Citrus Consumption in the EU

Growth is back!

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Methodological remarks

• 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

• 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
The strength of a renovated range on the late market

• A more qualitative supply, on a longer production calendar

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<tr>
<th>Varieties</th>
<th>Sources</th>
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Professional sources

• A production boom for today…and tomorrow

<table>
<thead>
<tr>
<th>Sources</th>
<th>Varieties</th>
<th>Planted areas</th>
<th>Indicative export potential</th>
<th>Comments</th>
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<tbody>
<tr>
<td>Morocco</td>
<td>Nadocott</td>
<td>5 200 ha (2016)</td>
<td>210 000 t</td>
<td>6 production centres in the country: Gharb, Beni Mellal, Safi, Chichaoua, Souss, Marrakech</td>
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<td>Israel</td>
<td>Or</td>
<td>5 500 ha (2016)</td>
<td>150 000 t</td>
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<tr>
<td>Spain</td>
<td>Nadocott</td>
<td>4 520 ha (2015)</td>
<td>180 000 t</td>
<td>40 % Valencian Com. (Valencia/Alicante), 18 % Murcia, 41 % Andal (Huelva/Sevilla)</td>
</tr>
<tr>
<td>Spain</td>
<td>Or</td>
<td>2 200 ha* (2015)</td>
<td>80 000 t</td>
<td>40 % Andalusia (Huelva 29 %), 14 % Murcia, 46 % Valencian Com. (Valencia 27 %)</td>
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<td>Sub-total</td>
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<td>17 450 ha</td>
<td>620 000 t</td>
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<tr>
<td>Spain</td>
<td>Tango</td>
<td>3 000 ha? (2016)</td>
<td>120 000 t?</td>
<td>No official figures on planted areas. Production conditions?</td>
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<td>Spain</td>
<td>Others (Mor, GH, Tahoe, etc.)</td>
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<td>low?</td>
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*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
A lemon craze all over the EU 28 and the world

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

100g of lemon = 30% daily recommended intake

• Also positive for lime
EU 15 – 2009/2016 : consumption x 2

• A worldwide trend

Lemon consumption - evolution 2016-2013
Eurostats - national customs

<table>
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<tr>
<th>g/capita</th>
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<td>UE 15 np</td>
<td>1 790</td>
<td>189</td>
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<td>UE 12 East</td>
<td>2 344</td>
<td>397</td>
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<tr>
<td>US</td>
<td>1 850</td>
<td>241</td>
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<td>Canada</td>
<td>1 848</td>
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Lime consumption in the EU 28
Eurostat - calculation CIRAD

Contenu publié par l’Observatoire des Marchés du CIRAD − Toute reproduction interdite
Orange: mixed trends

**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*
**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

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A cocktail of improved quality varieties and new convenient consumption ways

• A more qualitative supply, on a longer production calendar

![](chart.png)

Late Navel oranges – Mediterranean Basin – Harvest calendar

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<thead>
<tr>
<th>Varieties</th>
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<tr>
<td>Powell Summer Navel</td>
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<td>X</td>
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<tr>
<td>Chislett Summer Navel</td>
<td>X</td>
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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

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To sum up: INNOVATION AND COMMUNICATION PAY!

• 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 increasring

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