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Foreign Agricultural Service

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Global Agricultural Information Network

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Report Name: Citrus Semi-annual

Country: European Union

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Report Highlights:

In MY 2023/24, a reduction was registered in EU orange and mandarin production, while a larger lemon and grapefruit output was obtained. Increased imports from EU neighboring citrus producers in the Mediterranean Basin have partially offset the internal production decline, allowing fresh consumption to decline only marginally, and helping citrus processing to grow.

Disclaimer: This report presents the outlook for fresh oranges, orange juice, fresh tangerines/mandarins, fresh lemon/limes, and fresh grapefruits in the European Union (EU). This report presents the views of the authors and does not reflect the official views of the U.S. Department of Agriculture (USDA). The data is not official USDA data.

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Executive Summary

In MY 2023/24, the drop registered in EU orange and mandarin production was not compensated by the larger lemon and grapefruit output. EU citrus production is concentrated in the Mediterranean region. Spain and Italy represent the leading EU citrus producers, followed by Greece, Portugal, and Cyprus.

The EU is a net importer of citrus fruits, with imports largely exceeding exports. A large amount of trade takes place internally, from producing to non-producing EU Member States. With trade through Asian routes becoming increasingly challenging, EU neighboring citrus producers in the Mediterranean Basin (such as Egypt or Turkey) are concentrating their export efforts in the EU. This has been particularly true during the first half of the marketing year, coinciding with the Northern Hemisphere citrus producing season and resulting in increasing competition in the region. EU citrus exports in MY 2023/24, largely concentrated in non-EU Member European countries, are projected to decline only marginally.

After hitting record volumes during the pandemic, fresh citrus consumption is anticipated to return to pre-pandemic levels. In MY 2023/24, the mild winter conditions discouraged citrus intake. Moreover, the downwards trend in consumption is driven by some consumers responding to inflation by watching their expenditures and reducing fruits consumption, whereas others increasingly opt for non-citrus fruits, such as tropical fruits. EU citrus industrial uses, which only account for a small portion of consumption, are anticipated to expand as new markets for citrus products arise.

Oranges

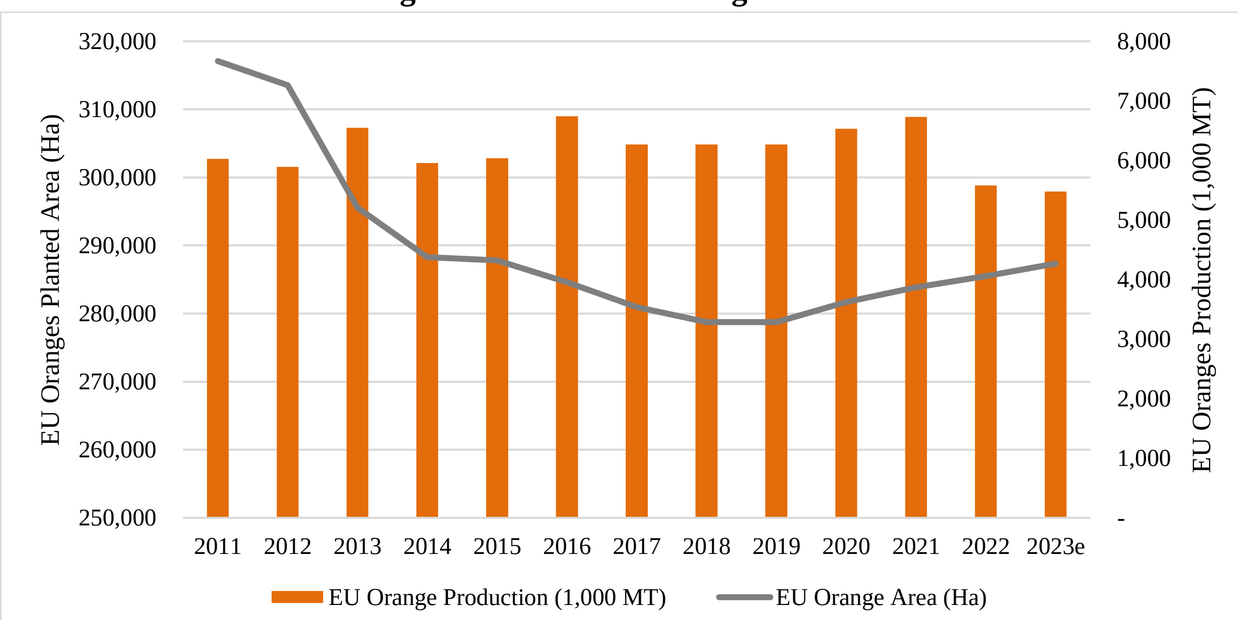
Table 1. EU Oranges Production, Supply, and Distribution

Oranges, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Oct 2021		Oct 2022		Oct 2023	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	283,872	283,872	285,348	285,348	285,147	286,863
Area Harvested (HECTARES)	261,440	261,440	264,632	264,632	236,305	265,831
Bearing Trees (1000 TREES)						
Non-Bearing Trees (1000 TREES)						
Total No. Of Trees (1000 TREES)						
Production (1000 MT)	6,728	6,728	5,564	5,580	5,475	5,475
Imports (1000 MT)	736	735	1,043	1,047	1,000	1,090
Total Supply (1000 MT)	7,464	7,463	6,607	6,627	6,475	6,565
Exports (1000 MT)	403	403	343	343	340	300
Fresh Dom. Consumption (1000 MT)	5,950	5,950	5,640	5,660	5,525	5,625
For Processing (1000 MT)	1,111	1,110	624	624	610	640
Total Distribution (1000 MT)	7,464	7,463	6,607	6,627	6,475	6,565
(HECTARES), (1000 TREES), (1000 MT)						

Not official USDA data.

Sources: Trade for MY 2021/22 and 2022/23: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

Chart 1. EU Orange Production and Orange Planted Area 2011-2023

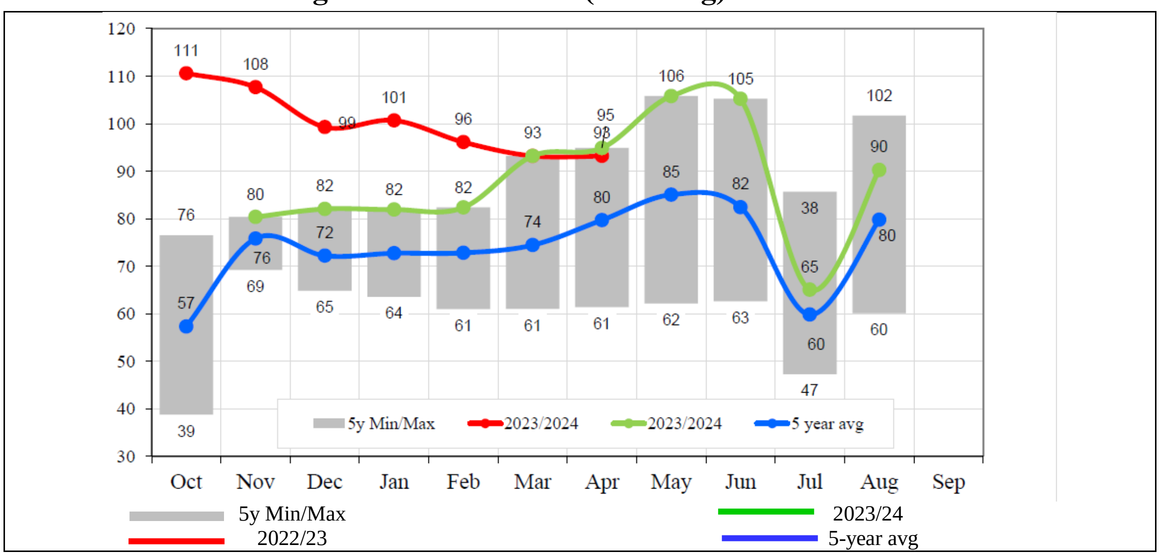


Source: FAS EU posts.

In MY 2023/24, EU orange production is projected at just above 5.4 million MT, slightly down from the already short EU orange crop obtained in MY 2022/23. Orange production is the largest citrus category within the EU, and Spain accounts for 50 percent of the bloc's production. Excessive rains during fruit setting, drought and warm conditions, and irrigation restrictions hampered yields and negatively affected fruit sizes. The better output in Italy did not suffice to compensate for the productivity losses in Spain and, to a lesser extent, in Greece and Portugal.

According to the EU Citrus Dashboard, MY 2023/24 started off with higher prices of oranges than MY 2022/23 that prevailed until February 2024. However, since March 2024, EU orange prices registered a downward correction, resulting in price levels below the previous season.

Chart 2. EU Orange Prices Evolution (€/ 100 kg) MY 2022/23 - MY 2023/24



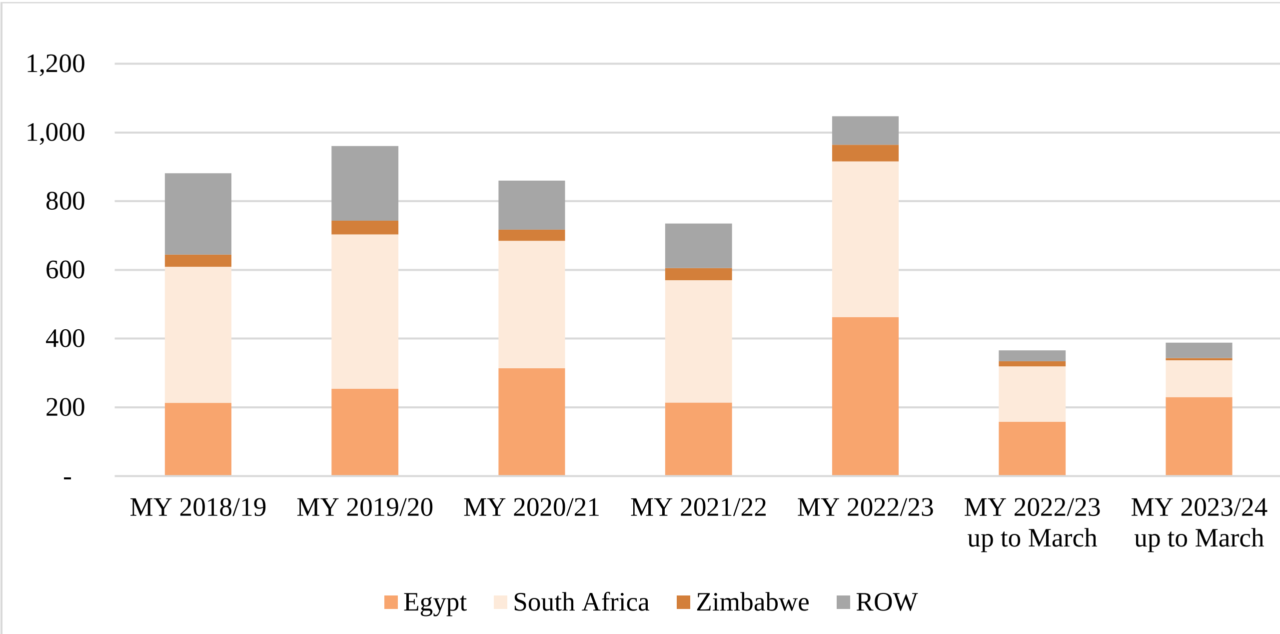
Source: DG AGRI Dashboard: Citrus Fruit.

In MY 2023/24, fresh orange consumption is expected to decline compared to the previous season in response to both the higher prices triggered by the second consecutive short domestic crop in the EU and the changes registered in consumers preferences. Conversely, orange processing is corrected upwards in MY 2023/24 in light of the relatively larger availability of non-commercial sizes of oranges. For additional information see Orange Juice section below.

In MY 2023/24, a larger volume of oranges, ultimately both for both fresh consumption and processing, is anticipated to be imported to the EU to offset the drop in domestic production. Main import origins include Egypt, overlapping with the EU's crop season, and South Africa and Zimbabwe during the off-season.

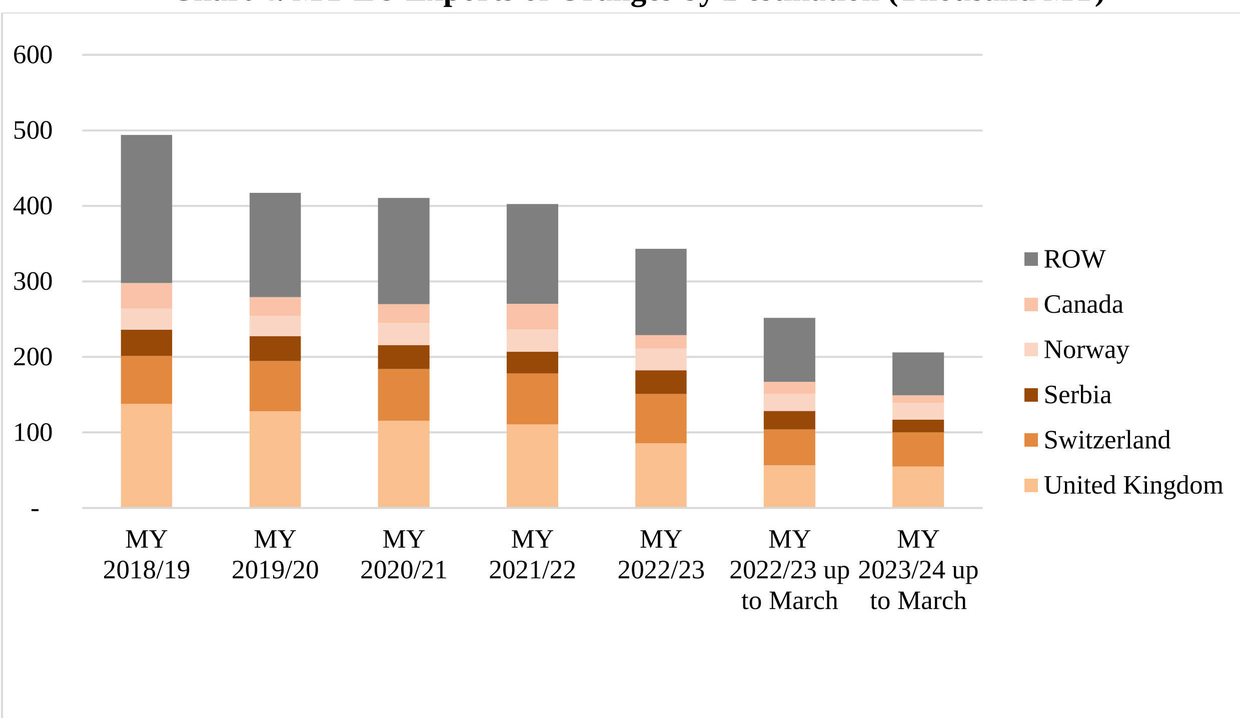
EU orange exports in MY 2023/24 are projected down, given lower domestic availability and increased competition by other orange producers in the Mediterranean basin that see the EU's traditional export markets as a solid alternative to their Asian export routes. Main destinations for EU oranges, primarily exported out of Spain, include the United Kingdom, Switzerland, Serbia, Norway, and Canada.

Chart 3. MY EU Imports of Oranges by Origin (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Chart 4. MY EU Exports of Oranges by Destination (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Orange Juice

Table 2. Production, Supply, and Distribution (Brix 65)

Orange Juice	2021/2022		2022/2023		2023/2024	
Market Year Begins	Oct 2021		Oct 2022		Oct 2023	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	1,111,000	1,111,000	624,000	624,000	910,000	640,000
Beginning Stocks (MT)	15,000	15,000	15,000	15,000	15,000	15,000
Production (MT)	86,127	86,127	48,374	48,374	47,288	49,614
Imports (MT)	566,745	566,745	525,090	525,090	508,000	528,000
Total Supply (MT)	667,872	667,872	588,464	588,464	570,288	592,614
Exports (MT)	111,848	111,848	110,798	110,798	95,000	116,000
Domestic Consumption (MT)	541,024	541,024	462,666	462,666	460,288	461,614
Ending Stocks (MT)	15,000	15,000	15,000	15,000	15,000	15,000
Total Distribution (MT)	667,872	667,872	588,464	588,464	570,288	592,614
(MT)						

Not official USDA data.

Sources: Trade for MY 2021/22 and 2022/23: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

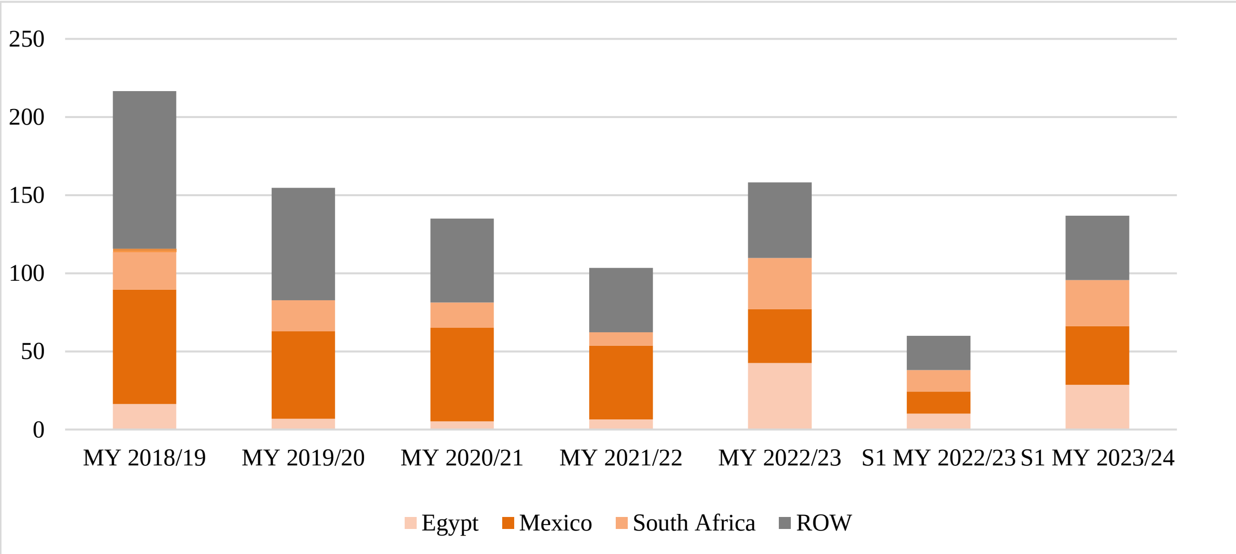
The larger share of oranges that do not meet size standards for fresh consumption and the somewhat higher volume of oranges imported are projected to moderately push domestic orange juice production up to 49.6 million in MY 2023/24.

Despite a global surge in orange juice prices, based on data available for the first semester of MY 2023/24**,** EU orange juice imports are revised up from MY 2022/23 levels, both in volume and in value. Some industry actors are exploring options to mix orange juice with other citrus to cushion the impact in prices paid by consumers. Orange juice import volumes from Egypt, the EU's second largest supplier after Brazil,[1] registered the largest increase in volume, while imports originating in Mexico grew significantly in value. Data available for the first semester of MY 2023/24 also show an uptick in EU orange juice exports, mostly directed to the United Kingdom, which remains by far the largest destination of EU orange juice.

In MY 2023/24, orange juice consumption is revised marginally down compared to previous season levels, as the increased prices are leading to price-sensitive consumers reducing their intake or opting for more affordable alternative drinks and fruit juices.

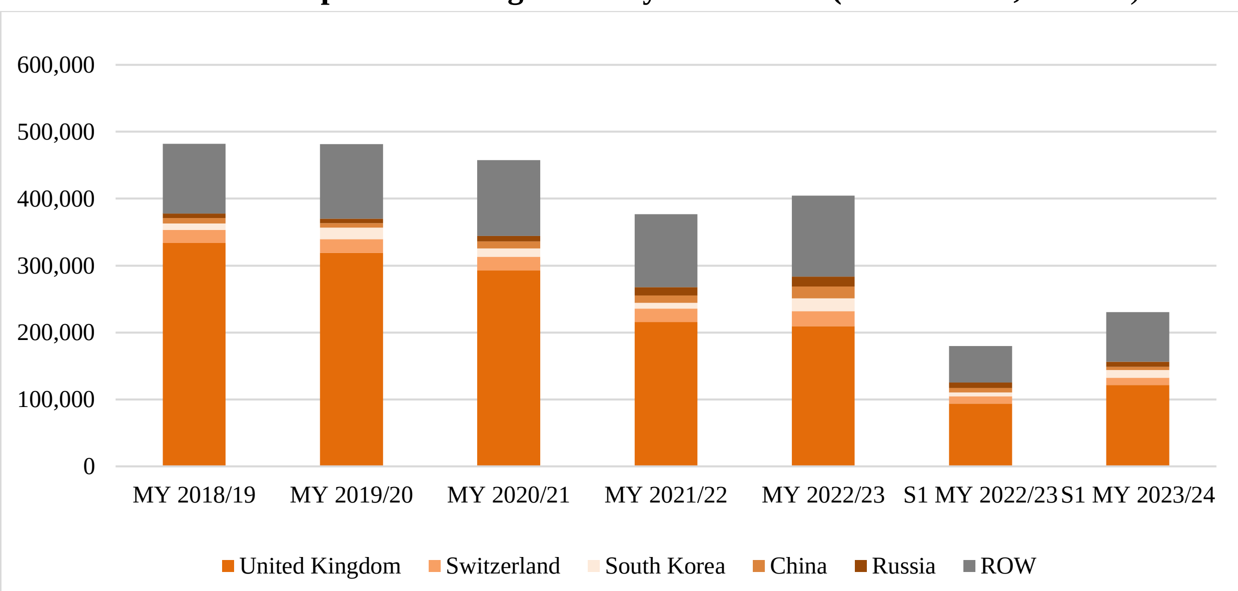
[1] Brazil accounts on average for 90 percent of the EU's orange juice imports.

Chart 5. EU Imports of Orange Juice, excluding Brazil, by Origin (Million USD, Brix 65)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Chart 6. EU Exports of Orange Juice by Destination (Million USD, Brix 65)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Tangerines/Mandarins

Table 3. Production, Supply, and Distribution

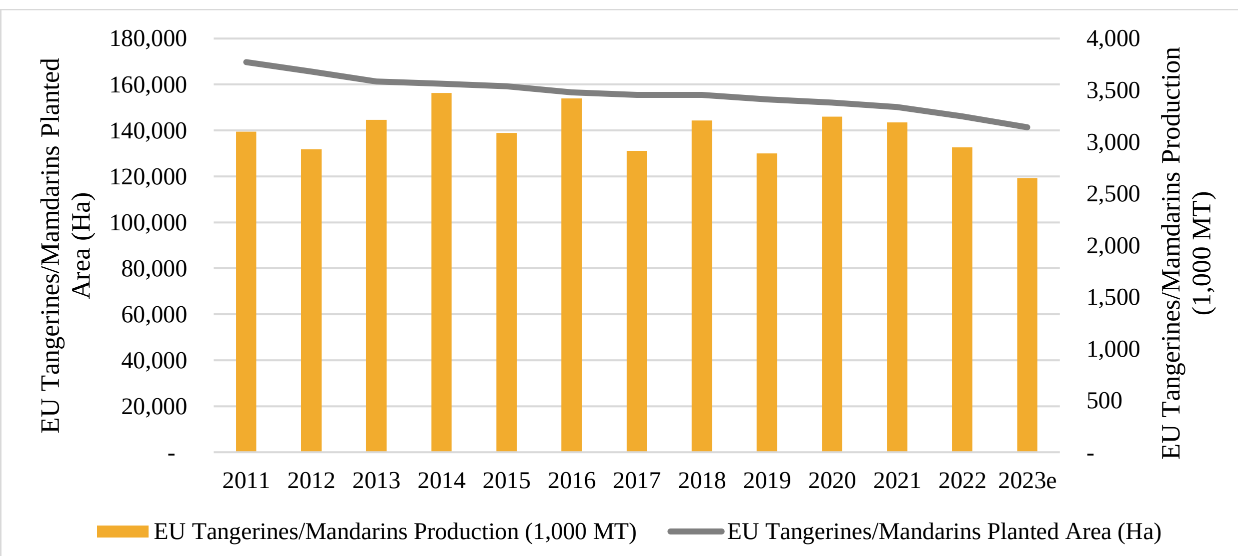
Tangerines/Mandarins, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Oct 2021		Oct 2022		Oct 2023	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	150,200	150,200	146,120	146,120	142,033	142,000
Area Harvested (HECTARES)	137,785	137,785	136,458	136,458	132,595	132,485
Bearing Trees (1000 TREES)						
Non-Bearing Trees (1000 TREES)						
Total No. Of Trees (1000 TREES)						
Production (1000 MT)	3,190	3,190	2,820	2,947	2,675	2,650
Imports (1000 MT)	430	430	482	482	480	470
Total Supply (1000 MT)	3,620	3,620	3,302	3,429	3,155	3,120
Exports (1000 MT)	322	322	297	296	225	295
Fresh Dom. Consumption (1000 MT)	3,051	3,051	2,785	2,913	2,720	2,575
For Processing (1000 MT)	247	247	220	220	210	250
Total Distribution (1000 MT)	3,620	3,620	3,302	3,429	3,155	3,120
(HECTARES), (1000 TREES), (1000 MT)						

Not official USDA data.

Sources: Trade for MY 2021/22 and 2022/23: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

EU tangerine and mandarin production in MY 2023/24 is forecast at 2.6 MMT, down from the 2.9 MMT registered in the previous season in response to the production decline across all EU producing Member States. Beyond the impact in quantity, the unfavorable weather conditions also resulted in smaller fruit size.

Chart 7. EU Mandarins Production and Planted Area 2011-2023

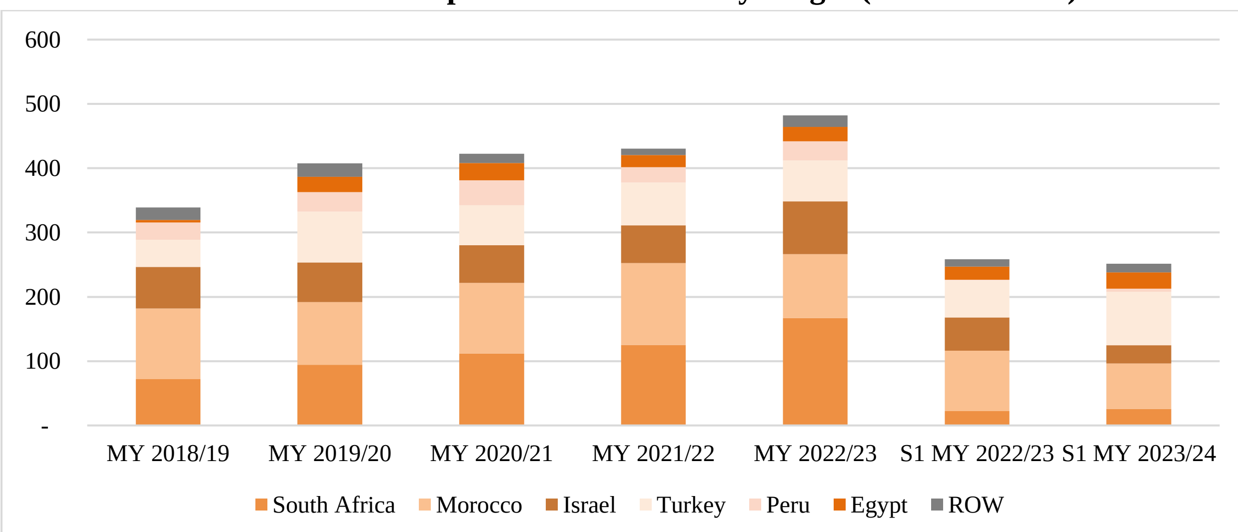


Source: FAS EU posts.

The shorter EU domestic tangerine and mandarin supply and higher prices are projected push fresh consumption down in MY 2023/24. The smaller size of fruits, the larger presence of seeds in the fruits, and the fact that mandarins being used for juice production is one of the alternatives to address the challenges affecting orange juice supply globally, are the drivers behind the increase in processing uses in MY 2023/24.

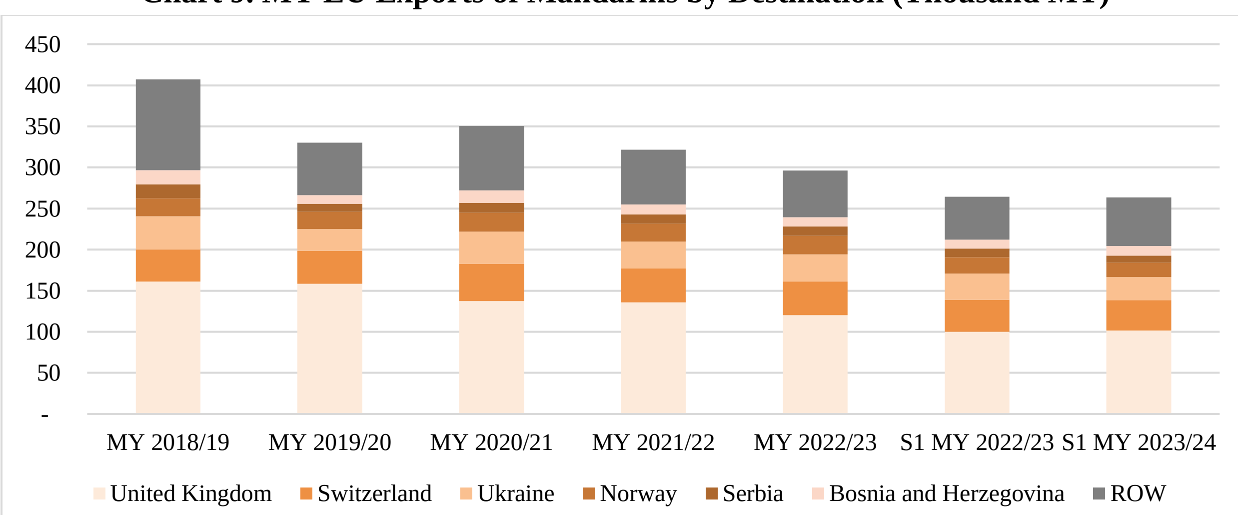
Tangerine and mandarin imports by the EU are forecast to be marginally down in MY 2023/24. South Africa, Morocco, Israel, and Turkey are the EU's leading suppliers of mandarins and tangerines. Data available up to March show how the EU has managed to meet its export commitments, with exports remaining steady despite the reduced domestic availability. The EU's main export market destinations include the United Kingdom, Switzerland, Ukraine, Norway, and Serbia.

Chart 8. MY EU Imports of Mandarins by Origin (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Chart 9. MY EU Exports of Mandarins by Destination (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Lemons/Limes

Table 4. Production, Supply, and Distribution

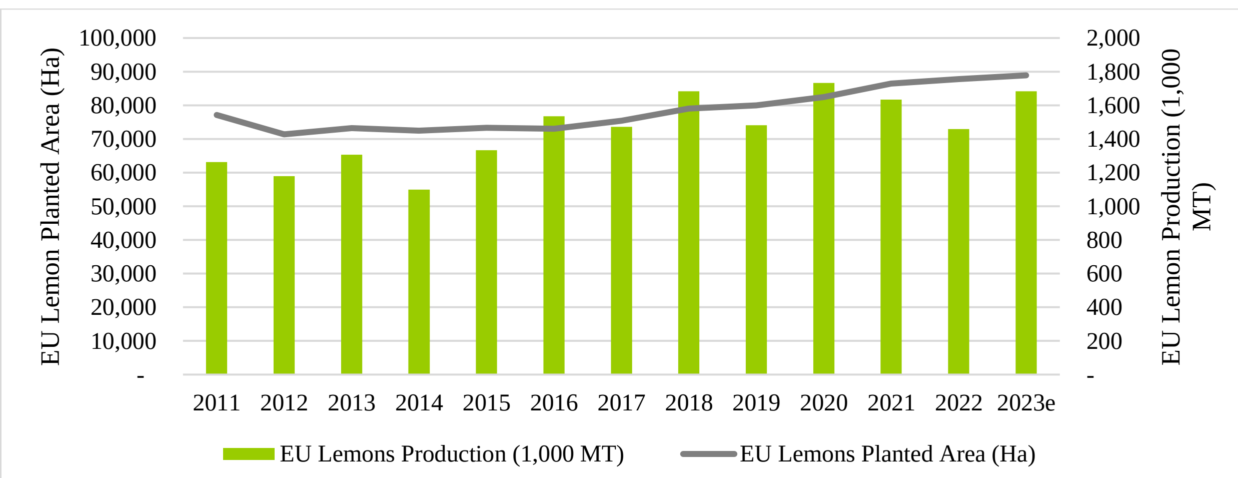
Lemons/Limes, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Oct 2021		Oct 2022		Oct 2023	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	86,466	86,466	87,838	87,838	89,371	89,043
Area Harvested (HECTARES)	74,174	74,174	77,192	77,192	78,841	78,539
Bearing Trees (1000 TREES)						
Non-Bearing Trees (1000 TREES)						
Total No. Of Trees (1000 TREES)						
Production (1000 MT)	1,635	1,635	1,458	1,453	1,685	1,673
Imports (1000 MT)	630	630	581	581	550	600
Total Supply (1000 MT)	2,265	2,265	2,039	2,034	2,235	2,273
Exports (1000 MT)	144	142	122	122	180	140
Fresh Dom. Consumption (1000 MT)	1,830	1,830	1,650	1,650	1,790	1,780
For Processing (1000 MT)	291	293	267	262	265	353
Total Distribution (1000 MT)	2,265	2,265	2,039	2,034	2,235	2,273
(HECTARES), (1000 TREES), (1000 MT)						

Not official USDA data.

Sources: Trade for MY 2021/22 and 2022/23: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

In MY 2023/24, following favorable weather conditions, EU lemon production is forecast to recover from the low registered in MY 2022/23 and amount to nearly 1.7 million MT. The increase is driven by both the larger area harvested and the improved yields registered in Spain,[2] the largest EU producing Member State. This more than offsets the production reductions reported in Italy and Greece, which combined account for nearly one third of the bloc's lemon production.

Chart 10. EU Lemon Production and Planted Area 2011-2023



Source: FAS EU posts.

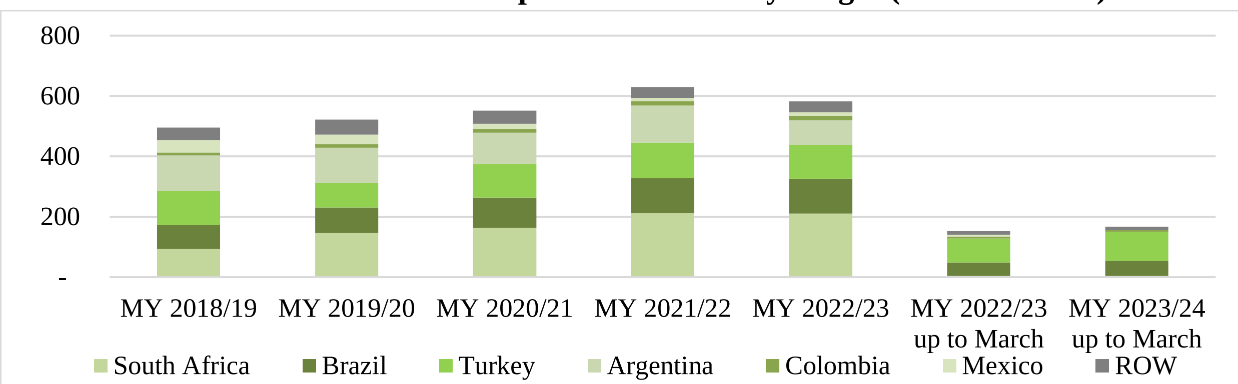
[2] Spain production data do not include unharvested lemons.

In Spain, the largest EU producer, MY 2023/24 prices paid to farmers registered downward corrections between the end of October and the end of March, when farm-gate prices slightly recovered, though are still below the past year and five-year average levels.

Consumption of lemons in the EU in MY 2023/24 is anticipated to bounce back to pre-pandemic levels, driven by the larger domestic availability and reduction in prices. While lemons in the EU are primarily consumed fresh, a further expansion for processing uses is projected for MY 2023/24 as opportunities continue to arise in lemon uses as an acidifier in food preparations.

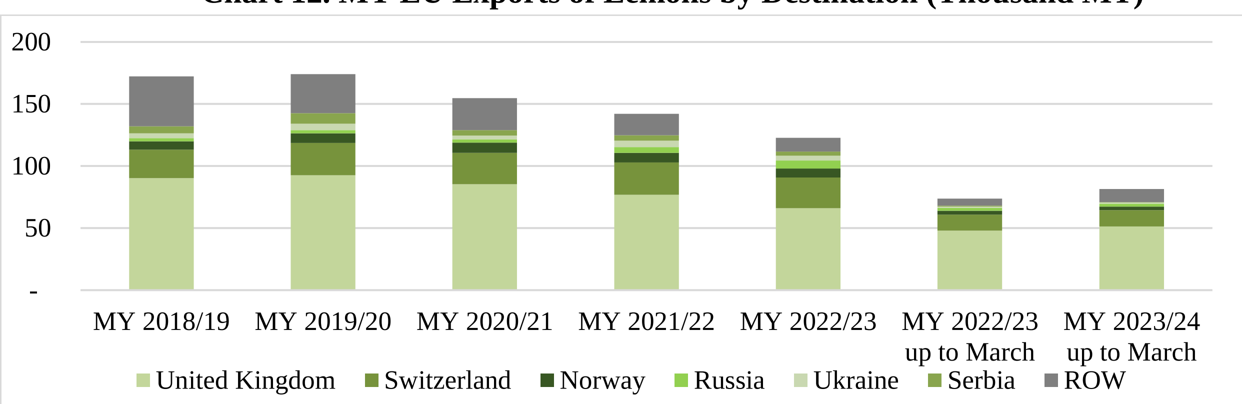
Trade data available for the first half of MY 2023/24 reveal an increase in EU lemon imports, mainly driven by increased shipments originating in Turkey, which is the EU's leading supplier during the Northern Hemisphere producing season. Conversely, during the off-season, South Africa, Brazil, and Argentina are the leading suppliers to the EU. Likewise, MY 2023/24 EU lemon exports are projected slightly above MY 2022/23. Main destinations for EU lemons include the United Kingdom and Switzerland.

Chart 11. MY EU Imports of Lemons by Origin (Thousand MT)[3]



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Chart 12. MY EU Exports of Lemons by Destination (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

[3] HS Code 080550 includes lemons and limes combined. Products under this HS code originating in Brazil, Colombia and Mexico largely consist of limes.

Grapefruit

Table 5. Production, Supply, and Distribution

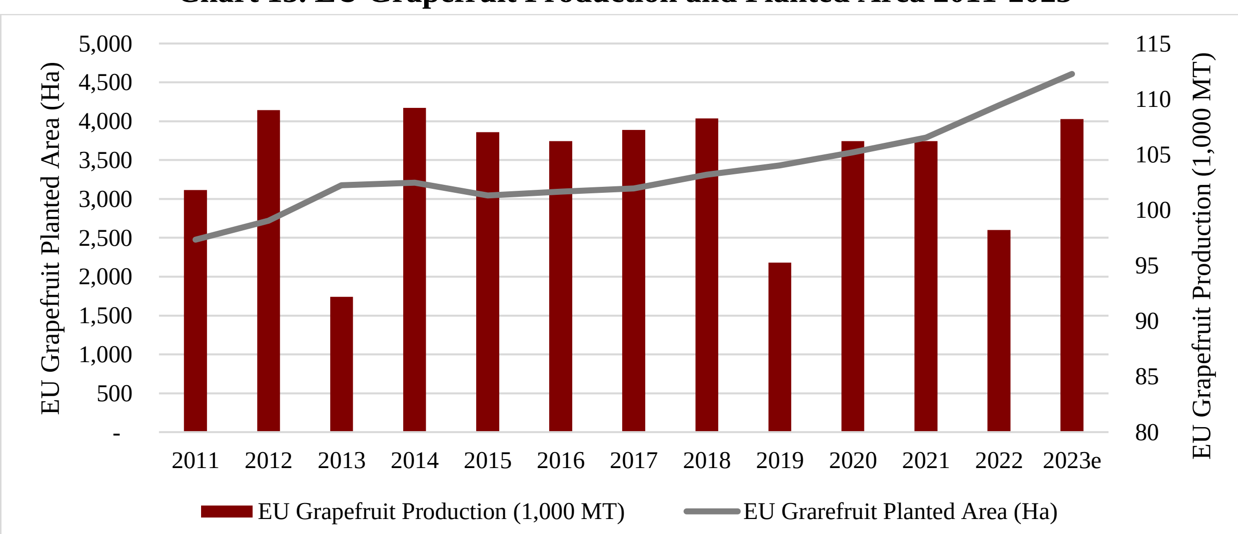
Grapefruit, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Oct 2021		Oct 2022		Oct 2023	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	3,791	3,791	4,203	4,230	4,610	4,614
Area Harvested (HECTARES)	3,191	3,191	3,323	3,323	3,729	3,735
Bearing Trees (1000 TREES)						
Non-Bearing Trees (1000 TREES)						
Total No. Of Trees (1000 TREES)						
Production (1000 MT)	106	106	98	98	104	108
Imports (1000 MT)	223	224	209	209	200	210
Total Supply (1000 MT)	329	330	307	307	304	318
Exports (1000 MT)	17	17	20	20	25	20
Fresh Dom. Consumption (1000 MT)	299	300	276	276	267	284
For Processing (1000 MT)	13	13	11	11	12	14
Total Distribution (1000 MT)	329	330	307	307	304	318

Not official USDA data.

Sources: Trade for MY 2021/22 and 2022/23: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

MY 2023/24 EU grapefruit production has been revised up compared to Post initial estimates, and it is now expected to amount to 108 thousand MT, up from the 98 thousand MT produced in the previous drought-hit season. The production rebound is entirely driven by Spain, the largest grapefruit producing EU Member State, which in MY 2023/24 reached a historical grapefruit production record. Production in Italy, which is concentrated in Sicily, and in Greece, where most grapefruits are grown in Crete, Corinth, Kavala, and Thessaly, is forecast to remain stable.

Chart 13. EU Grapefruit Production and Planted Area 2011-2023



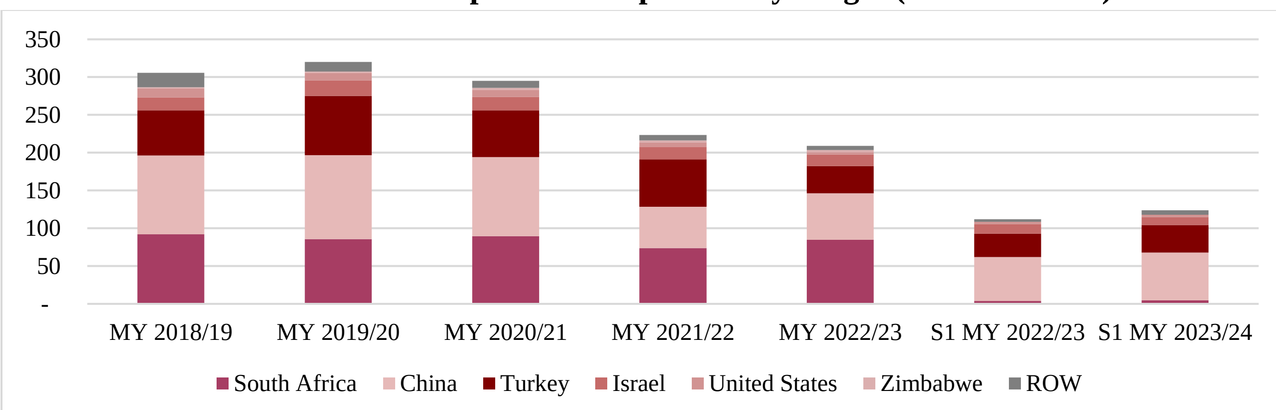
Source: FAS EU posts.

In MY 2023/24, EU grapefruit consumption, which largely takes place fresh, is revised up slightly in line with the recovery in domestic supply, despite food inflation pressuring fresh fruits consumption in more price-sensitive consumers. Germany is the EU's largest market for grapefruits.

Data available for the first six months of MY 2023/24 show a slight increase in the EU's grapefruit imports despite ample domestic availability. The increase in EU grapefruit imports for MY 2023/24 is mostly driven by increased imports originating in China and Turkey, the EU's largest grapefruit suppliers, together with South Africa and Israel. In recent years, China has increased its share of grapefruit imports to the EU by expanding its sales of Marsh Seedless varieties. Ruby Red grapefruit varieties imported by the EU largely originate in South Africa, Turkey, and Israel.

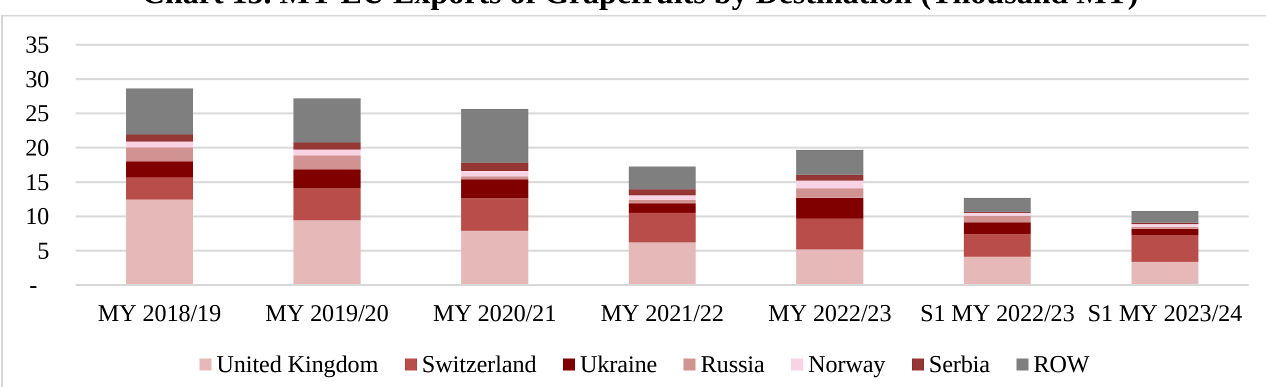
Conversely, the EU grapefruit export season started off slowly but is expected to stay at similar levels to the previous season. EU grapefruit exports are only minor and fairly concentrated to EU neighboring countries such as the United Kingdom, Switzerland, Ukraine, Russia, Norway, and Serbia.

Chart 14. MY EU Imports of Grapefruits by Origin (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Chart 15. MY EU Exports of Grapefruits by Destination (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Policy[4]

Certification of Fruit and Vegetables

Fruit and vegetables exported to the EU require a phytosanitary certificate issued by USDA/Animal and Plant Health Inspection Service (APHIS) inspectors. This standard-setting body coordinates cooperation between nations to control plant and plant product pests and to prevent their spread. Regulation 2016/2031 concerning protective measures against pests of plants since December 14, 2019, contains provisions concerning compulsory plant health checks. This includes documentary, identity, and physical plant health checks to verify compliance with EU import requirements and uniform conditions for its implementation that are established in Commission Implementing Regulation (EU) 2019/2072. More information is available on the DG SANTE website: Trade in plants and plant products from non-EU countries. The Commission monitors imports of fruit and vegetables on an annual basis to determine how to adjust the frequency of testing consignments. There is a reduced frequency of plant health checks for certain products when justified, established by Commission Implementing Regulation (EU) 2022/2389 of December 07, 2022, as last amended by Implementing Regulations (EU) 2024/591 of February 20, 2024. More information is available on the DG SANTE website: Reduced frequency checks.

Related Reports

Title	Date
EU Citrus Annual	12/15/2023
EU Citrus Semi-Annual	06/15/2023
EU Citrus Annual	12/23/2022
EU Citrus Semi-Annual	07/19/2022
EU Citrus Annual	12/23/2021
EU Citrus Semi-Annual	06/17/2021
EU Citrus Annual	12/18/2020

These and other GAIN reports can be downloaded from the USDA/FAS GAIN database: https://gain.fas.usda.gov/#/search.

[4] This policy section contains an update of the policy section in EU Citrus Annual 2023. It outlines the legislation affecting citrus that has been updated since the annual report was released. For additional information on EU Policy affecting citrus, please consult the GAIN Report EU Citrus Annual 2023.

Abbreviations and References used in this report:

EC	European Commission
EU	European Union
€	Euro
FAS	Foreign Agricultural Service
HA	Hectares
TDM	Trade Data Monitor
MY	Marketing Year (October/September for all citrus and products)
MS	EU Member State
MT	Metric ton (1,000 kg)
MMT	Million Metric Tons
OJ	Orange Juice
PS&D	Production, Supply, and Demand
ROW	Rest of the World
UK	United Kingdom
$	U.S. Dollar

Harmonized System (HS) Codes:
Oranges : 080510
Orange Juice: 200911, 200912, 200919
Tangerines/Tangerines : 080520, 080521, 080522, 080529
Lemons/Limes : 080550
Grapefruits : 080540

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Sabine Lieberz	FAS/Berlin covering Germany
Marcel Pinckaers	FAS/The Hague covering The Netherlands
Marta Guerrero	FAS/Madrid covering Spain and Portugal, and report coordinator

Attachments:

No Attachments