



# 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

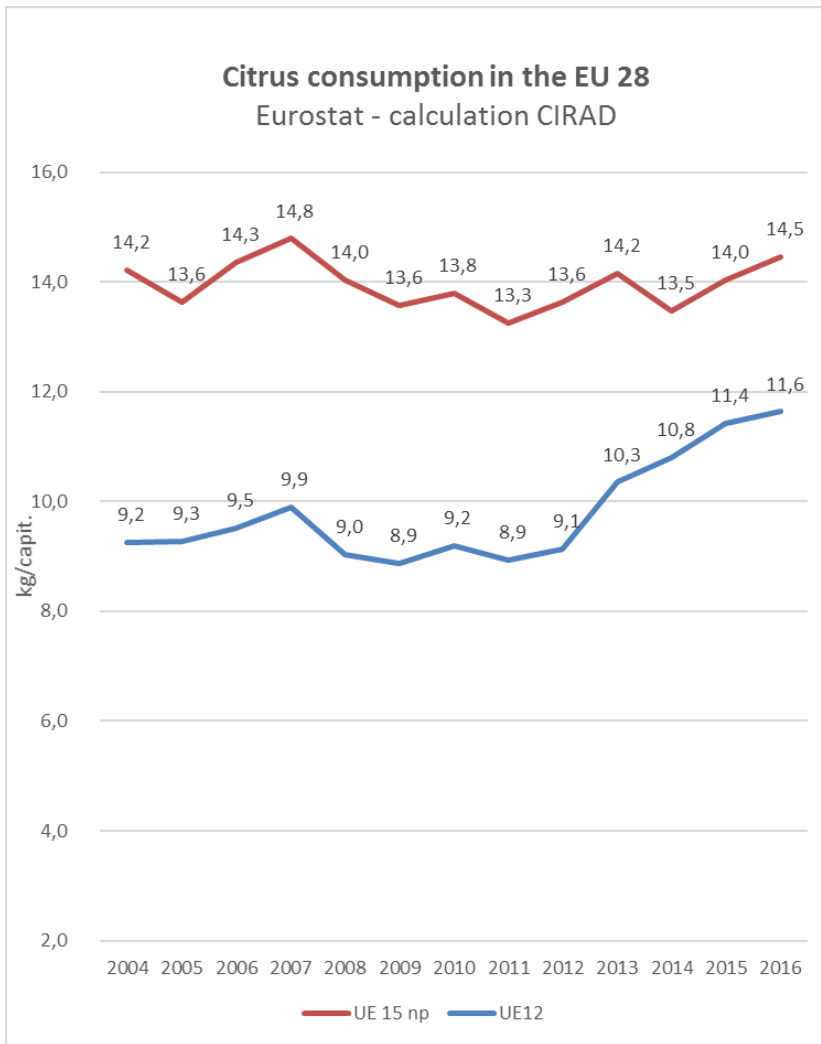
- Work on a selection of markets

- 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

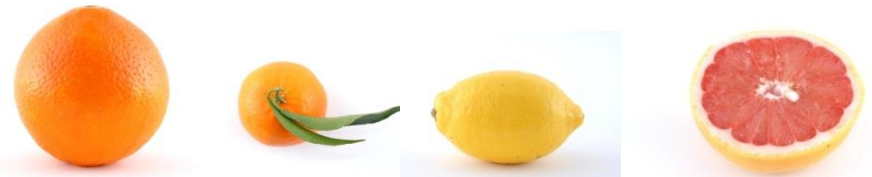


## •EU12 : Awakening at least !

- **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 !

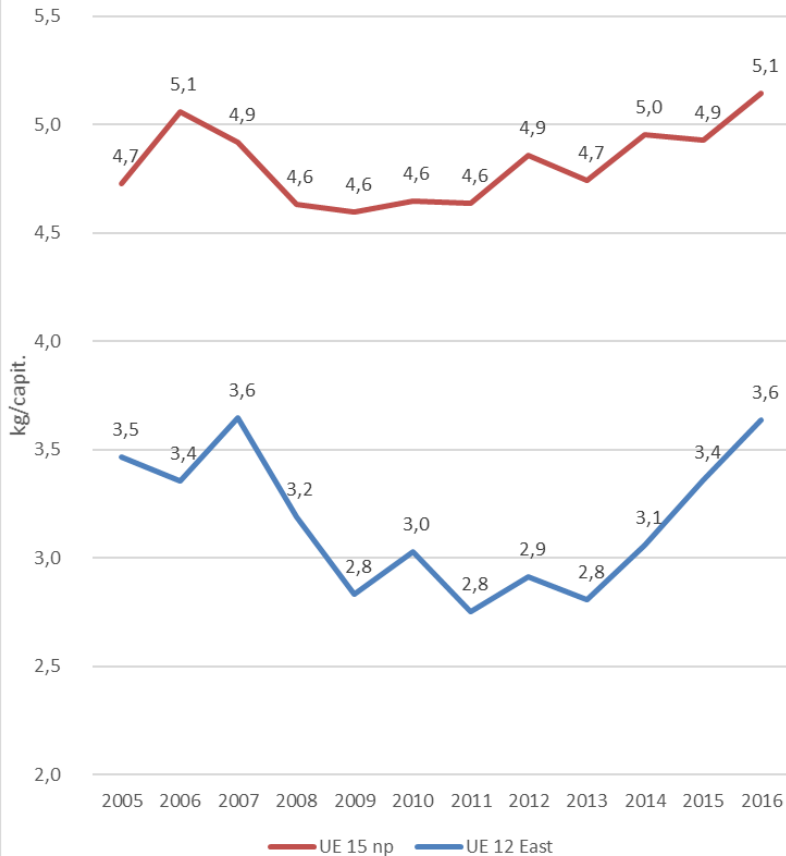


\*non producing countries

# Soft citrus : strong growth all over the EU 28



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 2<sup>nd</sup> half of the season – Mediterranean Basin – Marketing calendar

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

Professional sources

- A production boom for today...and tomorrow

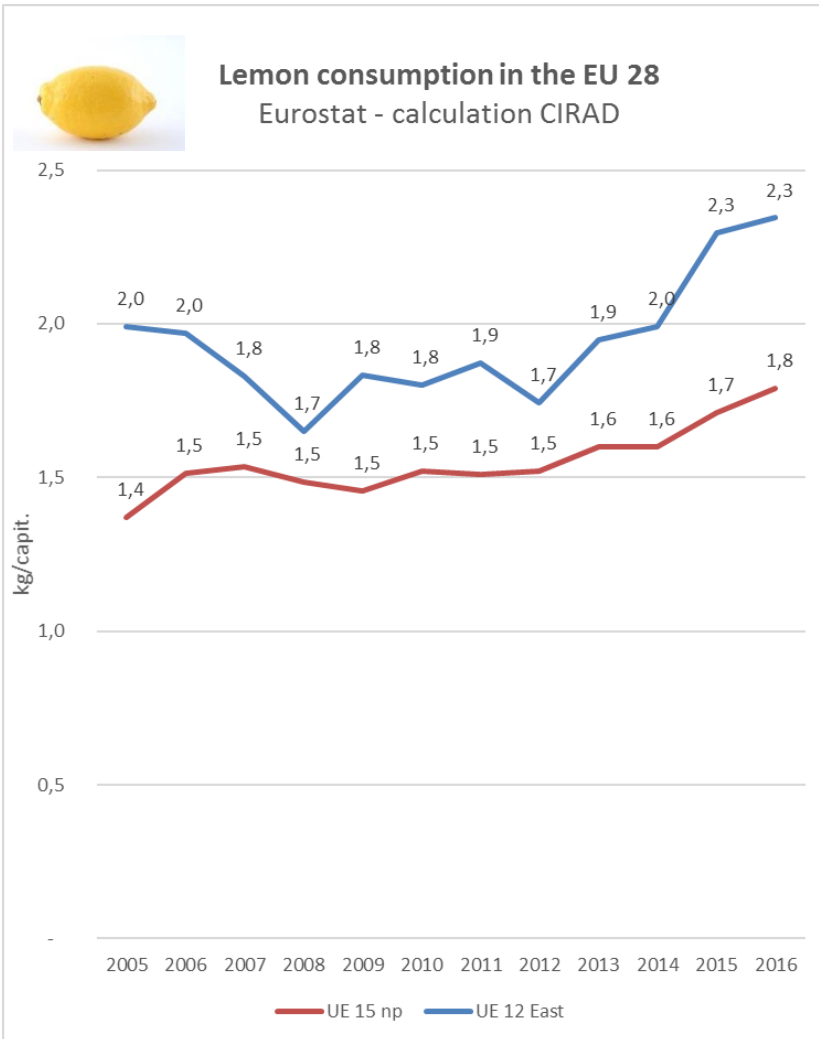
Late easy peelers – Mediterranean Basin – New varieties in production now or in the medium term

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 %)
<b>Sub-total</b>		<b>17 450 ha</b>	<b>620 000 t</b>	
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**

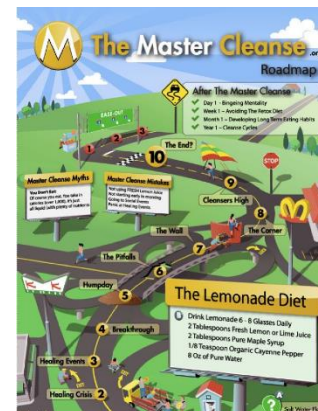
## •EU12 : More and more over-consuming !

- **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

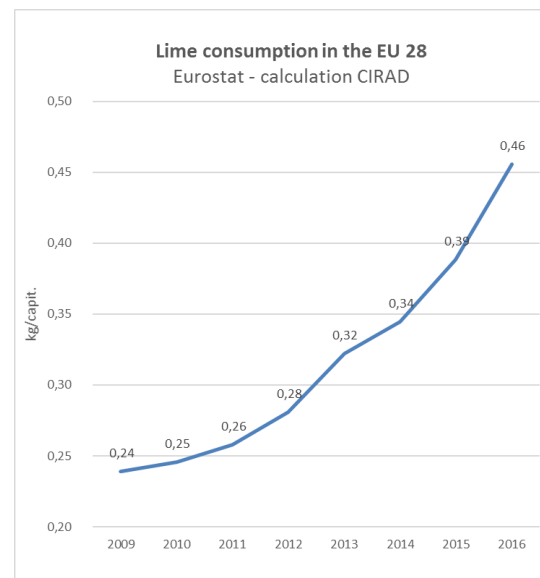
## Lemon consumption - evolution 2016-2013

Eurostats - national customs

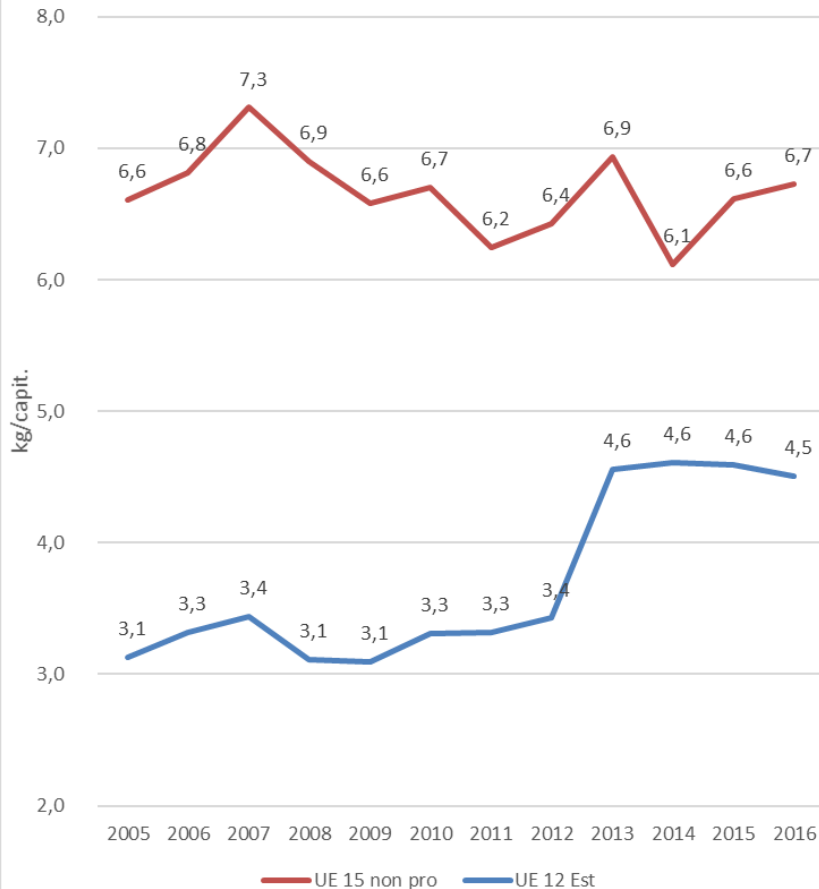
g/capita	2016	Evol.16-13
UE 15 np	1 790	189
UE 12 East	2 344	397
US	1 850	241
Canada	1 848	350

- 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



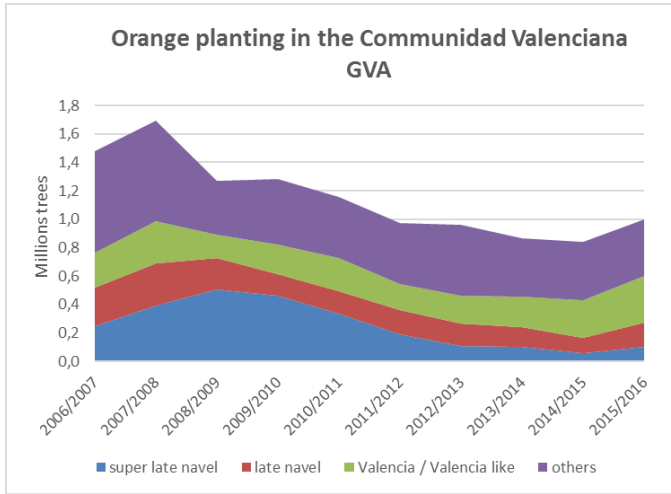
## •EU15 np\*: A mixed situation

- **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 non producing countries

EU12

EU28

EU27

EU26

EU25

EU24

EU23

EU22

EU21

EU20

EU19

EU18

EU17

EU16

EU15

EU14

EU13

EU12

EU11

EU10

EU9

EU8

EU7

EU6

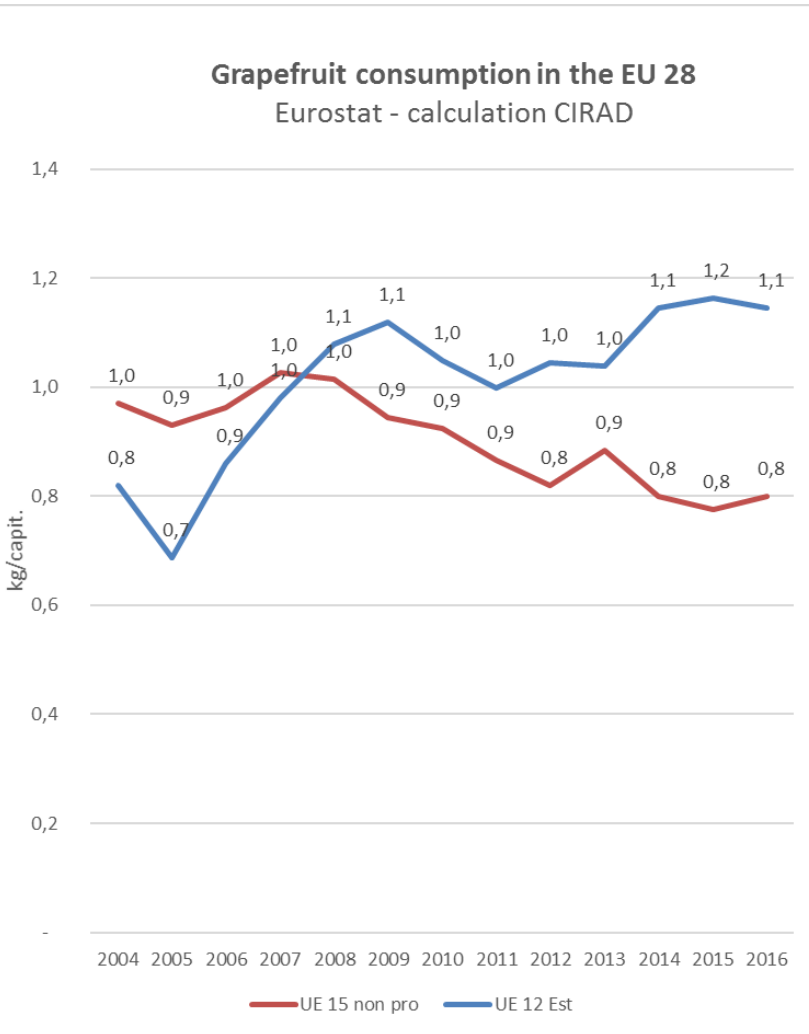
EU5

EU4

EU3

EU2

EU1



### •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 increasing

**All the statistics by country in the next FRUITROP edition**  
**[www.fruitrop.com](http://www.fruitrop.com)**