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**Report Highlights:**

In MY 2022/23, European Union (EU) citrus production is projected to amount to 10.4 million metric tons (MMT), 10 percent down from the previous season, especially impacting oranges and lemons, and slightly lower than previous estimations. The reduced production is mainly driven by strong expected decreases in Spain resulting from a combination of 2022 spring rains negatively impacting flowering and fruit setting and a severe drought experienced in 2023. Due to an expected decline in domestic consumption because of increasing citrus prices, EU citrus supply may not be supplemented with higher imports, except for oranges.

**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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## Abbreviations and References used in this report:

CAP	Common Agricultural Policy
CMO	Common Market Organization
EC	European Commission
EU	European Union
FAS	Foreign Agricultural Service
HA	Hectares
TDM	Trade Data Monitor LLC
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
US	United States
\$	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

## Executive Summary

In MY 2022/23, the EU citrus production is projected to amount to 10.4 MT, 10 percent down from the previous marketing year. This citrus production level is 0.7 percent down from previous estimation (see [EU Citrus Annual 2022](#)).

EU citrus production is concentrated in the Mediterranean region. Spain and Italy represent the leading EU citrus producers, followed by Greece, Portugal, and Cyprus. According to industry sources and official data, a reduction in EU citrus production is expected mainly in Spain with an almost 18 percent decrease, the lowest citrus production levels since the last decade. Spain's citrus accounts for approximately 65 percent of the EU's citrus production. Reductions in citrus production is also projected in Italy, mainly in oranges, and Portugal. Conversely, in MY 2022/23, Greece expects a rebound compared to the last season. The major decrease expected in Spain is due to a combination of 2022 spring rains that negatively affected flowering and fruit setting and an unusually warm summer and continued drought experienced up to May 2023. These unfavorable weather conditions significantly compromised citrus production, particularly in the case of oranges and lemons.

Russia's invasion of Ukraine in February triggered an increase in input costs such as energy (fuel and electricity) and compromised fertilizer availability and increasing its prices. The sales value of citrus fruits did not increase along with the price hike in agricultural inputs, leading to profitability losses for citrus fruit producers and operators. Higher agricultural input costs, lack of economic productivity, and an agricultural labor deficit remain concerns for citrus producers across the EU.

According to FAS EU Post projections, area planted to citrus in the EU is expected to increase in line with the previous estimations, as more profitable tree plantations continue to replace arable crops in the Mediterranean producing countries. Lemons and grapefruits area are expected to experience the largest increase in MY 2022/23. EU orange plantings are also expected to grow moderately in MY 2022/23, whereas area planted to mandarins in the EU is anticipated to slightly decline. Citrus area expansion is concentrated in Spain, whereas area planted to citrus in Italy, Portugal, and Greece remains more stable.

In MY 2022/23, given the EU's shorter citrus crop, an overall rise in citrus prices, higher food inflation in the EU, and price sensitive consumers, citrus consumption in the EU is expected to decline, as previously estimated.

The EU is a net importer of citrus fruits. According to Trade Data Monitor, LLC (TDM), in MY 2021/22, total EU citrus imports from non-EU countries were five percent lower than the previous season. From October 2022 to March 2023, EU citrus imports are six percent higher compared to the same period of 2022, mainly due to the orange production shortages. Main EU citrus suppliers are [South Africa](#), [Turkey](#), [Egypt](#), [Morocco](#), [Argentina](#), and [Brazil](#), primarily shipping citrus fruits to Northern and Eastern EU countries. While EU citrus imports from Turkey and Morocco declined during the first half of MY 2022/23, imports from South Africa and Egypt rose. Regarding EU citrus exports, in MY 2021/22, the EU exported six percent fewer citrus fruits than the previous season. Similarly, during the first half of MY 2022/23, EU citrus shipments were three percent lower than the same period of the previous season with reduced supplies, lower demand, and higher competition aggravated by a change of trade flows after the Russian invasion of Ukraine. Main destinations for EU citrus exports are the UK, Switzerland, Norway, and Canada.

Spain is both the major EU citrus producer as well as the main citrus supplier to the rest of EU Member States. Spain is one of the top global citrus producers and exporters ([see Citrus World Markets and Trade Report](#)). In MY 2021/22, Spanish citrus exports amounted at 3.7 MMT, mainly oranges, mandarins, and lemons. The primary export destination for Spanish citrus are other EU countries.

## Oranges

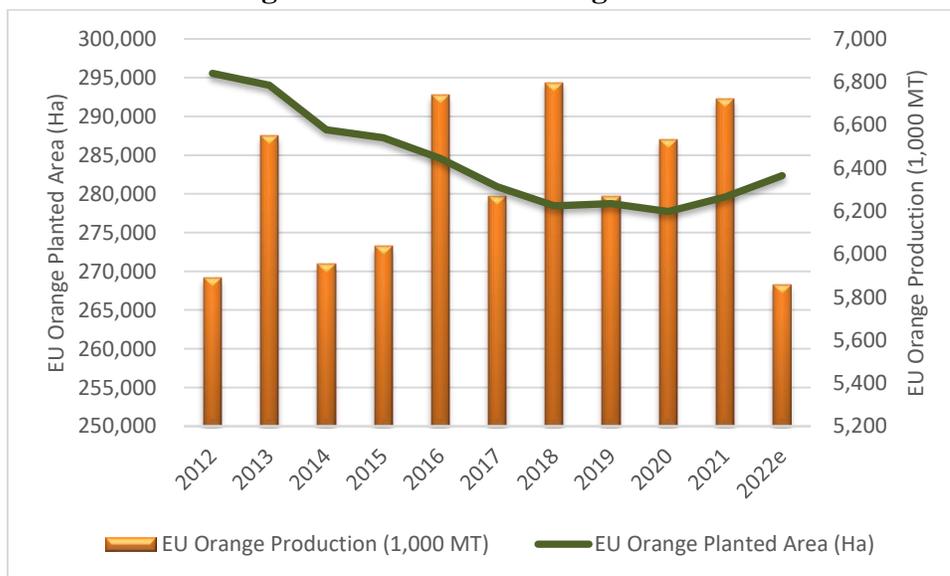
**Table 1. EU Oranges Production, Supply, and Distribution**

Oranges, Fresh Market Year Begins	2020/2021		2021/2022		2022/2023	
	Oct 2020		Oct 2021		Oct 2022	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	277,864	277,714	279,620	279,596	282,145	282,348
Area Harvested (HECTARES)	259,164	259,164	257,780	260,935	262,779	263,043
Bearing Trees (1000 TREES)						
Non-Bearing Trees (1000 TREES)						
Total No. Of Trees (1000 TREES)						
Production (1000 MT)	6,540	6,531	6,720	6,720	5,854	5,856
Imports (1000 MT)	858	859	740	734	835	835
Total Supply (1000 MT)	7,398	7,390	7,460	7,454	6,689	6,691
Exports (1000 MT)	410	410	403	403	390	390
Fresh Dom. Consumption (1000 MT)	5,992	5,954	5,947	6,009	5,640	5,470
For Processing (1000 MT)	996	1,026	1,110	1,042	659	831
Total Distribution (1000 MT)	7,398	7,390	7,460	7,454	6,689	6,691
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Not official USDA data.

Sources: Trade for MY 2020/21 and 2021/22: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

**Chart 1. EU Orange Production and Orange Planted Area 2012-2022**



Source: FAS EU posts.

## Production

EU orange production is concentrated in the Mediterranean region. Spain and Italy represent around 55 and 25 percent respectively of the EU's total orange production. The remaining 20 percent is distributed among other Member States (MS), such as Greece and Portugal.

For MY 2022/23, EU orange production is expected at nearly 5.8 million MT, almost a 13 percent reduction compared to the previous season and stable compared to the previous estimation (see Chart 1). The production decline is explained by the reductions expected mainly in Spain and slightly in Italy and Portugal.

According to [official data](#), MY 2022/23 orange production in Spain is projected to decline by 22.8 percent, amounting at 2.895 MMT of oranges. Spanish orange production was the citrus crop most severely affected by the poor flowering and fruit setting conditions. According to official data, adverse and extreme weather conditions occurred in the areas of Spanish citrus production, namely the Community of Valencia and Andalusia, during flowering and fruit set due to excess of rainfalls in spring 2022 as well as extremely high temperatures, drought, and limitations in irrigation allocations during the fattening phase, led to the expected reduced harvest, almost 20 percent lower than the last five-year average.

After several consecutive years of economic slowdown, citrus farmers are increasingly leaving orange production for more profitable products. However, Spanish orange planted area has been steadily rebounding since 2018, amounting to approximately 143,000 Ha in 2022. Nevertheless, sustainable practices, the productivity of Spanish orange farms, and the use of efficient and high-performing varieties have kept Spain as the top orange producer and exporter in the EU.

Accounting for approximately 90 percent of Spanish orange production, Valencia and Andalusia are Spain's major orange producing regions. Spanish producers try to supply the market throughout the whole marketing year by growing both early and late varieties to extend the fruit availability. *Naveline*, *Navel*, *Navelate*, *Salustiane*, *Valencia* and *Sanguinello* are the leading orange varieties grown in Spain.

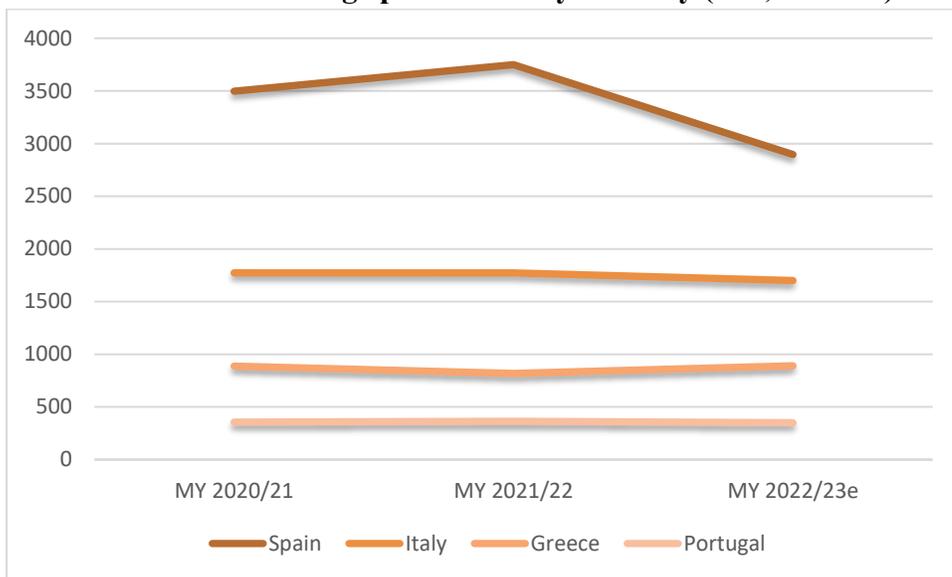
Italy is the second largest European orange producer after Spain. Sicily and Calabria are the main orange-producing areas, accounting for approximately 63 and 19 percent of total production, respectively. *Tarocco*, *Moro*, *Sanguinello*, *Naveline*, and *Valencia* are the leading orange varieties grown in the country. Moreover, *Ippolito* and *Meli* cultivars are gaining popularity. Italy's MY 2022/23 orange production, as previously estimated, is expected to slightly decrease from the previous season, amounting 1.7 MMT, due to the drought in Sicily that mostly affected blonde and late varieties.

Greece's MY 2022/23 orange production is expected to increase by approximately 9 percent compared to the previous year due to normal fruit set in most varieties. Peloponnese and Etoloakarnania (western Greece) are the main orange-producing areas. *Washington Navel*, *Commons*, *Skaggs Bonanza*, *Navelina*, *New Hall*, *Lanelate*, and *Valencia* are the chief varieties grown in Greece. The *Valencia* harvest currently is delayed compared to the previous year due to high storage and energy costs.

Conversely, according to official data, in MY 2022/23, Portuguese production is expected to slightly decline compared to the previous season due to unfavorable weather conditions and extreme drought.

Nevertheless, over the last decade, Portugal has increased its orange production with more efficient and irrigated citrus farms. Seventy-five percent of Portuguese orange production are in Algarve, the southern region.

**Chart 2. EU’s Orange production by Country (in 1,000 tons)**



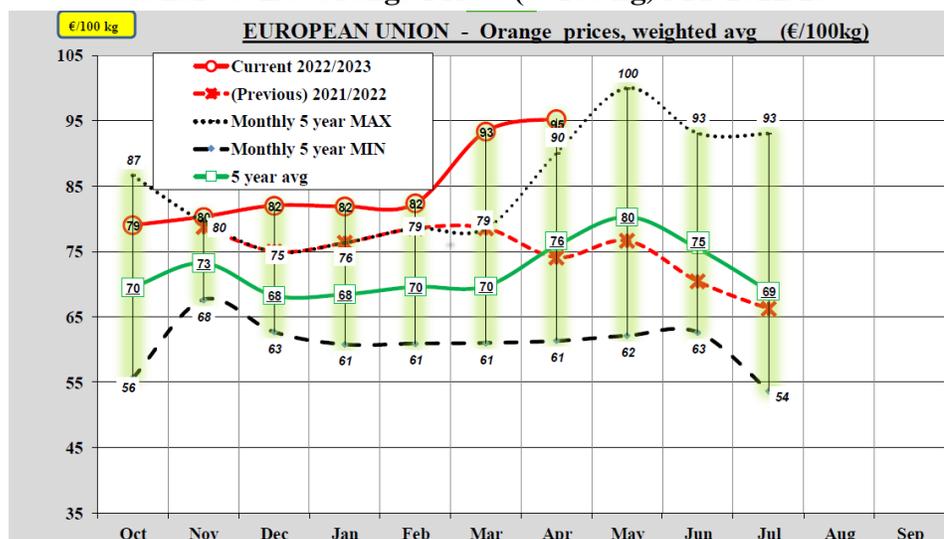
Source: FAS EU posts.

According to the [EU Citrus Dashboard](#), MY 2022/23 started off with average EU orange prices higher than the last five-year average (see Chart 3), fueled by the lower domestic supply. In April 2023, EU orange prices stood at 95 €/100 kg, 125 percent higher than the last five-year average. Overall, EU’s orange producers increased their prices. In April 2023, Spain’s orange price rose 134 percent compared to the average to 89 €/100 kg and Italy’s orange price also increased 127 percent to 132 €/100 kg.

**Consumption**

In MY 2022/23, as previously estimated, fresh orange consumption is expected to decline compared to the previous season and to previous estimations, given the EU’s shorter crop, higher orange prices, and price sensitive consumers. In the EU, approximately 85 percent of EU oranges are consumed fresh. The increase in farmgate orange prices reduced fruit for processing in MY 2022/23.

**Chart 3. EU Orange Prices (€/ 100 kg) MY 2022/23**



Source: DG AGRI Dashboard: Citrus Fruit

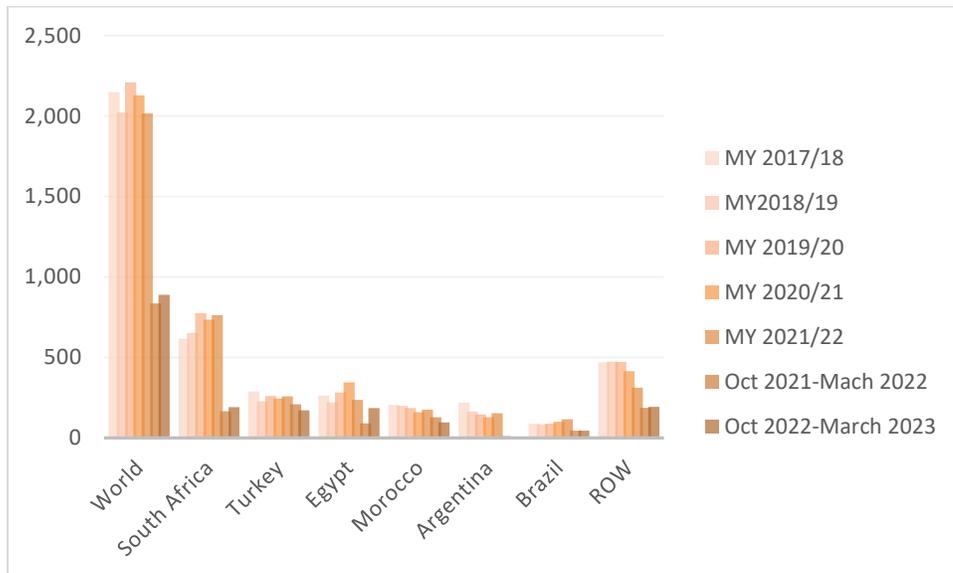
## Trade

In MY 2022/23, EU imports of oranges are anticipated to grow compared to previous season levels, because of the significant reduction in EU orange production (see Chart 4). It is important to note that the major orange supplier to the EU is Spain. Main non-EU import origins include South Africa, especially during the off-season, Egypt, Morocco, Zimbabwe, and Argentina. Since May 1, 2021, Argentina is again eligible to export fresh lemons and oranges to the EU, after the market was shut due the detection of Citrus Black Spot (CBS) in MY 2019/20. Since July 14, 2022, EU orange imports from countries affected by False Codling Moth (*Thaumatotibia leucotreta*) will be required to undergo a precooling and cold treatment in transit.

For additional information, please consult the Policy section at the end of this report.

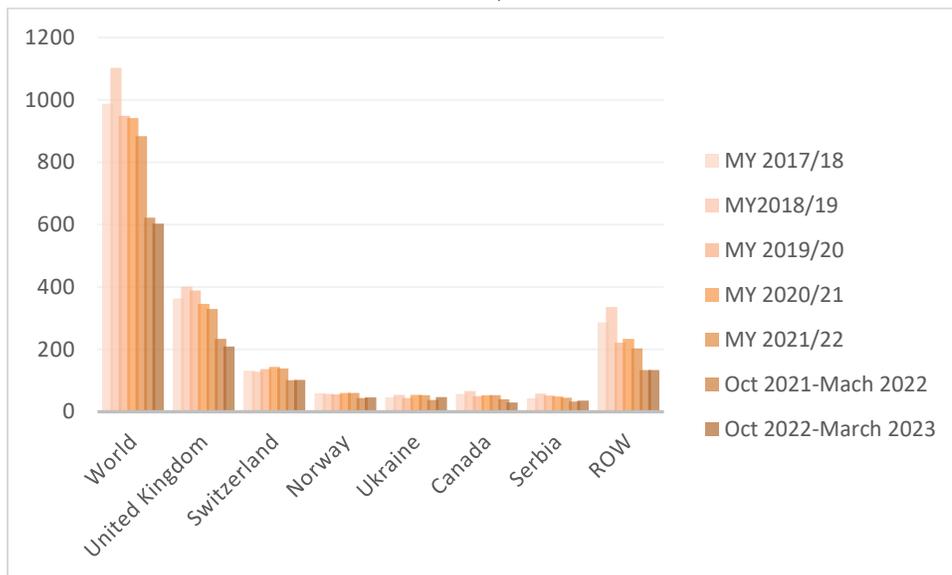
In MY 2022/23, EU orange exports are expected to slightly decline due to the orange production shortage. Main destinations for EU oranges, primarily exported by Spain, include the United Kingdom, Switzerland, Canada, Norway, Serbia, and Middle East (see Chart 5).

**Chart 4. MY EU Imports of Oranges by Origin MY 2017-2022 & Year-To-Date (Thousand MT)**



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

**Chart 5. MY EU Exports of Oranges by Destination MY 2017-2022 & Year-To-Date (Thousand MT)**



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

## Orange Juice

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

Orange Juice Market Year Begins	2020/2021		2021/2022		2022/2023	
	Oct 2020		Oct 2021		Oct 2022	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Deliv. To Processors</b> (MT)	1,029,000	1,026,000	1,116,000	1,042,000	709,000	831,000
<b>Beginning Stocks</b> (MT)	15,000	15,000	15,000	15,000	15,000	15,000
<b>Production</b> (MT)	79,538	79,538	77,522	80,778	54,963	64,421
<b>Imports</b> (MT)	637,366	637,409	569,057	566,664	570,000	560,000
<b>Total Supply</b> (MT)	731,904	731,947	661,579	662,442	639,963	639,421
<b>Exports</b> (MT)	132,127	132,086	111,765	111,860	82,000	90,000
<b>Domestic Consumption</b> (MT)	584,777	584,861	534,814	535,582	542,963	534,421
<b>Ending Stocks</b> (MT)	15,000	15,000	15,000	15,000	15,000	15,000
<b>Total Distribution</b> (MT)	731,904	731,947	661,579	662,442	639,963	639,421
(MT)						

Not official USDA data.

Sources: Trade for MY 2020/21 and 2021/22. Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

### Production

EU orange juice production in MY 2022/23 is forecast at 64,421 MT, 20 percent down from the previous season, higher than previously estimated. The volume of oranges destined for processing depends on overall orange production and the quality and size of the fruit destined for the fresh markets domestically and abroad. The EU orange processing industry plays a key role in stabilizing the EU orange balance. Given the anticipated significant decline in the EU's orange production and the good prices that farmers receive for fresh oranges, the processing sector is expected to decline.

Spain is the major orange processor in the EU, followed by Italy. Around 20 percent of Spanish orange production is used in processing, mainly into fresh orange juice but also in the manufacture of other essential citrus by-products. Additionally, prominent Spanish citrus processors are implementing sustainable measures and respond to new consumer demand. The use of sustainable packaging is also a significant trend in the EU.

### Consumption

EU MY 2022/23 orange juice consumption is expected to decline slightly compared to last season, given high food price inflation, price sensitive consumers, and increased competition by alternative drinks and fruit juices. EU orange juice production only meets around 15 percent of the domestic orange juice demand, amounting to approximately 535,000 MT.

### Trade

The EU is a net importer of orange juice, primarily to meet domestic demand. EU orange juice imports are dominated by Brazil, which accounts for 90 percent of the EU imports at 566,664 tons in My 2021/22. During the first half of MY 2022/23, EU orange juice imports declined seven percent. In MY

2022/23, EU orange juice imports are expected to drop slightly compared to last season due to the expected lower EU orange domestic consumption. Other suppliers to the EU include Mexico, South Africa, Argentina, and Egypt. Despite the elimination of the EU tariffs on U.S. orange juice in spring 2021, the United States has not recovered its pre-2018 export levels to the EU.

The United Kingdom is by far the largest destination of EU orange juice. In MY 2022/23, EU orange juice exports are expected to drop slightly in line with the lower EU orange domestic production.

## Tangerines/Mandarins

**Table 3. Production, Supply, and Distribution**

Tangerines/Mandarins, Fresh Market Year Begins	2020/2021		2021/2022		2022/2023	
	Oct 2020		Oct 2021		Oct 2022	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	152,102	152,102	149,975	150,197	150,758	149,476
Area Harvested (HECTARES)	140,575	140,575	136,652	137,950	138,576	137,546
Bearing Trees (1000 TREES)						
Non-Bearing Trees (1000 TREES)						
Total No. Of Trees (1000 TREES)						
Production (1000 MT)	3,243	3,245	3,155	3,158	3,013	3,035
Imports (1000 MT)	423	423	432	430	410	410
Total Supply (1000 MT)	3,666	3,668	3,587	3,588	3,423	3,445
Exports (1000 MT)	350	350	322	322	300	300
Fresh Dom. Consumption (1000 MT)	3,051	3,041	3,016	3,018	2,990	2,905
For Processing (1000 MT)	257	277	249	248	133	240
Total Distribution (1000 MT)	3,658	3,668	3,587	3,588	3,423	3,445
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Not official USDA data.

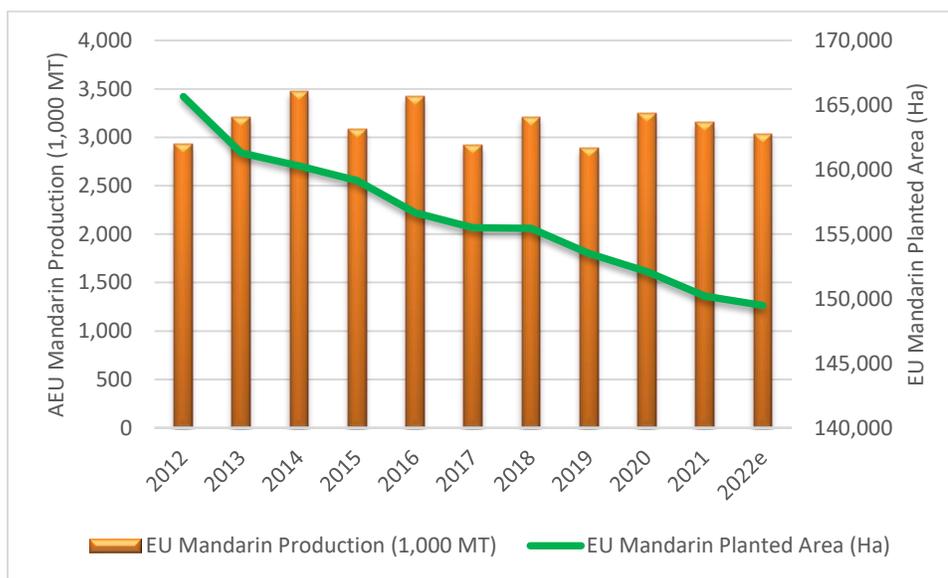
Sources: Trade for MY 2020/21 and 2021/22. Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

EU mandarin production in MY 2022/23 is forecast at 3 MMT, almost four percent down from the previous season and 0.7 percent up from previous estimations. The shortage in EU mandarin production expected for this marketing year is mainly the result of anticipated decreases in Spain, EU's major mandarin producer.

Spain and Italy are respectively the first and second largest EU mandarin producers, accounting for nearly 65 and 25 percent of the EU's total mandarin production. In Spain, the lack of rain and warm temperatures since summer 2022 reduced the country's mandarin production expectations by nearly 10 percent to slightly below 2 MMT, compared to the previous season and as previously estimated. Italy's MY 2022/23 mandarin production is expected to remain flat from the previous season. Greece's MY 2022/23 mandarin production is expected to increase by 28 percent compared to the previous year due to increased fruit-set that improved yields.

In MY 2022/23, EU planted area for mandarins may slightly decrease to almost 149,500 Ha (see Chart 6). Spanish mandarin planted area may continue to decrease while the rest of EU mandarin producers remain flat.

**Chart 6. EU Mandarins Production and Planted Area 2012-2022**



Source: FAS EU posts.

## Consumption

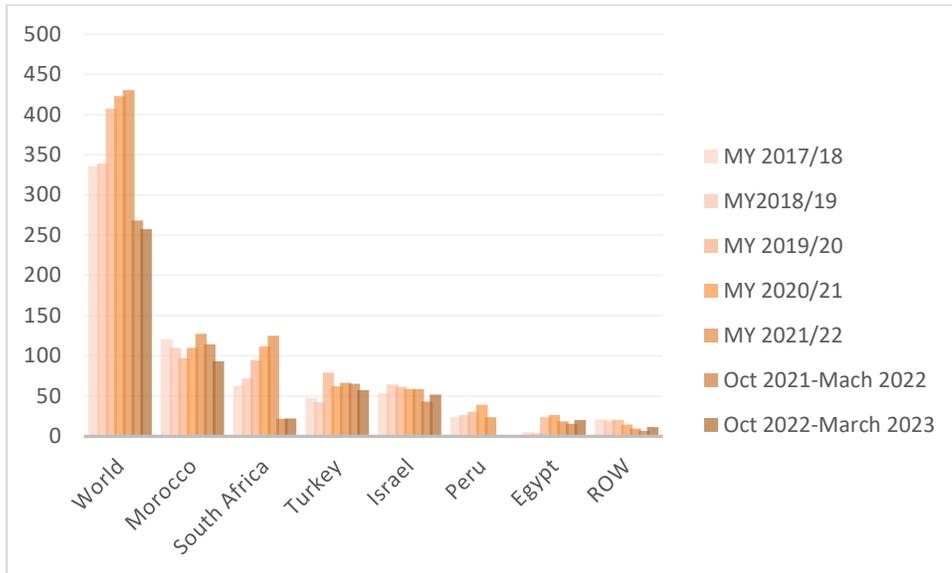
EU mandarins are mainly consumed fresh. MY 2022/23 EU fresh mandarins for consumption and processing are forecast to decrease in line with the expected drop in supply and the rise on mandarin prices. During the COVID-19 pandemic, in MY 2020/21 and MY 2021/22, EU consumers sought mandarins for their health benefits and as good natural sources of vitamin C.

## Trade

EU is a net importer of mandarins. In MY 2021/22, EU mandarin imports slightly increased to meet demand. For MY 2022/23, EU mandarin imports are expected to decline in line with the anticipated reduction in internal demand. Morocco, South Africa, Turkey, Israel, Peru, and Egypt are the leading suppliers to the EU market (see Chart 7).

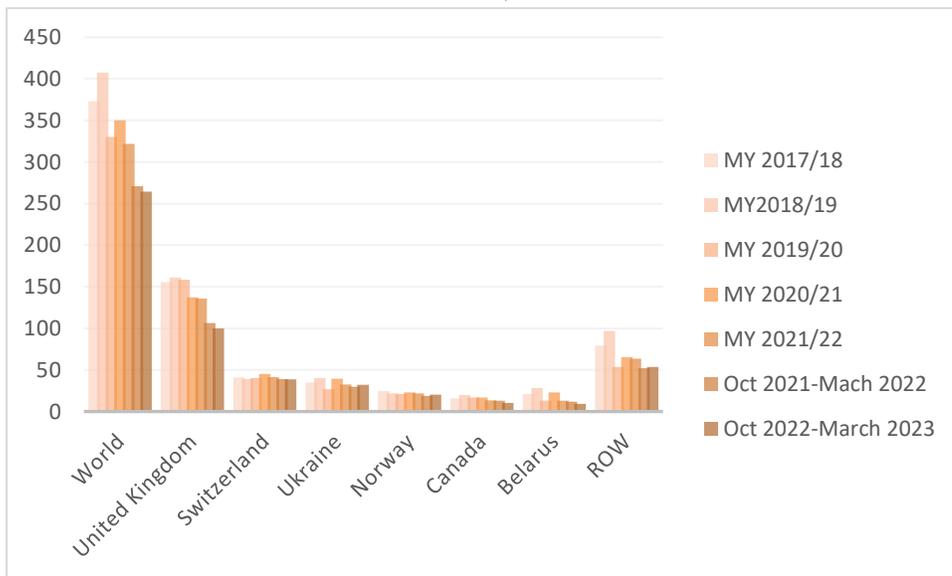
The reduced domestic supply driven by the shorter Spanish mandarin production is projected to limit EU mandarin exports. In MY 2021/22, the trade balance continued to erode with increased imports and reduction in exports. EU's main export market destinations, primarily shipped from Spain, for mandarins are the United Kingdom, Switzerland, Ukraine, Belarus, Norway, and Canada (see Chart 8).

**Chart 7. MY EU Imports of Mandarins by Origin MY 2017-2022 & Year-To-Date (Thousand MT)**



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

**Chart 8. MY EU Exports of Mandarins by Destination MY 2017-2022 & Year-To-Date (Thousand MT)**



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

## Lemons/Limes

**Table 4. Production, Supply, and Distribution**

Lemons/Limes, Fresh Market Year Begins European Union	2020/2021		2021/2022		2022/2023	
	Oct 2020		Oct 2021		Oct 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Planted</b> (HECTARES)	83,978	83,998	86,464	85,164	88,631	86,442
<b>Area Harvested</b> (HECTARES)	71,844	72,844	74,201	74,209	76,496	76,333
<b>Bearing Trees</b> (1000 TREES)						
<b>Non-Bearing Trees</b> (1000 TREES)						
<b>Total No. Of Trees</b> (1000 TREES)						
<b>Production</b> (1000 MT)	1,731	1,733	1,629	1,630	1,567	1,474
<b>Imports</b> (1000 MT)	551	551	629	628	560	560
<b>Total Supply</b> (1000 MT)	2,282	2,284	2,258	2,258	2,127	2,034
<b>Exports</b> (1000 MT)	155	155	142	142	140	140
<b>Fresh Dom. Consumption</b> (1000 MT)	1,734	1,837	1,741	1,829	1,731	1,642
<b>For Processing</b> (1000 MT)	393	292	375	287	256	252
<b>Total Distribution</b> (1000 MT)	2,282	2,284	2,258	2,258	2,127	2,034
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Not official USDA data.

Sources: Trade for MY 2020/21 and 2021/22. Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

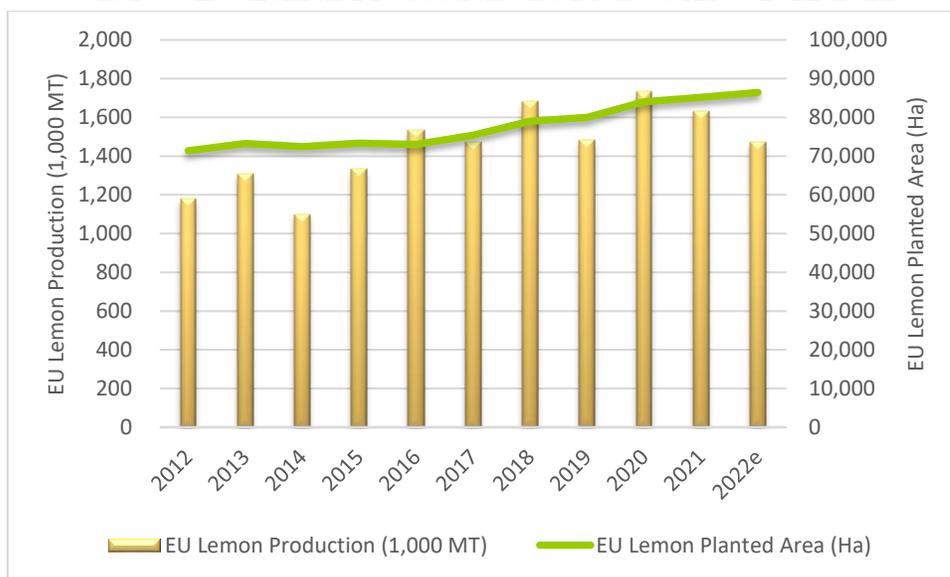
### Production

In MY 2022/23, EU lemon production is forecast at almost 1.5 million MT, 9.5 percent down from MY 2021/22 and lower than previous estimations due to an estimated lower lemon production in Spain and despite the rebound expected in Italy (see Chart 9). EU lemon planted area continued trending upwards in MY 2022/23 to about 86,400 Ha, mainly due to the strong expansion in Spain. Additionally, around 25 percent of Spain's lemon planted area is devoted for organic lemon production. According to the Spanish lemon industry, this upward trend on organic lemon production in Spain will continue in the coming years and the country will be able to supply organic lemons year-round.

Spain and Italy are respectively the first and second largest EU lemon producers, accounting for approximately 65 and 30 percent of the EU's total lemon production. In MY 2022/23, despite the increase in lemon area planted in Spain, spring rains in 2022 that negatively affected flowering and fruit setting and extremely dry weather in 2023 pushed production went down by 18 percent to about 857,000 MT. *Primofiori* and *verna* production varieties represent respectively about 70 and 30 percent of Spain's lemon production, mainly grown in the region of Murcia.

Italy's MY 2022/23 lemon production is expected to increase by 7 percent at 500,000 MT while in Greece, lemon production is expected to remain flat at approximately 87,000 MT.

**Chart 9. EU Lemon Production and Planted Area 2012-2022**



Source: FAS EU posts.

### Consumption

EU’s lemon production is primarily intended for the fresh market. In MY 2022/23, the reduced domestic production and the increase in lemon prices are expected to strongly reduce EU fresh lemon consumption and use in processing due to a rise in farmgate lemon prices.

### Trade

The EU is a net importer of lemons. In MY 2021/22, EU lemon imports strongly increased to meet the domestic demand and a reduced crop. In MY 2022/23, EU imports of lemons are expected to decline given the reduction expected in internal demand (see Chart 10). The leading lemon suppliers to the EU are South Africa, Argentina, Turkey, and Brazil. Since MY 2021/22, lemons from South Africa exceeded lemon imports from Argentina, the former major lemon supplier to the EU, even though the EU reopened its market in May 2021 to Argentine fresh lemons and oranges after its CBS detection-related closure in MY 2019/20.

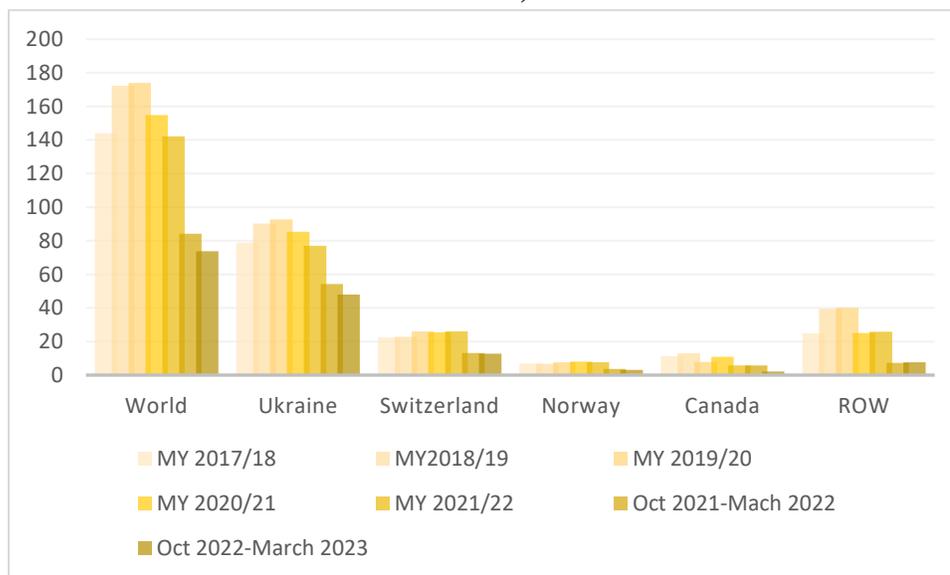
MY 2022/23 EU lemon exports are projected only slightly below previous season levels (see Chart 11). In MY 2021/22, the United Kingdom, Switzerland, Norway, and Canada remained the main destination for EU lemons, which are shipped primarily from Spain.

**Chart 10. MY EU Imports of Lemons by Origin MY 2017-2022 & Year-To-Date (Thousand MT)**



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

**Chart 11. MY EU Exports of Lemons by Destination MY 2017-2022 & Year-To-Date (Thousand MT)**



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

## Grapefruit

**Table 5. Production, Supply, and Distribution**

Grapefruit, Fresh Market Year Begins European Union	2020/2021		2021/2022		2022/2023	
	Oct 2020		Oct 2021		Oct 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Planted</b> (HECTARES)	3,598	3,598	3,799	3,791	3,892	3,960
<b>Area Harvested</b> (HECTARES)	3,120	3,120	3,191	3,191	3,260	3,344
<b>Bearing Trees</b> (1000 TREES)						
<b>Non-Bearing Trees</b> (1000 TREES)						
<b>Total No. Of Trees</b> (1000 TREES)						
<b>Production</b> (1000 MT)	106	106	111	106	109	99
<b>Imports</b> (1000 MT)	295	295	223	223	215	215
<b>Total Supply</b> (1000 MT)	401	401	334	329	324	314
<b>Exports</b> (1000 MT)	26	26	17	17	15	15
<b>Fresh Dom. Consumption</b> (1000 MT)	362	362	299	299	297	288
<b>For Processing</b> (1000 MT)	13	13	18	13	12	11
<b>Total Distribution</b> (1000 MT)	401	401	334	329	324	314
(HECTARES) ,(1000 TREES) ,(1000 MT)						

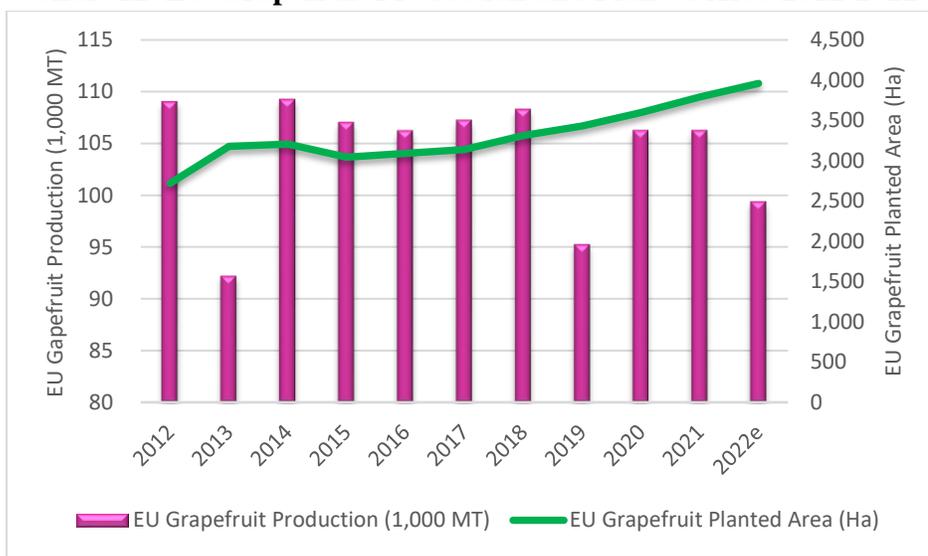
Not official USDA data.

Sources: Trade for MY 2020/21 and 2021/22: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

### Production

MY 2022/23 EU grapefruit production is forecast to decline 6.6 percent to 99,000 MT, largely due to the drought-driven 8.5 percent production decline reported in Spain (see Chart 12). Spain is the EU's grapefruit leading producer and accounts for nearly 75 percent of the bloc's production followed by Cyprus. Reduced grapefruit production expected in Spain is driven by the impact of the 2022 spring rains that hampered grapefruit trees' flowering and fruit setting and the extreme warm weather up to May 2023. Like lemons, EU grapefruit planted area may continue to trend upwards in MY 2022/23 to almost 4,000 Ha, mainly due to the strong expansion in Spain.

**Chart 12. EU Grapefruit Production and Planted Area 2012-2022**



Source: FAS EU posts.

### Consumption

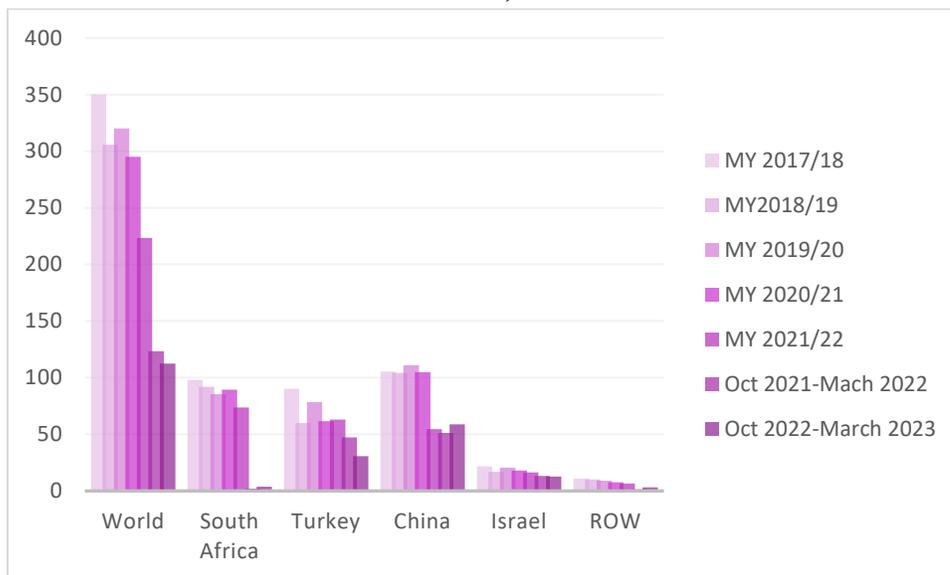
Grapefruits in the EU are mainly consumed fresh, with consumption significantly surpassing grapefruit production. Therefore, the EU is a net importer of grapefruits to satisfy the EU domestic demand. EU grapefruit imports comprise around 75 percent of the EU’s total grapefruit supply. Spain and Cyprus are the main grapefruit processors in the EU. In MY 2022/23, EU grapefruit consumption is expected to decline in line with the lack of production.

### Trade

The EU is a net importer of grapefruits to satisfy the domestic demand. In MY 2022/23, EU imports of grapefruit are expected to decline despite the shorter domestic crop as demand is expected to decrease in response to increasing prices. In MY 2021/22, imports of grapefruit declined by 25 percent driven by reductions in South Africa’s exports to the EU. Despite the suspension of additional EU tariffs since spring 2021, U.S. grapefruit exports to the EU further contracted in MY 2021/22, as [Florida’s grapefruit production](#) continues to shrink (see Chart 13), and were valued at \$8 million. The largest grapefruit suppliers to the EU are South Africa, Turkey, [China](#), Israel, United States, and Mexico.

EU grapefruit exports are very small and expected to decline marginally in MY 2022/23, given the tight domestic supply. Main destinations of EU grapefruits included the United Kingdom and Switzerland.

**Chart 13. MY EU Imports of Grapefruits by Origin MY 2017-2022 & Year-To-Date (Thousand MT)**



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

## Policy Section

### EU Policy Response to the War in Ukraine

On March 23, 2022, the European Commission published a Communication on [“Safeguarding food security and reinforcing the resilience of food systems.”](#) This Communication outlines short-term and medium-term actions that the EU will take to enhance global food security and support EU farmers given rising commodity prices and costs for energy and fertilizer inputs due to the war in Ukraine. A total of €500 million is being distributed in national allocations to directly support EU farmers most affected by higher input costs and the closure of export markets. Member States can supplement this support up to 200 percent using national funds. Despite the measures in place, the European fresh produce sector remains concerned about market stability since the focus is on crops and fertilizer availability.

### EU Fertilizer Plan

On November 9, 2022, the European Commission published a [Communication](#) on the availability and affordability of fertilizers in the EU. The aim of this long-awaited document was to propose solutions to address the significant price increases EU farmers are facing, which grew by 149 percent from September 2021 to September 2022 for nitrogen fertilizers. The Communication proposes using emergency funds from the CAP 2023 agricultural reserve to stabilize agricultural markets and to create a market observatory system for fertilizer prices. Additional information may be viewed at: [EC Factsheet: Ensuring the availability and affordability of fertilizers.](#)

## **The European Green Deal**

On December 11, 2019, the Commission presented its [Communication on the European Green Deal](#). The flagship proposal is a draft European Climate Law that will make the EU's 2050 climate neutrality objective binding across the Union. The Green Deal includes a "[Farm to Fork Strategy](#)" and a "[Biodiversity Strategy](#)" that aim to support the Green Deal's objectives by fundamentally changing the way agriculture operates and how food is produced for, and provided to, EU consumers. Both strategies were published on May 20, 2020. Key aspects of the two Strategies include: reducing pesticide use, supports to domestic production of plant protein for animal feed, increasing organic production, and increasing soil and nature conservation by setting aside a minimum of 10 percent of the existing agricultural area into higher biodiversity landscape features.

## **The Farm to Fork Strategy**

The F2F Strategy highlights 27 actions aimed to transform the way EU food is produced, processed, transported, presented, and sold. The full F2F Strategy is available [here](#). The Commission identified these actions to further the Green Deal goals, reduce greenhouse gas emissions, and pursue economic growth decoupled from resource use. The F2F Strategy seeks to position the EU's food systems on a more sustainable path. At the production level, the Commission proposes actions to reduce the overall use and risk of chemical pesticides by 50 percent by 2030, as well as the reduction of the use of fertilizers by at least 20 percent among other cuts. Additionally, the Commission set a goal that 25 percent of agricultural lands should be used for organic farming, up from the current 8 percent. For additional information on Green Deal pesticide use reduction proposals, including improved collection of pesticide use statistics and proposed revision of existing pesticide legislation, see [GAIN report: Pesticides Initiatives in the EU Farm to Fork Strategy](#).

## **Biodiversity Strategy**

The EU Biodiversity Strategy provides a broad focus on nature conservation and tackling biodiversity loss in the EU and globally. The full Biodiversity strategy is available [here](#). The two main pesticide reduction initiatives presented in F2F are emphasized in the Biodiversity Strategy and complemented by the Biodiversity Strategy's pledge to review and possibly revise the EU 2018 Pollinators Initiative. The Biodiversity Strategy also aims for further soil and nature conservation by setting aside a minimum of 10 percent of the existing agricultural area into higher biodiversity landscape features, such as buffer strips and rotational and non-rotational fallow land. The Commission's proposed conservation measure is nested within the over-arching target of the Biodiversity Strategy to protect 30 percent of all EU land.

## **Common Agricultural Policy Reform**

The CAP supports agriculture and rural development throughout the EU with a significant portion of the total EU budget ([39 percent](#)). A political agreement was finalized on the CAP 2023-2027 after the "trialogue" negotiations concluded between the European Council, the European Commission, and the European Parliament over the summer 2021. The European Parliament granted final approval on November 23, 2021, and the Council provided final approval on December 2, 2021. The CAP legislative

framework is delineated by the [Common Market Organization](#)-, the [Strategic Plan](#)- and the [Horizontal regulations](#). By these decisions, the new CAP began on January 1, 2023. Major changes from the previous CAP include a new “delivery model” that de-centralizes funding and a new requirement that EU Member States develop National Strategic Plans (NSPs) in line with Commission priorities, such as the EU Green Deal.

### **Next Generation EU**

Since 2020 an additional €8 billion under the Next Generation EU Recovery Instrument (Next Generation) has been assigned to the European agricultural fund for rural development (EAFRD). The [Next Generation EU](#) is a €806.9 billion temporary recovery instrument which aims to help repair the economic and social damage brought about by the coronavirus pandemic.

### **Certification of Fruit and Vegetables**

Fruit and vegetables exported to the EU require a phytosanitary certificate. A USDA/Animal Plant Health Inspection Service inspector issues these certificates. 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](#). There is more information 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, as per [Commission Implementing Regulation \(EU\) 2022/2389](#) of December 07, 2022. There is more information available on the DG SANTE website: [Reduced frequency checks](#).

Note: The Commission has updated the [Notification of reduced plant health checks for 68 products](#) for 2023.

### **Marketing Standards**

Fresh fruit and vegetable imports into the EU also must comply with the EU-harmonized marketing standards. These standards apply at all marketing stage and include criteria such as quality, size, labeling, packaging, and presentation. [Commission Implementing Regulation \(EU\) No 543/2011](#) provides for a general marketing standard for all fresh fruits and vegetables. Specific marketing standards are still in place for ten products, including citrus fruit, and are set out in Part 2 of Annex I to this Regulation on page 42.

### **Pesticides and Maximum Residue Levels (MRLs) for Citrus – Upcoming Reviews**

Maximum Residue Levels (MRLs) for pesticides, including import tolerances, have been harmonized throughout the EU and can be found in the [EU MRL database](#). The following tables provide interested

stakeholders with advance notice of active ingredients under review for renewal of approval in the EU and are listed with a U.S. MRL for citrus fruit in the [global MRL database](#).

In particular, the Commission approved the non-renewal of the active substance *phosmet* which will likely have an impact for future U.S. exports of citrus to the EU once the MRLs are reviewed. For additional information, consult the FAS/Brussels' website on [EU Early Alerts](#).

**Upcoming reviews for MRLs:** Article 12 review:

<https://www.efsa.europa.eu/sites/default/files/pesticides-MRL-review-progress-report.pdf>

**Upcoming reviews for active substances:**

Active substance	Expiration date
<i>Flucapyroxad</i>	05/31/2025
<i>Bixafen</i>	05/31/2025
<i>Pyriofenone</i>	01/31/2025
<i>Disodium phosphonate</i>	01/31/2026
<i>Penflufen</i>	05/31/2025
<i>Sedaxane</i>	05/31/2025
<i>Benalaxyl-</i>	04/30/2025
<i>Pyroxulam</i>	04/30/2025
<i>Penthiopyrad</i>	05/31/2025
<i>1,4-Dimethylnaphthalene</i>	06/30/2025
<i>Pyridalyl</i>	06/30/2025

## Glyphosate

The active substance glyphosate is approved for use at the EU level but was set to expire on December 15, 2022. The Commission extended the approval period for glyphosate by one year until December 15, 2023, since both the European Food Safety Authority (EFSA) and the European Chemicals Agency (ECHA) need additional time to complete the re-evaluation process of glyphosate.

## EU Import Policies Concerning Tariffs

**Entry Price System:** EU imports of fresh fruit and vegetables are subject to the Entry Price System, which has been in place in its current form since the Uruguay Round. It is a complex tariff system, which provides a high level of protection to EU producers. In this system, fruits and vegetables imported at or above an established entry price are charged an ad valorem duty only. The tariff and statistical nomenclature and the Common Custom tariff levels for 2023 are published in [Commission Implementing Regulation \(EU\) 2022/1998 in EU Official Journal L 282](#). This version applies as of January 01, 2023. The tariffs for citrus fruit can be found on Part II, Section II, Chapter 8, page 104 for

oranges, tangerines, lemons, grapefruit, and other citrus fruit, while the tariff for orange juice can be found on page 173 and 174 depending on frozen or not frozen.

**First Come, First Served Principle:** Regarding the administration of import tariff quotas, certain types of citrus fruit are subject to the Commission Implementing Regulation (EU) 2020/1988 of November 11, 2022 that lays down rules for the application of Regulations (EU) No 1308/2013 and (EU) No 510/2014 of the European Parliament and of the Council as regards to the administration of import tariff quotas in accordance with [‘first come, first served’ principle](#).

### **Additional EU Duties Targeting U.S. Citrus**

EU retaliation on U.S. Section 232 Safeguard Measures on EU Steel and Aluminum Temporary Suspension: On June 22, 2018, the EU imposed [additional tariffs](#) of 25 percent on orange juice products in retaliation to U. S. safeguard measures on EU steel and aluminum as published in [Commission Implementing Regulation \(EU\) 2018/886](#). On October 30, 2021, the United States and European Union agreed to end the dispute over U.S. steel and aluminum tariffs. On November 26, 2021, under [Commission Implementing Regulation \(EU\) 2021/2083](#), the EU suspended tariffs affecting U.S. agricultural products from January 1, 2022, until December 31, 2023.

U.S.-EU WTO Cases on Aircraft Subsidies and Suspension: On November 9, 2020, the European Union announced retaliatory tariffs against U.S. exports following the World Trade Organization’s (WTO) ruling that authorized the EU to take such countermeasures due to U.S. subsidies to aircraft maker Boeing. The European Commission published [Implementing Regulation \(EU\) 2020/1646](#) that outlined the list of products subjected to a 25 percent additional tariff. The Regulation entered into force on November 10, 2020. Fresh Grapefruit was listed in the Regulation and hence subject to the additional tariff.

On June 15, 2021, the European Union and the United States reached an understanding in the large civil aircraft dispute. On July 9, 2021, the European Commission adopted [Implementing Regulation 2021/1123](#) suspending the application of tariffs until July 11, 2026. The two sides also agreed to seek to overcome long-standing differences in order to avoid future litigation through the [Understanding on a cooperative framework for Large Civil Aircraft](#).

### **Tariff Rate Quotas under Free Trade Agreements**

On June 28, 2019, the European Union became the first major partner to strike a trade agreement with the Southern Common Market (MERCOSUR) countries of Argentina, Brazil, Paraguay, and Uruguay. The EU Parliament and Commission still must ratify the agreement but it will eliminate 93 percent of tariffs for MERCOSUR exports to the EU, while offering preferential treatment for the remaining 7 percent. To protect European farmers, 357 Geographical Indicators (GI) will be protected against counterfeit products. Although a final tariff schedule has not yet been publicly released, a [preliminary analysis](#) indicates that U.S. agricultural products that compete with MERCOSUR and EU products will be at a significant disadvantage.

## Other Free Trade Agreements affecting citrus fruit exports to the EU:

The EU is negotiating and has implemented several Free Trade Agreements (FTAs) with other countries and regions such as the major EU citrus partners: [South Africa](#), [Turkey](#), [Egypt](#), [Morocco](#), [Israel](#), the UK, and Canada, which include concessions on food products. Additional information is available on the website of the EC at: [Negotiations and agreements](#).

## EU's Decision on Citrus Canker

The [Implementing regulation \(EU\) 2019/2072](#) establishes rules for citrus fruit and citrus hybrids exported from areas where *Xanthomonas citri* (Citrus canker) exists and require that groves are appropriately managed and that the fruit is free of symptoms of canker. The rules state that exports of these fruits must be accompanied by a phytosanitary certificate. The previous regulation required certification that “no symptoms have been observed in the field of production and in its immediate vicinity,” which was overly burdensome and would require expensive and time-consuming inspections of entire groves.

## EU's new restrictions on False Codling Moth

The European Union has approved new provisions for citrus exported from areas, such as Sub-Saharan African countries, affected by *Thaumatotibia leucotreta* (False Codling Moth). The [Commission Implementing Regulation \(EU\) 2022/959](#) of June 16, 2022 amends Annex VII to [Commission Implementing Regulation \(EU\) 2019/2072](#) as regards to new phytosanitary requirements. The new measure will require a cold treatment to the exports of citrus from the third countries affected by the disease.

## Related Reports

Country	Title	Date
EU	<a href="#">EU Citrus Annual 2022</a>	12/23/2022
EU	<a href="#">EU Citrus Semi-Annual</a>	06/17/2022
EU	<a href="#">EU Citrus Annual</a>	12/23/2021
EU	<a href="#">EU Citrus Semi-Annual</a>	06/17/2021
Spain	<a href="#">Spanish Fresh Deciduous Fruit Committed to Sustainability and Smart Farming</a>	10/01/2021
Portugal	<a href="#">Portuguese Fruit Sector Aims to Increase Investments Efficiency and Exports</a>	06/29/2021
EU	<a href="#">EU Citrus Annual</a>	12/18/2020

These and other GAIN reports can be downloaded from the [USDA/FAS GAIN database](#).

## Attachments:

No Attachments