

# Economic overview Western Australian Citrus

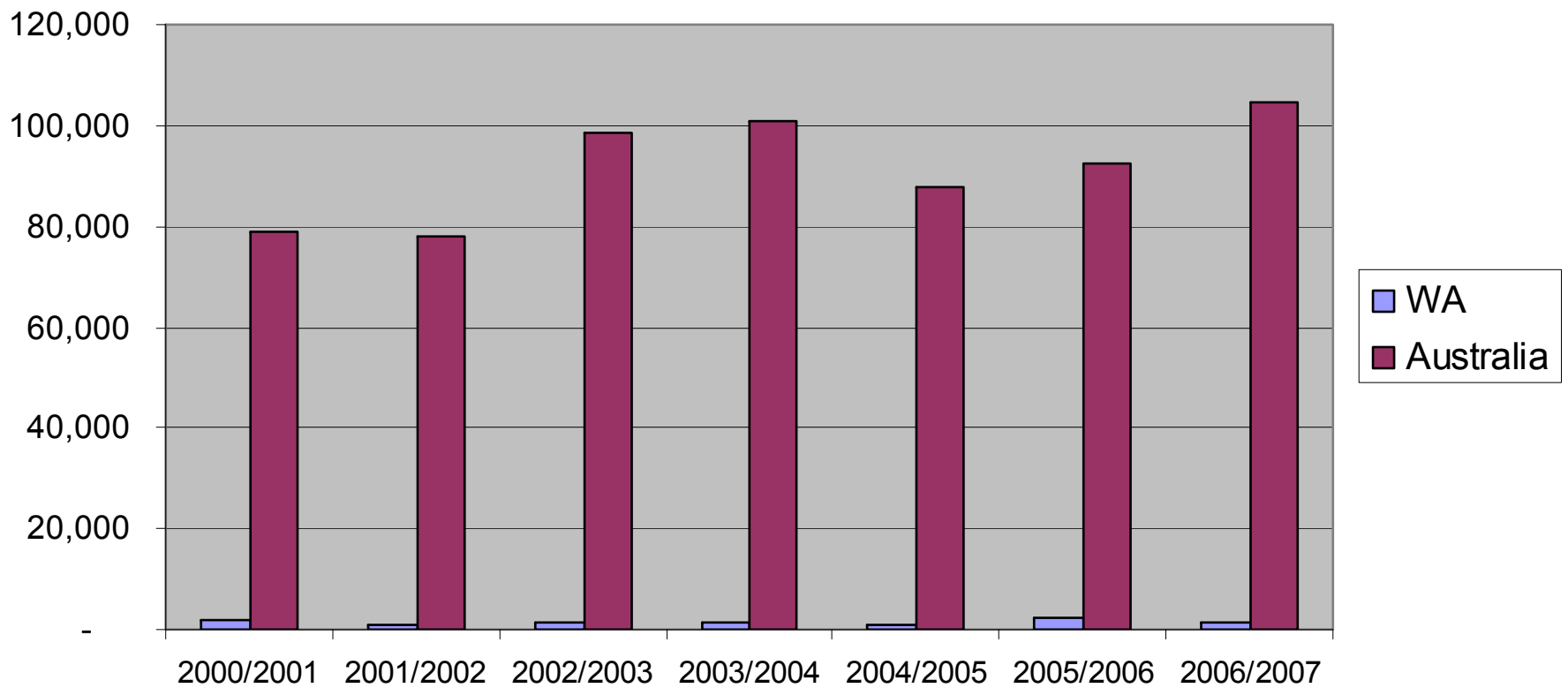
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Department of  
**Agriculture and Food**



# Australian Mandarin production



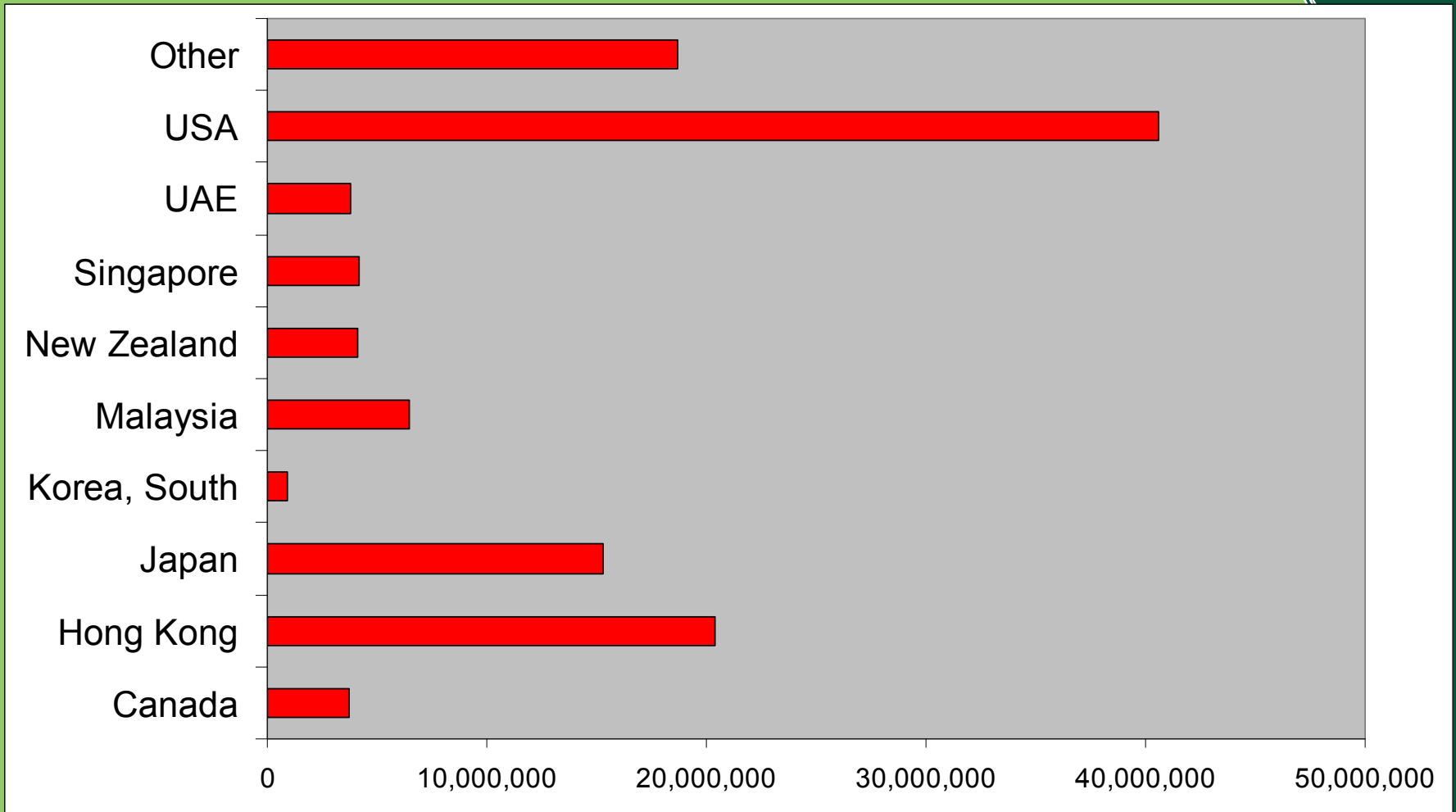
# Western Australian citrus production

	00/01	01/02	02/03	03/04	04/05	05/06	06/07
WA - Orange production	6,512	5,059	5,440	5,744	3,910	7,247	6,408
Australian Orange production	550,200	450,559	599,484	395,164	498,112	507,233	470,673
WA as a % of Aus	1.18%	1.12%	0.91%	1.45%	0.78%	1.43%	1.36%
WA - grapefruit production	981	0	728	1003	385		
Aus grapefruit production	15,475	13,933	17,575	15,117	19,559		
WA as a % of Aus	6.34%	0.00%	4.14%	6.63%	1.97%		

## Australian citrus exports - tonnes

	01/02	02/03	03/04	04/05	05/06	06/07	07/08
Navel oranges	86,743	100,750	67,087	80,869	82,163	98,182	99,405
Valencia oranges	46,733	31,326	24,903	28,825	28,500	28,601	13,972
Grapefruit	300	323	535	290	208	572	0
Mandarins	23,466	29,599	28,575	27,354	19,570	18,218	20,506

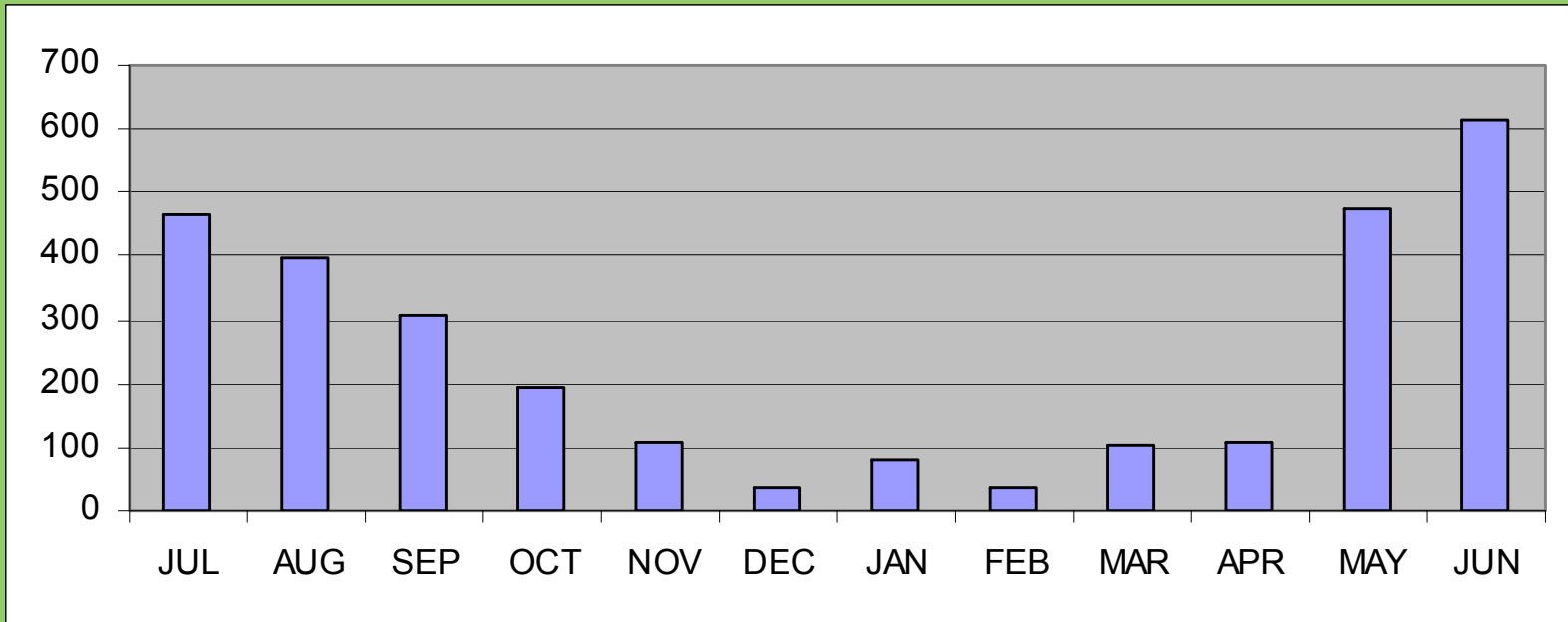
# Australian navel exports \$ 2007/08



# WA consumption & production figures

	2006/07		2004/05
	Oranges	Mandarins	Grapefruit
Australian per capita consumption kg	16.66	4.15	0.97
WA population (million)	2.106	2.106	2.106
WA consumption tonnes	35,084	8,749	2,047
WA production tonnes	6,408	1,551	385
WA exports tonnes	-	9	30
International imports tonnes	2,045	353	181
Eastern states imports tonnes	26,631	6,836	1,451

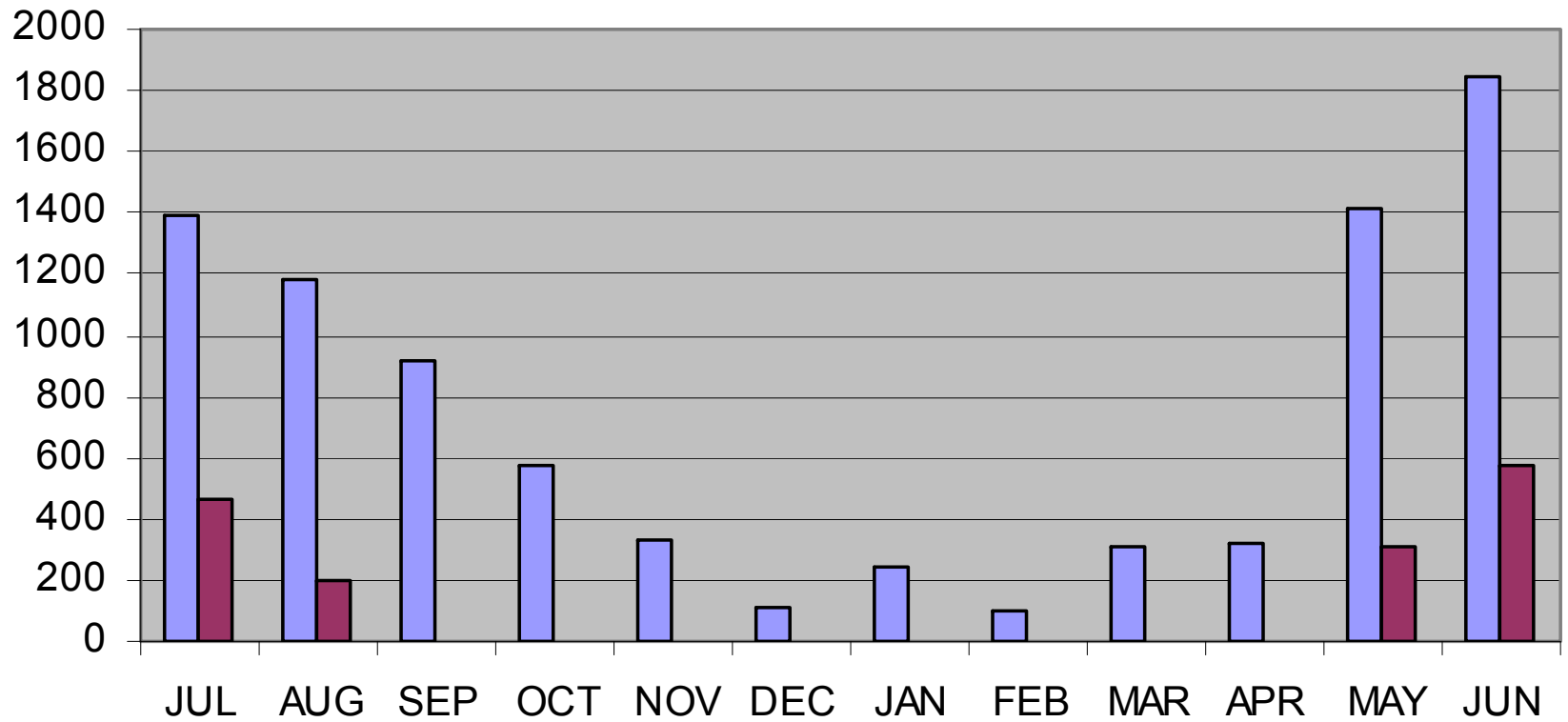
# Timing of market - Mandarins



Monthly volumes through Perth Market

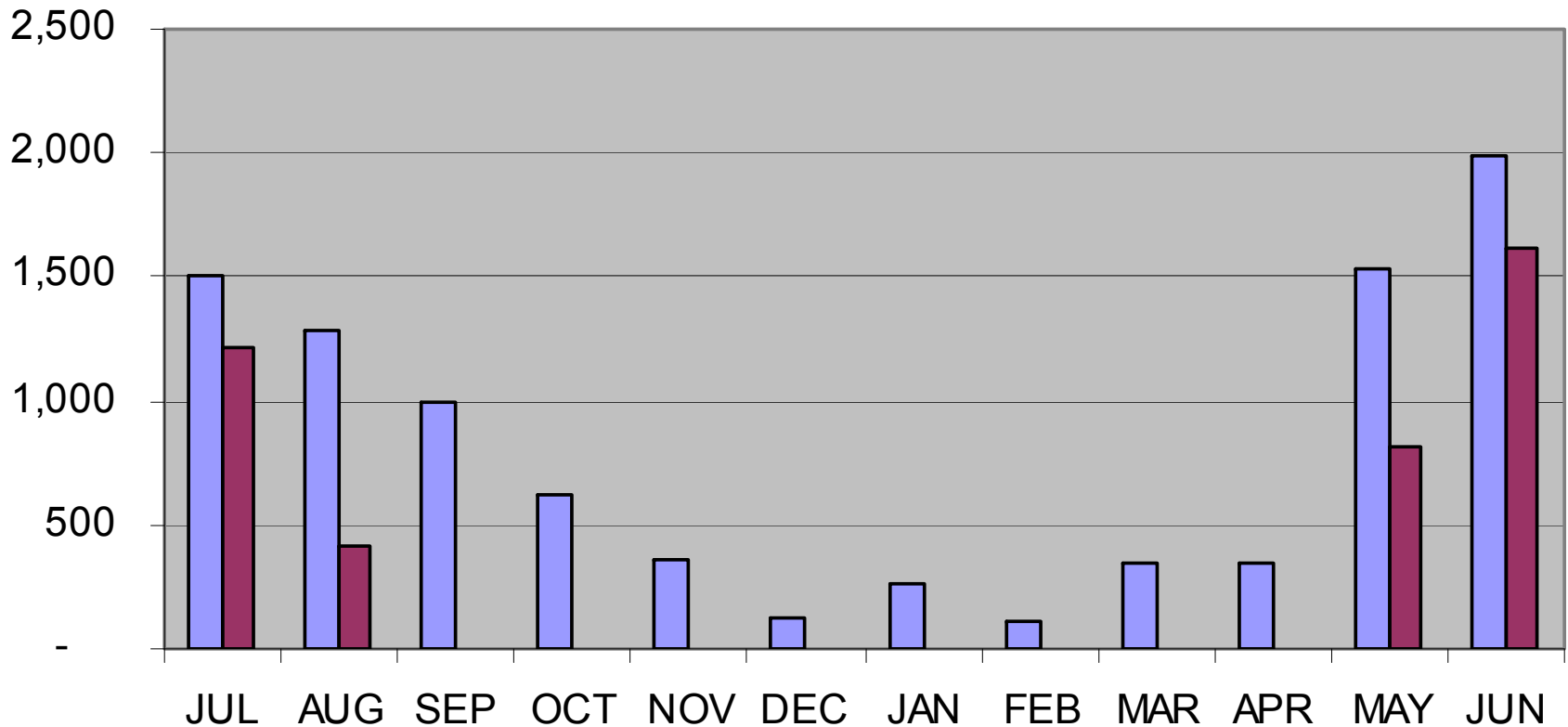
2,925 tonnes of 8,749 tonnes consumed = 33.4%

# WA Mandarin production and Consumption 2006/07

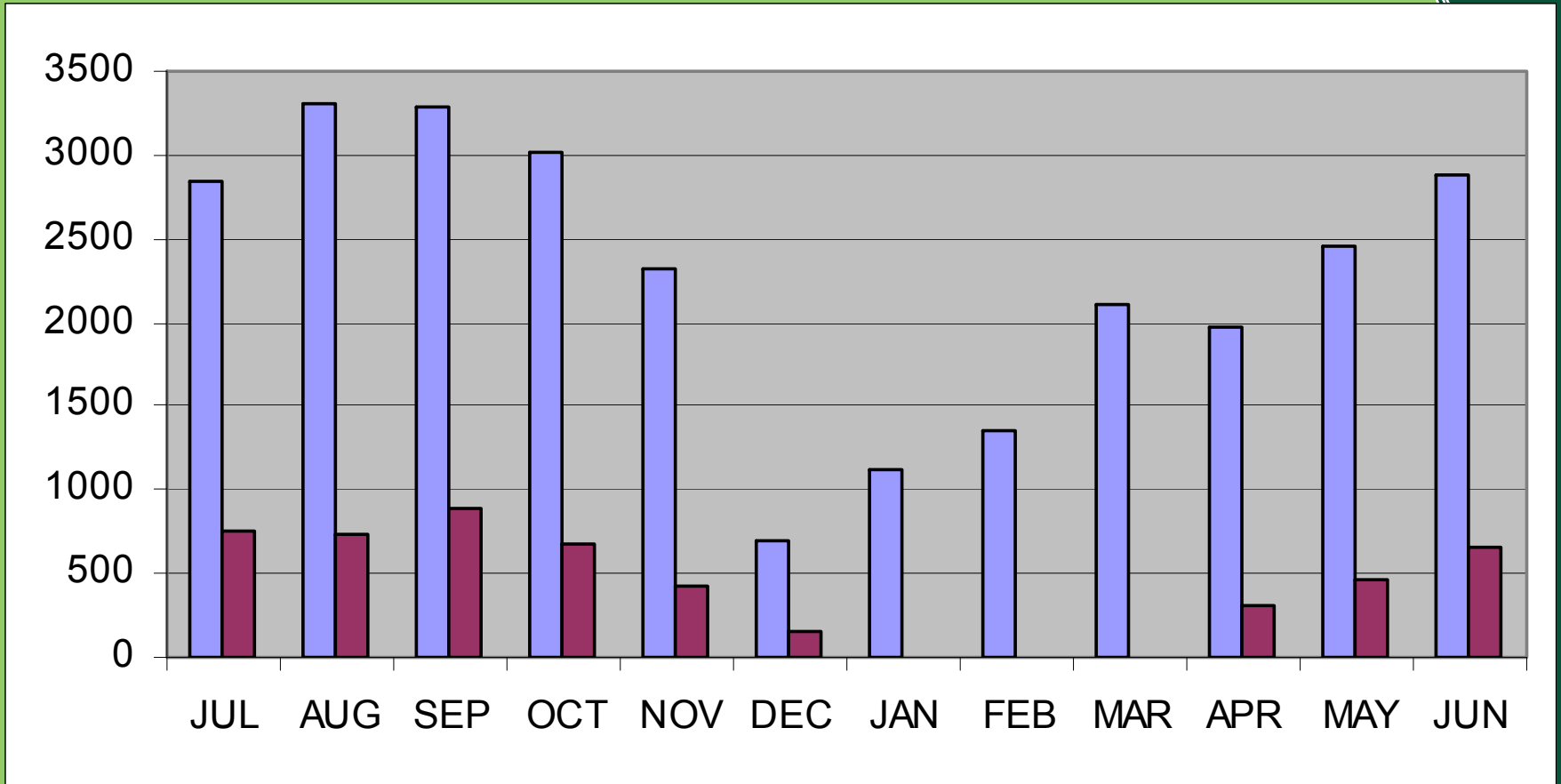




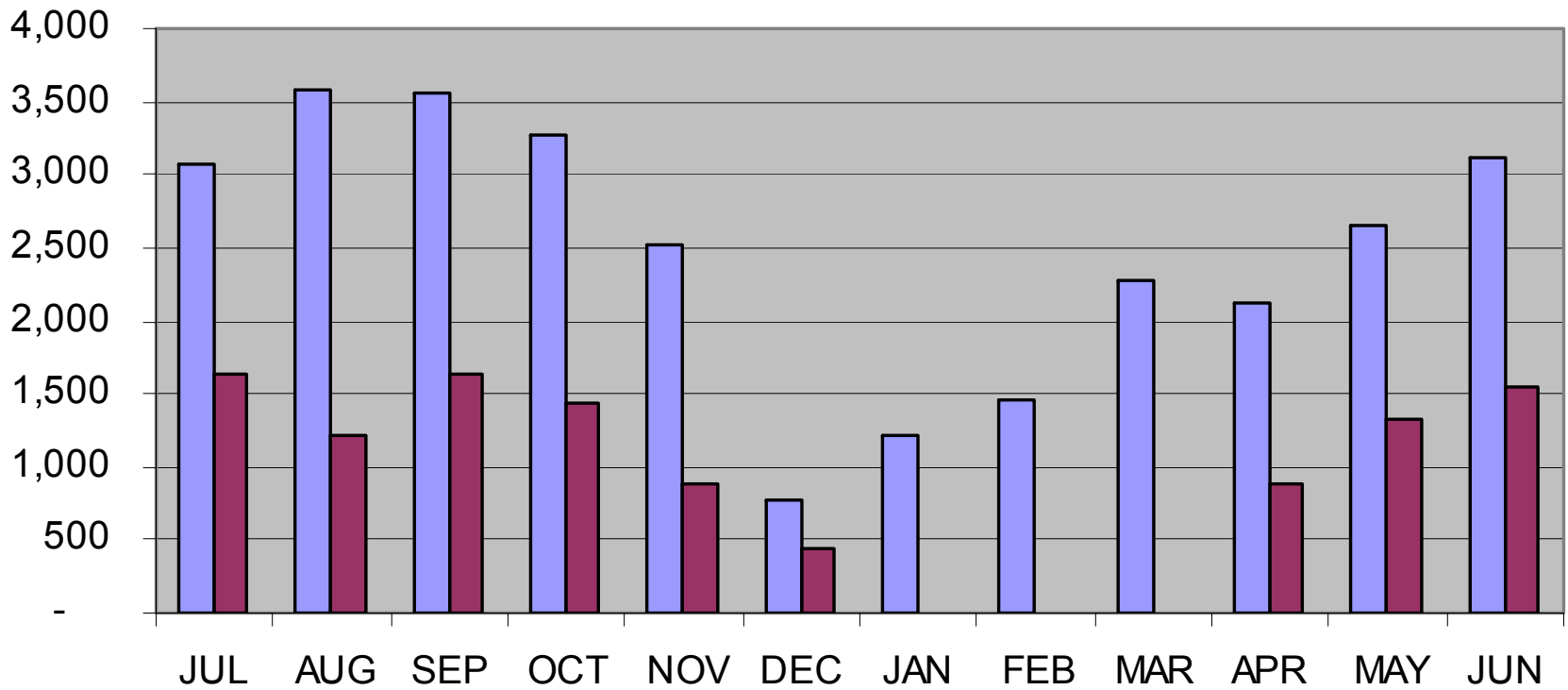
# WA Mandarin production and Consumption 2014/15



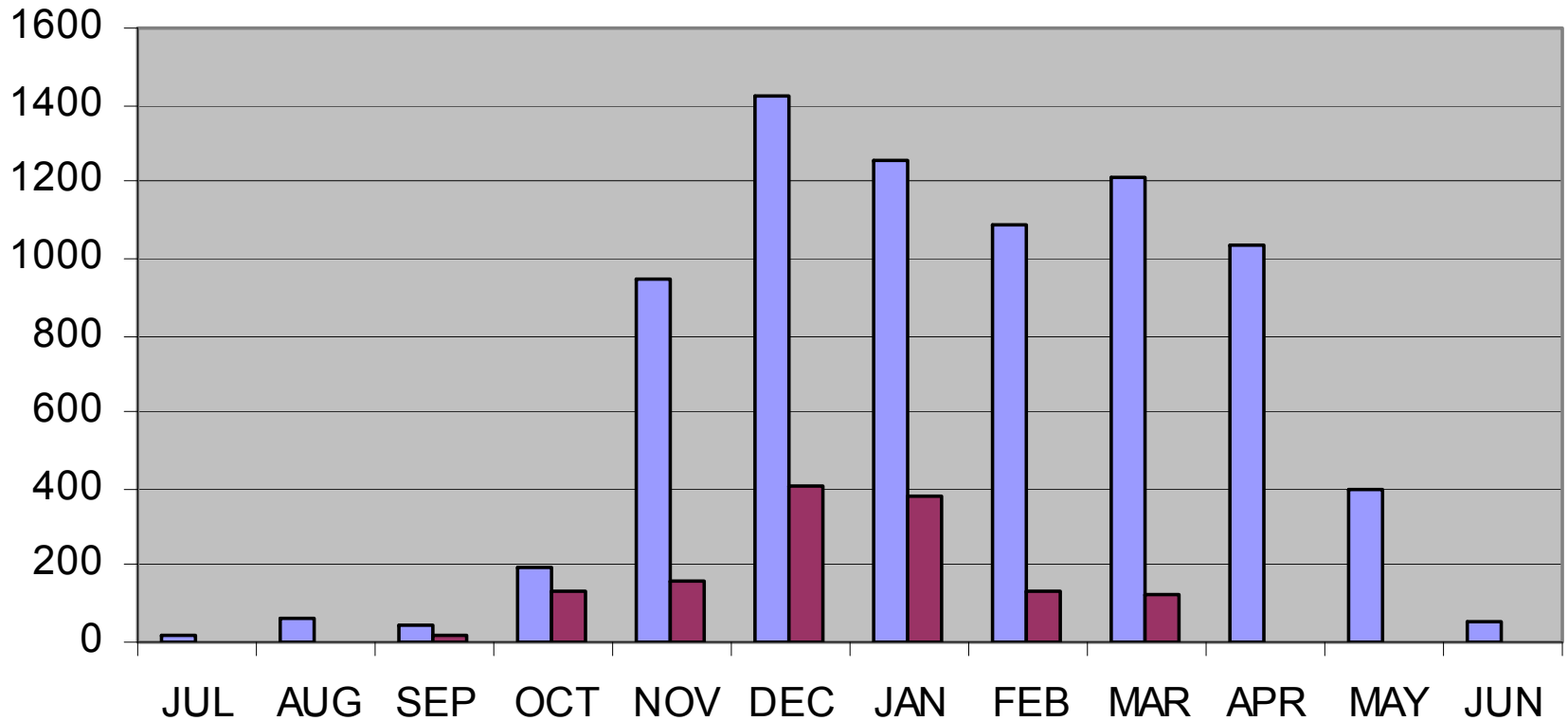
# WA Navel production and Consumption 2006/07



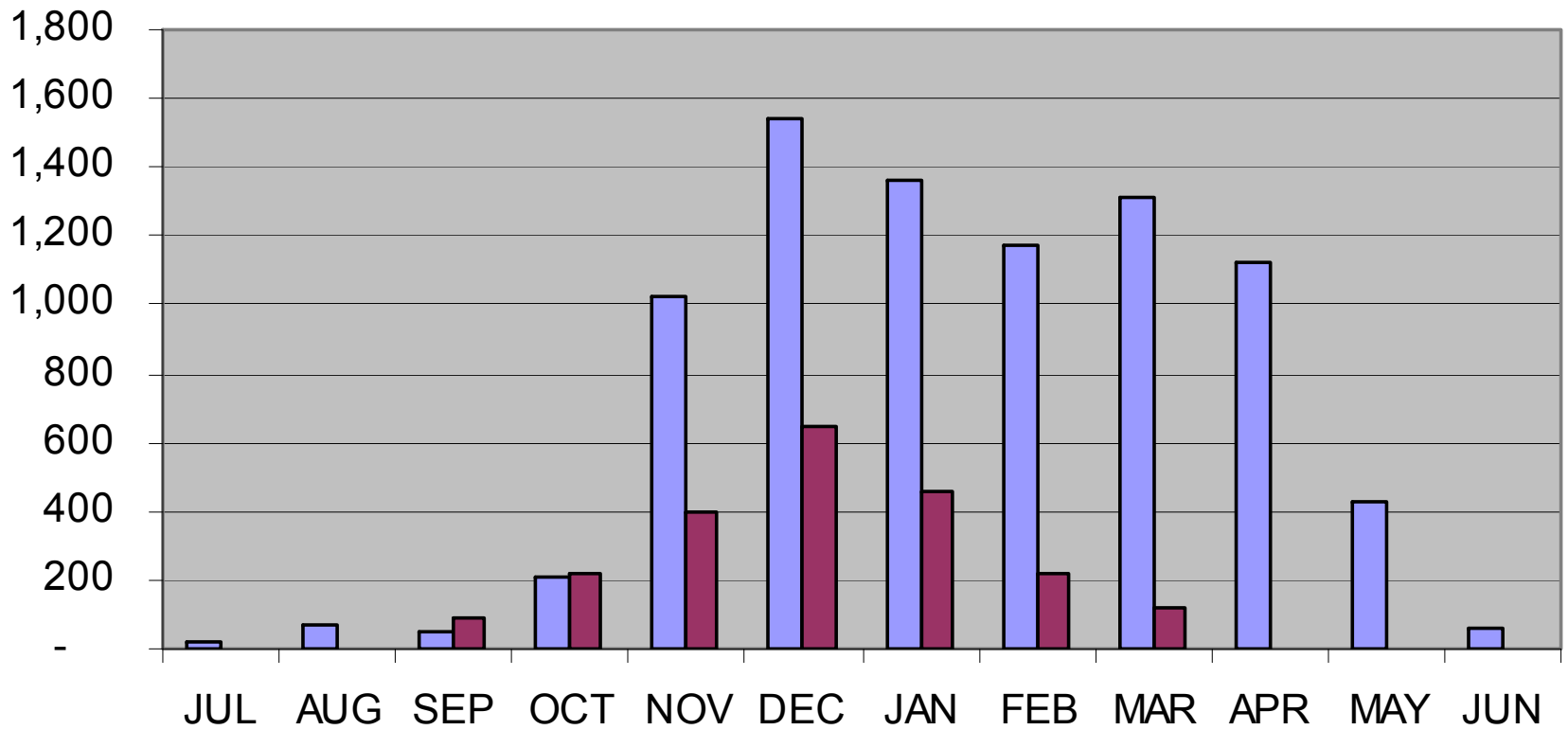
# WA Navel production and Consumption 2014/15



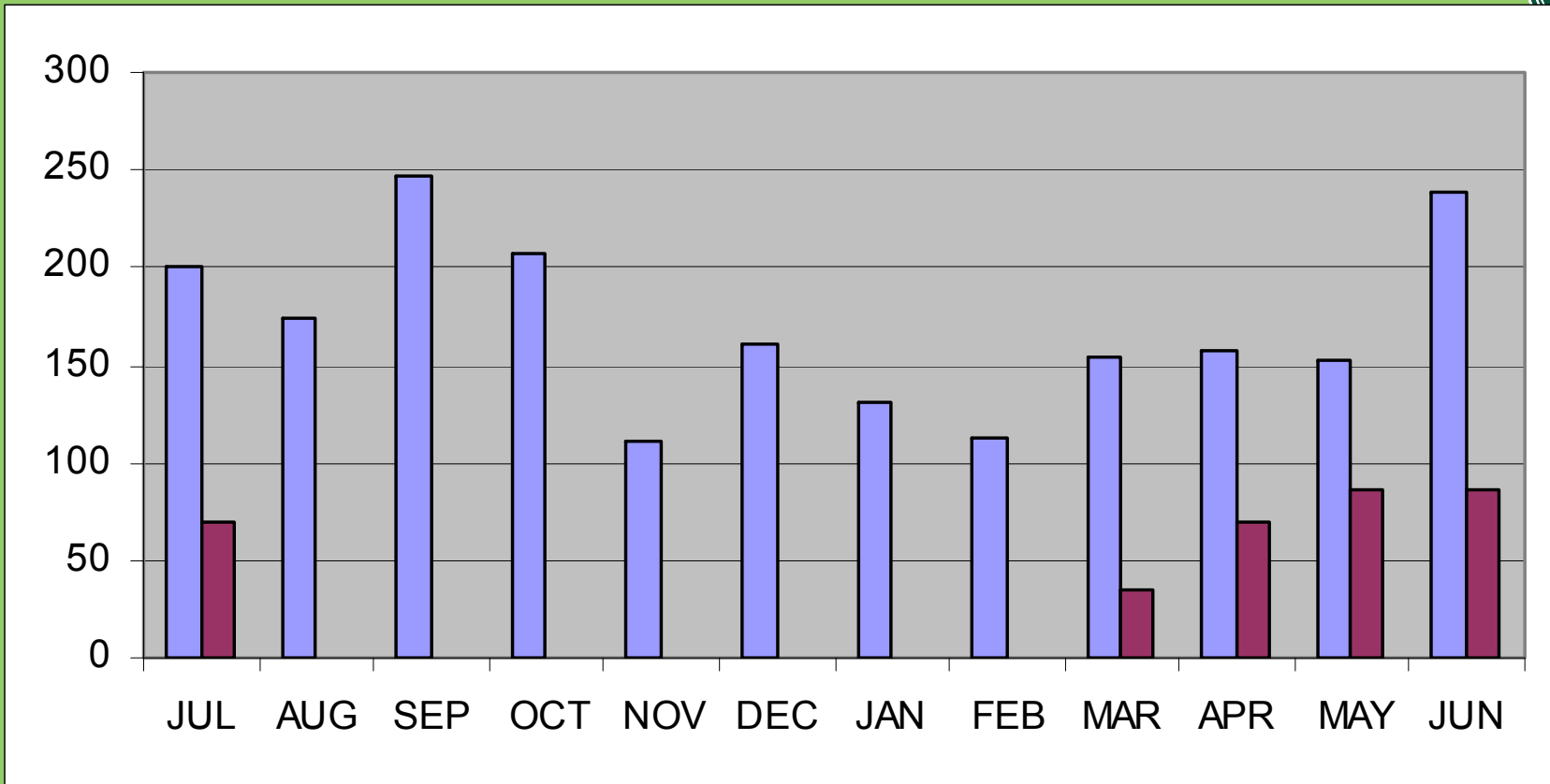
# WA Valencia production and Consumption 2006/07



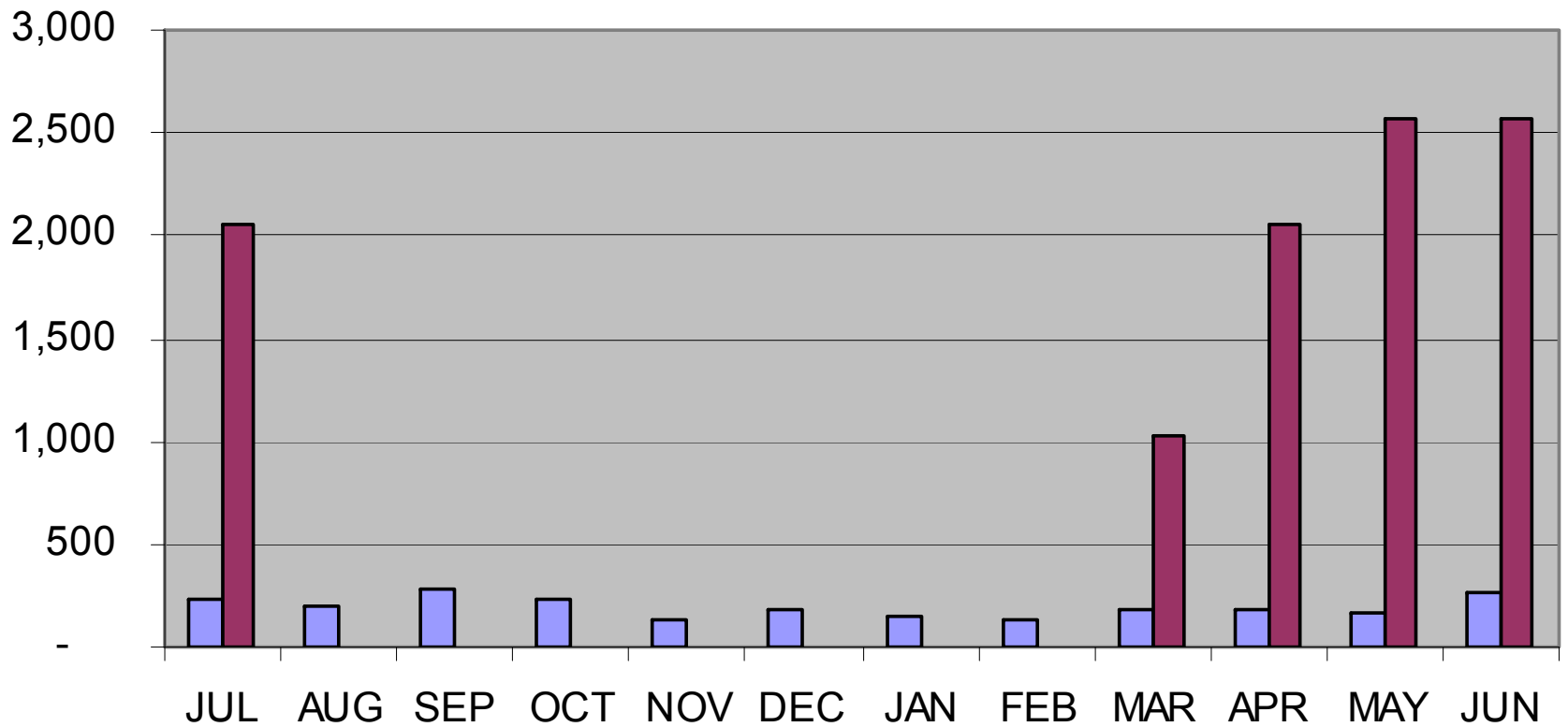
# WA Valencia production and Consumption 2014/15



# WA Grapefruit production and Consumption 2006/07



# WA Grapefruit production and Consumption 2014/15



	2006/07			2004/05
	Mandarins	Navel	Valencias	Grapefruit
<b>Production</b>	1,551	5,062	1,346	2,047
<b>Consumption</b>	8,749	27,356	7,727	385

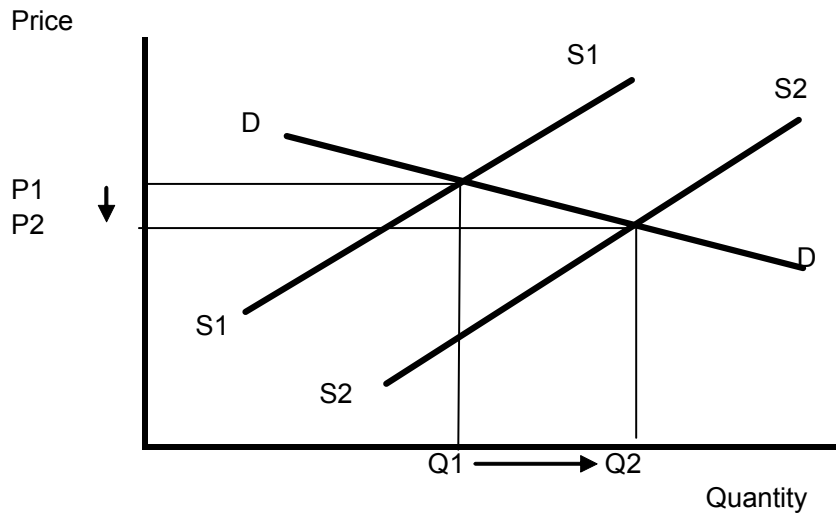
	2014/15			
	Mandarins	Navel	Valencias	Grapefruit
<b>Production</b>	4,043	10,976	2,154	10,385
<b>Consumption</b>	9,473	29,623	8,368	2,315



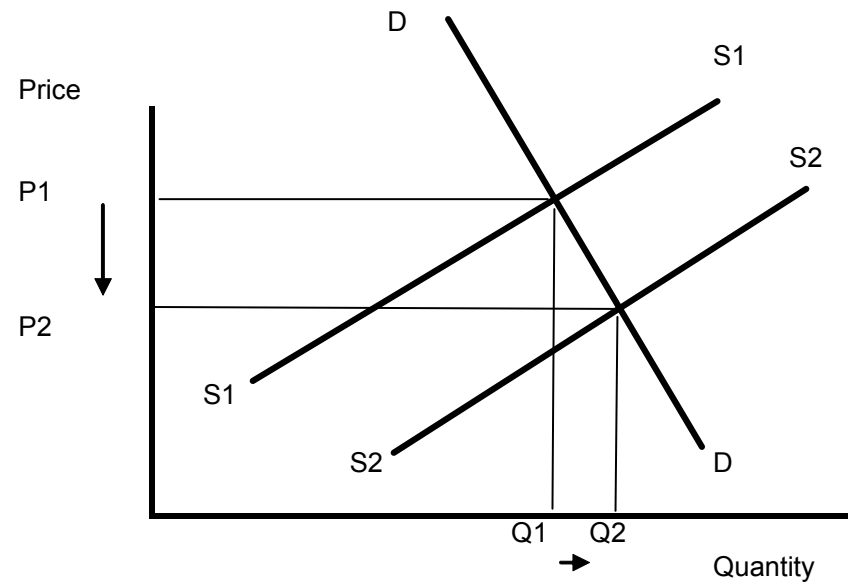
# Factors affecting future prices

- Supply - Plantings in WA & Eastern States
- Water issues in South Australia
- Exports - WA & Eastern States
- New varieties

Elastic demand



Inelastic demand



# South Australian production

	SA (tonnes)	Australia (t)	%
Mandarins	23,956	104,433	23%
Oranges	167,369	470,673	36%

	10% loss (tonnes)	20% loss (tonnes)
Mandarins	2,396	4,791
Oranges	16,737	33,474

# Gross margin for mandarins

	Yield tonnes	Price/tonne	Total income
<b>Total</b>	<b>39</b>		<b>\$ 33,152</b>
<b>Premium</b>	<b>25.35</b>	<b>982</b>	<b>\$ 24,894</b>
<b>2nd grade</b>	<b>13.65</b>	<b>605</b>	<b>\$ 8,258</b>
<b>Waste</b>	<b>3.9</b>		

# Sensitivity analysis

Prices	GM
-30%	\$ 9,605
-20%	\$ 12,920
-10%	\$ 16,235
0%	\$ 19,550
10%	\$ 22,866
20%	\$ 26,181
30%	\$ 29,496

# Export opportunities

- Citrus is primarily a commodity crop on export markets
- Niche marketing
- Varieties providing differentiation (quality & timing)

# Japanese Grapefruit imports

Annual Series: 2003 - 2008

Partner Country	Unit	Quantity					
		2003	2004	2005	2006	2007	2008
World	tonnes	274,328	288,510	205,961	170,881	212,838	184,022
United States	tonnes	194,262	202,663	93,335	109,341	138,778	126,097
South Africa	tonnes	65,775	69,408	96,707	48,562	64,335	49,836
Swaziland	tonnes	4,904	5,443	4,572	2,316	4,283	4,498
Israel	tonnes	8,568	8,354	10,418	9,335	5,396	3,589
Taiwan	tonnes	0	0	0	14	0	1
Argentina	tonnes	23	89	21	42	46	0
Chile	tonnes	188	1,173	757	599	0	0
Cuba	tonnes	609	1,381	151	671	0	0