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Spanish Citrus season

22-23 Balance
23-24 Forecast

Main figures 22-23 Spanish exports (Sept to May)

Source : MAPA on EUROSTAT

Volume (t.)	season	average	season	22-23 var %	
Spanish CITRUS EXPORTS	**21-22**	**5 years**	**22-23 (pr.)**	***var/ 20-21***	***var/avrg.***
Oranges	1.282.066	1.317.653	**1.084.070**	-15,40%	-17,70%
Small citrus	1.278.216	1.346.020	**1.068.020**	-16,40%	-20,70%
Lemon	467.124	483.490	**442.327**	-5,30%	-8,50%
Grapefruit	52.440	54.116	**62.559**	19,30%	15,60%
All citrus	**3.079.846**	**3.201.279**	**2.656.977**	**-13,70%**	**-17,00%**
Value (ts-€)	**season**	**average**	**season**	**22-23 var %**	
Spanish CITRUS EXPORTS	**21-22**	**5 years**	**22-23 (pr.)**	**var/ 20-21**	**var/avrg.**
Oranges	925.753	949.912	**933.932**	0,90%	-1,70%
Small citrus	1.434.536	1.363.147	**1.460.389**	1,80%	7,10%
Lemon	522.413	519.749	**551.334**	5,50%	6,10%
Grapefruit	51.718	49.495	**64.889**	25,50%	31,10%
All citrus	**2.934.420**	**2.882.303**	**3.010.544**	**2,60%**	**4,40%**
Value (€/kg)	**season**	**average**	**season**	**22-23 var %**	
Spanish CITRUS EXPORTS	**21-22**	**5 years**	**22-23 (pr.)**	**var/ 20-21**	**var/avrg.**
Oranges	0,72	0,72	**0,86**	19,3%	19,5%
Small citrus	1,12	1,01	**1,37**	21,8%	35,0%
Lemon	1,12	1,07	**1,25**	11,5%	15,9%
Grapefruit	0,99	0,91	**1,04**	5,2%	13,4%
All citrus	**0,95**	**0,90**	**1,13**	**18,9%**	**25,8%**

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Citrus exports and prices

- Big decrease in export volumes in oranges and mandarins.

- Moderate decrease in lemons and good sales of grapefruit.

- Higher global value of the trade.

- Prices reaching unprecedented levels in mandarins and oranges

The perception of the production is very unbalanced:

- Many growers had big troubles in production and suffer to set off the productive losses.
- Others with relative acceptable production figures; can be more satisfied.
- In any case, the huge increase in costs, diminished the measure of the good results.

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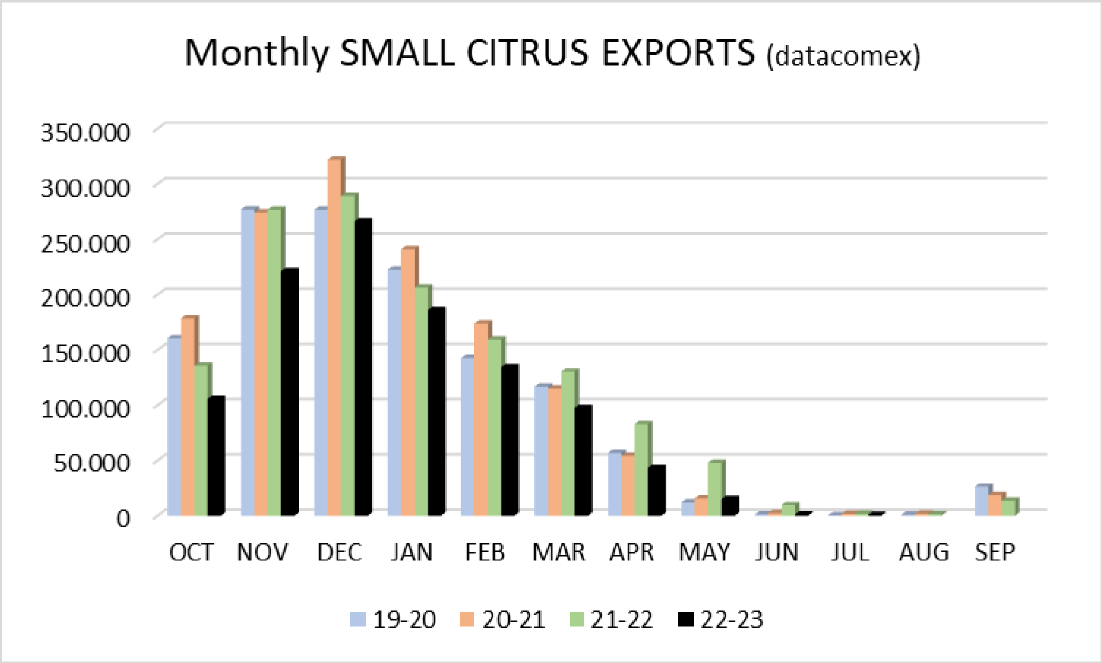
SMALL CITRUS SEASON RUN



- The season run with **rather low volumes** compared to last years during all months.
- Remarkably, **the early clementines** season (oct –nov) **was exceptionally short**. This is not only circumstantial, but also structural due to the evolution in varieties replanted in Spain.

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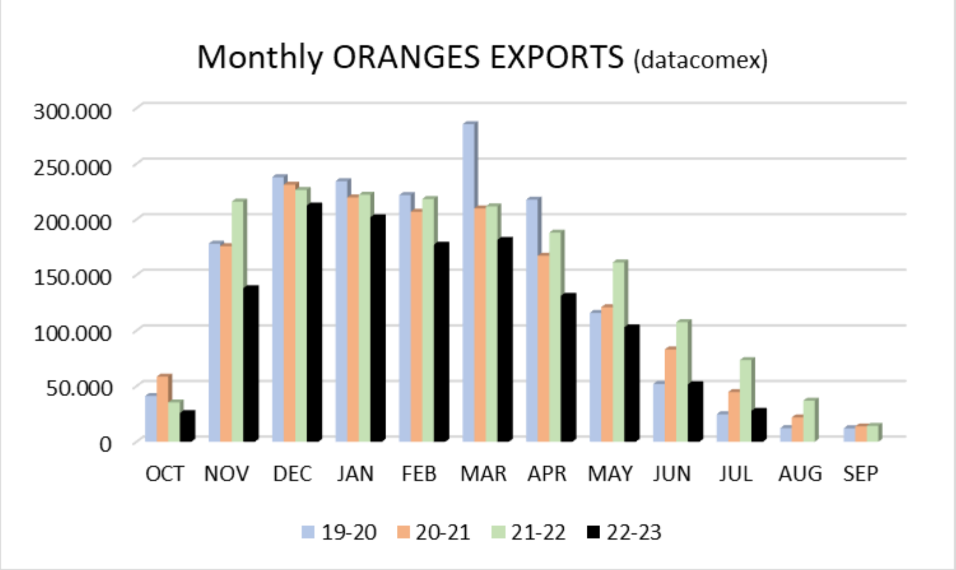
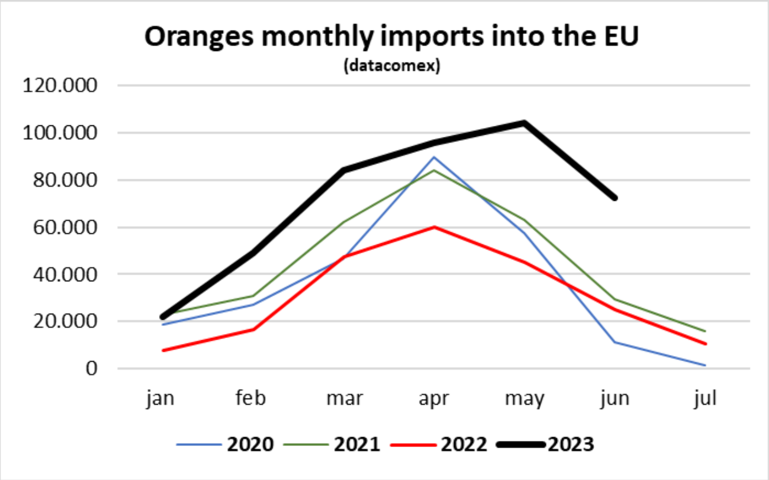


ORANGES SEASON RUN

- The season run with **very low volumes** during all months.
- Similarly, the early oranges season (oct –nov) was exceptionally short. But this is more circumstantial than structural.
- The important Spanish "gap" in late production was partially covered by the imports increase.
- Egypt took a very important role specially from February on.



Main figures 22-23 EU citrus imports

UE CITRUS IMPORTS 22-23 (sept-jun)			var %	
Volume (t.)	**21-22**	**22-23**	**22-23/21-22**	**22-23/ Avg-5y**
Oranges	583.631	828.762	42,0%	25,1%
Small citrus	347.736	374.427	3,1%	17,1%
Lemon	302.529	237.577	-21,5%	4,6%
Grapefruit	274.481	193.785	-8,9%	-32,0%
All citrus	**1.453.956**	**1.628.234**	**12,0%**	**10,1%**

To highlight:

- Huge orange volumes from Egypt.
- Consolidation of important small citrus volumes from South Africa.

UE ORANGE IMPORTS 22-23 (SEPT-AUG)			Var %	
Volume (t.)	**21-22**	**22-23**	**22-23/21-22**	**22-23/ Avg-5y**
South AfrIca	350.019	431.565	23,3%	11,1%
Egypt	**214.244**	**458.408**	**114,0%**	**83,4%**
Morroco	41.995	11.420	-72,8%	-83,8%
Zimbaue	34.495	43.575	26,3%	25,9%
Argentina	31.757	25.121	-20,9%	-26,2%
NorthtH	***284.045***	***492.848***	***73,5%***	***33,9%***
SouthH	***444.076***	***523.280***	***17,8%***	***3,7%***
TOTAL	**728.121**	**1.016.128**	**39,6%**	**16,5%**

UE SMALL CITRUS IMPORTS 22-23 (sept-aug.)			Var %	
Volume (t.)	**21-22**	**22-23**	**22-23/21-22**	**22-23/ Avg-5y**
Morroco	127.433	99.092	-22,2%	-12,4%
South AfrIca	**124.331**	**139.690**	**12,4%**	**56,4%**
Israel	58.699	82.224	40,1%	38,5%
Turkey	66.704	68.284	-5,1%	6,1%
Peru	26.919	24.725	-8,2%	-13,2%
Egypt	18.813	22.420	19,2%	42,3%
NorthtH	***268.799***	***277.165***	***-0,6%***	***6,4%***
SouthH	***257.975***	***173.910***	***10,1%***	***36,1%***
Total Extra UE	**433.701**	**447.535**	**3,2%**	**16,9%**

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Source: Mapa Bulletin -EUROSTAT

CITRUS SEASON 23-24

	Balance 22/23	Average 5 years	Forecast 23/24	23-24/ 22-23	23-24/ Avg-5y
Navels	2.168.043		1.892.024	-13%	
Juicing	674.329		710.346	5%	
Blood Oranges	35.750		40.929	14%	
ORANGES	**2.878.122**	**3.474.916**	**2.643.299**	**-8%**	**-24%**
Satsumas	106.235		80.143	-25%	
Clementines	976.073		1.000.927	3%	
Mand/Hybrid.	770.369		772.008	0%	
MANDARINES	**1.852.677**	**2.123.204**	**1.853.078**	**0%**	**-13%**
Verna	200.066		333.151	67%	
Primofiori	708.388		829.210	17%	
Others	4.554		5.082	12%	
LEMONS	**913.008**	**1.033.567**	**1.167.443**	**28%**	**13%**
GRAPEFRUIT	77.998	77.749	79.582	2%	**2%**
OTHERS	8.969	11.696	10.782	20%	**-8%**
TOTAL CITRUS	**5.730.774**	**6.721.133**	**5.754.184**	**0,4%**	**-14,4%**

- National forecast confirming very poor volumes, specially in sweet citrus.
- More bad news about production forecast are coming as the drought continues and some productive accidents affected the production.

Prospects for 2023-24

2023-24 will be again a season with:

- short volumes.
- relative high prices.
- even higher prices for the juice industry to unprecedented levels in oranges.
- big and continuous penetration of competitors countries.

Challenges for next future

- Spain will struggle to keep its leadership as supplier country in the EU against newcomers.
- Climate change is menacing the sustainability of the production in important Spanish areas, remarkably the drought in Andalucía.
- Citrus per capita consumptions are significantly decreasing specially in oranges.

Spanish Fresh CITRUS CONSUMPTION (t)			var %	
sep-may	21-22	22-23	22-23/21-22	22-23/Avg-5y
Volume (t.)	898.716	798.580	-11,1%	-20,1%

SOURCE: panel consumo hogares -DGIA-MAPA

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