

# Citruses

## Consumption in the EU-28

### Back to growth

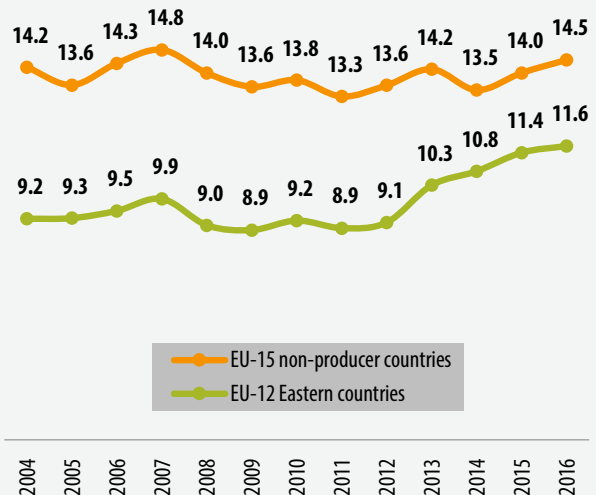
Stability, maturity or even decline have for a very long time been the only suitable words to describe the evolution of citrus consumption in the European Community. The 2015 and 2016 figures will force analysts to enrich their vocabulary, adding terms such as growth or rise.



### A boom in the eastern EC

The world's number one fresh citrus market seems to be back in form! The 2016 figures show that a consumption level at its highest for more than a decade. Besides this very decent record, we should emphasise above all the confirmation of an underlying trend of recovery in growth, though the dynamic varies between the geographic zones. In the eastern EC, a genuine revolution seems to be in progress. Consumption, previously completely static, has risen by nearly 30 % over the last four years, to reach 11.6 kg per capita in 2016. The trend is more subtle in the western EC. Nonetheless, there definitely seems to be a bounce-back: the consumption level of 14.5 kg/capita is close to the absolute record from 2007, marking a 1.2 kg rise from the low point of 2011. Regardless of the geographic zone, the trend is not being driven by a handful of countries, but all of them. Countries with the biggest rises are France (15.1 kg/capita, i.e. + 2.0 kg on 2011), Poland (11.4 kg, i.e. + 2.0 kg) and the United Kingdom (11.3 kg, i.e. + 1.2 kg).

**Citruses - EU-28 - Consumption**  
(in kg per capita / source: Eurostat / CIRAD calculation)





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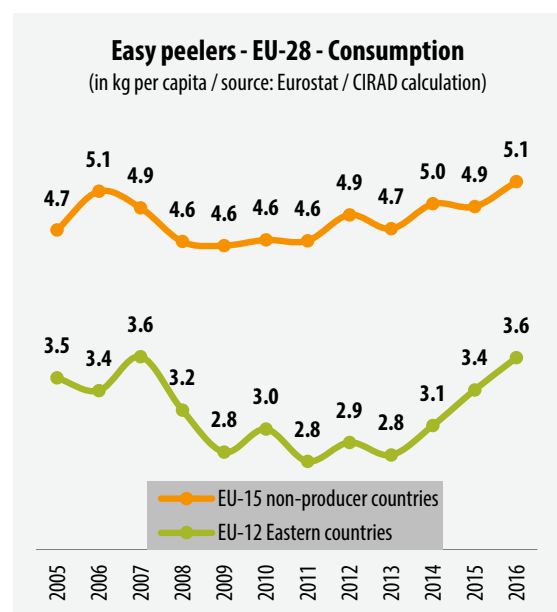
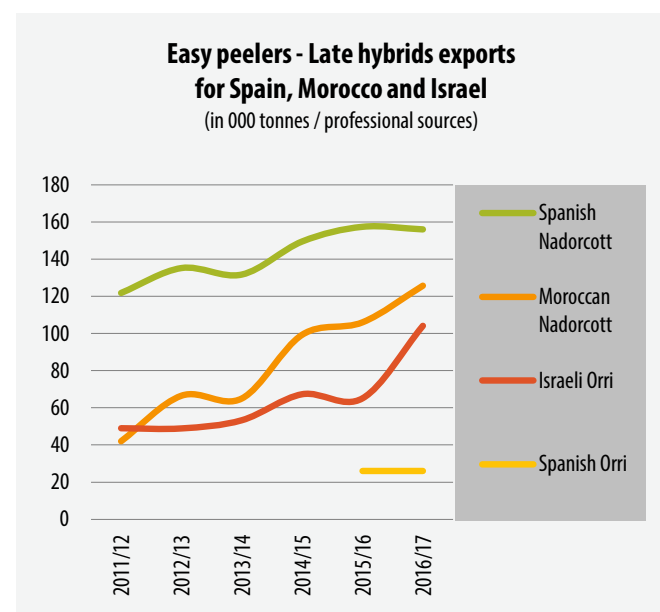
## Easy peelers: on the charge!

The trend is more or less the ideal. Easy peeler consumption growth in the European Community is generalised, fairly strong and with fine prospects. This follows on from a period of such flatness that observers were left wondering whether growth could actually make a comeback. In the western EU-28, consumption volumes per capita have risen by 500 g since the beginning of the decade. While the movement is generalised, its intensity is nonetheless highly marked in Germany and the United Kingdom, which saw their consumption levels approach the average mark. France has seen a rise too, though a little less dynamic, while Scandinavia is back on form after a deep depression. The markets in the east of the EU-28, overwhelmingly flat until 2013 after a period of collapse in the middle of the last decade, are rousing themselves and on the charge! Consumption per capita has gained more than 700 g in three years, to reach 3.6 kg. This is a generalised increase, though it is proving to be most hesitant in Poland.

This development is in tune with the rise by the other big world markets. A strong increase has also been seen in countries such as Canada (4.3 kg/capita, i.e. + 700 g since the beginning of the decade) or the USA, where the level is nonetheless still very low (+ 600 g since the beginning of the decade, yet reaching just 2.5 kg/capita). Russia is the sole exception: the embargo policy, which has meant cutting off major procurement sources at least temporarily, has reduced the volumes taken in by the former world number one consumer to below the European average (from 6.1 kg/capita in 2014 to 4.9 kg in 2016). The 2017 figures seem to be confirming a return to normal, which is also good news for the Community market, which could be potentially destabilised by this "export shortfall" to the Russian market.

## Wager on end-of-season varietal innovation paying off

This boom in easy peeler consumption seems primarily due to the roll-out of a renewed range of end-of-season hybrids, with higher quality and covering a later market window (in particular the spring). Furthermore, it is the supplier countries of these innovative varieties which are behind the volume growth in recent years. Morocco, which was tending to fall off the radar, has recovered its footing in the EU-28 thanks in particular to its Nadorcott supply (nearly 160 000 t of easy peelers exported to the EU-28 in 2016-17, as opposed to barely more than 60 000 t in 2012-13). Israel has managed a similar comeback, in its case thanks to its Or/Orri supply (exports to the EU-28 across all varieties of 75 000 t in 2016-17, as opposed to less than 30 000 t in 2010-11). There is a similar process for Spain, although it is going rather unnoticed in terms of volumes due to the substitution effects (rise of Nadorcott, Orri and other top-end late varieties, but other cultivars such as Fortuna or Ortanique slowing down or disappearing).





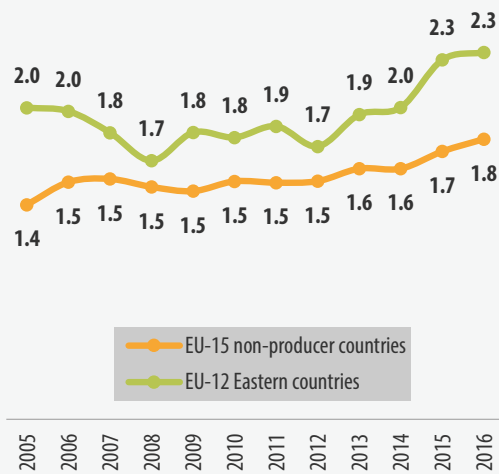
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## Lemon: a gold star performance

Who would have believed it? The lemon, which on the face of it seemed the least likely citrus to climb, saw a genuine consumption boom after a long period of complete flatness. This is not a solely European but worldwide movement, since world trade in this product has been up by approximately 100 000 t per year for the past three years, i.e. an increase of 15 % between 2013 and 2016. The EU-28 is leading the way in this trend. In the western EC, consumption in non-producer countries increased by 300 g/capita between 2012 and 2016, to reach 1.8 kg. All the major countries rose in comparable proportions, reaching a near-average consumption level (and up to 2.5 kg/capita in Sweden). This popularity of acidic citrus has also benefitted the lime: volumes taken in by the EU-15 doubled between 2010 and 2016, to reach 460 g/capita. The lemon is still flavour of the month in the eastern EC, where its consumption increased by 400 g between 2013 and 2016. This makes an increase greater than that registered in the EU-15, rather paradoxical given that the overall consumption level was already higher (2.5 kg/capita in the east, as opposed to 1.8 kg in the west at present). The dynamic is affecting all countries in this part of the continent too.

### Lemon - EU-28 - Consumption

(in kg per capita / source: Eurostat / CIRAD calculation)



## Thanks Beyoncé!

While the recovery in the popularity of easy peelers is based on in-depth work on the range, the renewed interest in the lemon seems to be due to a little nudge by destiny. The lemon has become a trendy fruit, promoted for its beneficial effects on health by the popular press and a handful of iconic figures (including Beyoncé and her famous "lemonade diet"). These virtues are justified, since 100 g of lemon provides 30 % of the recommended daily intake of vitamin C, recognised for its benefits on a great many of the body's systems (immune, metabolic, energy, antioxidant, etc.). All the market players are taking advantage, in particular the number one Spain.

## A more mixed trend for the orange

The orange is also seeing a favourable period. However, the trend is more difficult to discern, since it is at times more short-lived or less universal than for easy peelers or the lemon. In the eastern EC, the latest figures do not reveal any rise, though they are excellent nonetheless. They confirm the astounding – and hitherto suspect – change in pace of the market which occurred in 2013, with a sudden leap of more than 1 kg in one year. The only dark spot on this bright horizon is that a new ceiling of 4.5 kg per capita seems to have been established, except in Romania and Bulgaria, the only countries in the zone which still saw a distinct rise in 2015 and 2016. This part of Europe has nonetheless made up for lost time. In Western Europe, the trend is more heterogeneous. Paradoxically, stability is prevailing in countries where consumption lies at the extremes of the range: it remains desperately stable in the United Kingdom, despite a level barely higher than 4.0 kg/capita, and still sky-high in Sweden with nearly 10 kg. Consumption has regained some lost ground prior to 2014 in Germany. Yet the most interesting case is without doubt the French market, where there has been a steady rise since 2012, barring production vagaries. The efforts made to increase availability and quality of supply during the end of the winter season (super-late Spanish Navel) and new consumption modes (boom in fleet of freshly-squeezed juice machines in the supermarket sector) seem to be bearing fruit.

**Late Navel oranges – Mediterranean Basin – Harvest calendar**

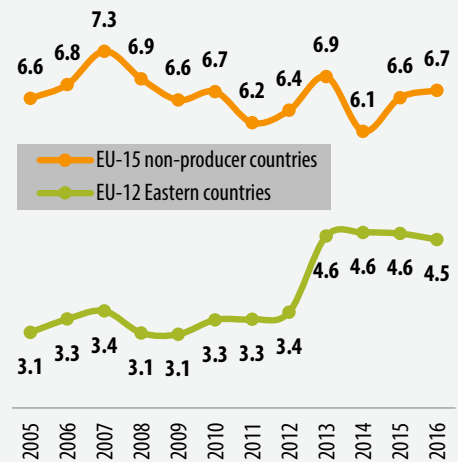
Varieties	D	J	F	M	A	M	J
Washington Navel							
Lane Late							
Rhode Summer Navel							
Barnfield							
Powell Summer Navel							
Chislett Summer Navel							

Professional sources



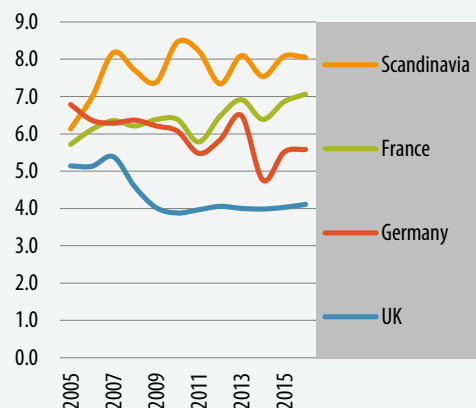
**Orange - EU-28 - Consumption**

(in kg per capita / source: Eurostat / CIRAD calculation)



**Orange - Evolution of consumption on leading West European markets**

(in kg per capita / sources: Customs, Comtrade, professionals)



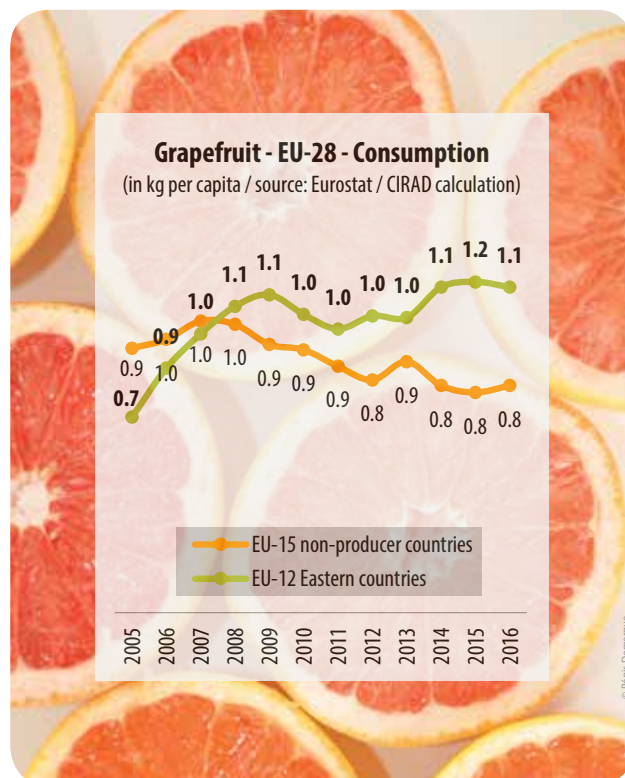
## “Entry-level” suppliers on a roll

The big winner of this renewed orange consumption growth in the EU-28 does not seem to be the expected players. It is Egyptian imports which have literally boomed in recent years, going from 100 000-130 000 t to more than 280 000 t in 2015-16. Could it be that this entry-level product is well-suited to the East European markets and juice machines? Spain, which greatly benefitted from its innovative range at the beginning of the decade (approximately + 100 000 t) has seen its volumes on the EU-28 market stagnate in recent years. We should also note the awakening of Portugal (volumes shipped doubled between the beginning of the decade and 2016-17, reaching 50 000 t) and a comeback trend by Morocco (more than 90 000 t in 2016-17, as opposed to barely 50 000 t at the beginning of the decade).



## Grapefruit still struggling, though only in Western Europe

It is widely believed that every family has its black sheep. We cannot help but observe that the grapefruit continues to occupy this role in the citrus family. The trend is very mixed depending on the geographic zone. In Western Europe, there is a prevailing decline, with the relative stability at 0.8 kg/capita of 2015 and 2016 not confirmed in 2017 according to the initial figures available. This a phenomenon common to markets across the developed countries, where the lack of top-end Floridian production is weighing heavily on the consumption balances. Western Europe is doing somewhat less badly than the rest, with a fall of approximately 100 g over the past three years, as opposed to 300 g in the United States and 400 g in Japan. All countries in the former EU-15 have been affected by this decrease, to a slightly greater extent for "Florida fans" such as France. Conversely, a bounce-back is at work in the Eastern EC. The consumption level of 1.1 to 1.2 kg per capita in 2015 and 2016 marked a rise of approximately 100 g from 2013, nearing the record set in 2009. However, growth is not generalised, relating primarily to the heavyweights of the zone, i.e. Poland and above all Romania and Bulgaria.



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## Entry-level taking the prize for the grapefruit too

This shift in the market's centre of gravity toward the eastern EU-15 consumer countries, mainly seeking entry-level or mid-range fruits, has major consequences on the EU-28 supply profile. Israel, which suffers from a high cost price and an unfavourable euro/shekel exchange rate, is on the wane with 30 000 t of shipments to the EU-28 in 2016-17, half of the volumes in 2010-11. Conversely, Turkey and Spain are gaining ground. Meanwhile the Floridian decline mentioned above is primarily due to a different production problem.

## A message of hope!

After a long flat period, European citrus consumption seems to have recovered the growth trend of recent years. While the durability of the dynamic is questionable for the orange, conversely it seems well-established in easy peelers and the lemon, which is most fortunate since the surface area extensions potentially required to feed this trend already seem to be in place. This return to growth is in any case a great message of hope. It shows that a well-targeted varietal innovation (range of spring easy peelers and oranges), the establishment of new modes of consumption (spread of fresh juice machines in supermarkets), or communication on the benefits of this product family, often under-promoted, are powerful vectors for development. It remains for the industry to get itself organised to continue to harness them, if possible with even greater intensity ■

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