United States Department of Agriculture
Foreign Agricultural Service

GAIN
Global Agricultural Information Network

Voluntary Report – Voluntary - Public Distribution **Date:** December 15, 2023

Report Number: E42023-0051

Report Name: EU Citrus Annual 2023

Country: European Union

Post: Madrid

Report Category: Citrus

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Report Highlights:

The combination of drought, water irrigation limitations and abnormally high temperatures during flowering and fruit-setting phases have limited the EU's citrus production potential in MY 2023/24, which is projected to stay at similar levels as the also short MY 2022/23 crop. The increase in the EU's lemon and grapefruit production offsets the reduction registered in oranges, mandarins, and tangerines output. Imports continue to gain share at the expense of domestic production in a context of inflation-driven weak demand.

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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Acknowledgements

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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
€	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
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

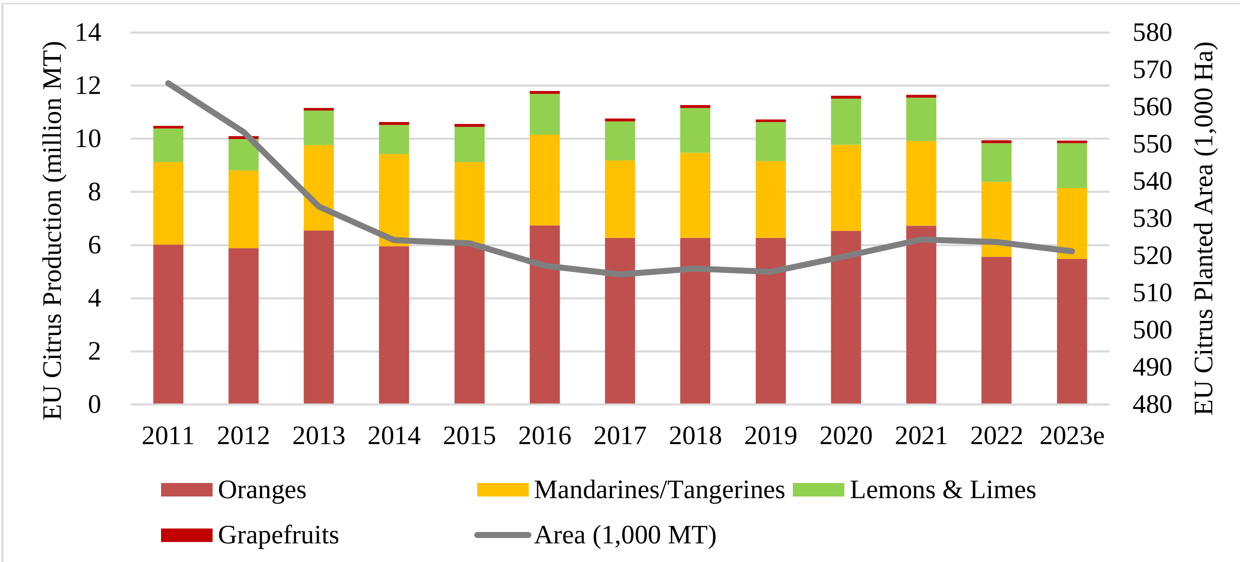
Table 1. EU Citrus Production, Supply, and Distribution

All Citrus, 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)	518,747	524,329	522,226	523,685		521,161
Area Harvested (HECTARES)	476,285	476,590	480,266	481,605		451,470
Bearing Trees (1000 TREES)						
Non-Bearing Trees (1000 TREES)						
Total No. Of Trees (1000 TREES)						
Production (1000 MT)	11,614	11,659	10,464	9,940		9,939
Imports (1000 MT)	2,021	2,019	2,020	2,315		2,230
Total Supply (1000 MT)	13,635	13,678	12,484	12,255		12,169
Exports (1000 MT)	884	886	845	782		770
Fresh Dom. Consumption (1000 MT)	11,093	11,130	10,305	10,351		10,302
For Processing (1000 MT)	1,658	1,662	1,334	1,122		1,097
Total Distribution (1000 MT)	13,635	13,678	12,484	12,255		12,169
(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 Citrus Production and Planted Area 2011-2023



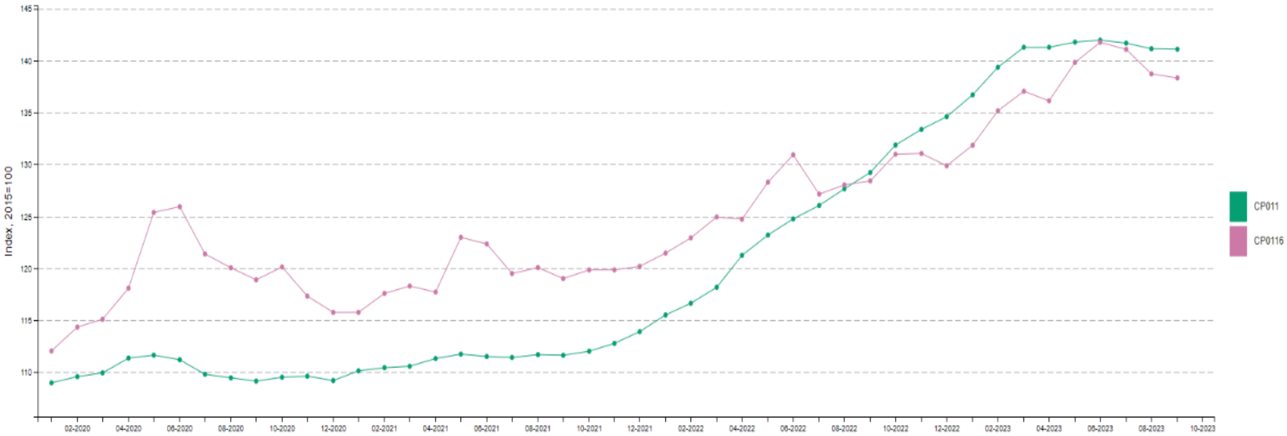
Source: FAS EU posts.

In MY 2023/24, the total EU production of citrus[1] is projected to amount to 9.9 million MT, very similar to the previous marketing year's levels but below the historical production average. However, the stability projected in the EU's total citrus production hides divergent trends among the different citrus categories. Oranges and mandarins/tangerines, which together account for nearly 85 percent of the EU's citrus production, register respectively a two and five percent decline. Conversely, grapefruits are anticipated to have six percent growth and, most notably, lemons are expected to have expanded production in MY 2023/24 by more than fifteen percent. The overall MY 2023/24 production reduction is expected to materialize in Spain, Greece, and Portugal, whereas Italy is projected to have a larger total citrus crop compared to the poor output registered in MY 2022/23.

In MY 2023/24, farmers across the EU continued facing increased costs ranging from energy costs (fuel and electricity) to fertilizers and plant protection products. On a positive note, higher farm-gate prices may contribute to improve producers' margins and offset the negative impact of the second consecutive short citrus crop in the EU. Soaring fresh fruit and general food prices negatively affecting consumers' disposable income are expected to curb consumption in the EU. Likewise, given the EU's shorter crop projected for MY 2023/24, a smaller amount of citrus is anticipated to be devoted for processing purposes.

[1] EU citrus production is concentrated in the Mediterranean region. Spain and Italy represent the leading EU citrus producers, followed by Greece, Portugal, and Cyprus.

Chart 2. EU Index of Food and Fruit Consumer Prices (Index 2015=100)



[Source: Food price monitoring tool.]

EU imports of citrus continue to increase market share at the expense of domestic production. Given the timely end of the south hemisphere citrus season ([South Africa], [Argentina], Uruguay, and [Chile]) the EU citrus are well-positioned to dominate the EU market during the bloc's transition to the new season. The EU is a net importer of all citrus fruits, with imports largely exceeding exports. Oranges followed by lemons represent the largest imported citrus.

Chart 3. EU Citrus Imports (1,000 MT)

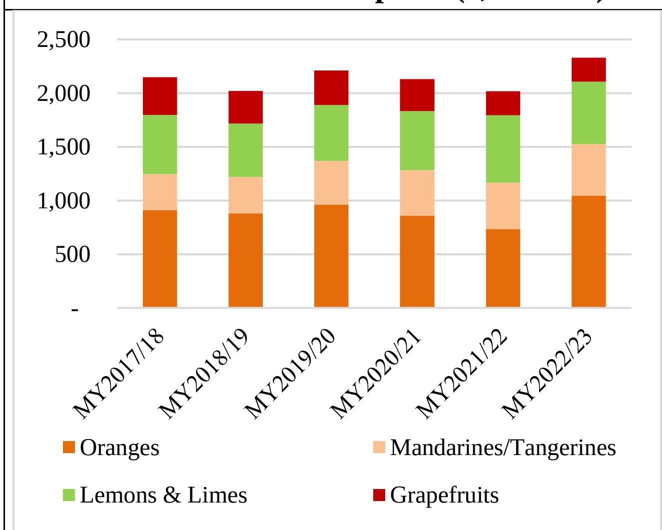
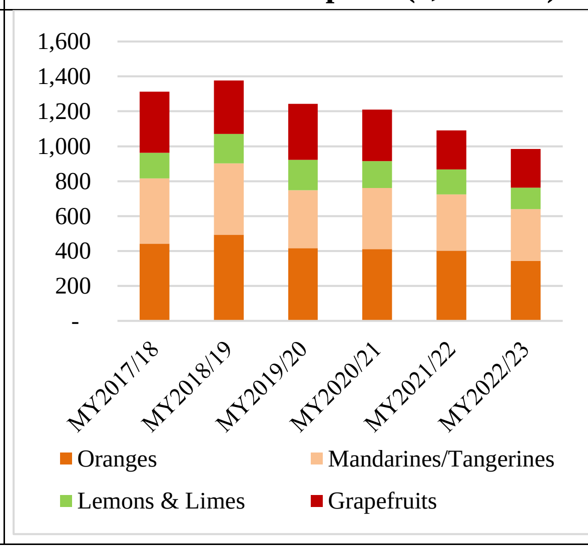


Chart 4. EU Citrus Exports (1,000 MT)



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

EU fresh citrus exports in MY 2023/24 are expected to contract in line with the EU's short crop. Likewise, the shorter domestic citrus availability is anticipated to result in a larger amount of internal citrus trade occurring from southern EU producing Member States to non-producing regions in the north.

Oranges

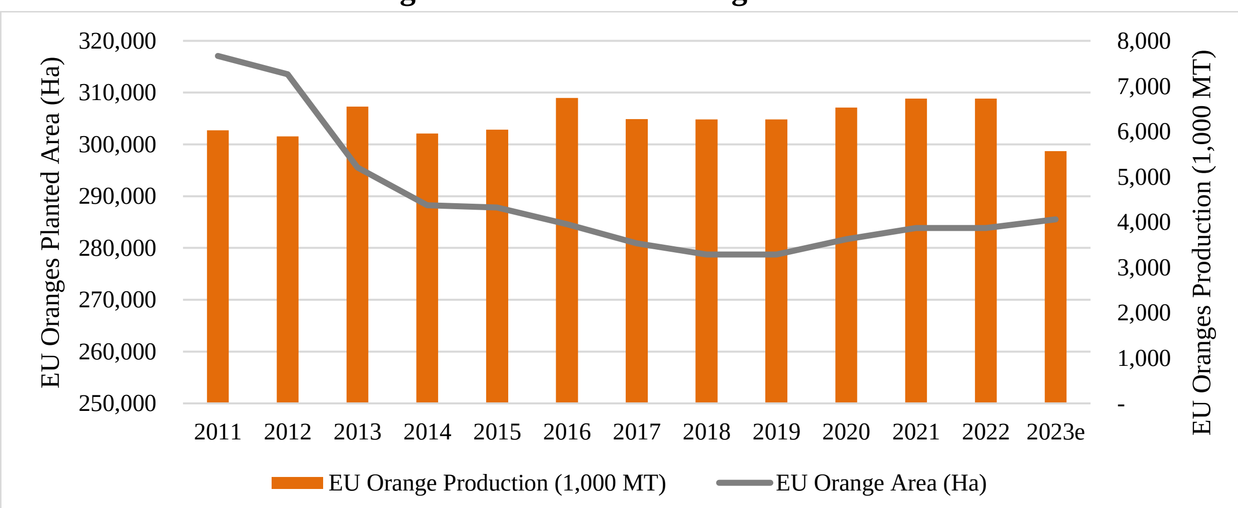
Table 2. EU Oranges Production, Supply, and Distribution

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)	279,596	283,872	282,348	285,524		285,147
Area Harvested (HECTARES)	260,935	261,440	263,043	264,632		236,305
Bearing Trees (1000 TREES)						
Non-Bearing Trees (1000 TREES)						
Total No. Of Trees (1000 TREES)						
Production (1000 MT)	6,720	6,728	5,856	5,564		5,475
Imports (1000 MT)	740	736	835	1,043		1,000
Total Supply (1000 MT)	7,460	7,464	6,691	6,607		6,475
Exports (1000 MT)	403	403	390	343		340
Fresh Dom. Consumption (1000 MT)	5,947	5,950	5,470	5,640		5,525
For Processing (1000 MT)	1,110	1,111	831	624		610
Total Distribution (1000 MT)	7,460	7,464	6,691	6,607		6,475
(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 2. EU Orange Production and Orange Planted Area 2011-2023



Source: FAS EU posts.

MY 2023/24, EU orange production is projected to reach 5.4 million MT, two percent down from the already short EU orange output level registered in MY 2022/23. Orange production is the largest citrus category within the EU, accounting for over 55 percent of total citrus production. The overall EU orange production anticipated is largely explained by the production decline registered in Spain, which accounts for 50 percent of the EU orange production, and to a lesser extent, to the production reductions expected in Portugal and Greece. The better prospects in Italy, which represents nearly 25 percent of the EU's total orange production, do not suffice to counter the reduction in other orange producing Member States in the EU.

MY 2023/24 orange production in Spain is projected to decline by 11 percent. Orange production in Spain was severely affected by the drought, which caused irrigation restrictions in citrus producing areas, and the extremely high temperatures registered during the flowering and fruit setting stages.

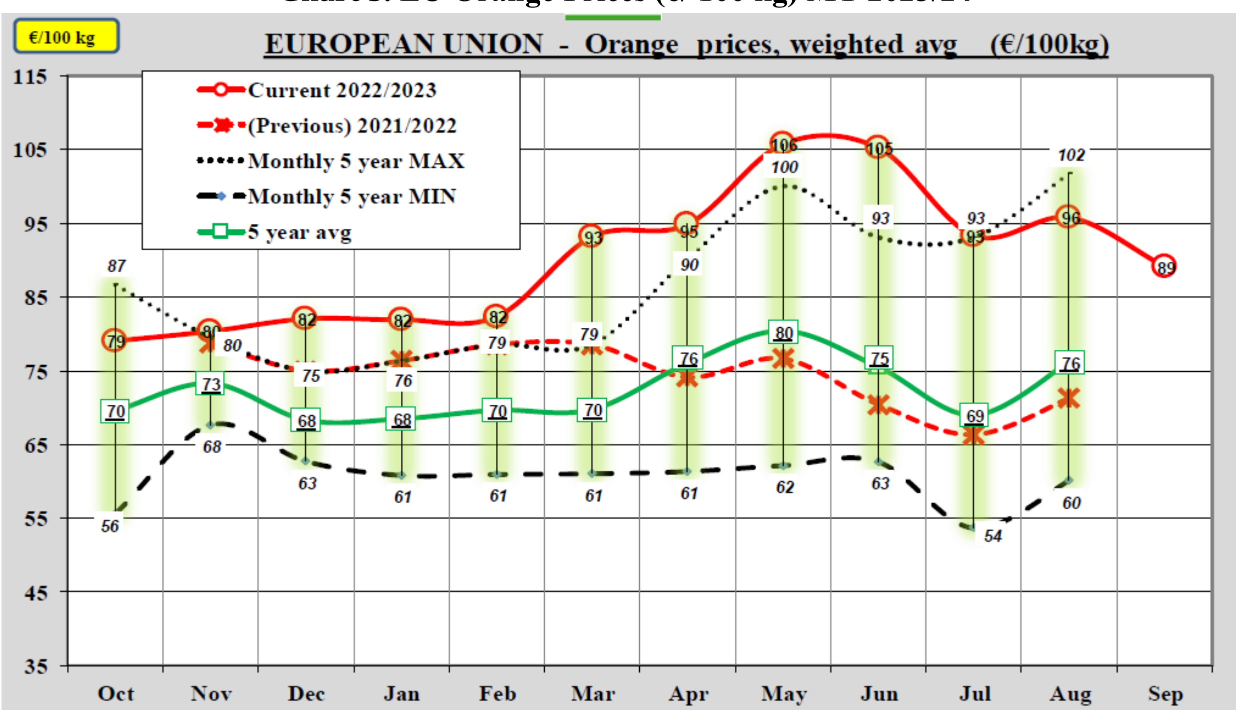
Italy's MY 2023/24 orange production is forecast to increase by 10 percent. Summer drought was offset with heavy irrigation, which forced farmers to incur higher costs. Nevertheless, the combination of a hot summer with little rain negatively impacted the fruit size. Likewise, the warm weather in Fall has delayed pigmentation onset in the *blood* varieties, which may ultimately affect the final color.

In Greece, MY 2023/24 orange production is expected to decrease marginally compared to the previous season due to reduced fruit set in *Navelina* variety. Likewise, summer drought conditions have also negatively affected most orange varieties' output.

Portugal's orange production in MY 2023/24 is estimated down from previous season levels, as the lack of rainfall negatively affected orange yields and sizes.

According to the EU Citrus Dashboard, in MY 2022/23 higher than average orange prices prevailed (see Chart 5), fueled by the lower domestic supply. The new reduction in the EU's oranges crop anticipated for MY 2023/24 may contribute to consolidate this trend.

Chart 5. EU Orange Prices (€/ 100 kg) MY 2023/24



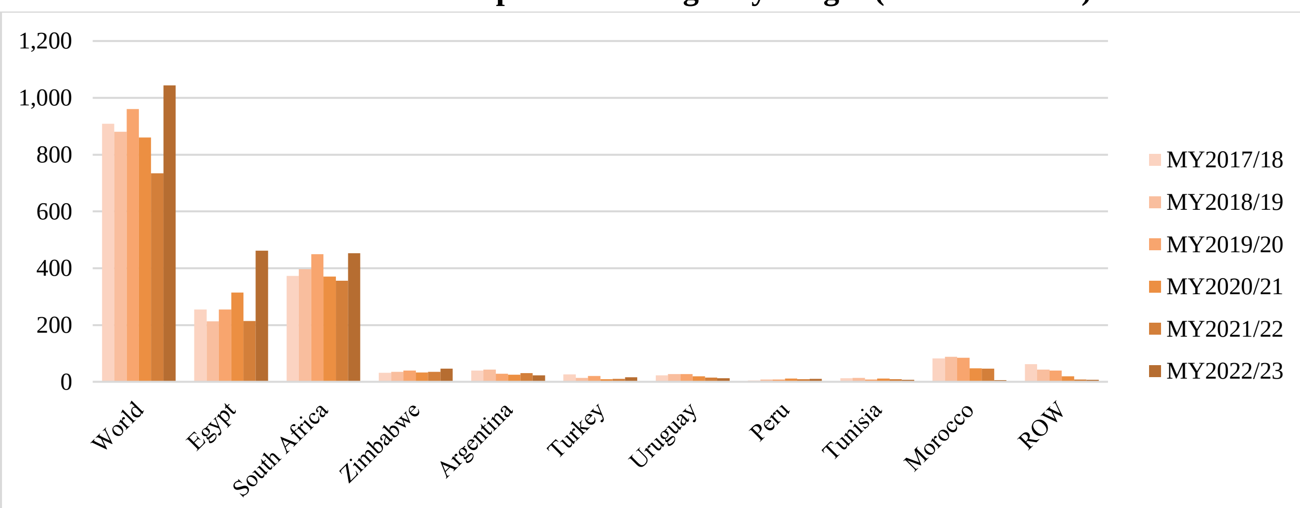
Source: DG AGRI Dashboard: Citrus Fruit.

In MY 2023/24, fresh orange consumption is expected to decline compared to the previous season, given the EU's shorter crop, and the fact that consumers' fruit prices remain high, as price sensitive consumers watch their expenditures avoiding pricy food items. In the EU, approximately 80 percent of EU oranges are consumed fresh. The orange processing sector, which is also projected down in MY 2023/24, plays a key role by cushioning excess supply shocks in the market. For additional information see Orange Juice section below.

In MY 2023/24, despite the reduction in EU orange production, a shorter volume of oranges is anticipated to be imported to the EU as domestic consumption is projected to shrink. The EU imported over 1 million MT of fresh oranges in MY 2022/23. Main import origins include South Africa, especially during the off-season, Egypt, Zimbabwe, and Argentina.[2]

EU orange exports in MY 2023/24 are revised slightly down from previous season levels in line to the reduced production expectations. The EU is the world's leader on fresh orange exports. Main destinations for EU oranges, primarily exported out of Spain, the EU's lead orange producing Member State, include the United Kingdom, Switzerland, Serbia, Norway, and Canada.

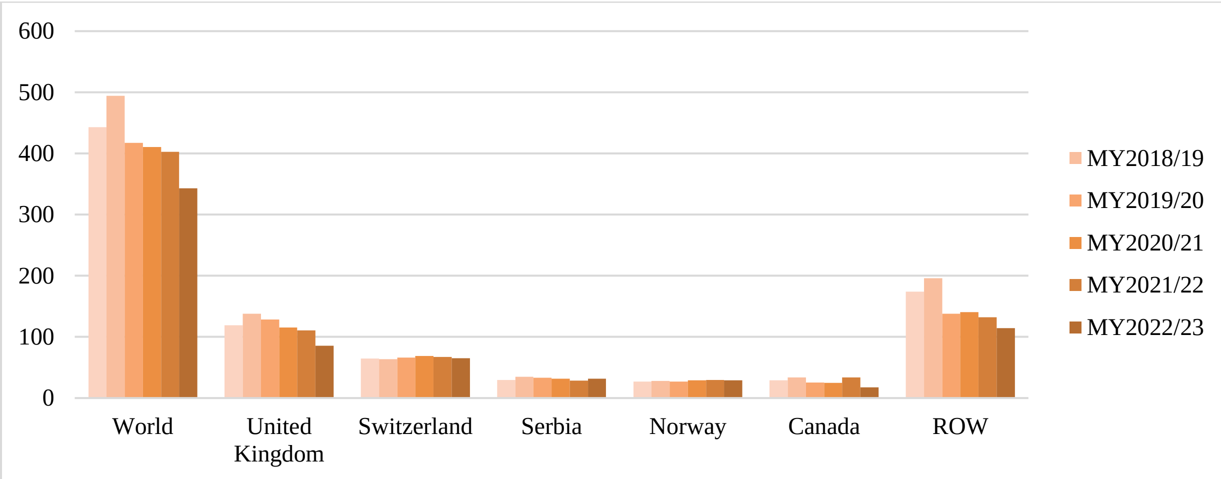
Chart 6. MY EU Imports of Oranges by Origin (Thousand MT)



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

[2] 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.

Chart 7. MY EU Exports of Oranges by Destination (Thousand MT)



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

Since July 14, 2022, EU orange imports from countries affected by False Codling Moth (*Thaumatotibia leucotreta*) are required to undergo a precooling and cold treatment in transit.

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

Orange Juice

Table 3. 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)	1,042,000	1,111,000	831,000	624,000		610,000
Beginning Stocks (MT)	15,000	15,000	15,000	15,000		15,000
Production (MT)	80,778	86,127	64,421	48,374		47,288
Imports (MT)	566,664	566,745	560,000	525,090		508,000
Total Supply (MT)	662,442	667,872	639,421	588,464		570,288
Exports (MT)	111,860	111,848	90,000	110,798		95,000
Domestic Consumption (MT)	535,582	541,024	534,421	462,666		460,288
Ending Stocks (MT)	15,000	15,000	15,000	15,000		15,000
Total Distribution (MT)	662,442	667,872	639,421	588,464		570,288
(MT)						

Not official USDA data.

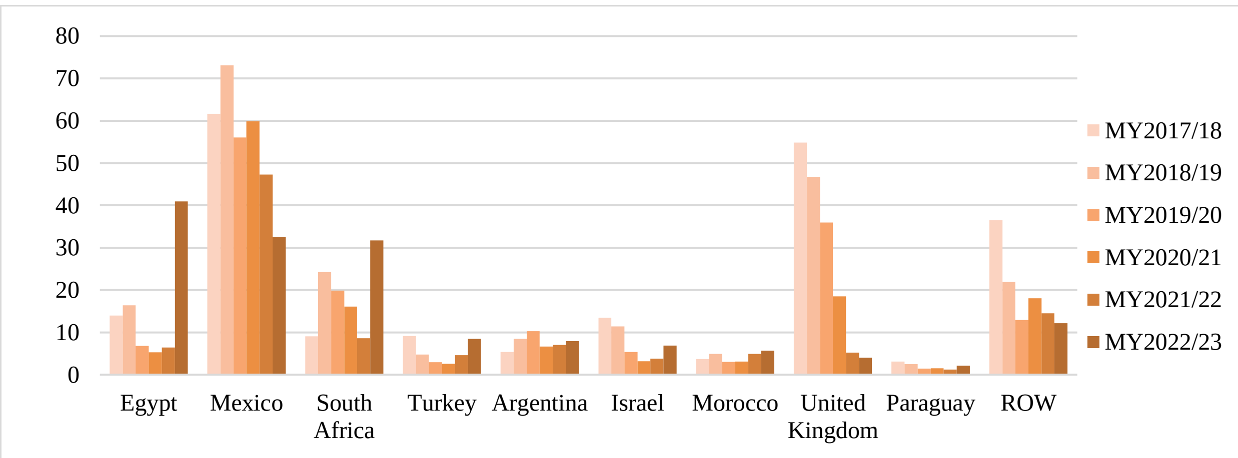
Sources: Trade for MY 2021/22 and 2022/23: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

EU orange juice production in MY 2023/24 is projected at 47.3 thousand MT, down from the 48.4 MT estimated for MY 2022/23. The smaller volume of oranges devoted for processing purposes for the second consecutive year is attributed to the short internal availability. When supplies are tight, orange producers prioritize the most profitable fresh market. Nevertheless, the EU orange processing industry plays a key role in stabilizing the EU orange market balance when ample supply is available, or fruit sizes do not meet fresh market standards.

In MY 2023/24, orange juice consumption is expected to drop from previous season levels, as food inflation continues to affect consumers' choices, and orange juice faces increased competition by a wide range of alternative drinks and fruit juices.

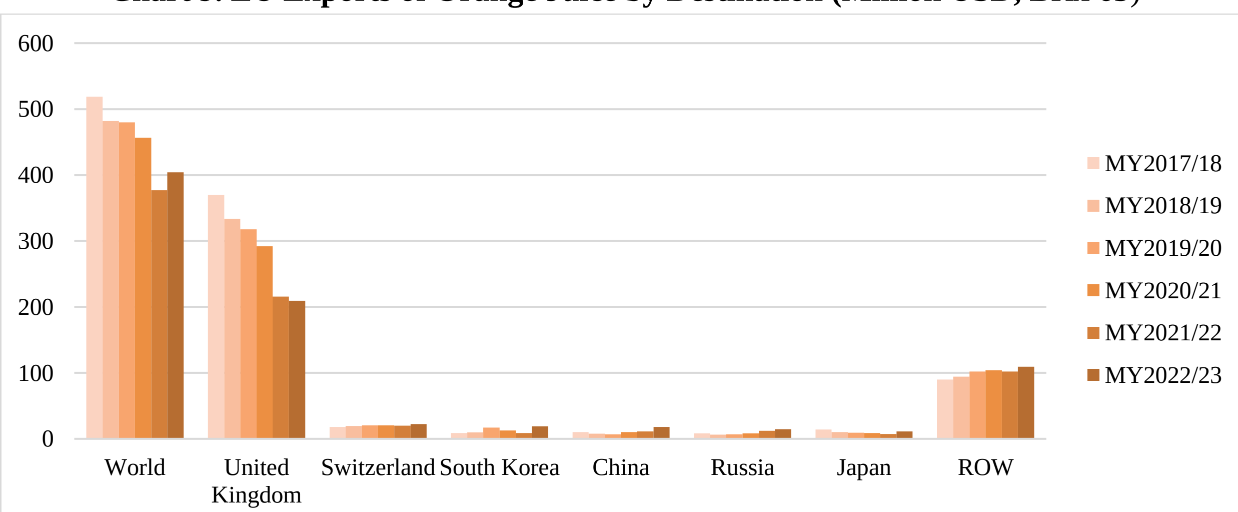
MY 2023/24 EU orange juice imports are revised down from the previous year. Brazil dominates the EU orange juice import market. In MY 2022/23, EU imports from Egypt and South Africa experienced significant increases, surpassing in value the exports from Mexico, the EU's traditional second largest suppliers of orange juice. In MY 2023/24, EU orange juice exports are expected to drop slightly in line with the lower EU orange domestic production. The United Kingdom remains by far the largest destination of EU orange juice.

Chart 8. EU Imports of Orange Juice, excluding Brazil, by Origin (Million USD, Brix 65)



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

Chart 9. EU Exports of Orange Juice by Destination (Million USD, Brix 65)



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

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

Tangerines/Mandarins

Table 4. Production, Supply, and Distribution

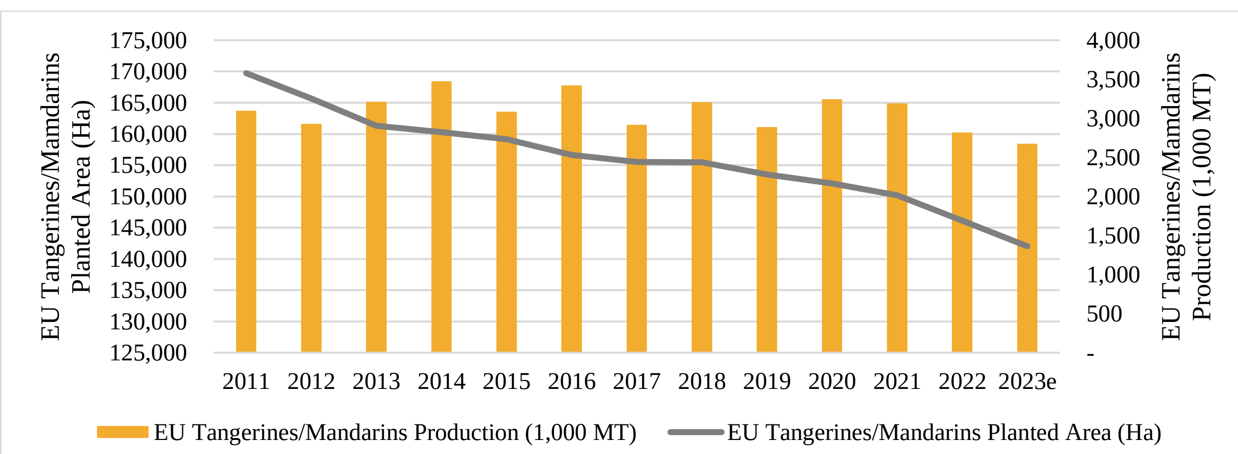
Tangerines/Mandarins, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Oct 2021		Oct 2022		Oct 2023	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	150,197	150,200	149,476	146,120		142,033
Area Harvested (HECTARES)	137,950	137,785	137,546	136,458		132,595
Bearing Trees (1000 TREES)						
Non-Bearing Trees (1000 TREES)						
Total No. Of Trees (1000 TREES)						
Production (1000 MT)	3,158	3,190	3,035	2,820		2,675
Imports (1000 MT)	430	430	410	482		480
Total Supply (1000 MT)	3,588	3,620	3,445	3,302		3,155
Exports (1000 MT)	322	322	300	297		225
Fresh Dom. Consumption (1000 MT)	3,018	3,051	2,905	2,785		2,720
For Processing (1000 MT)	248	247	240	220		210
Total Distribution (1000 MT)	3,588	3,620	3,445	3,302		3,155
(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 2.7 MMT, down from the 2.8 MMT registered in the previous season, as all major producers registered production declines. Italy's MY 2023/24 tangerine and mandarin production is forecast to decline by nearly 10 percent compared to MY 2022/23 due to the abnormally hot temperatures in Sicily, one of Italy's largest growing regions. In Greece, MY 2023/24 tangerine production is expected to decrease by 15 percent compared to the previous year due to adverse weather in western Greece, which impacted Clementine variety yields more severely. In Spain, the EU's largest mandarin and tangerine growing Member State, MY 2023/24 production is also projected down. However, the production decline in mandarins and tangerines in Spain is not anticipated to be as steep as in Greece or Italy.

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

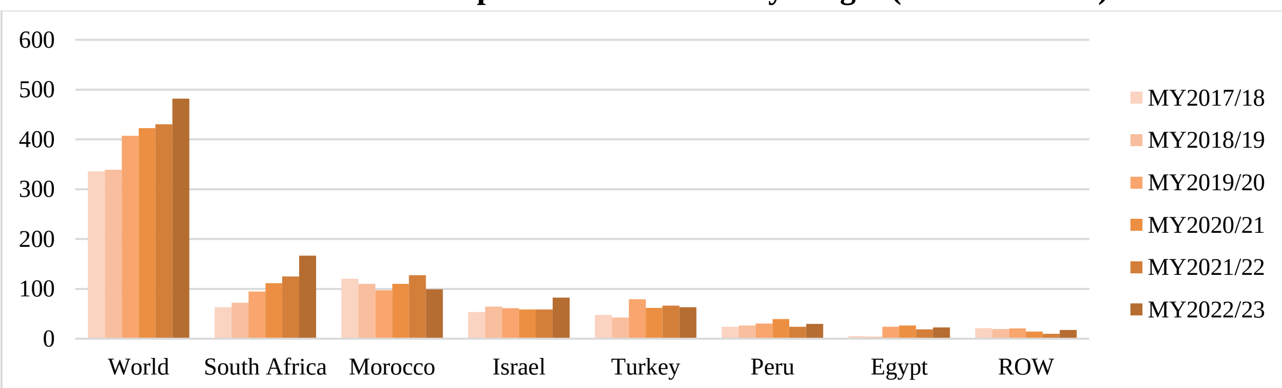


Source: FAS EU posts.

EU's tangerine and mandarin consumption in fresh and for processing purposes is expected to decline in MY 2023/24 given the shorter domestic supply anticipated. Inflation affecting fresh fruit prices is another factor behind the somewhat reduced consumption expectations in the EU. Most mandarins and tangerines in the EU are consumed fresh. Consumption is highly concentrated in fall and winter months when the bulk of north hemisphere production hits the market. In Greece, *Clementines* cover early and late season demand, both domestically and abroad. Late varieties *Nova* and *Page* cover the late season demand when saturation from *Clementines* occurs.

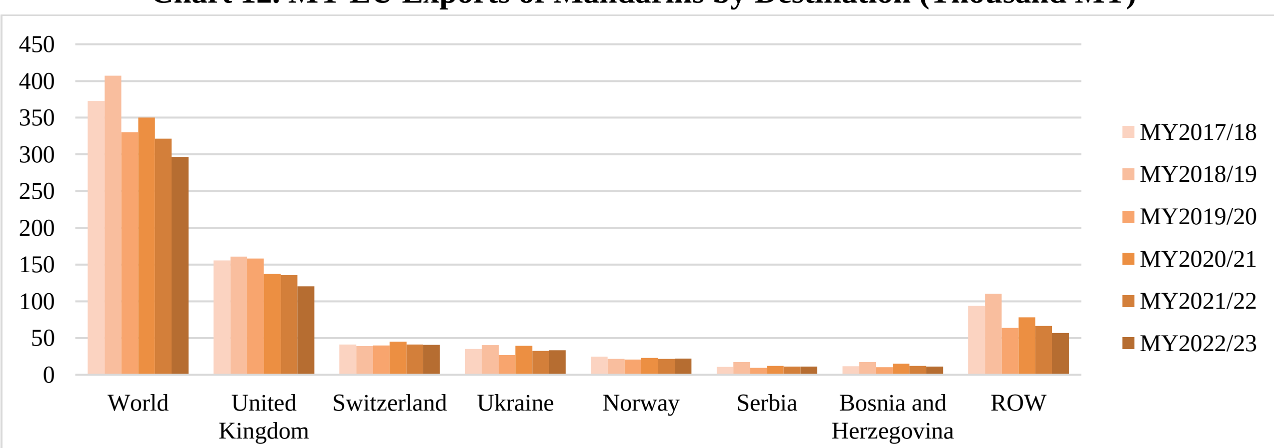
EU is a net importer of mandarins. In MY 2023/24, tangerine and mandarin imports by the EU are forecast to be very similar to previous season levels. The reduced domestic availability, driven by the shorter EU crop, is expected to limit the bloc's export potential. South Africa, Morocco, Israel, and Turkey are the EU's leading suppliers of mandarins and tangerines. EU's main export market destinations include the United Kingdom, Switzerland, Ukraine, Norway, and Serbia.

Chart 11. MY EU Imports of Mandarins by Origin (Thousand MT)



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

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



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

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

Lemons/Limes

Table 5. 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)	85,164	86,466	86,442	87,838		89,371
Area Harvested (HECTARES)	74,209	74,174	76,333	77,192		78,841
Bearing Trees (1000 TREES)						
Non-Bearing Trees (1000 TREES)						
Total No. Of Trees (1000 TREES)						
Production (1000 MT)	1,630	1,635	1,474	1,458		1,685
Imports (1000 MT)	628	630	560	581		550
Total Supply (1000 MT)	2,258	2,265	2,034	2,039		2,235
Exports (1000 MT)	142	144	140	122		180
Fresh Dom. Consumption (1000 MT)	1,829	1,830	1,642	1,650		1,790
For Processing (1000 MT)	287	291	252	267		265
Total Distribution (1000 MT)	2,258	2,265	2,034	2,039		2,235
(HECTARES), (1000 TREES), (1000 MT)						

Not official USDA data.

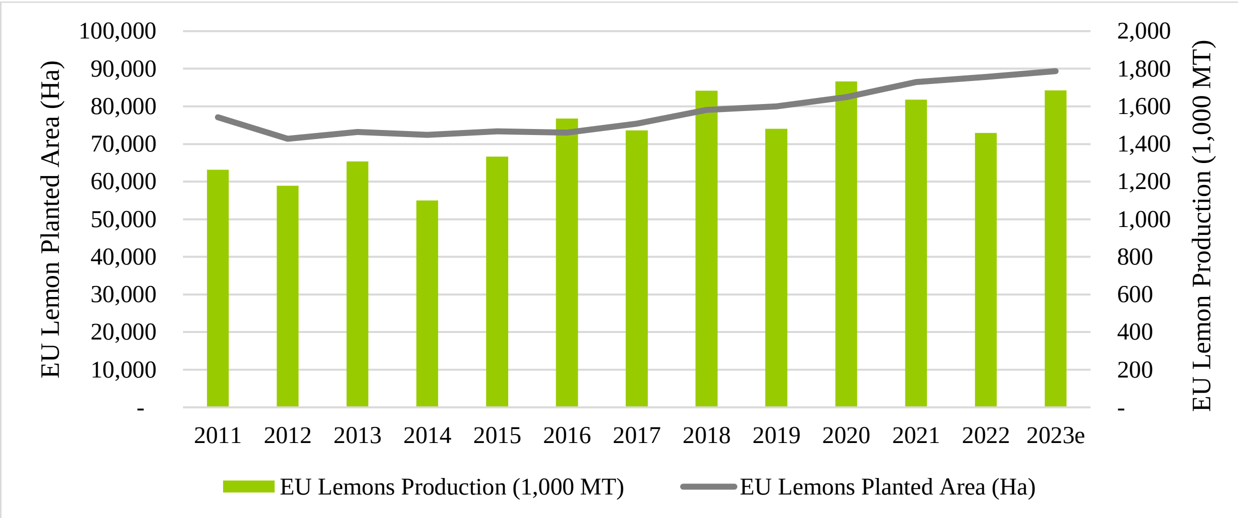
Sources: Trade for MY 2021/22 and 2022/23: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

In MY 2023/24, EU lemon production is forecast at just over 1.6 million MT, up from the 1.5 million MT registered in MY 2022/23. This production increase can be entirely attributed to an all-time-record production in Spain, following the historically low lemon production obtained in MY 2022/23. Conversely, a reduced lemon output is anticipated in Italy and Greece for MY 2023/24. Spain and Italy are the first and second largest EU lemon producers, accounting for nearly 65 and 30 percent of the EU's total lemon production respectively. With over 11,500 Ha cultivated under organic practices, since 2022, Spain has become the world's leader in organic lemon area.

In Spain, the combination of an increase in area planted to lemons and favorable growing conditions have resulted in a production increase, according to official sources, of over 25 percent compared to the disastrous previous season, which was marked by precipitations negatively affecting flowering and fruit setting, and an extremely warm and dry summer. Nevertheless, industry sources point out that the summer heat was detrimental for lemon fruit sizes and September hailstorms have caused some damages in lemon orchards.

In MY 2023/24, Italy is expecting a 10 percent decline, whereas in Greece's MY 2023/24 lemon production is expected to remain stable compared to previous season's levels.

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

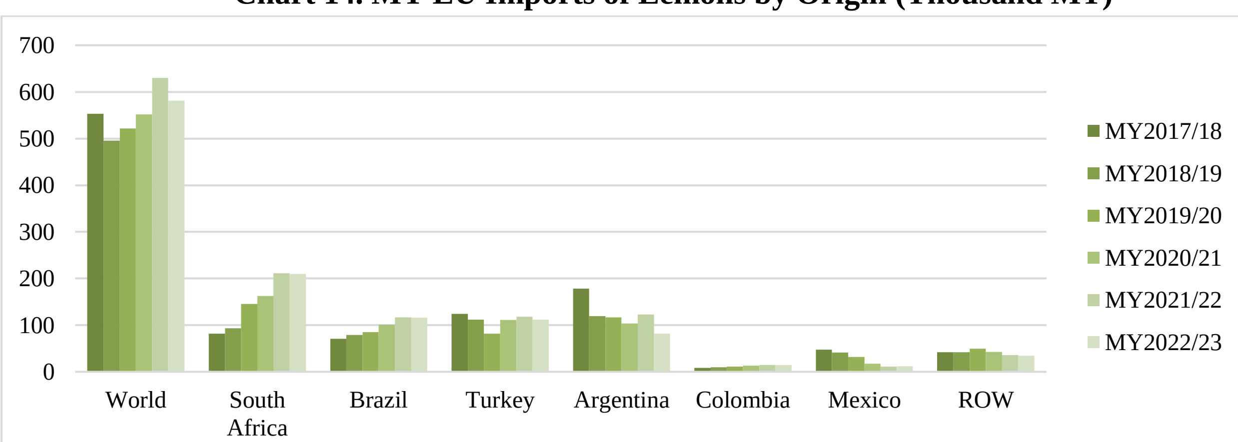


Source: FAS EU posts.

Consumption of lemons in the EU in MY 2023/24 is anticipated to recover from the low levels registered during the previous season. In the EU, lemons are primarily consumed fresh, and its demand is highly price-elastic. Consequently, the ample domestic supply supports a recovery in consumption. Food uses of the lemon peel continue to boost organic lemon demand in the EU, which is driving the increase in lemon groves cultivated under organic practices, most prominently in Spain. Profiting from this growing demand in MY 2023/24, Argentina exported organic lemons to the EU for the first time in 20 years.

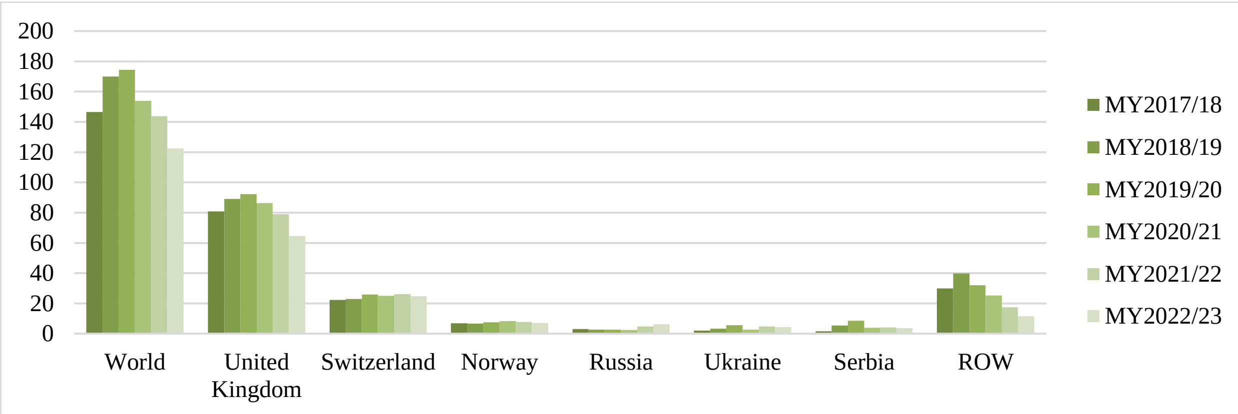
MY 2023/24 EU imports of lemons are expected to curb as domestic supply is anticipated to be ample. South Africa, Brazil, and Argentina during the off-season and Turkey are the leading suppliers to the EU market. MY 2023/24 EU lemon exports are projected slightly above previous season levels. Main destination for EU lemons, primarily shipped out of Spain, include the United Kingdom, Switzerland, and Norway.

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



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

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



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

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

Grapefruit

Table 6. Production, Supply, and Distribution

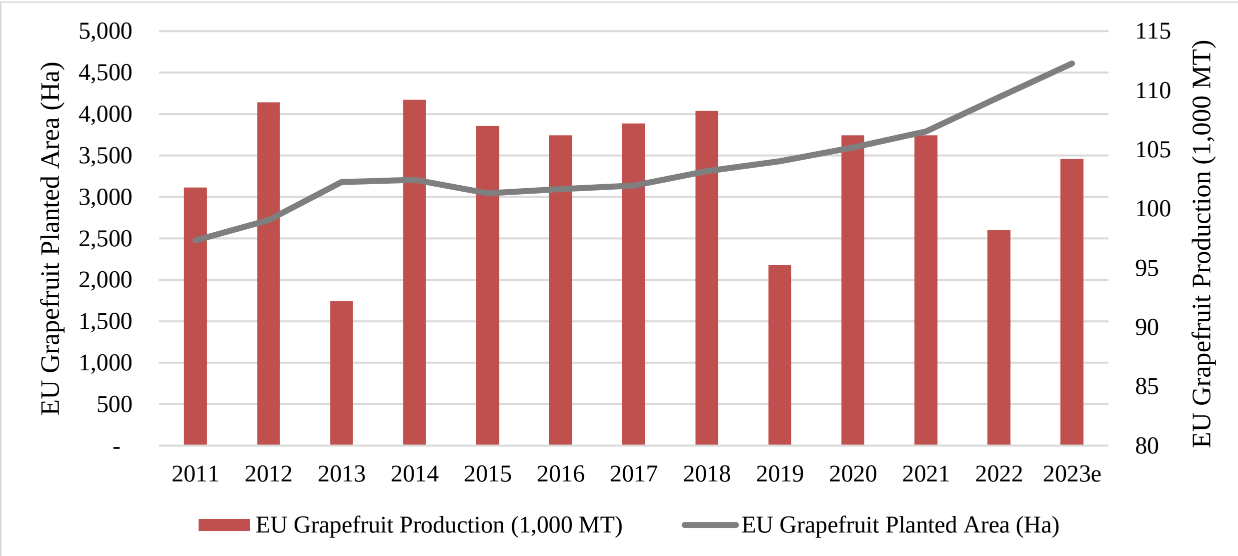
Grapefruit, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Oct 2021		Oct 2022		Oct 2023	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	3,790	3,791	3,960	4,203		4,610
Area Harvested (HECTARES)	3,191	3,191	3,344	3,323		3,729
Bearing Trees (1000 TREES)						
Non-Bearing Trees (1000 TREES)						
Total No. Of Trees (1000 TREES)						
Production (1000 MT)	106	106	99	98		104
Imports (1000 MT)	223	223	215	209		200
Total Supply (1000 MT)	329	329	314	307		304
Exports (1000 MT)	17	17	15	20		25
Fresh Dom. Consumption (1000 MT)	299	299	288	276		267
For Processing (1000 MT)	13	13	11	11		12
Total Distribution (1000 MT)	329	329	314	307		304
(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.

MY 2023/24 EU grapefruit production is forecast to 104 thousand MT, up from the 98 thousand MT produced in MY 2022/23. The production recovery can be entirely attributed to the production rebound in Spain. Spain is the largest grapefruit producing EU Member State, accounting on average for nearly 75 percent of the EU's total production. Stable production is projected in other EU grapefruit producing Member States such as Cyprus, Italy, and Greece.

Chart 16. EU Grapefruit Production and Planted Area 2011-2023

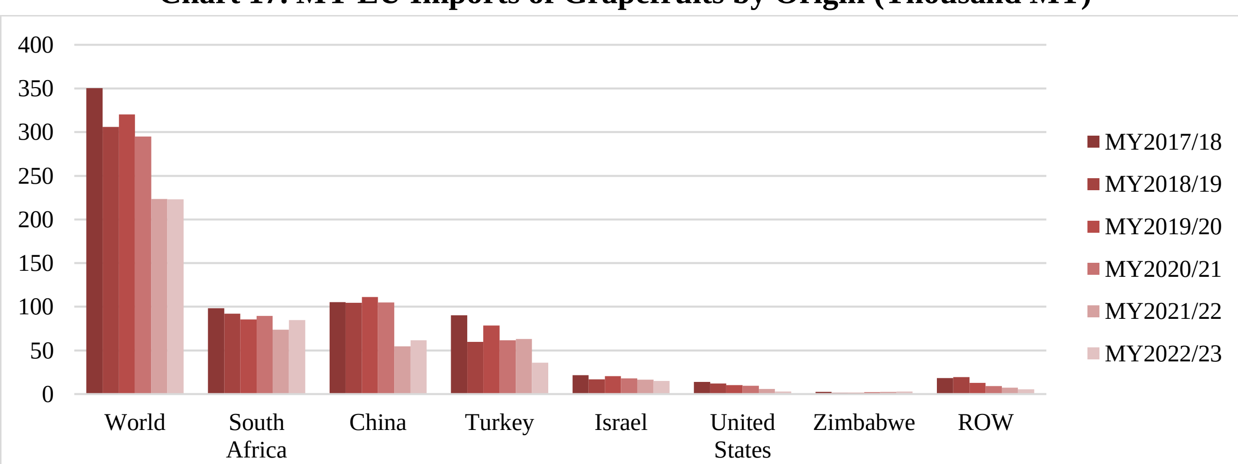


Source: FAS EU posts.

In MY 2023/24, EU grapefruit consumption is revised down slightly as food inflation pressures fresh fruits consumption. Grapefruits in the EU are mainly consumed fresh. Spain and Cyprus, the EU's largest producers of grapefruits, are also the main grapefruit processors in the EU. France and Germany are the largest grapefruit consuming EU Member States.

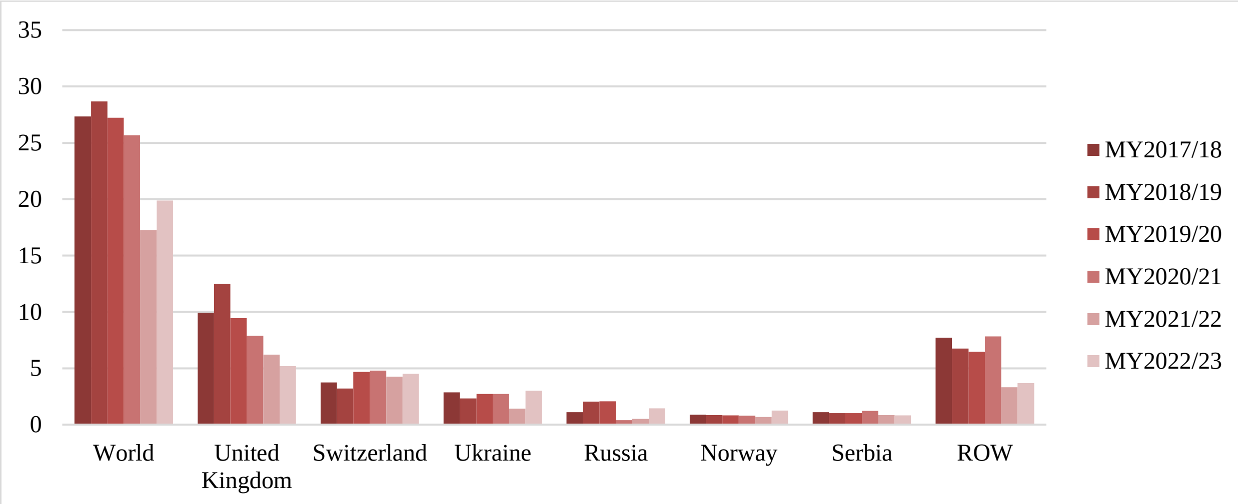
In MY 2023/24, EU imports of grapefruit are expected to decline given the recovery anticipated in internal availability. In MY 2022/23, imports of grapefruit contracted significantly. South Africa, especially in the off season, followed by China, Turkey, and Israel, and the United States, to a much lesser extent, are the EU's main grapefruit suppliers. EU grapefruit exports are small but expected to expand marginally in MY 2023/24, in line with the larger domestic availabilities. Main destination markets for EU grapefruits include the United Kingdom, Switzerland, Ukraine, and Russia.

Chart 17. MY EU Imports of Grapefruits by Origin (Thousand MT)



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

Chart 18. MY EU Exports of Grapefruits by Destination (Thousand MT)



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

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

Policy

European School Fruit Scheme

The European "School Fruit Scheme" originated in 2009 as a measure to combat child obesity. It includes three elements: free distribution of fruit and vegetables in schools, informational campaigns on healthy eating habits, and monitoring and evaluation. In March 2023, it allocated $271 million (€223 million) of EU funds for the school year 2023/2024 to all of the Member States according to Commission Implementing Decision (EU) 2023/655, which applies as of August 1, 2023. In addition to the school fruit scheme, fruit and vegetable consumption is also encouraged through the EU's promotional budget for agricultural products and quality schemes. For more information about the EU's promotion program please see GAIN Reports EU 2023 Promotion Programs for Agricultural Products.

Certification of Fruit and Vegetables

Fruit and vegetables exported to the EU require a phytosanitary certificate. A USDA/Animal Plant Health Inspection Service (APHIS) inspector issues these certificates for U.S. exports. This standard-setting body coordinates cooperation between nations to control plant and plant products pests and to prevent their spread.

EU 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. More information is 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 stages 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 in place for ten products, including citrus fruit, and are set out in Part 2 of Annex I to this Regulation on page 42.

Note: On April 21, 2023, the European Commission proposed an update to the marketing standards, including those for citrus fruit, that will be published before the end of the year. The new rules are expected to enter into force by January 1, 2025. The new standards will apply to citrus fruit of certain varieties to be supplied fresh to the consumer but exclude citrus fruit for industrial processing. For additional information, please see the current Regulation (EU) No 1308/2013 and GAIN: European Commission Proposes to Update Marketing Standards for Agricultural Products.

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. The European Commission has published its withdrawal of approval of *phosmet* in the official Implementing Regulation (EU) 2022/94. *Phosmet* is the active ingredient in insecticides used by U.S. citrus growers to control a variety of insect pests. Effective September 15, 2023, as per Commission Regulation (EU) 2023/1029 published on May 25, 2023, the MRLs for *phosmet* was lowered to 0.01 ppm for citrus and to 0.005 ppm for oranges.

For additional information, consult the FAS/Brussels' website on EU Early Alerts.

Upcoming reviews for MRLs: [Article 12 review](#).

Upcoming reviews for active substances:

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

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 the 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 2024 are published in Commission Implementing Regulation (EU) 2023/2364 in EU Official Journal L 282. This version applies as of January 01, 2023. The tariffs for citrus can be found on Part II, Section II, Chapter 8.

First Come, First Served Principle: Regarding the administration of import tariff quotas, certain types of citrus fruit are subject to the "[first come, first served principle](#)":

Product	Tariff codes	Quantity (kg)	Period	Origin	In-Quota Duty
Sweet oranges	0805 10 22 10 0805 10 24 10 0805 10 28 10	20,000,000	Feb 1-April 30	All third countries except the United Kingdom	10% ad valorem
Minneola	0805 29 00 21 0805 29 00 29	14,931,000	Feb 1-April 30	All third countries except the United Kingdom	2% ad valorem
Frozen concentrated Orange Juice	2009 11 99 11 2009 11 99 19	1,500,000	Jan 1-Dec 31	All third countries except the United Kingdom	13% ad valorem

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 to several commodities, including on orange juice products in retaliation against U.S. safeguard measures on EU steel and aluminum as published in Commission Implementing Regulation (EU) 2018/886. On October 30, 2021, the Unites States and the 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. As of December 2023, negotiations are ongoing.

U.S.-EU WTO Cases on Aircraft Subsides 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 the list of products subjected to a 25 percent additional tariff. 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.

Trade Policy – EU Free Trade Agreements (FTAs)

The EU is negotiating and has implemented several Free Trade Agreements (FTAs) with other countries and regions such as the major EU citrus partners: Chile, South Africa, Türkiye, Egypt, Morocco, and Israel, 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 Commission Implementing Regulation (EU) 2019/2072 establishes rules for citrus fruit and citrus hybrids exported from areas where *Xanthomonas citri* (Citrus canker) exists and requires 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.

EU's new restrictions on False Codling Moth

The European Union has approved new provisions for citrus exported from areas affected by *Thaumatotibia leucotreta* (False Codling Moth), such as Sub-Saharan African countries. The Commission Implementing Regulation (EU) 2022/959 of June 16, 2022, amends Annex VII to Commission Implementing Regulation (EU) 2019/2072 regarding new phytosanitary requirements for the protection of the Union against this pest. The new rules entered into force on July 14, 2022, and require that all Europe-bound exports of citrus fruit from countries affected by the disease must undergo specified mandatory cold treatment process (temperatures of - 2C up to 25 days) before importation.

Bans Impacting Citrus Trade

Russian Import Ban on Agricultural Products: On August 7, 2014, the Russian government implemented a (then) one-year ban on a range of agricultural and food products, including citrus fruit from the United States, the EU, Canada, Australia, and Norway, in response to U.S. and EU sanctions over Russian actions in Ukraine. Russia has continued to extend the ban every year. The Commission introduced specific market support measures for citrus fruit, including for mandarins and clementines, but the last emergency measures for fruit and vegetables were phased out on June 30, 2018. The impact on the EU citrus sector is very limited because exports to Russia have not been significant in terms of volumes. Overall, the EU granted $588 million (€500 million) of aid to EU producers of fruit and vegetables corresponding to 1.7 million tons of withdrawals from the market. For more information, see the Commission's website regarding the Russian ban.

Annex I. Main Citrus Producing Areas by Member State

Member State	Spain	Italy	Greece
Oranges	Comunidad Valenciana and Andalucía	Sicily and Calabria (combined account for approximately 95 percent of total production)	Peloponnese and Etoloakarnania
Tangerines/ Mandarins	Comunidad Valenciana, Cataluña and Andalucía	Calabria, Sicily and Puglia	Prefectures of Igoumenitsa, Arta, Mesologgi, and Thesprotia, and prefecture of Laconia in Peloponnese.
Lemons and Limes	Murcia	Sicily	Prefectures of Achaia, Korinthos, and Laconia, in the Peloponnese and the island of Crete.
Grapefruits	Murcia	Sicily (86 percent of the country's production)	Island of Crete and Greek prefectures of Corinth and Kavala, together with the region of Thessaly

Source: FAS EU posts.

Annex II. Main Citrus Varieties by Member State

Member State	**Spain**	**Italy**	**Greece**
Oranges	*Navelate, Navelina, Valencia late, Salustiana* and *Navel.*	Blood varieties grown in Italy include *Tarocco*, *Moro* and *Sanguinello*. *Naveline* and late varieties such as *Valencia* and *Ovale*, are the leading blond-orange varieties. *Ippolito* and *Meli* cultivars are gaining popularity.	*Washington Navel*, *Commons*, *Skaggs Bonanza*, *Navelina*, *New Hall*, *Lanelate*, and *Valencia*.
Tangerines/Mandarins	*Clementine* is the major tangerine group, new plantings include *Clemenrubi*, *Nova*, *Leanri* and *Oronules.*	*Comune* or *Oroval* and *Monreal* are the leading clementine varieties grown, whereas *Avana* and *Tardivo di Ciaculli* are the main mandarin cultivars.	*Clementine* is the major tangerine group, new plantings include *Nova*, *Page* and *Ortanique* varieties.
Lemons and Limes	Verna and Mesero (Fino or Primofiori)	*Femminello Siracusano*, *Lunario*, *Interdonato*, *Limone di Sorrento*, and *Limone di Procida.*	The major variety grown in Greece is *Maglini*, along with the early varieties *Interdonato* and *Eureka*.
Grapefruits	*Star Ruby and Ruby Red*	*Star Ruby and Ruby Red*	*Marsh Seedless* and *Star Ruby*.

Source: FAS EU posts.

Trade Shows

Trade fairs play a key role in presenting new products to the trade or in finding additional buyers and importers. The most important trade shows related to the fruit and vegetable sectors are:

FRUIT LOGISTICA Berlin, Germany (Interval: yearly) Target Market: Germany/EU/Central & Eastern Europe FRUIT LOGISTICA is the leading European trade show for fresh and dried fruit, nuts, and related products. More than 2,400 companies from across the entire fresh produce value chain will participate, including major global players, as well as small and medium-sized suppliers from around the world. https://www.fruitlogistica.com/en/	Next Fair: February 7-9, 2024
BIOFACH Nuremberg, Germany (Interval: yearly) Target Market: Germany/Europe The leading European trade show for organic food and non-food products. http://www.biofach.de/en	Next Fair: February 13-16, 2024
FRUIT ATTRACTION Madrid, Spain (Interval: yearly) Target Market: Spain/EU/International Fruit attraction is an international Trade Show for the Fruit and Vegetable Industry sector with more than 1600 exhibitor companies from around the world. https://www.ifema.es/en/fruit-attraction	Next Fair: October 8-10, 2024

Related Reports

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

Attachments:

No Attachments.