



Citrus Consumption in the EU Growth is back !

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- Calculation based on the « appearing consumption »:

IMPORT – EXPORT

- Custom sources

EUROSTAT, US/japan customs, COMTRADE

- Work on a selection of markets

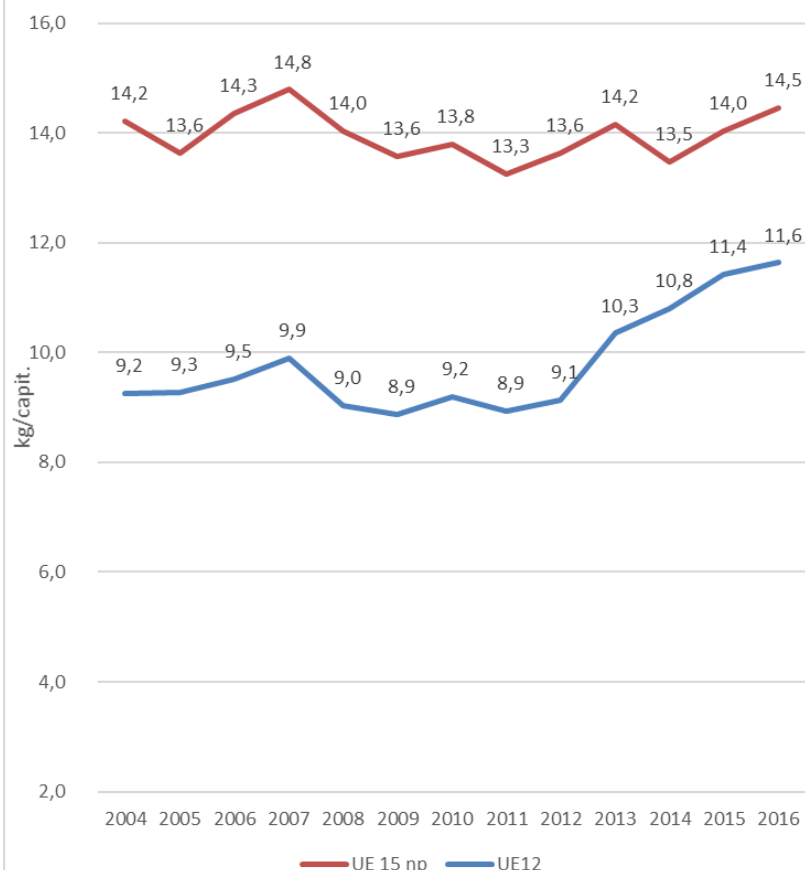
- Focus on the EU 28

- producing countries excluded (Spain, Italy, Greece, Cyprus)

Target: to COMPARE and DESCRIBE THE EVOLUTION of
markets with similar structure

A nice growth, especially in the Eastern part of the EU 28

Citrus consumption in the EU 28
Eurostat - calculation CIRAD



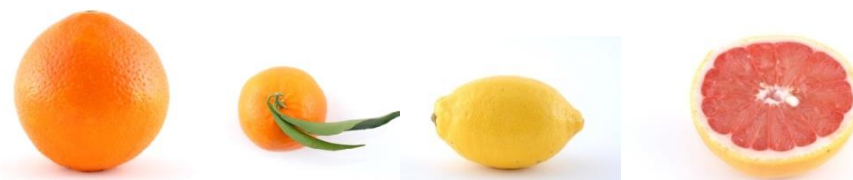
•EU12 : Awakening at least !

- **4 consecutive years of growth** after a long period of slept
- **Record breaking consumption** in 2016 at 11,6 kg/capita ... +2,5 kg/capita in 4 years !
- Linked to the **come back of a nice economic growth** since 2014?
- Consumption still far from the EU 15np one...

•EU15 np*: close to the record after 2 years of strong growth !

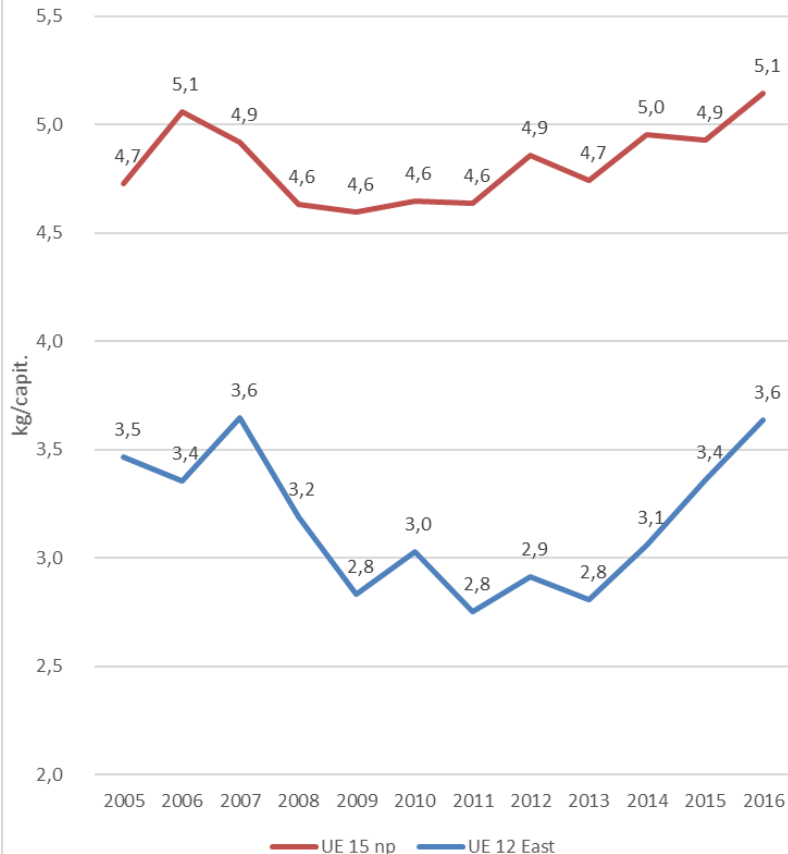
- **End of the stability** at around 13,5 kg /capita
- **Increase** these last two years
- 14,5 kg / capita in 2016 – **not so far from the record** at 14,8 kg/capita registered ...10 years ago !

*non producing countries





Soft Citrus consumption in the EU 28
Eurostat - calculation CIRAD



•EU15 np*: a solid growth !

- **Growth till 2011** (with off production season effects)
- **Back to the 2006 all time high at 5,1 kg/capita**

•EU12 : a recent ... but strong movement

- **3 consecutive years of growth “only”** but +800g !
- **Back to the 2006 all time high at 3,6 kg/capita**
- **Still far from the EU 15np one...**



*non producing countries

- A more qualitative supply, on a longer production calendar

Easy peelers 2nd half of the season – Mediterranean Basin – Marketing calendar

Varieties	Sources	D	J	F	M	A	M
Clementines							
Nour	Morocco						
Hernandine	Spain						
Hybrids							
Nadorcott	Morocco						
Nadorcott	Spain						
Or	Spain						
Ortanique	Spain						
Tango	Spain						
Or	Israel						

Professional sources

- A production boom for today...and tomorrow

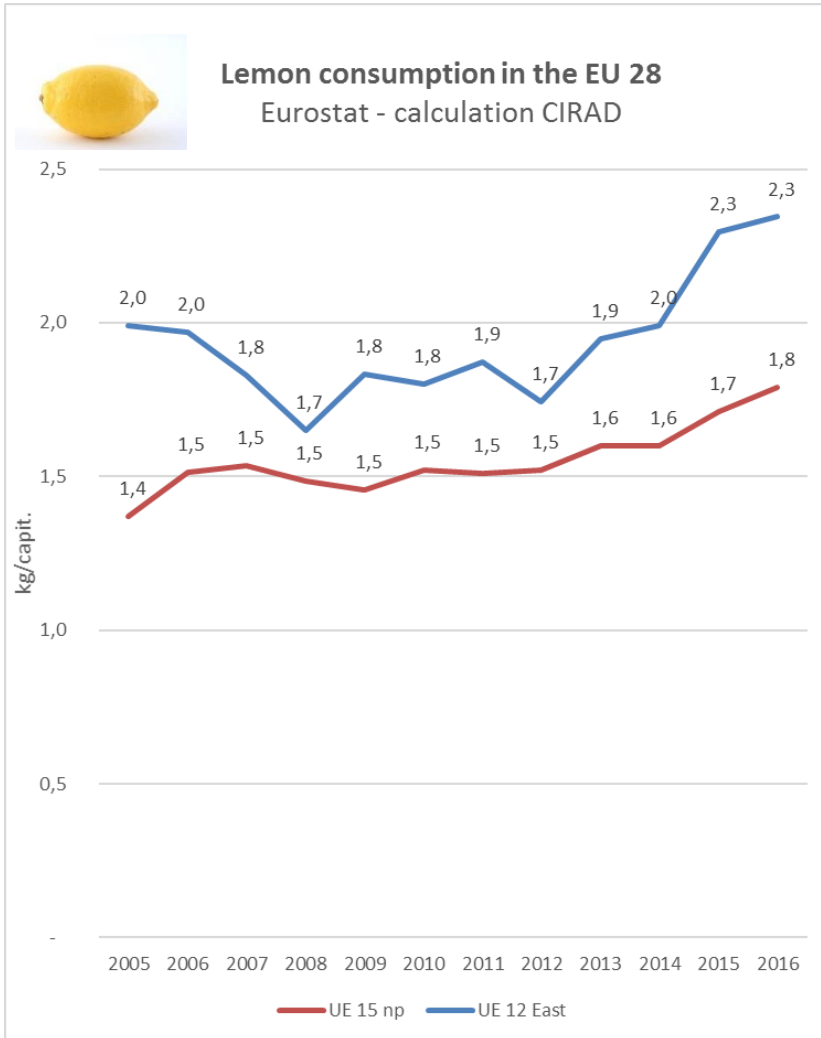
Late easy peelers – Mediterranean Basin – New varieties in production now or in the medium term

Sources	Varieties	Planted areas	Indicative export potential	Comments
Morocco	Nadorcott	5 200 ha (2016)	210 000 t	6 production centres in the country: Gharb, Beni Mellal, Safi, Chichaoua, Souss, Marrakech
Israel	Or	5 500 ha (2016)	150 000 t	
Spain	Nadorcott	4 520 ha (2015)	180 000 t	40 % Valencian Com. (Valencia/Alicante), 18 % Murcia, 41 % Andal (Huelva/Sevilla)
	Or	2 200 ha* (2015)	80 000 t	40 % Andalusia (Huelva 29 %), 14 % Murcia, 46 % Valencian Com. (Valencia 27 %)
Sub-total		17 450 ha	620 000 t	
Spain	Tango	3 000 ha? (2016)	120 000 t?	No official figures on planted areas. Production conditions?
	Others (Mor, GN, Tahoe, etc.)	low?		

*Areas under licence / Professional sources, ORC, CVVP



Lemon: such a good surprise !



•EU15 np*: a slight but regular upper trend

- **+300 g in 4 years**
- **All time high at 1,8 kg/capita**

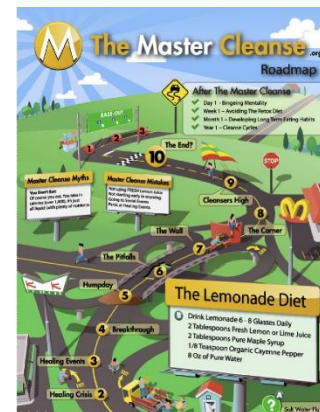
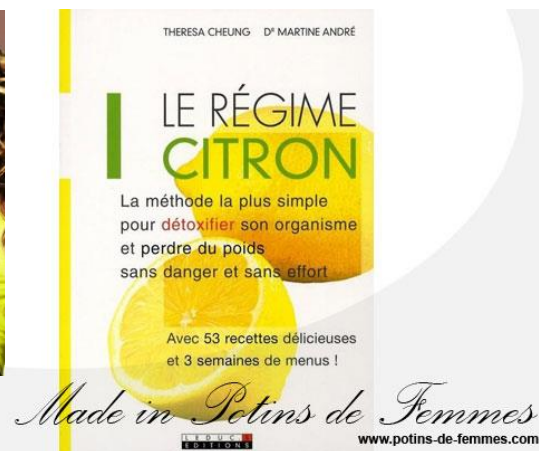
•EU12 : More and more over-consuming !

- **3 consecutive years of growth / +400/500 g/capita**
- **All time high at 2,3 kg/capita**
- **Within the world champions :**
 - Russia : 1,3/1,4 kg/capita
 - USA/Canada : 1,8/1,9 kg/capita

*non producing countries

- Consumption boosted by a very positive image of a diet/detox product

100g of lemon = 30% daily recommended intake



- A worldwide trend

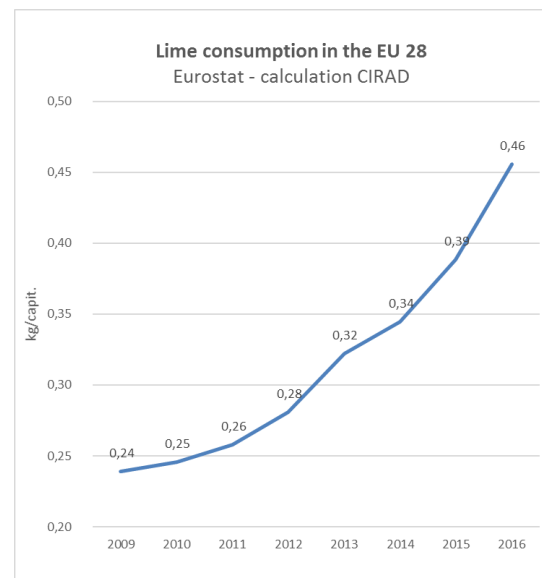
Lemon consumption - evolution 2016-2013

Eurostats - national customs

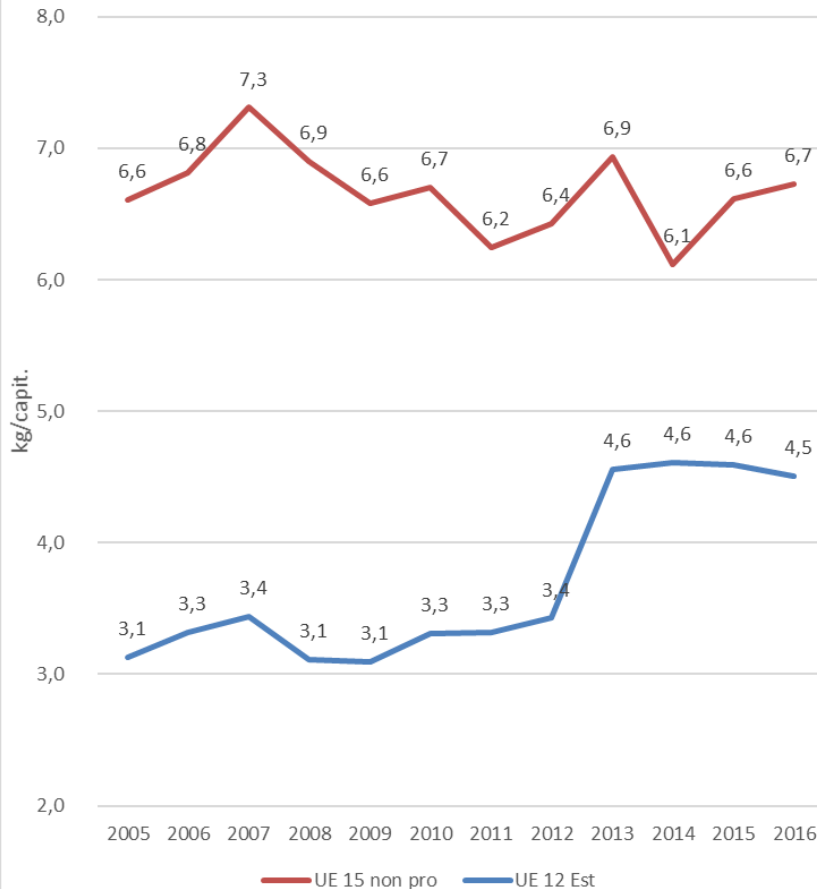
g/capita	2016	Evol.16-13
UE 15 np	1 790	189
UE 12 East	2 344	397
US	1 850	241
Canada	1 848	350

- Also positive for lime

EU 15 – 2009/2016 : consumption x 2



Orange consumption in the EU 28
Eurostat - calculation CIRAD



•EU12 : Static...but confirming a nice increase

- A sharp 1 kg increase in 2013
- Strange...but **confirmed** these last seasons
- New **step** at 4,5 kg/capita
- Only Bulgaria/Romania still increasing
- **Still far from the EU standard**
 - 4,5 kg versus 6,7 kg/capit

•EU15 np*: The end of the nightmare

- No more decreasing countries
- Mixed situation

*non producing countries



EU 15 np : orange consumption
Eurostat - calculation CIRAD



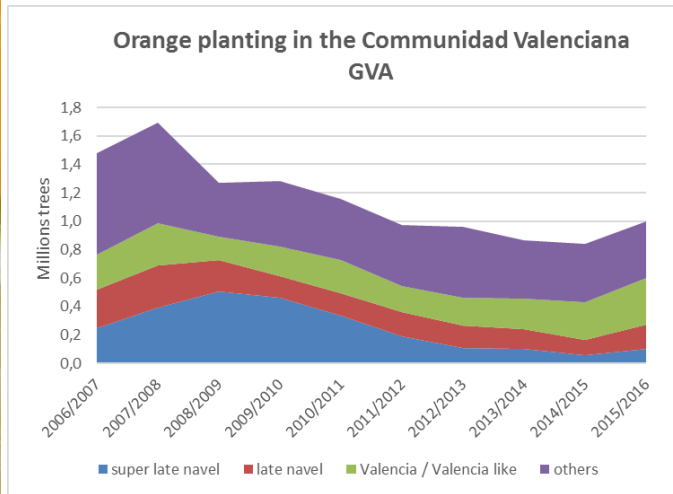
•EU15 np*: A mixed situation

- **Stability of the highest and lowest consumers**
 - Scandinavia still at around 8 kg/capita
 - And UK still at 4 kg/capita....
- **End of a dramatic decrease in Germany**
 - 5,5 kg/capita
- **France is up !**
 - From 6,4 kg/capita in 2010 to around 7,0 kg/capita

*non producing countries



•A more qualitative supply, on a longer production calendar



Late Navel oranges – Mediterranean Basin – Harvest calendar

Varieties	D	J	F	M	A	M	J
Washington Navel							
Lane Late							
Rhode Summer Navel							
Barnfield							
Powell Summer navel							
Chislett Summer Navel							

Professional sources

Valencian Community
(50-55 % of Spanish orange production)
2014-2016 estimate

- Washington Navel: 130 000 to 150 000 t
- Lanelate and Navelate: 450 000 to 550 000 t
- Powel/Chislett/Barnfield/Rhode: 75 000 to 100 000 t

•New ways of consumption – fresh juice machine EVERYWHERE in France



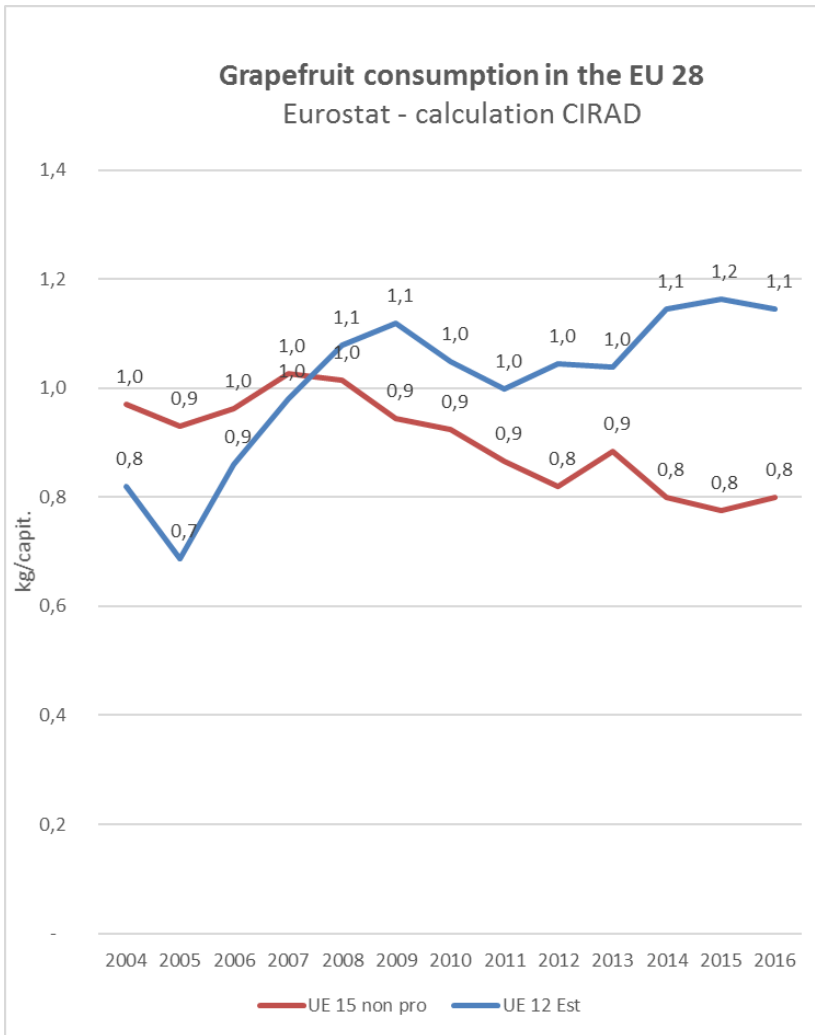
Grapefruit: last...but also least....

•EU15 np*: From a sharp decrease to an erosion

- Period of sharp seems decrease to be over
- All countries **stable to slightly down**
- **Erosion more marked in the “Floridian fan” countries**

•EU12 : Recovering the 2005/2010 level

- Recovery at 1,1 kg/capita, after a gap at the beginning of the decade
- Poland / Romania / Bulgaria are the leading consumers and the main driver of the growth



*non producing countries



•An - unexpected – growth recovery after years of stability/erosion

- Movement especially marked in soft citrus / lemon and at a lower extend orange in some markets (France)

•A very interesting message from the market :

INNOVATION AND COMMUNICATION PAY !

- Varietal innovation key driver of the growth in soft citrus / orange (French market)
- New way of consumption key driver of the growth for orange in France
- Communication on the health benefit of citrus key driver of the growth for lemon

We have to continue to work on these points !

•But be cautious: the fruits to feed this growth have already been planted !!!

- Soft citrus : Plan Maroc Vert in Morocco / development expected in Spain/Israel
- Lemon: lots of plantings theses last years in Spain, Sicily, Turkey (at a lower extend?) and in the SH
- Orange: lots of new acreage in Egypt / Production of the new orchards of Late Spanish varieties increeasing

All the statistics by country in the next FRUITROP edition
www.fruitrop.com