Citrus Consumption in the EU

Growth is back!

Eric Imbert
CIRAD - PERSYST
Market News Service
Editor of FRUITROP monthly
eric.imbert@cirad.fr
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

<table>
<thead>
<tr>
<th>Varieties</th>
<th>Sources</th>
<th>D</th>
<th>J</th>
<th>F</th>
<th>M</th>
<th>A</th>
<th>M</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clementines</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nour</td>
<td>Morocco</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hernandine</td>
<td>Spain</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hybrids</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nadorcott</td>
<td>Morocco</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nadorcott</td>
<td>Spain</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Or</td>
<td>Spain</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ortanique</td>
<td>Spain</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tango</td>
<td>Spain</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Or</td>
<td>Israel</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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>
</tr>
</thead>
<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>
</tr>
<tr>
<td>Israel</td>
<td>Or</td>
<td>5 500 ha (2016)</td>
<td>150 000 t</td>
<td></td>
</tr>
<tr>
<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>
</tr>
<tr>
<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>
</tr>
<tr>
<td>Sub-total</td>
<td></td>
<td>17 450 ha</td>
<td>620 000 t</td>
<td></td>
</tr>
<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>
</tr>
<tr>
<td></td>
<td>Others (Mor, GH, Tahoe, etc.)</td>
<td></td>
<td>low?</td>
<td></td>
</tr>
</tbody>
</table>

*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: 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/capita

--non producing countries
Orange: mixed trends

- 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

EU 15 np: orange consumption
Eurostat - calculation CIRAD

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

• A more qualitative supply, on a longer production calendar

![Graph showing Orange planting in the Comunidad Valenciana GVA](image)

<table>
<thead>
<tr>
<th>Late Navel oranges – Mediterranean Basin – Harvest calendar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Varieties</td>
</tr>
<tr>
<td>-----------</td>
</tr>
<tr>
<td>Washington Navel</td>
</tr>
<tr>
<td>Lane Late</td>
</tr>
<tr>
<td>Rhode Summer Navel</td>
</tr>
<tr>
<td>Barnfield</td>
</tr>
<tr>
<td>Powell Summer navel</td>
</tr>
<tr>
<td>Chislett Summer Navel</td>
</tr>
<tr>
<td>Professional sources</td>
</tr>
</tbody>
</table>

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

![Images of fresh juice machines](image)
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 increaasing

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