

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Morocco

Citrus Annual

Morocco Expects Record Citrus Production in MY2018/19

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Report Highlights:

With the majority of the harvest now complete, Post expects Morocco's citrus production for MY 2018/19 to reach an estimated 2.6 million metric tons, increasing 18 percent over the previous marketing year. Tangerine/mandarin production should increase by 14 percent over the previous year to 1.35 MMT, while orange production should increase by 18 percent to 1.2 MMT and lemon/lime production to reach 45,000 MT. Much of the increase in production is due to favorable weather conditions and increases in the area harvested as younger trees begin to bear fruit. Tangerine/mandarin exports should total about 585,000 MT while orange exports should reach around 190,000 MT.

Tangerines/Mandarins, Fresh

Production: Post forecasts Morocco's tangerine/mandarin production for MY 2018/19 at 1.35 MMT, an increase of 14 percent compared to MY 2017/18 due to favorable weather. Post also revised MY 2017/18 production numbers based on final official data.

Consumption: Post forecasts tangerine/mandarin domestic consumption at 765,000 MT in MY2018/19, an increase of 18 percent over 2017/18 to more closely follow per capita consumption trends. Post also updates MY 2017/18 fresh domestic consumption reflecting remaining available supply in the balance sheet after accounting for year-end trade data.

Trade: Post projects tangerine/mandarin exports for MY 2018/19 to reach 585,000 MT, 9 percent more than MY 2017/18 due to increased supplies. Russia and the European Union remain Morocco's primary export destinations. Post also updates MY17/18 exports based on year end trade data. Exports to the United States increased by 30%, aided by regained market access for Morocco's Berkane region.

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

Partner Country	2013/14	2014/15	2015/16	2016/17	2017/18	% Change
Russia	284,041	139,339	188,023	205,389	205,091	-0.15%
EU	112,416	104,057	141,516	166,659	166,299	-0.22%
Canada	48,080	40,155	58,886	63,199	67,800	7.28%
United States	41,542	45,016	38,549	42,804	55,561	29.80%
Sub-Saharan Africa	3,360	8,373	25,328	26,017	25,817	-0.77%
Middle East	8,025	8,958	12,692	9,925	15,678	57.96%
Other	3,449	1,024	976	1,947	2,904	49.15%
Total	500,915	346,917	465,995	515,913	539,150	4.50%

Source: Office des Changes

Production, Supply & Distribution

Tangerines/Mandarins, Fresh	2016/2017		2017/2018		2018/2019	
	Sep 2016		Sep 2017		Sep 2018	
Market Begin Year	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Morocco						
Area Planted	63,420	63,420	64,516	64,516	0	65,300
Area Harvested	55,167	55,167	57,321	57,321	0	58,050
Bearing Trees	19,800	19,800	19,850	19,850	0	19,900
Non-Bearing Trees	6,730	6,730	6,750	6,750	0	6,800
Total No. Of Trees	26,530	26,530	26,600	26,600	0	26,700
Production	1,278	1,278	1,200	1,185	0	1,350
Imports	0	0	0	0	0	0
Total Supply	1,278	1,278	1,200	1,185	0	1,350
Exports	516	516	538	539	0	585
Fresh Dom. Consumption	762	762	662	646	0	765
For Processing	0	0	0	0	0	0
Total Distribution	1,278	1,278	1,200	1,185	0	1,350

(HECTARES) ,(1000 TREES) ,(1000 MT)

Oranges, Fresh

HS-080510

Production: Orange production for MY 2018/19 is forecast at a record 1.2 MMT, up 18 percent over MY 2017/18 due to favorable weather and increased area as new orchards begin production. Post also revised MY 2017/18 production numbers based on final official data.

Consumption: Post forecasts MY 2018/19 domestic consumption of fresh oranges at 950,000 MT an increase of 14 percent due to high production. According to industry contacts, many farmers had to dump their products in local markets, causing prices to drop to their lowest levels. Post also updates domestic consumption for MY 2017/18, based on available remaining supplies following year-end trade figures.

Trade: Post projects orange exports for MY 2018/19 to reach 190,000 MT, 42 percent more than MY 2017/18 due to more available supply. That said, industry contacts are highly pessimistic on Morocco's ability to export any additional volumes this year given what they perceive as intense competition within the region by other major exporters. Post also updates MY17/18 exports number based on year end trade data. Exports to the United States have been increased by 230%, supported by regained market access for Morocco's Berkane region.

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

Partner Country	2013/14	2014/15	2015/16	2016/17	2017/18	% Change
EU	63,249	83,763	67,872	113,598	86,038	-24%
Russia	23,669	14,721	9,524	12,708	13,625	7%
Sub-Saharan Africa	18,246	23,919	10,495	19,631	12,479	-36%
United States	2,077	1,813	0	3,276	10,806	230%
Middle East	363	610	232	7,681	10,291	34%
Canada	2,280	4,114	561	5,523	8,385	52%
Other	1,544	1,261	1,148	1,278	2,006	57%
Total	111,428	130,201	89,832	163,695	143,630	-12%

Source: Office des Changes

Oranges Production, Supply & Distribution

Oranges, Fresh	2016/2017		2017/2018		2018/2019	
Market Begin Year	Oct 2016		Oct 2017		Oct 2018	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	57,040	57,040	57,255	57,255	0	58,750
Area Harvested	52,185	52,185	52,750	52,750	0	53,500
Bearing Trees	16,900	16,900	16,950	16,950	0	17,000
Non-Bearing Trees	1,585	1,585	1,590	1,590	0	1,595
Total No. Of Trees	18,485	18,485	18,540	18,540	0	18,595
Production	1,037	1,037	1,025	1,021	0	1,200
Imports	0	0	0	0	0	0
Total Supply	1,037	1,037	1,025	1,025	0	1,200
Exports	165	165	165	144	0	190
Fresh Dom. Consumption	822	822	810	831	0	950
For Processing	50	50	50	50	0	60
Total Distribution	1,037	1,037	1,025	1,025	0	1,200

(HECTARES) ,(1000 TREES) ,(1000 MT)

Orange Juice (65° brix basis)

HS-200911, 200912, 200919

Production: Post forecasts orange juice production for MY 2018/19 at 60,000 MT, 20 percent higher than MY 2017/18 based on industry contacts and supported by more available fruit for processing.

Consumption: Post forecasts MY 2018/19 domestic consumption at 3,800 MT up 33 percent over the previous season on higher available supplies. Post revised its estimate for MY2017/18 from 4,100 MT to 2,866 MT following year-end trade figures.

Trade: For MY 2018/19, Post forecasts orange juice exports to increase to 4,300 MT and imports lower to 2,100 MT on higher production. Note: Morocco began exporting significant volumes of frozen orange juice in MY 2017/18 to the Netherlands and France.

Orange Juice Imports by Source (MT @ 65°)

Product	conv. factor	2013/14	2014/15	2015/16	2016/17	2017/18	% Change
2009.11: Frzn	1.0154	829	333	1,957	1,851	1,159	-37%
2009.12: Not Frzn, ≤20 Brix	0.1815	3	1	13	4	3	-25%
2009.19: Not Frzn, Other	1	2,087	1,050	1,244	1,227	986	-20%
Total (65° Basis)		2,919	1,384	3,213	3,082	2,148	-30%

Source: Office des Changes

Orange Juice Exports by Destination (MT @ 65°)

Product	conv. factor	2013/14	2014/15	2015/16	2016/17	2017/18	% Change
2009.11: Frzn	1.0154	252	982	739	552	1,213	120%
2009.12: Not Frzn, ≤20 Brix	0.1815	11	66	11	1,114	1,146	3%
2009.19: Not Frzn, Other	1	3,969	2,568	2,156	2,115	1,923	-9%
Total (65° Basis)		4,232	3,616	2,906	3,782	4,282	13%

Source: Office des Changes

Orange Juice Production, Supply & Distribution

Orange Juice	2016/2017		2017/2018		2018/2019	
	Oct 2016		Oct 2017		Oct 2018	
Market Begin Year	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Morocco						
Deliv. To Processors	50,000	50,000	50,000	50,000	0	60,000
Beginning Stocks	0	0	0	0	0	0
Production	5,000	5,000	5,000	5,000	0	6,000
Imports	3,082	3,082	2,700	2,148	0	2,100
Total Supply	8,082	8,082	7,700	7,148	0	8,100
Exports	3,782	3,782	3,600	4,282	0	4,300
Domestic Consumption	4,300	4,300	4,100	2,866	0	3,800
Ending Stocks	0	0	0	0	0	0
Total Distribution	8,082	8,082	7,700	7,148	0	8,100
(MT)						

Lemons/Limes, Fresh

HS-080550

Production: Post forecasts lemon/lime production for MY 2018/19 to reach 45,000 MT, 25 percent more than MY 2017/18, again on good weather conditions during the growing season.

Consumption: Post forecasts MY 2018/19 fresh domestic consumption at 28,000 MT, allowing for a slight increase in per capita consumption and no change in MY 2017/18.

Trade: Post projects lemon/lime exports for MY 2018/19 to reach 17,000 MT, 88 increase over MY 2017/18 based on available supplies.

Lemon/Lime Exports by Destination (MT)

Partner Country	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	% Change
Russia	3,849	4,411	2,978	3,737	6,834	3,709	-46%
EU28	1,595	1,527	1,272	3,217	1,757	861	-51%
Canada	97	827	1,052	82	990	502	-49%
United States	-	417	46	-	-	351	-
Other	7,582	7,821	2,135	2,280	3,307	3,362	2%
Total	13,123	15,003	7,483	9,316	12,888	8,785	-32%

Source: Office des Changes

Lemons/Limes Production, Supply & Distribution

Lemons/Limes, Fresh Market Begin Year	2016/2017		2017/2018		2018/2019	
	Oct 2016		Oct 2017		Oct 2018	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	3,820	3,820	3,910	3,910	0	3,950
Area Harvested	2,950	2,950	2,980	2,980	0	3,050
Bearing Trees	1,560	1,560	1,570	1,570	0	1,600
Non-Bearing Trees	375	375	385	385	0	0
Total No. Of Trees	1,935	1,935	1,955	1,955	0	1,600
Production	40	40	36	36	0	45
Imports	0	0	0	0	0	0
Total Supply	40	40	36	36	0	45
Exports	13	13	9	9	0	17
Fresh Dom. Consumption	27	27	27	27	0	28
For Processing	0	0	0	0	0	0
Total Distribution	40	40	36	36	0	45
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Commodities:

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