WORLD CITRUS ORGANISATION

Lead protagonists include:

ailimpo
Asociación Interprofesional de Limón y Pomelo

Citrus Growers' Association
OF SOUTHERN AFRICA
Grower levies working for you!

freshfel
EUROPEAN FRESH PRODUCE ASSOCIATION

Introducing the world citrus organisation initiative

1. **Market outlook**: an increasingly challenging environment for the citrus sector

2. **Stepping-up cooperation**: lessons learnt from other sectors to build a citrus organization

3. **A World Citrus Organisation**: a tailor-made solution for citrus inspired by ‘success stories’ of other categories

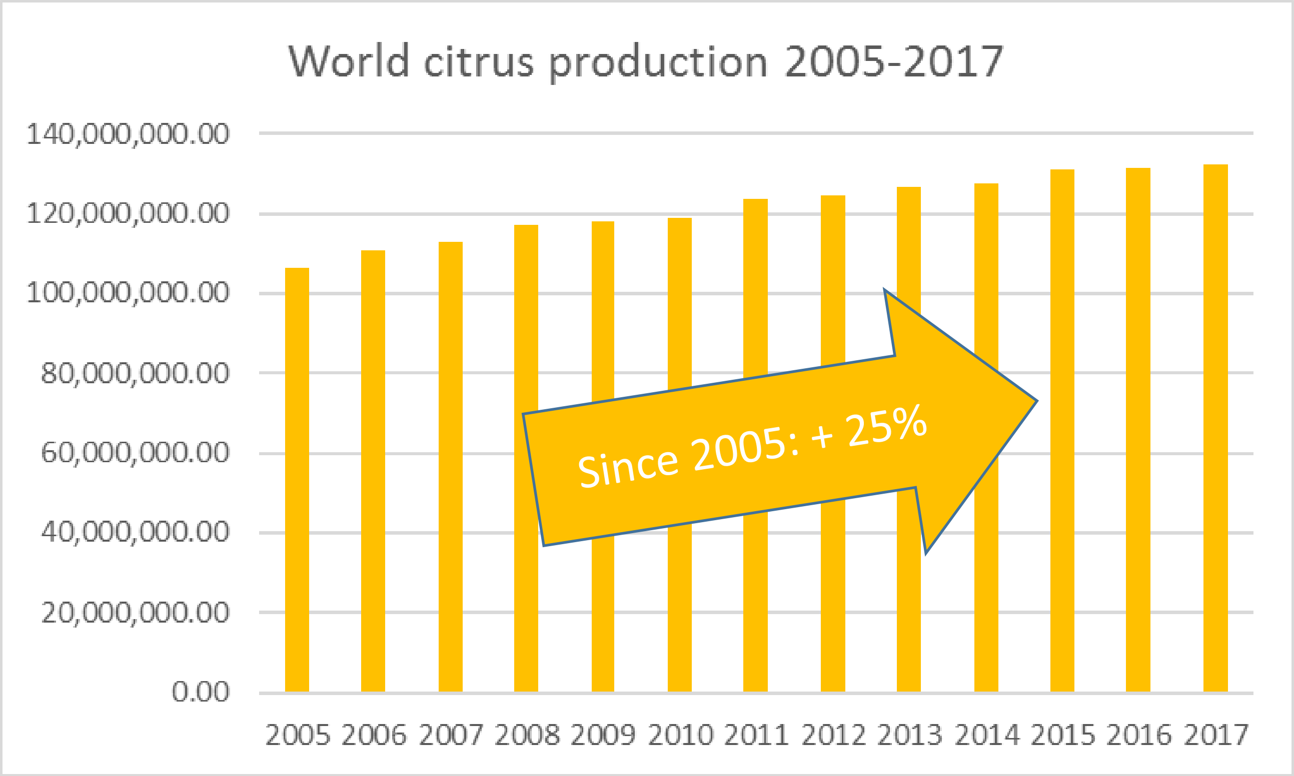
1.1 Market outlook: increasing international competition within the F&V category

Steady growth of fruit production in the last 3 decades to reach 865 Mio T (+ 156%) while citrus reached 132,5 Mio T with a slower growth pace than the fruit category (+128%)

Steady growth of fruit exports in the last 3 decades from 87,5 Mio T (+ 280%) while citrus reached 16 Mio T with a slower growth pace than the aggregate fruit (+122%)

As a result, citrus are losing ground in the fruit category , with strong competition of other fruit exports (mangoes, kiwi, table grapes, avocadoes…) but also from other food categories.

1.2 Market outlook: increased production and competition within a changing dynamic within the sub category



Trends last 3 decade

Oranges: share down from 69% to 55%,

Volume up from 40 to 73 Mio => **growth by 83%**

-14 %

Soft citrus: share up from 4% to 25%

Volume up from 8,5 to 33 Mio T **=> growth by 288%**

+21 %

Lemons: share up from 9% to 13%

Volume up from 5,2 to 17,5 Mio T => **growth by 21**

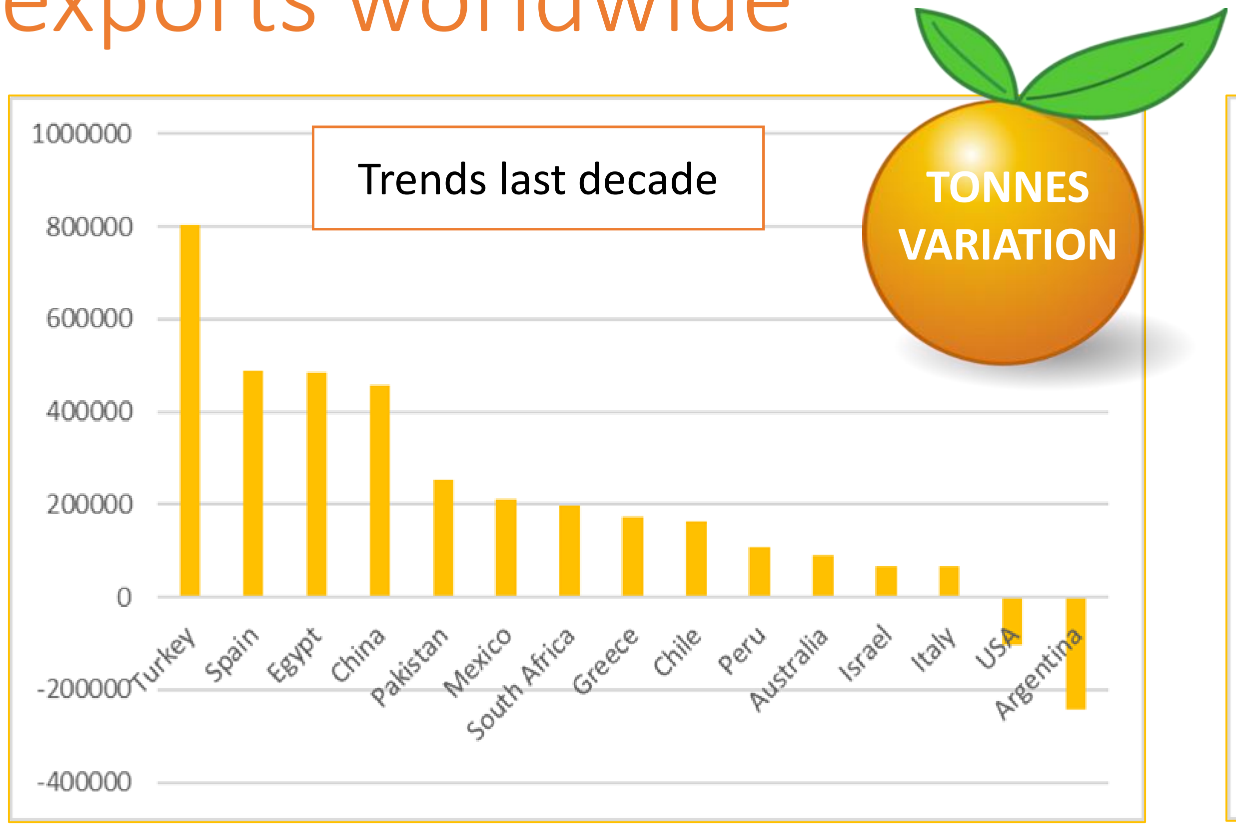
+4%

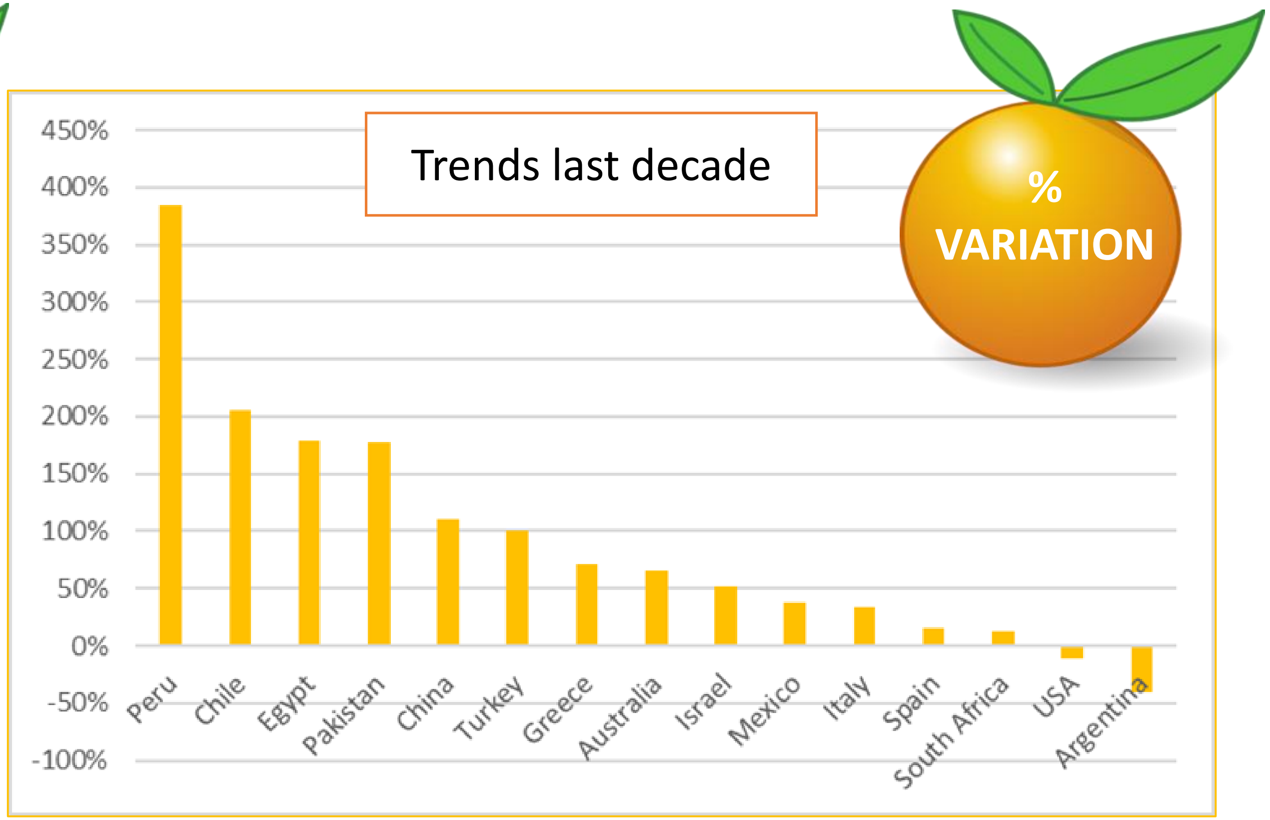
Grapefruits: share down by from 8% to 7%

Volume up from 4,5 to 9 Mio T **=> growth by 100%**

-1%

1.3 Market outlook: dynamic trends among leading citrus exports worldwide





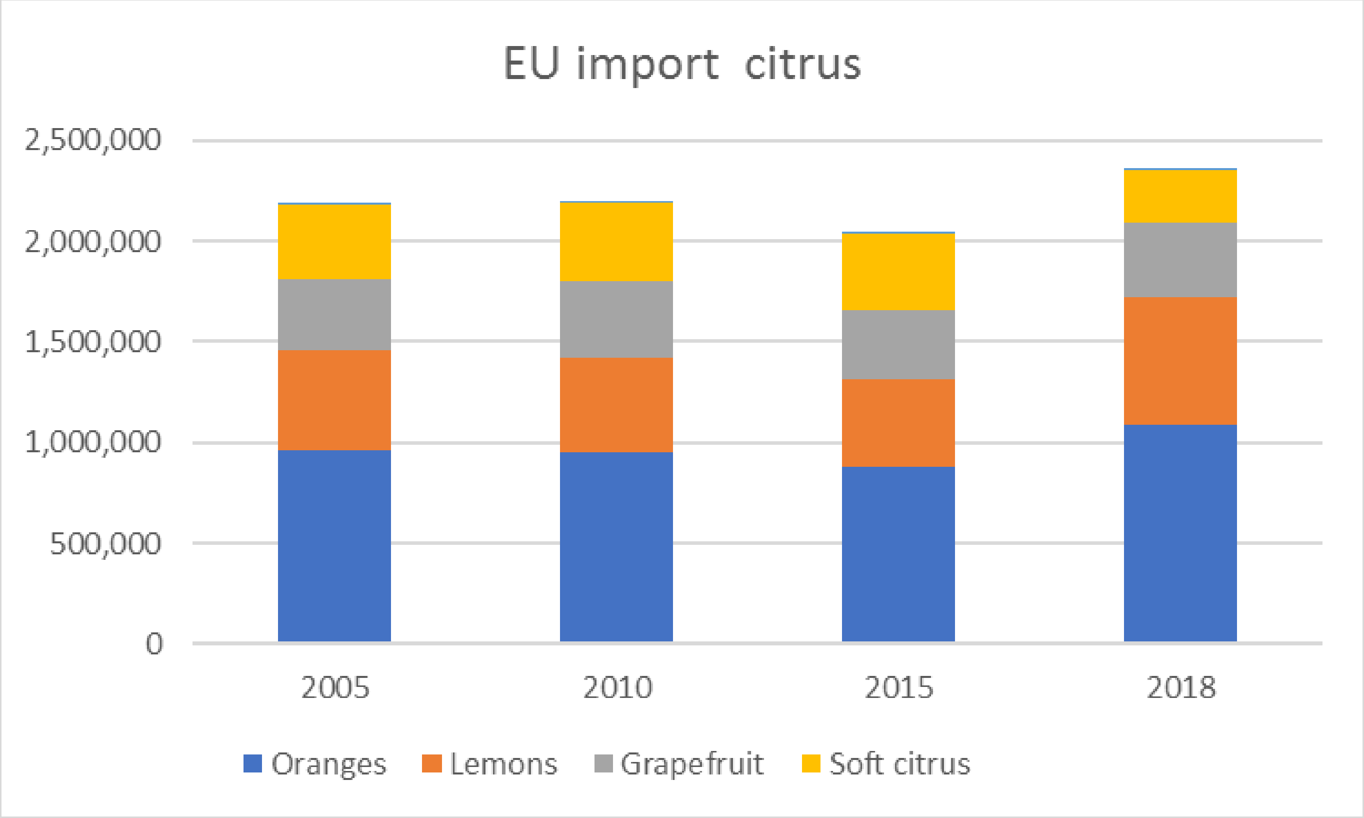
Larger citrus export variation in T

- Turkey=> + 800.000 T
- Spain, Egypt, China => + 450/500.000 T
- Pakistan, Mexico, South Africa.....

Larger citrus export variation in %

- Peru => +380%
- Chile => + 200%
- Egypt, Pakistan => + 175%
- China, Turkey => + 100%

1.4 Market outlook: trends EU citrus imports



HS6	2005	2010	2015	2018
Total	**2,180,080**	**2,196,460**	**2,039,721**	**2,352,476**
Oranges	957,959	953,393	882,843	1,084,380
Lemons	496,416	468,906	435,029	638,507
Grapefruit	353,754	381,852	337,195	368,785
Soft citrus	370,376	388,323	381,695	257,298
Other citrus	1,576	3,986	2,959	3,507

Partner	2005	2010	2015	2018
Total	**2,180,080**	**2,196,460**	**2,039,721**	**2,352,476**
South Africa	539,363	607,422	654,584	750,222
Egypt	122,324	135,275	192,717	338,576
Turkey	333,825	276,604	240,148	313,058
Argentina	385,569	317,410	170,102	231,207
Morocco	245,263	201,540	201,062	144,954
Brazil	65,004	89,300	92,436	105,947
China	6,166	72,540	83,900	104,250
Israel	124,239	113,706	99,090	78,473
Mexico	16,111	47,528	66,037	70,893
Peru	25,220	39,839	54,869	59,151
Zimbabwe	36,046	25,911	30,467	41,832
Uruguay	122,878	119,241	53,025	36,345
United States	54,926	58,743	38,020	13,722
Tunisia	18,459	22,394	17,113	12,544
Colombia	2,788	3,044	4,727	12,264

1.4 Market outlook: an increasingly challenging environment for the citrus sector

Increased production of citrus worldwide => trends transparency ,risk of increase overlapping

Competition with other food categories => citrus to lose ground against other F&V (and food) categories worldwide

Health properties of citrus => often unknown and better used coud be made

Production is facing multiple threats => more exchanges on disease such as greening,.. And other implication of climate changes
R&I exchange

Marketing /promotion => Exchange and synergies of promotion activities , and best practice in place to stimulate consumption

Partnership y globalization => Citrus world more and more global with international partnership

2.1 Stepping-up cooperation: lessons learnt from other sectors

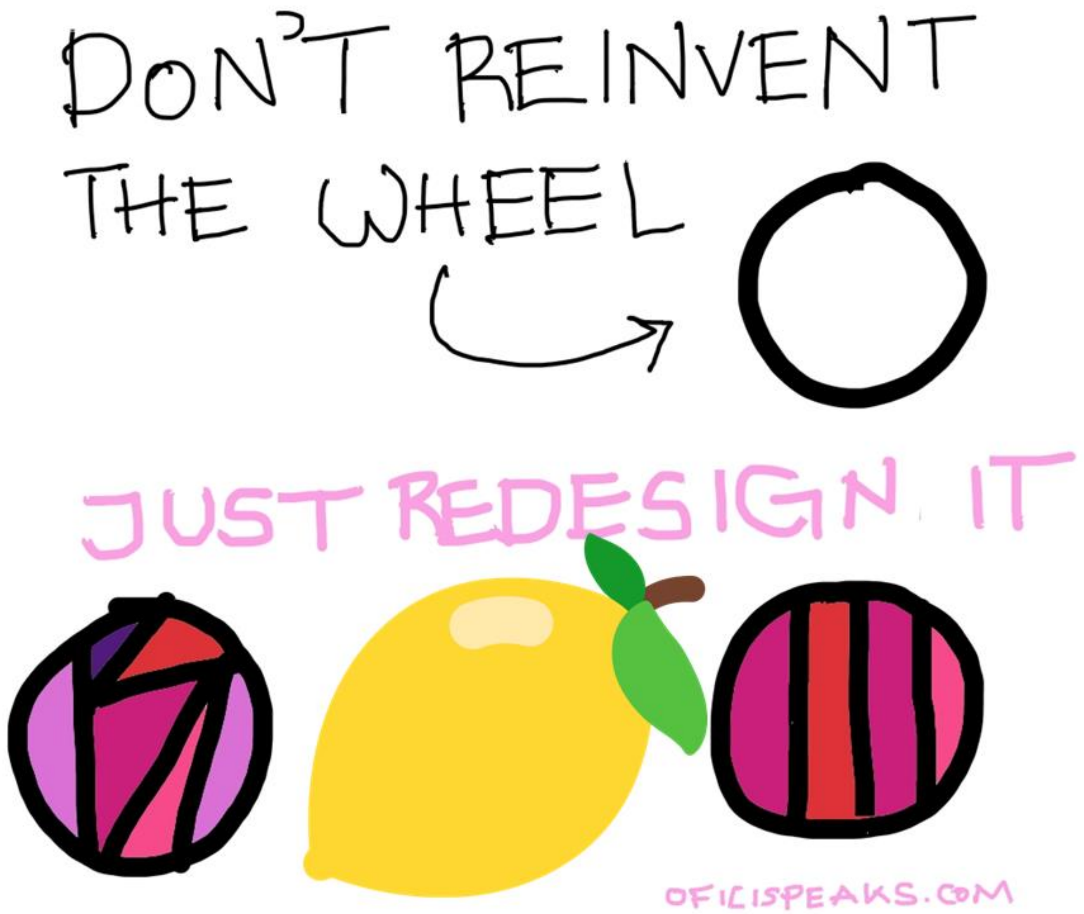
World Avocado Organization (AWO)

World Apple and Pear Association (WAPA)

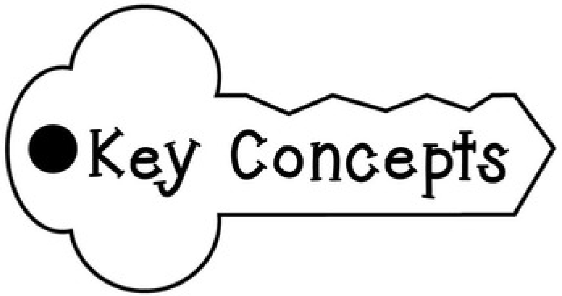
International Kiwi Organization (IKO)

International Blueberry Organization (IBO)

2.2 Stepping-up cooperation: lessons learnt from other sectors



2.3 Stepping-up cooperation: key concepts leading to the initial discussion



- Create a global platform and fill a gap for citrus
- Light structure for exchanging information and trends
- Pre-competitive discussion on matters of common concern
- Not a lobby group but a networking place to debate and share knowledge and best practices
- Improve transparency and knowledge among international citrus Cie.
- Interconnection between fresh and processed citrus
- Generate a collective vision for a sector confronted with common challenges
- To be driven by national citrus organization by country (more than one association per country possible).

3.1 World Citrus Organisation: a platform tailored to the sector’s needs

1. A platform to discuss common **problems** that affect **citrus-producing countries** to prepare the citrus community for the **2030 horizon**.

2. **Exchange information** on production and market trends.

3. Promote **dialogue** on policy issues of common interest.

4. Identify and promote specific **Research and Innovation** projects for the citrus sector.

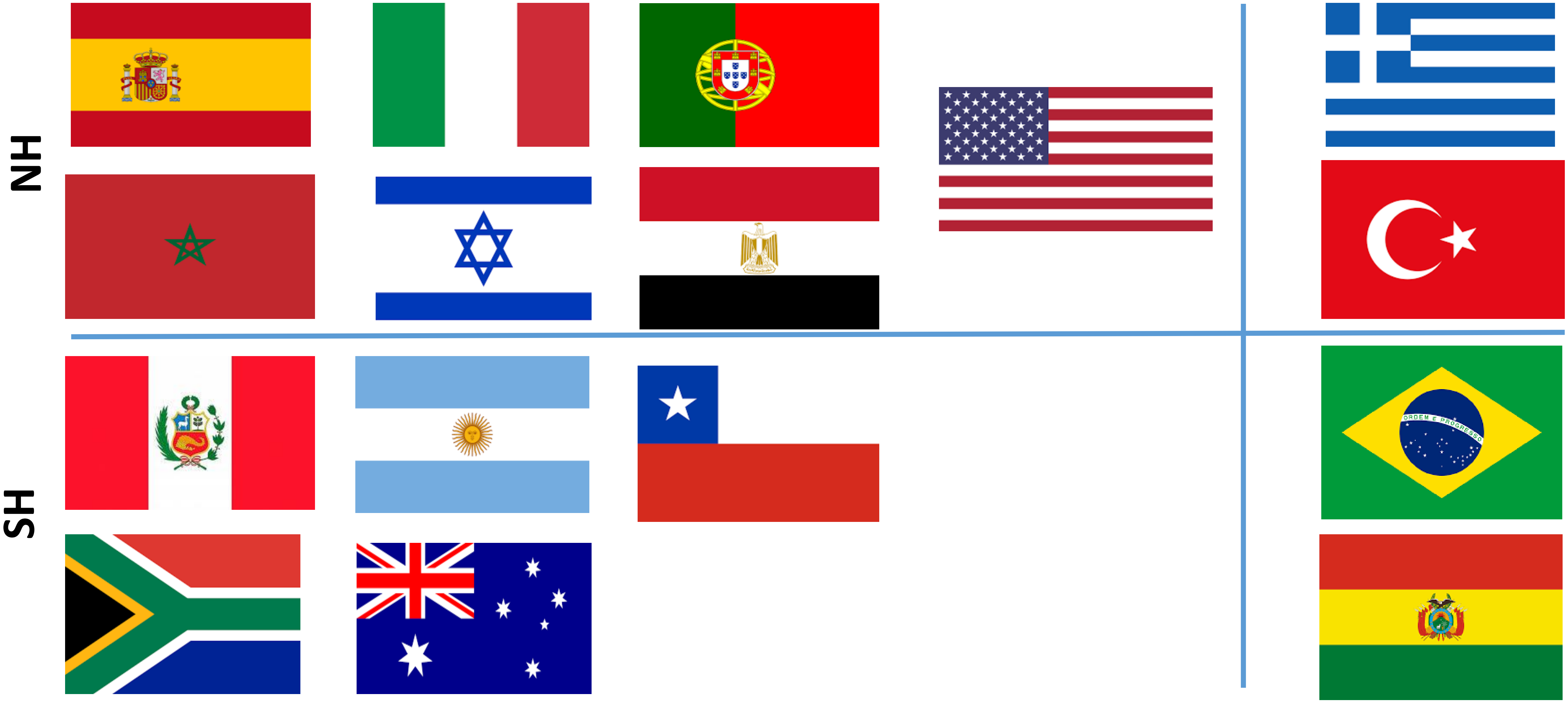
5. Serve as a **liaison with public and private stakeholders** in matters related to citrus to, among other things, highlight the importance of citrus growers and the need for **fair revenue**.

6. Promote global **citrus consumption**.

3.2 World Citrus Organisation: a platform with many committed countries and open to others

ALREADY COMMITTED

STILL TBC



3.3 World Citrus Organisation: on the way to get all main international players ON BOARD

MAIN GLOBAL CITRUS EXPORTERS

Soft Citrus	TOP 15 = 90%
Spain	1,110,432
China	493,983
Turkey	453,901
South Africa	201,111
Israel	128,925
Chile	116,901
Italy	84,670
Greece	71,661
Australia	62,251
Egypt	48,663
Peru	42,775
Pakistan	42,584
Argentina	40,863
United States	35,433
Georgia	23,874

Oranges (in T)	TOP 15 = 87%
Spain	1,847,877
South Africa	1,173,121
Egypt	660,201
Turkey	620,775
United States	573,281
Pakistan	268,476
Greece	252,286
Australia	191,119
Peru	117,740
Portugal	113,759
Italy	113,452
Argentina	79,838
Chile	75,679
Mexico	75,535
Honduras	67,591

Lemons	TOP 15 = 90%
Mexico	733,918
Spain	688,256
Turkey	451,911
South Africa	299,020
Argentina	237,653
United States	132,616
Brazil	92,393
Chile	76,806
Italy	47,470
Egypt	25,051
China	20,367
Colombia	16,475
India	16,369
Uruguay	14,491
Portugal	13,069

Grapefruit	TOP 15 = 83%
South Africa	227,245
China	192,326
Turkey	127,033
United States	84,503
Israel	79,142
Spain	59,140
Mexico	22,514
Egypt	14,374
Cyprus	8,212
Malaysia	2,977
Italy	2,579
Chile	2,182
Greece	1,425
Australia	1,320
Peru	1,080

3.4: on the road to increase the competitiveness of the citrus sector for the sake of growers worldwide

- Aim to enhance **information exchange, trust and transparency** to increase the **competitiveness** of the citrus sector worldwide

- Welcomed support from **EU & national authorities, and such support** remain key for the project's success

- Current work focused on **concretisation of support & interest** from producers worldwide to set up the structure

- Next steps: **Berlin**