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

• 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!

• 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…

*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
• A more qualitative supply, on a longer production calendar

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<th>Varieties</th>
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Professional sources

• A production boom for today...and tomorrow

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<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>Nadorcott</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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<td>Spain</td>
<td>Nadorcott</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>
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<td></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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<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>Others (Mor, GN, Tahoe, etc.)</td>
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*Areas under licence / Professional sources, ORC, CVWP
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

• A worldwide trend

Lemon consumption - evolution 2016-2013
Eurostats - national customs

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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>2 344</td>
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<td>US</td>
<td>1 850</td>
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<td>Canada</td>
<td>1 848</td>
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• Also positive for lime
EU 15 – 2009/2016 : consumption x 2
Orange: mixed trends

• EU15 np*: The end of the nightmare
  - No more decreasing countries
  - Mixed situation

• 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

*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

*non producing countries*
A cocktail of improved quality varieties and new convenient consumption ways

• A more qualitative supply, on a longer production calendar

Orange planting in the Communidad Valenciana GVA

Late Navel oranges – Mediterranean Basin – Harvest calendar

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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

*non producing countries
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 increasing

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