we assume entry is from east coast ports) and provides a good example to Australian exporters. Possibilities may exist for 'Riversun' citrus charter shipping ex Australia to the USA to sail on to Vancouver after unloading at west coast USA ports.



Hong Kong

The Hong Kong market for imported lemons is healthy at 25,000 tonnes in 2000 and has a steady growth rate.

- *Quarantine and Phytosanitary Requirements* – Permitted with no special requirements.
- *Import Duty* – Duty free.

Current Suppliers

Major suppliers to the Hong Kong market in order are USA, South Africa and Argentina. Cyprus, Thailand, and Uruguay supplied 1,500 metric tonnes between them, but these countries are not seen as steady interests. Australia, however, supplied nearly 1,000 tonnes. The USA dominates the market at present usually supplying a 50% share.

Seasonality of supply is reported as:

USA – year round (but weakest between June and November)

South Africa – June through October

Argentina – June through September

Australia – June through October/November

The USA is mainly supplying from California and Arizona with Eureka and Lisbon varieties. South Africa is reported as supplying Eureka, and Argentina Eureka.

Australia's Current Position

Australia exported close to 1,000 tonnes of lemons to Hong Kong in the calendar year 2000. This makes Hong Kong Australia's second largest export market for lemons (after Japan), yet our market share is still just 4%. This share has been climbing in recent years to the point where the US Dept. Agriculture has (surprisingly) noted Australia as the main threat to the US lemon market in Hong Kong.

Consumer Requirements

Due to the large expatriate populations living in Hong Kong, lemons of good quality are sought. Australian products are far more popular in Hong Kong due to the lower freight costs, but South African and USA lemons are more abundant. Both the two main supermarket chains in Hong Kong, ParkNshop and Wellcome, keep imported organic lemons. The supermarkets service areas with high to middle class clientele whom demand yellow, smoothed skinned lemons without bruising or pitting.

Prices

The average price for imported lemons in Hong Kong is about the AUD\$1,400 per metric tonnes. Australia's lemons have been achieving a price just below this average making them an attractive proposition for distributors in Hong Kong and China.

The USA commands AUD\$1,600 per Metric tonne, which may suggest why Hong Kong may be looking to other suppliers, including Australia (as noted by the USDA in the 'Fresh Citrus Annual – China and the WTO, 2001'). South Africa and Argentina, however, supply for a cost somewhat lower than Australia at AUD\$1,100 and AUD\$1,200 respectively.

The Opportunity

The Hong Kong market for imported lemons in 2000 was close to 25,000 Metric tonnes, nearly AUD\$35 million in value. Australia's current market share is close to 4%, but this has been rising over the last 5 years and looks to increase further into the future. Despite the low selling prices of South Africa and Argentina, the fact that the United States prices are higher shows great incentive for Australian growers.

For Hong Kong, peak prices are in the early months of the year, maybe outside of Australia's season. November is the end of year peak coming after the Southern Hemisphere's season and US seasonal low point, which may indicate a goal for Australia with some regions still able to supply.

Shipping times are good being 18 days out of Sydney at a weekly frequency, with numerous shipping lines, and 9 days weekly out of Brisbane direct to Hong Kong with Maersk Sealand. Shipping times and costs from Australia to Hong Kong should not be a disadvantage especially against South Africa and Argentina.

We believe Australia is capable of increasing its market share in Hong Kong whilst retaining a strong average selling price.



Singapore

The Singapore market for imported lemons is small on a worldwide scale, but for the Asia-Pacific region is quite healthy and growing. The United Nations FAO statistics states that Singapore imported approximately 7,500 tonnes of lemons and limes in the calendar year 2000.

Lemons and limes are not consumed in the same manner as other citrus in Singapore, but are used to make fruit juices or in local food recipes. They are mostly sold to the food service sector although they are available through retail outlets.

- ***Quarantine & Phytosanitary Requirements*** – Permitted with no special requirements.
- ***Import Duty*** – Duty free with a 3% G.S.T.

Current Suppliers

The major suppliers of lemons and limes to Singapore in 2000 were Malaysia and South Africa, and to a limited extent Argentina and Australia. As Singapore and Malaysia do not submit their trade figures to the Tradstat data base, imports of lemons from Malaysia are not noted. However, figures from Austrade in Singapore suggest Malaysia is the supplier for close to 4,000 tonnes of Singapore's lemon and lime imports.

Seasonality of supply is reported as:

South Africa – June through September/October

Argentina – June through September

Australia – June through October/November

South Africa is supplying mainly the Eureka lemon variety. The Malaysian lemon is a more traditional type of fruit used in the local cuisine. It is reported that Malaysia exports some 4,000 tonnes of lemons to Singapore but is not recorded in the Tradstat data. This would make Malaysia the largest supplier to Singapore.

Australia's Current Position

Singapore is currently Australia's third largest export market for lemons and limes. In the calendar year of 2000 Australia exported approximately 440 tonnes of lemons and limes to Singapore. This is still a very small portion of the market with South Africa supplying nearly 70% of recorded imports (Malaysia excluded).

Australia's share of Singapore's lemon and lime imports was likely only about 6% in year 2000 and follows a steady decline in performance over the last 10 years. Given our success with other fruit & vegetables into Singapore, we should be looking to substantially increase our lemon exports to this country.

Consumer Requirements

During the late 1990s the fresh produce market in Singapore felt the aftershocks of the Asian financial crisis. Imports followed a downward trend, which was primarily due to declining consumer demand for high quality produce from the United States, Europe, New Zealand and Australia. Until 1999 Singaporean consumers had no qualms about substituting cheaper produce from nearby sources into their diet, in particular from China and Malaysia. Australian and American produce is now once again finding its place on supermarket shelves in Singapore, but is not as popular as the cheaper Malaysian and South African lemons.

Prices

The average price for imported lemons in Singapore is just over AUD\$700 per tonne. The average price over a year for Australian lemons is AUD\$900 per Metric tonne, peaking in March at nearly AUD\$1,300. Lemons from Argentina also cost AUD\$900 per Metric tonne where South African lemons are much cheaper. On average lemons and limes from South Africa cost below AUD\$600 and this may be the reason South Africa has obtained 70% of the market in Singapore (excluding Malaysian lemons).

No prices were available for imports of Malaysian lemons and limes.

The Opportunity

Although the lemon and lime market is not as large as Japan or Hong Kong it is profitable. Obviously preference is towards the cheaper South African produce, but much higher prices are being paid for the Australian and Argentinean lemons and limes.

Whilst not being shown in our figures, Malaysia is the dominant player in the Singapore market, obviously due to proximity. According to the FAO, Malaysia produced 4,000 tonnes of lemons and limes in 2000 and exported 90% of the crop to Singapore. This is actually a decrease as in 1999 Malaysia exported over 4,000 tonnes to Singapore. The difference is that South Africa has increased its exports by 150% to Singapore and may have taken away some of Malaysia's market share. By looking at seasonality gaps and by having a better quality product South Africa is increasing its market share in Singapore and showing an example for Australia to follow.

Shipping times are 15 days direct from Sydney, weekly, with numerous shipping lines and 9 days direct from Brisbane, also a weekly frequency, with Maersk Sealand. Australia has an advantage over both South Africa and Argentina due to location and shortness of transport times. The cost of

shipping from Australia to Singapore is very reasonable and most shipping lines use Singapore as a trans-shipment point.



The United States of America

Although the United States exported over 100,000 Metric tonnes of lemons and limes in 2000, imports of fresh lemons reached nearly 27,000 tonnes. Imports of lemons have been steadily over 20,000 tonnes per year since 1997.

- **Quarantine & Phytosanitary Requirements** – Permitted only from Riverland, Sunraysia and the Riverina areas with import permit and phytosanitary certification. If either Guignardia citricarpa (citrus black spot) or Spaceloma fawcettivar scabiosa (citrus scab) were detected in citrus from Sunraysia or Riverina, importation would cease. Citrus must be produced according to the conditions governing the entry of citrus, packed in an area free of fruit fly, and subject to in-transit cold treatment.
- **Import Duty** – Lemons 2.2 cents per kilogram.

Current Suppliers

The major suppliers to the United States market at present are Spain, Argentina, Chile and to a lesser degree the Bahamas. These four nations accounted for approximately 96% of the United States fresh lemon imports in 2000. Australia does export a limited amount of lemons to the U.S.A., 231 Metric tonnes in 2000, about 1%.

Seasonality of supply is reported as:

Spain – March to July

Argentina – June through September

Chile – June to November (peaking July-September)

Spain is supplying mainly Fino and some Verna. Argentina is supplying Eureka and Lisbon. Chile is supplying Genova and Eureka.

Australia's Current Position

Australia exported 231 tonnes of lemons to the United States in the calendar year 2000. This was less than 1% of the import market and it is not currently a major market for Australia. Early indications from 2001 reports suggest Australian fresh lemon exports may have increased to some 400 tonnes.

Consumer Requirements

Because the United States is a net exporter of fresh lemons, imports are expected to be of very good quality. Half of the United States imports of fresh lemons in the calendar year 2000 came from Argentina and Chile. This would suggest Eureka varieties are very acceptable, especially as the domestic product is also of this variety. However, Spain fills up the remainder of the United States import demand and supply is mainly of Verna and Fino.

Prices

The average price per metric tonne of imported fresh lemons is just below the AUD\$1300 mark. For Australia's limited exports to the United States in 2000 a very high price was achieved, AUD\$2785 per metric tonne. This landed price may have been inflated due to matters such as small shipments, possible air freight, etc. Prices for lemons in the United States, however, do peak between June and September, which is Australia's export season to the U.S.A, whilst the USD\$ has been very strong cf AUD\$.

Argentina commands a high price of approximately AUD\$1700 per metric tonne, but is only supplied during two months, August and September, albeit with large quantities. Spain has been supplying January to August at a lower than average price of AUD\$1150. Chile, not unlike Argentina, supplies in significant quantities only in the period July through September and at a better price than Argentina, AUD\$1400 per metric tonne.

The Opportunity

The United States overall is a net exporter of fresh lemons. However, imports since 1997 have never been higher, each year recording over 20,000Mt. The majority of imports are between June and October, right in the middle of Australia's lemon marketing season. Australia already exports limited but growing amounts of fresh lemons to the United States whilst other Australian citrus such as navel oranges and easy peelers are becoming established in the American market suggesting the stage is set for increased exports.

Peak prices, interestingly, coincide with the peak import period so returns in the American market look very good for Australian exports of fresh lemons.

Shipping from Australian east coast ports to the United States west coast would take some 21 – 25 days and probably less on Riversun charters, ensuring competitive transport costs and good outturns. September/early October would appear a particularly good period for imports arriving into the USA.

Key References

Identification of Export Markets for Australian Fresh Lemons.

Prepared by International Trade Unit Australian Business Ltd. 30 June 2002.