

**Required Report:** Required - Public Distribution

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**Report Name:** Citrus Annual

**Country:** Morocco

**Post:** Rabat

**Report Category:** Citrus

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**Report Highlights:**

Post expects Morocco's Tangerine/mandarin production for MY 2023/24 to reach an estimated 950,000 metric tons, increasing 3 percent over MY 2022/23, orange production should increase by 5 percent over the previous year to 820,000 MT, while lemon/lime production will reach 40,000 MT. Much of the increase in production is due to improved weather conditions compared to the previous season coupled with an increased adoption of drip irrigation techniques. Post estimates Morocco's MY 2023/24 tangerine/mandarin exports will slightly decrease to approximately 450,000 MT due to high domestic prices while orange exports should reach around 50,000 MT and lemon/lime exports at 7,000 MT.

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## Executive Summary

While still below historical averages, Morocco’s MY 2023/24 citrus production showed a slight improvement over the previous season due to improved weather conditions during the growing season coupled with an increased adoption of drip irrigation techniques. Growers reported a favorable production compared to last year, except in the Souss-Massa region of southern Morocco, where high temperature led to smaller sizes and drier fruits. Post expects Morocco’s Tangerine/mandarin production for MY 2023/24 to reach an estimated 950,000 metric tons, increasing 3 percent over MY 2022/23, orange production should increase by 5 percent over the previous year to 820,000 MT, while lemon/lime production to reach 40,000 MT.

The export season did not start until the second week of November due to a delay in fruit maturation. The European Union and Russia remain Morocco’s top export markets. Moroccan exporters are encountering challenges in shipping their products to the North American market, mainly because of issues in securing reservations on conventional ships. Consequently, the majority are turning to container shipping as an alternative, largely driven by the lower costs of containers. This situation is expected to reduce Moroccan tangerine and mandarin exports to the United States and Canada in MY2023/24.

The industry reports that for MY2023/24 farmers are prioritizing the domestic market, influenced by the high costs of shipping, strong competition posed by Egypt, and attractive domestic prices.

Post estimates Morocco’s MY 2023/24 tangerine/mandarin exports at approximately 450,000 MT while orange exports should reach around 50,000 MT and lemon/lime exports at 7,000 MT.

### *Summary of Post’s Citrus PSDs (1,000MT)*

Citrus	MY 2022/2023			MY 2023/2024		
	Production	Domestic Consumption	Exports	Production	Domestic Consumption	Exports
Tangerines/Mandarins Fresh	927	474	453	950	500	450
Oranges, Fresh	783	703	40	820	715	50
Lemons/Limes Fresh	35	28	7	40	33	7
Orange Juice (65° brix)*	4	4	2.8	5.5	4.5	3

Source : *Office des Changes*, \* *For import data see trade section.*

## I. Tangerines/Mandarins, Fresh

(HS-080520, 080521, 080522, 080529)

**Production:** For MY 2023/2024, Morocco's tangerine and mandarin production is forecasted to reach 950,000 MT, slightly up by 3 percent compared to the previous season. This increase is largely due to intensified irrigation efforts aimed at mitigating the negative impacts of heatwaves on crops. Growers in southern Morocco reported that while heatwaves have negatively impacted various agricultural crops, the timing of the most severe heatwave occurred after the citrus flowering phase, which somewhat reduced its effect on the tangerine and mandarin harvest. Additionally, growers in southern Morocco's Souss-Massa region noted that drought conditions led to delayed fruit maturation, resulting in abundance of smaller-sized fruits, which generally have lower market demand.

**Consumption:** Post forecasts domestic tangerine and mandarin consumption at 500,000 MT in MY 2023/2024, which represents a 5 percent increase compared to MY 2022/2023 based on increased production and higher domestic prices. Post also updates MY 2022/2023 fresh domestic consumption, reflecting remaining available supply in the balance sheet after accounting for year-end trade data. Post notes that increasing domestic tangerine/mandarin prices have helped maintain domestic supply at the cost to some exports.

**Trade:** The export season did not start until the second week of November due to a delay in fruit maturation. Industry sources in the south reported that the fruits are smaller in size and drier than usual. Consequently, many farmers chose to postpone harvesting, resulting in a delay to the start of the export season. Post projects MY 2023/2024 tangerine and mandarin exports to reach 450,000 MT, reflecting the figures from the previous season. The European Union and Russia continue to be the primary export destination for Morocco's tangerine and mandarin. Post also updates MY 2022/2023 export figures based on year-end trade data. It should be noted that Moroccan exporters are encountering challenges in shipping their products to the North American market, mainly because of issues in securing reservations on conventional ships. Consequently, the majority are turning to container shipping as an alternative, largely driven by the lower costs of containers. This situation is expected to reduce Moroccan tangerine and mandarin exports to the United States and Canada in MY2023/24.

### *Tangerine/Mandarin Exports (1,000 MT) by Marketing Year (Sep-Aug)*

Partner Country	2018/19	2019/20	2020/21	2021/22	2022/23	% Change
EU 27	151,914	150,097	165,801	180,699	145,059	-20%
Russia	303,330	124,247	149,464	182,346	94,900	-48%
United States	56,477	38,244	43,208	109,254	82,139	-25%
Canada	64,492	53,824	54,160	69,033	73,049	6%
Sub-Saharan Africa	23,855	26,830	30,364	52,428	37,338	-29%
Middle East	15,762	14,093	18,007	18,801	15,376	-18%
Other	6,993	3,617	4,648	12,415	6,001	-52%
Total	622,823	410,952	465,652	624,976	453,862	-27%

Source: Office des changes

***Production, Supply & Distribution: Tangerines/Mandarins, Fresh***

<b>Tangerines/Mandarins, Fresh</b>	<b>2021/2022</b>		<b>2022/2023</b>		<b>2023/2024</b>	
<b>Market Year Begins</b>	<b>Sep 2021</b>		<b>Sep 2022</b>		<b>Sep 2023</b>	
<b>Morocco</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Area Planted (HECTARES)</b>	65750	65750	59150	59150	0	59100
<b>Area Harvested (HECTARES)</b>	58900	58900	50000	50000	0	50050
<b>Bearing Trees (1000 TREES)</b>	20000	20000	17975	17975	0	17400
<b>Non-Bearing Trees (1000 TREES)</b>	6820	6820	6150	6150	0	6100
<b>Total No. Of Trees (1000 TREES)</b>	26820	26820	24125	24125	0	23500
<b>Production (1000 MT)</b>	1360	1360	927	927	0	950
<b>Imports (1000 MT)</b>	0	0	0	0	0	0
<b>Total Supply (1000 MT)</b>	1360	1360	927	927	0	950
<b>Exports (1000 MT)</b>	625	625	425	453	0	450
<b>Fresh Dom. Consumption (1000 MT)</b>	735	735	502	474	0	500
<b>For Processing (1000 MT)</b>	0	0	0	0	0	0
<b>Total Distribution (1000 MT)</b>	1360	1360	927	927	0	950
(HECTARES) ,(1000 TREES) ,(1000 MT)						

## II. Oranges, Fresh

(HS-080510)

**Production:** Weather conditions remain challenging, ongoing drought and increasing temperatures are adversely affecting orange production in Morocco. Industry indicates that while this season’s production is better than the previous drought-affected year, it is still approximately 24 percent lower than in a favorable year. For MY 2023/2024 orange production is expected to increase by 5 percent, reaching 820,000 MT, due to improved weather conditions during the growing season compared to the last year, coupled with an increased adoption of drip irrigation techniques.

**Consumption:** Post estimates MY 2023/2024 domestic consumption of fresh oranges at 715,000 MT, an increase of 1.7 percent from the previous season. Deliveries to processors are estimated to increase to 55,000 MT due to available supplies. Post adjusts domestic consumption for MY 2022/2023, based on year-end trade figures.

**Trade:** Orange exports have declined due to intense competition from Egypt and attractive prices in the local market. The industry reports that for MY2023/24 farmers are prioritizing the domestic market, influenced by the high costs of shipping and strong competition posed by Egypt. Post projects orange exports for MY2023/2024 to reach 50,000 MT, a 25 percent increase from the MY 2022/2023 due to the available of supplies. However, the MY2023/24 export projection is still approximately 67 percent below the levels seen in a good year due to lower-than-average production and continued higher domestic prices.

Post also updates the MY2020/2021 export number based on year-end trade data.

### *Orange Exports (MT) by Marketing Year (Oct-Sep)*

Partner Country	Marketing Year				Year to Date		
	2018/19	2019/20	2020/21	2021/22	10/21-08/22	10/22-08/23	%Δ
EU 27	97,459	84,191	52,011	51,284	46,955	5,915	-87%
Russia	14,908	9,909	9,609	20,307	20,307	6,343	-69%
United States	6,244	2,142	2,919	18,611	18,611	6,622	-64%
Canada	12,869	6,968	10,972	17,783	17,783	10,309	-42%
Sub-Saharan Africa	9,977	8,706	10,030	13,867	13,037	8,401	-36%
Middle East	9,592	4,532	4,459	6,784	6,784	579	-91%
Other	3,634	736	1,546	1,723	1,723	522	-70%
<b>Total</b>	154,683	117,184	91,546	130,359	125,200	38,691	-69%

Source: Office des changes

***Production, Supply & Distribution: Oranges, Fresh***

<b>Oranges, Fresh</b>	<b>2021/2022</b>		<b>2022/2023</b>		<b>2023/2024</b>	
<b>Market Year Begins</b>	<b>Oct 2021</b>		<b>Oct 2022</b>		<b>Oct 2023</b>	
<b>Morocco</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Area Planted (HECTARES)</b>	59600	59600	58500	58500	0	58200
<b>Area Harvested (HECTARES)</b>	56500	56500	55100	55100	0	54900
<b>Bearing Trees (1000 TREES)</b>	17200	17200	17125	17125	0	17100
<b>Non-Bearing Trees (1000 TREES)</b>	1635	1635	1600	1600	0	1590
<b>Total No. Of Trees (1000 TREES)</b>	18835	18835	18725	18725	0	18690
<b>Production (1000 MT)</b>	1150	1150	783	783	0	820
<b>Imports (1000 MT)</b>	0	0	0	0	0	0
<b>Total Supply (1000 MT)</b>	1150	1150	783	783	0	820
<b>Exports (1000 MT)</b>	130	130	80	40	0	55
<b>Fresh Dom. Consumption (1000 MT)</b>	965	965	663	703	0	715
<b>For Processing (1000 MT)</b>	55	55	40	40	0	50
<b>Total Distribution (1000 MT)</b>	1150	1150	783	783	0	820
(HECTARES) ,(1000 TREES) ,(1000 MT)						

### III. Orange Juice (65° brix basis)

(HS-200911, 200912, 200919)

**Production:** Post forecasts orange juice production for MY 2023/24 at 55,000 MT, 37 percent higher than MY 2022/23 based on industry reports indicating more available fruit for processing.

**Consumption:** Post forecasts MY 2023/24 domestic consumption at 4,500 MT, up 11 percent over the previous season on higher available supply. Post revised its estimate for MY2022/23 following year-end trade figures.

**Trade:** For MY 2023/24, Post estimates that orange juice exports will reach 3,000 MT, about 118 MT higher than MY 2022/23. Post also expects Morocco to import 2,000 MT of orange juice, a decrease of 934 MT over the previous year. Decreased imports reflect domestic production increase.

#### Orange Juice Imports (MT @ 65°) by Marketing Year (Oct-Sep)

Product	conv. factor	2018/19	2019/20	2020/21	2021/22	2022/23	% Change
2009.11: Frzn	1.0154	1,052	627	243	165	469	184.24%
2009.12: Not Frzn, ≤20 Brix	0.1815	7	5	9	8	15	87.50%
2009.19: Not Frzn, Other	1	1,320	1,054	1,304	1,607	2,451	52.52%
<b>Total (65° Basis)</b>		2,379	1,687	1,556	1,780	2,934	64.83%

Source: Office des Changes

#### Orange Juice Exports (MT @ 65°) by Marketing Year (Oct-Sep)

Product	conv. factor	2018/19	2019/20	2020/21	2021/22	2022/23	% Change
2009.11: Frzn	1.0154	1,310	226	522	818	846	3.42%
2009.12: Not Frzn, ≤20 Brix	0.1815	1,266	755	554	841	460	45.30%
2009.19: Not Frzn, Other	1	1,707	1,075	1,594	1,398	1,576	12.73%
<b>Total (65° Basis)</b>		4,283	2,056	2,670	3,057	2,882	-5.72%

Source : Office des Changes

#### Production, Supply & Distribution: Orange Juice (65° brix basis)

Orange Juice	2021/2022		2022/2023		2023/2024	
	Oct 2021		Oct 2022		Oct 2023	
Market Year Begins	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	55000	55000	40000	40000	0	55000
Beginning Stocks (MT)	0	0	0	0	0	0
Production (MT)	5500	5500	4000	4000	0	5500
Imports (MT)	1780	1780	2000	2934	0	2000
<b>Total Supply (MT)</b>	7280	7280	6000	6934	0	7500
Exports (MT)	3057	3057	2500	2882	0	3000
<b>Domestic Consumption (MT)</b>	4223	4223	3500	4052	0	4500
Ending Stocks (MT)	0	0	0	0	0	0
<b>Total Distribution (MT)</b>	7280	7280	6000	6934	0	7500
(MT)						

#### IV. Lemons/Limes, Fresh

(HS-080550)

**Production:** Post forecasts lemon and lime production for MY 2023/24 to reach 40,000 MT, about 14 percent higher than MY 2022/23. Production increases are due to the increase in area harvested.

**Consumption:** Post forecasts MY 2023/24 fresh domestic consumption to be slightly up at 33,000 MT based on available supply.

**Trade:** Post projects lemon/lime exports for MY 2023/24 to be flat at 7,000 MT. Post also updates MY2022/23 exports number based on year-end trade data.

##### *Lemon/Lime Exports by Destination (MT)*

Partner Country	2018/2019	2019/2020	2020/2021	2021/2022	2022/23	%Δ
Russia	5,151	6,477	4,242	2,091	1,615	-23%
Sub Saharan Africa	7,708	6,855	2,727	2,536	2,880	14%
EU 27	703	2,117	891	1,120	1,391	24%
United Kingdom	115	317	4	44	204	364%
Canada	719	1,073	649	1,642	1,203	-27%
United States	0	2	26	0	0	0%
Middle East	658	434	339	4	28	600%
Other	149	44	31	0	3	0%
Total	15,228	17,319	8,909	7,437	7,324	-2%

Source : Office des Changes

##### *Production, Supply & Distribution: Lemons/Limes, Fresh*

Lemons/Limes, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Oct 2021		Oct 2022		Oct 2023	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	4000	4000	3900	3900	0	3950
Area Harvested (HECTARES)	3110	3110	3000	3000	0	3050
Bearing Trees (1000 TREES)	1680	1680	1650	1650	0	1670
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	1680	1680	1650	1650	0	1670
Production (1000 MT)	45	45	35	35	0	40
Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	45	45	35	35	0	40
Exports (1000 MT)	7	7	7	7	0	7
Fresh Dom. Consumption (1000 MT)	38	38	28	28	0	33
For Processing (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	45	45	35	35	0	40
(HECTARES) ,(1000 TREES) ,(1000 MT)						

## V. Policy

The Moroccan government continues to provide a set of incentive measures to support citrus export and encourage new investment in citrus packinghouses.

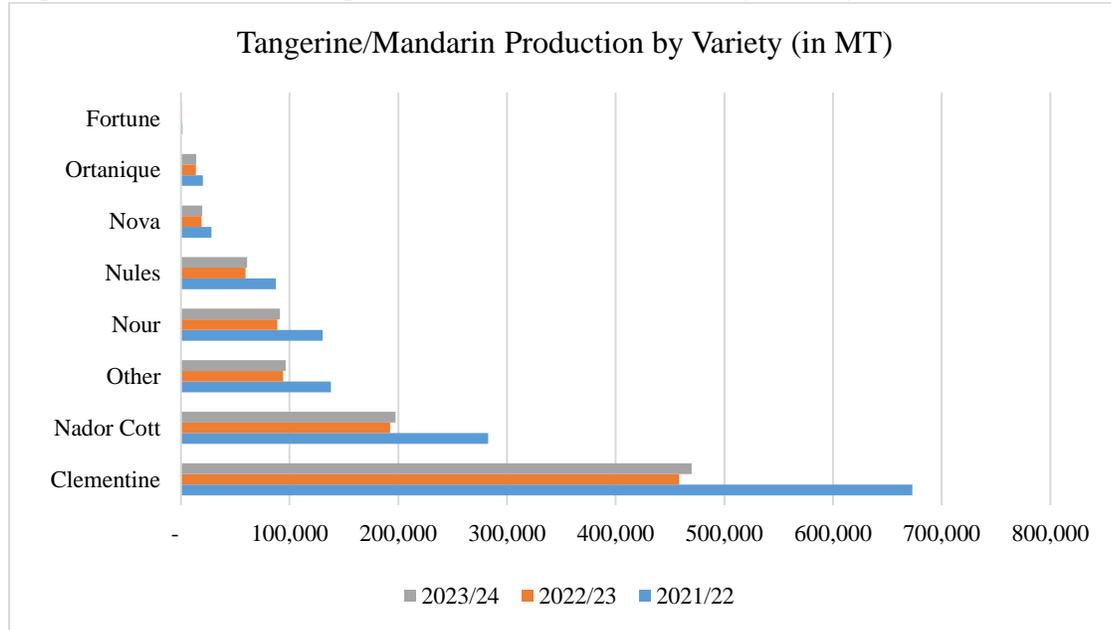
### *Subsidies and Incentives for the Citrus Sector:*

<b>Program</b>	<b>Subsidy</b>
Phyto-sanitary assistance	\$100/ha for the mass trapping technique based on the use of Medfly female attractant.
Packinghouse station	30% of the cost of construction
Export subsidy for citrus destined to Ukraine, China, Gulf countries	Since September 2017, exporters receive 500 DH/T for quantities that exceed the amount exported during the 2000/2001 export campaign.
Export subsidy for Countries other than Russia, Ukraine, China, Gulf countries, EU Members, and UK	Exporters receive 500MAD/MT for all exported quantities exceeding the levels exported between September 1, 2000 to August 31, 2001

Source: MoA/FDA-2023 [link](#)

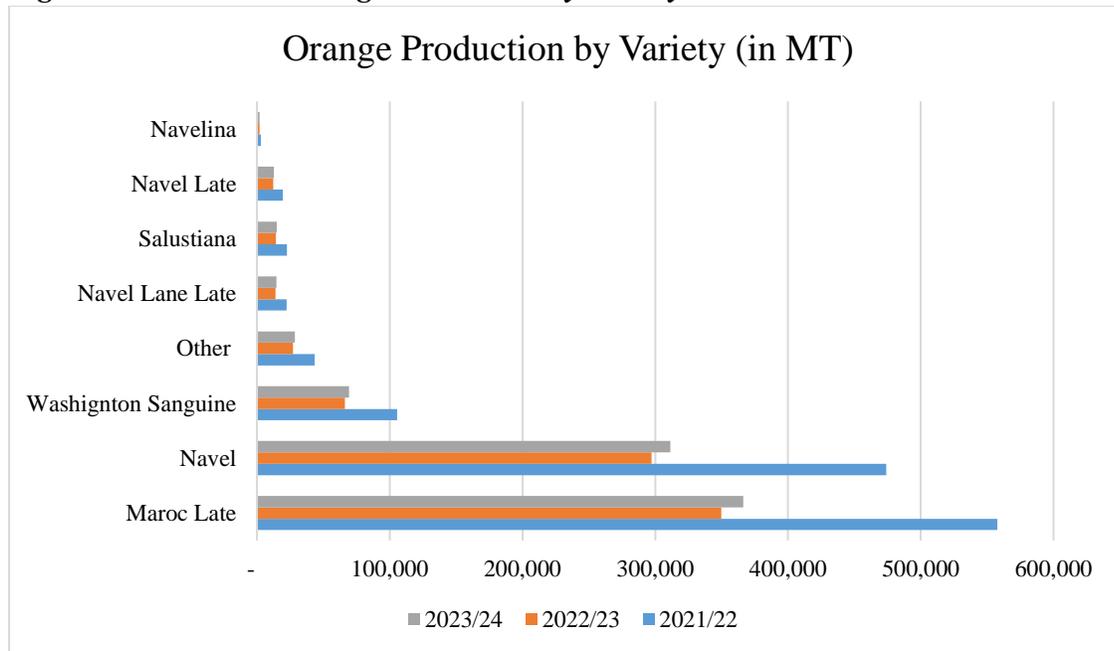
**VI. Annex**

**Figure 1: Morocco's Tangerine/Mandarin Production by Variety in MY 2023/2024**



Source: MinAg, \*MY2023/2024 forecast

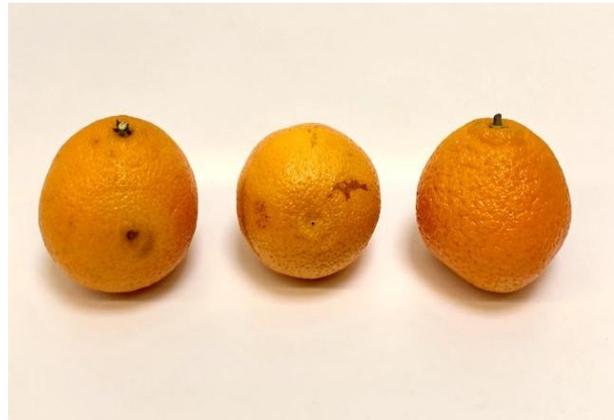
**Figure 2: Morocco's Orange Production by Variety in MT 2023/2024**



Source: MinAg, \*MY2023/2024 forecast

**Field Trip Observations:**

*The photos, captured on our field trip in the Souss-Massa region during the week of November 6<sup>th</sup>, shows the effect of the drought, with many fruits being small size and too dry.*



**Attachments:**

No Attachments