

WORLD CITRUS ORGANISATION

EU COMMISSION CITRUS MARKET OBSERVATORY

18 November 2021



World Citrus Organisation

The World Citrus Organisation key successes one-year on: the global platform for the citrus community

- ❖ Consolidation of production & trade citrus data for main international players in NH & SH for 2020/2021 and 2021/2022 seasons
- ❖ Intelligence gathering and exchange among members on quality aspects in relation to citrus fruit marketing seasons and set up of Data Management working group to improve these exercises
- ❖ Set up of working group on Health & Nutrition to foster common action and promotion based on citrus nutritional assets
- ❖ Launch of WCO's social media channels (Linkedin & Twitter) to disseminate citrus health information
- ❖ Second Global Citrus Congress edition on 2-days global format!
- ❖ Consolidation of membership :
 - ❖ 12 associations,
 - ❖ 21 companies
 - ❖ 16 citrus producing countries: ARG, AUS, BOL, BR, CL, EG, IL, IT, MO, PE, RSA, SP, TK, TN, UR, USA + close contact with CN



Our Members

Not a member yet?
Contact us!
wco@worldcitrusorganisation.org



TOTAL CITRUS



About WCO's data mangement work

WCO and production forecast model

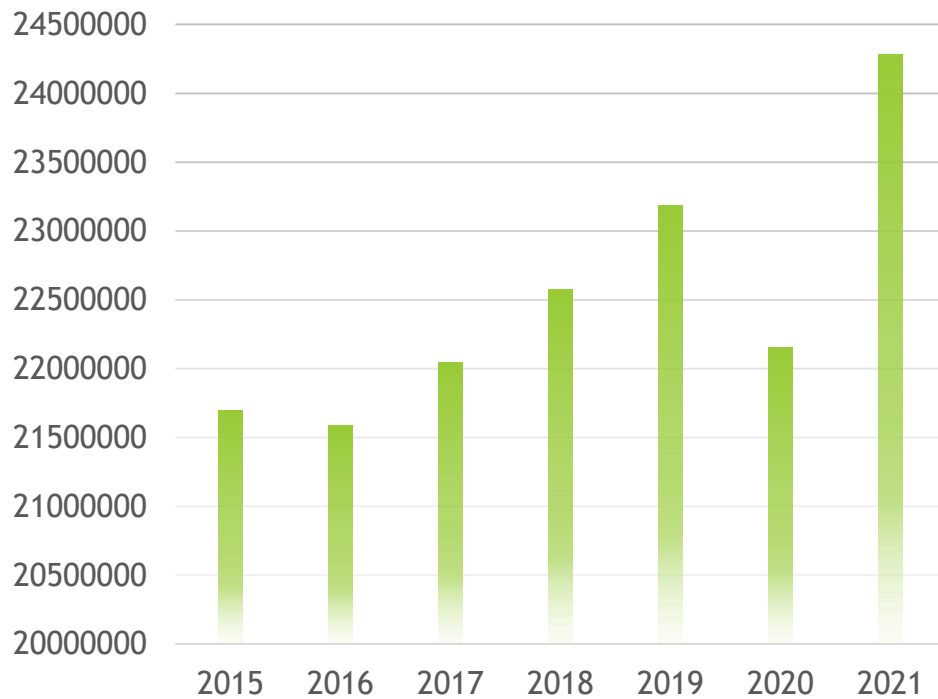
- ▶ Southern Hemisphere: data released in April
- ▶ Northern Hemisphere: data released in November
- ▶ Production and market data/analysis => Work in progress with Members to:
 - ▶ Provide transparency
 - ▶ Secure members information for main varieites, for market outlet...
 - ▶ Provide quantitative and qualitative information
 - ▶ Collaboration with Eric Imbert, CIRAD-FruiTrop
- ▶ Southern Hemisphere 2021 season:
 - ▶ America: Argentina, Brazil, Bolivia Chile, Peru, Uruguay
 - ▶ South Africa
 - ▶ Australia
- ▶ Northern Hemsiphere 2021/22 forecast :
 - ▶ EU: Spain, Italy, Greece
 - ▶ Other Mediterranean countries : Morocco, Tunisia, Egypt, Israel, Turkey
 - ▶ USA: California, Florida, Other States (Arizona, Texas...)
 - ▶ China : breakdown by provinces and categories

Southern Hemisphere

Forecast released in May - updated in July

Southern Hemisphere 2021 season -overview production & 2021/20 variation by category

SH PRODUCTION EVOLUTION (TONNES)



2020/2021 variation: +9.6%
Average annual growth: +2%

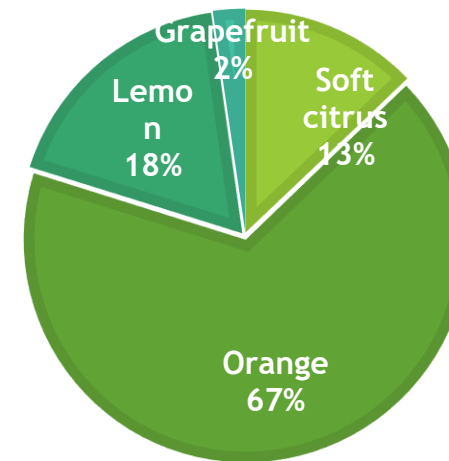
Orange: +11%*

Soft citrus: +14%*

Grapefruit: +6%*

Lemon & lime: +4% *

Soft citrus Orange
Lemon Grapefruit



Total volume 24.100.000 T = >9,6%*

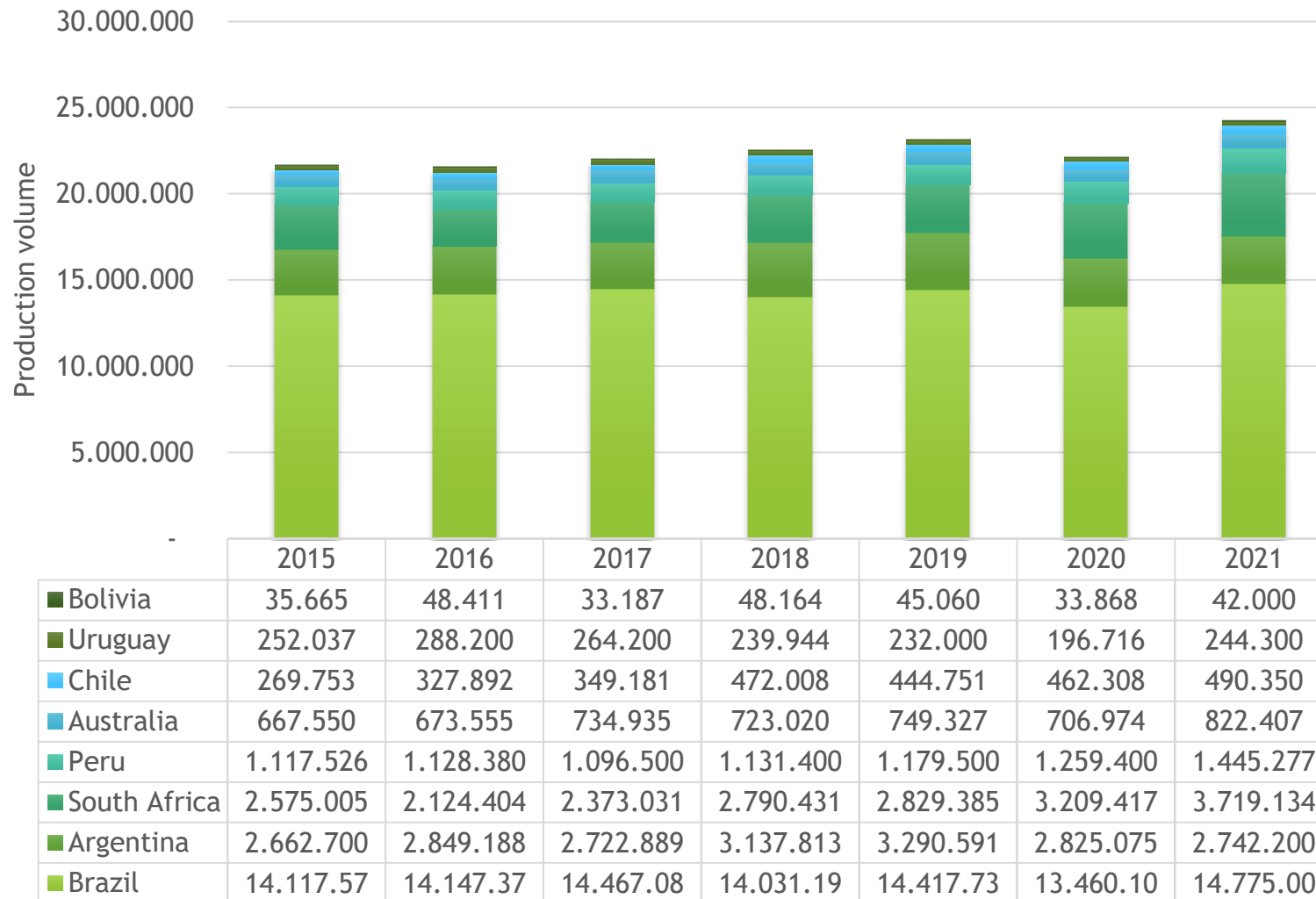
Southern Hemisphere 2021 season -overview production & 2021/20 variation by category without Brazil

ALL CITRUSES	%2021/2020	2021	2020	2019
TOTAL PRODUCTION	9.37%	9,403,517.59	8,597,905.61	8,660,478.93
Destined to export	12.86%	3,835,204.92	3,398,343.94	3,105,578.17
Destined to processing	9.34%	2,633,325.54	2,408,374.82	2,884,005.24
Destined to domestic market	17.78%	2,935,187.14	2,492,131.85	2,670,895.52

Brazil: 14.7 Mio T, out of which 9.5 Mio T to processing

Southern Hemisphere 2021 season -overview production & 2021/20 variation by country

SH Production evolution by country (T)



Argentina -3%*

Chile +6%*

Brazil +10%*

Peru +15%*

RSA +16%*

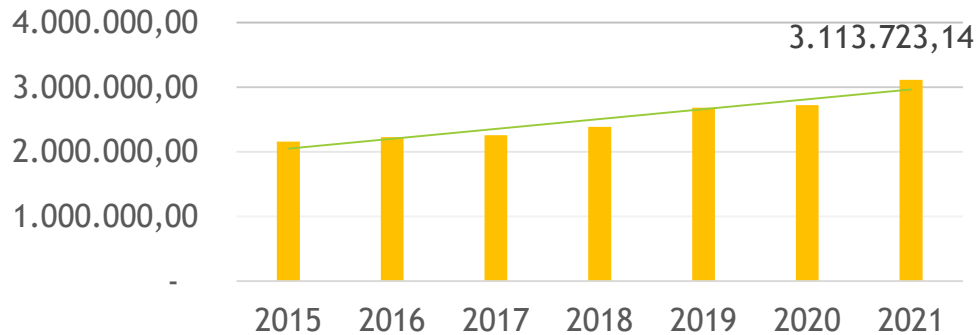
Australia +16%*

Uruguay +24%*

Bolivia +24%*

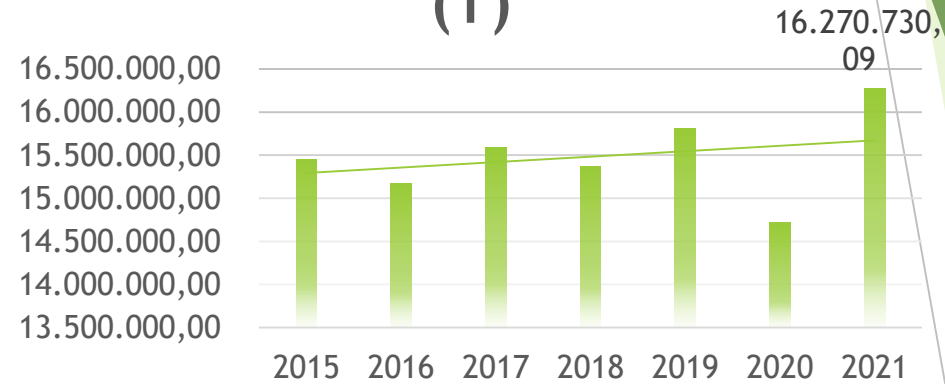
Southern Hemisphere season: overview production & evolution by category

SOFT CITRUS PRODUCTION SH (T)



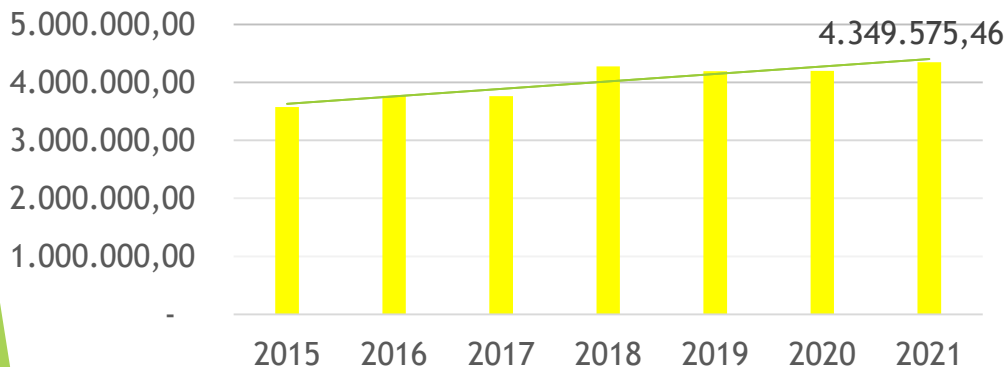
Average annual growth rate (AAGR): +6%

ORANGE PRODUCTION SH (T)



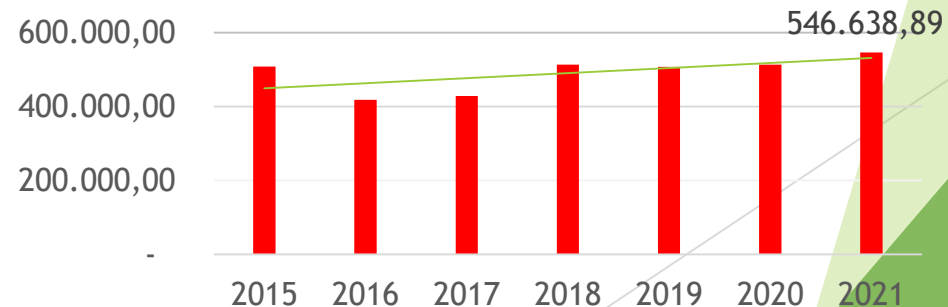
AAGR: : +1%

LEMON PRODUCTION SH (T)



AAGR: +3%

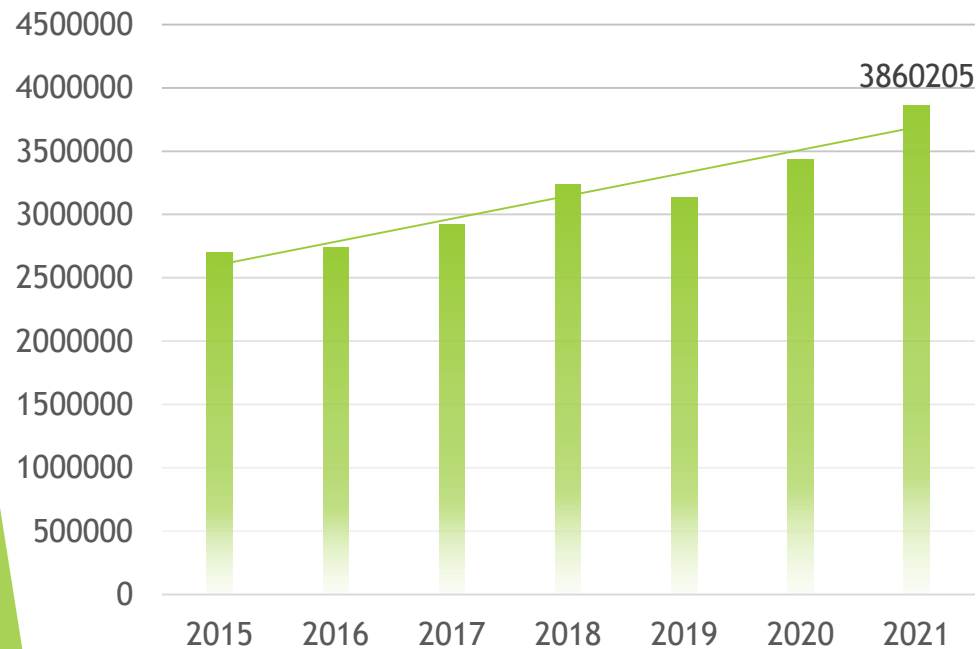
GRAPEFRUIT PRODUCTION SH (T)



AAGR: : +2%

Southern Hemisphere 2021 season -overview of trade 2021/20 variation by category

SH PRODUCTION SHARE DESTINED TO EXPORT (TONNES)



1.717.903 T

Orange: +11%*

1.005.045 T

Soft citrus: +20%*

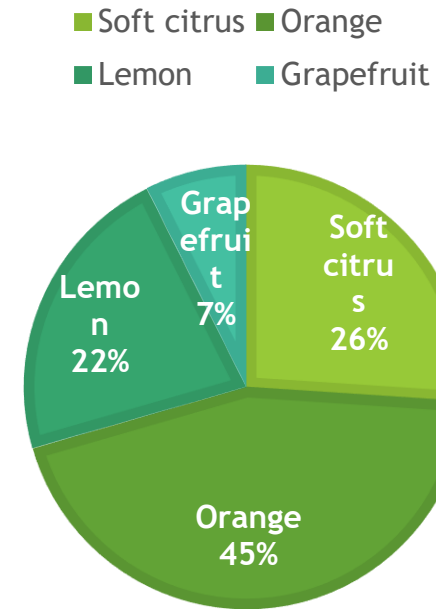
284.718 T

Grapefruit: +10%*

852.557 T

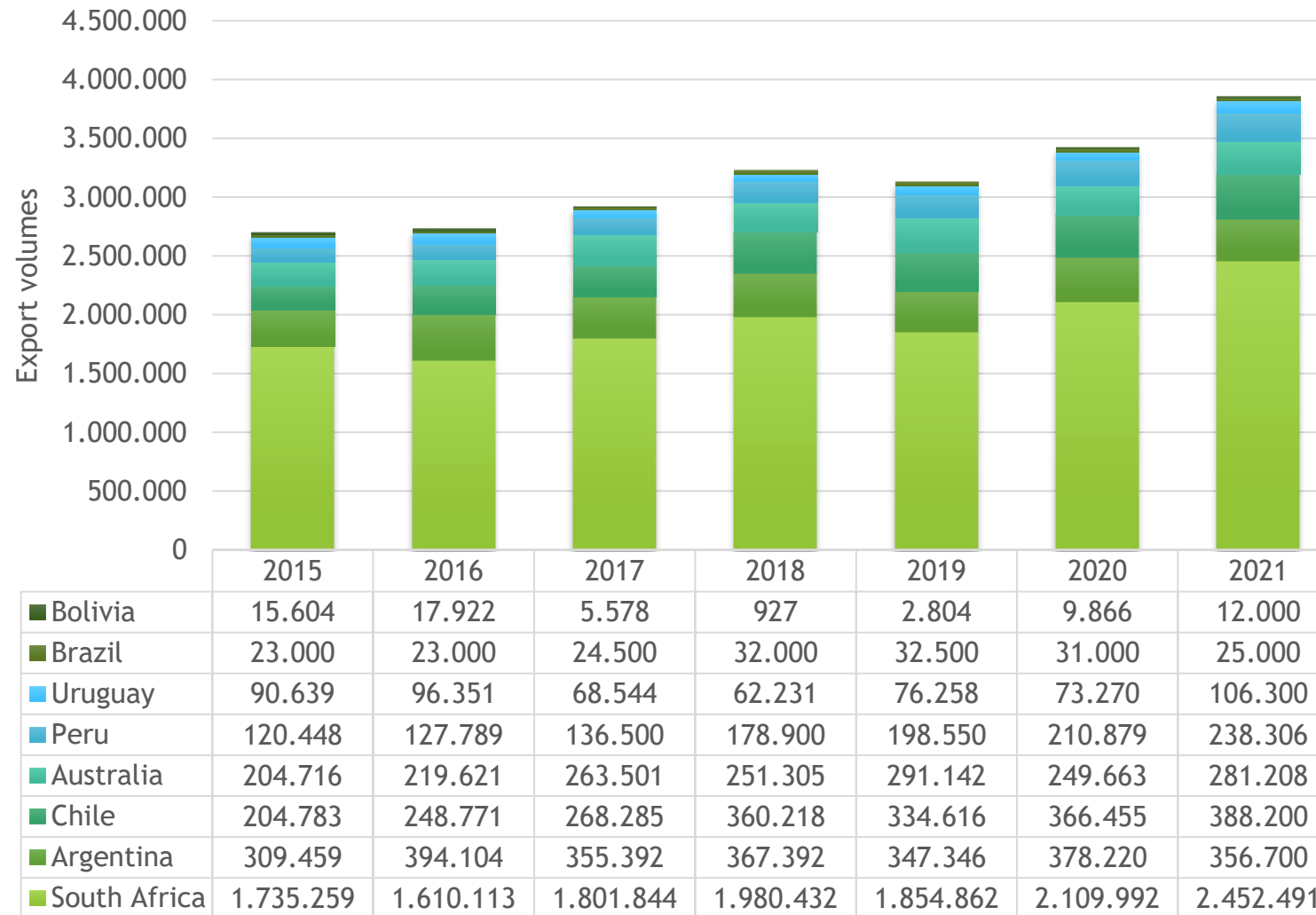
Lemon & lime: +7%*

2020/2021 variation: +12.6%
AAGR: +6%



Southern Hemisphere 2021 season -overview of citrus trade & 2021/20 variation by producing country

SH Export evolution by country (T)



Brazil -19%*

Argentina -6%*

Chile +6%*

Peru +13%*

Australia +13%*

RSA +16%*

Bolivia +22%*

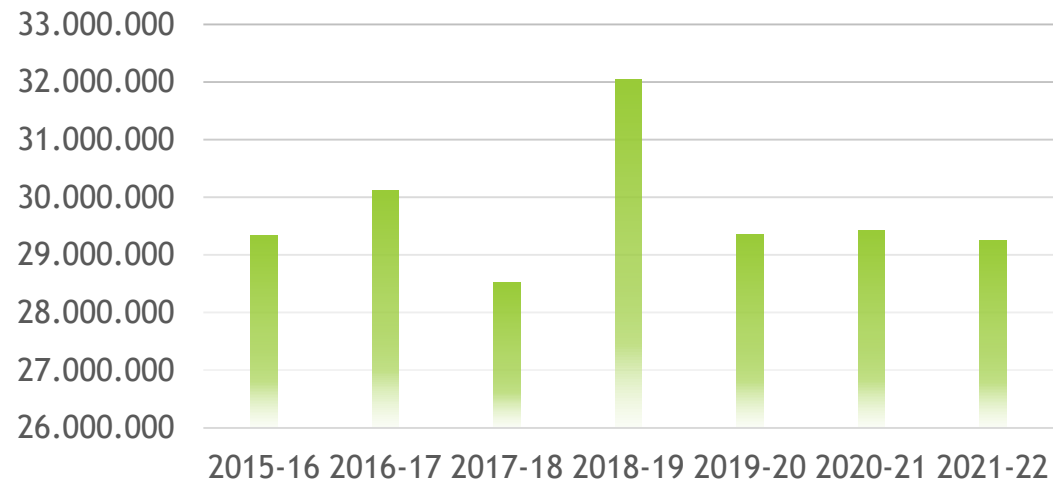
Uruguay +45%*

Northern Hemisphere

Forecast released 12 November (updated 16 Nov)

Northern Hemisphere 2021 season -overview production & 2021/20 variation

NH PRODUCTION EVOLUTION (T)



2020/2021 variation: -0,62%
AAGR for the total period: 0%

15.513.806 T

Orange: -2,27%*

8.334.862 T

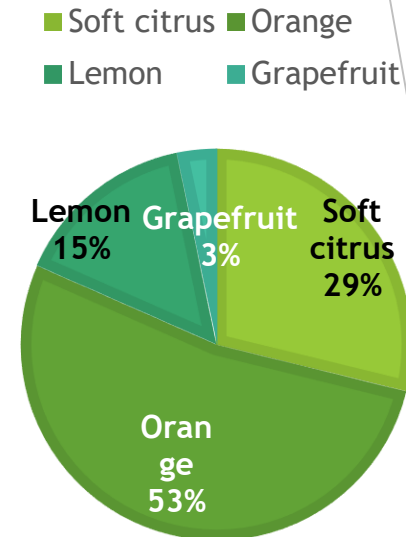
Soft citrus: -0,74%*

947.221 T

Grapefruit: -0,26%*

4.454.327 T

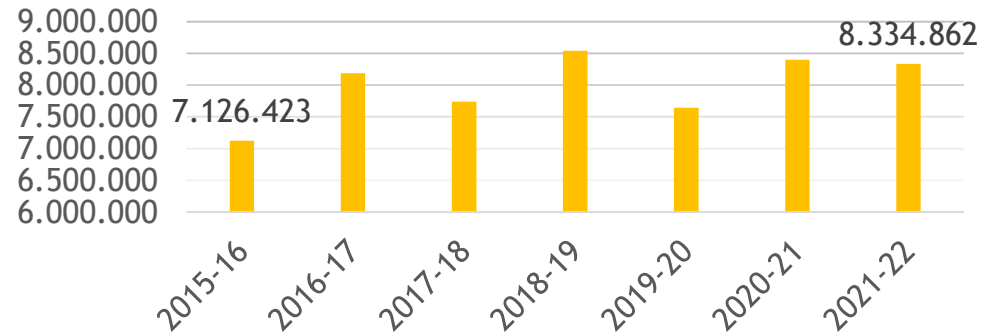
Lemon: 5,77%*



Total volume 29.250.216
=> -0,62%
(excluding CN)

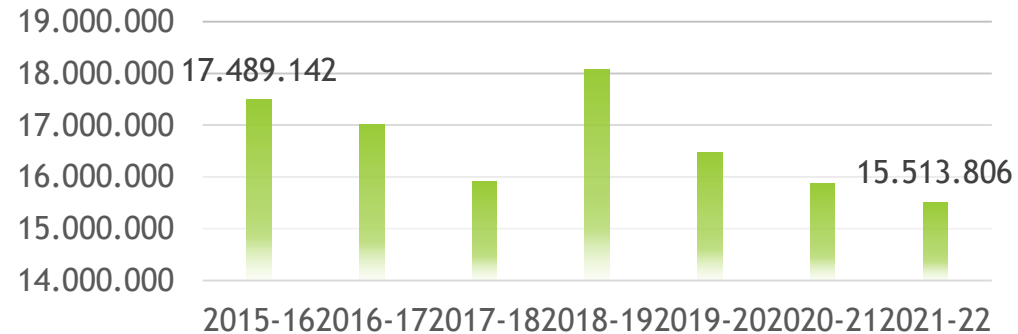
Northern Hemisphere season: overview production & evolution by category

SOFT CITRUS PRODUCTION NH (T)



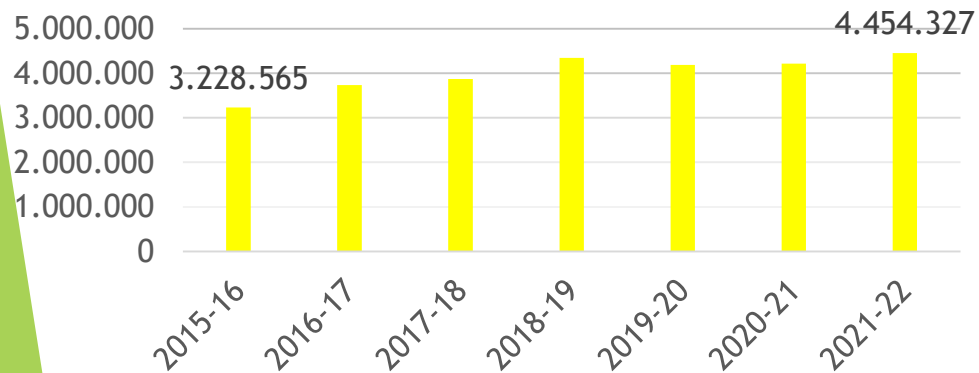
AAGR for the total period +3%

ORANGE PRODUCTION NH (T)



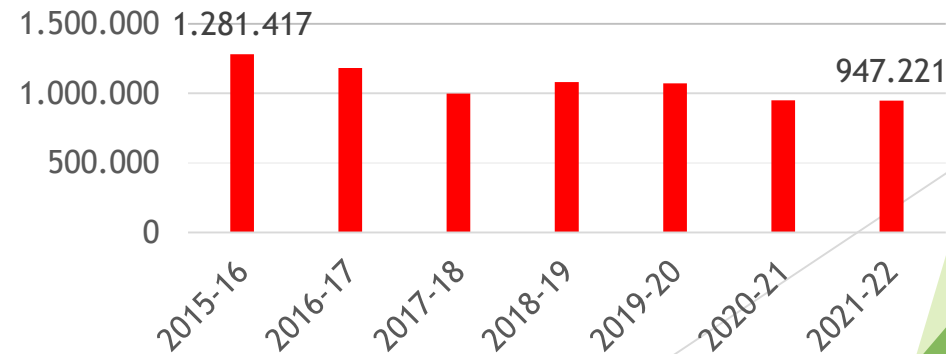
AAGR for the total period -2%

LEMON PRODUCTION NH (T)



AAGR for the total period +6%

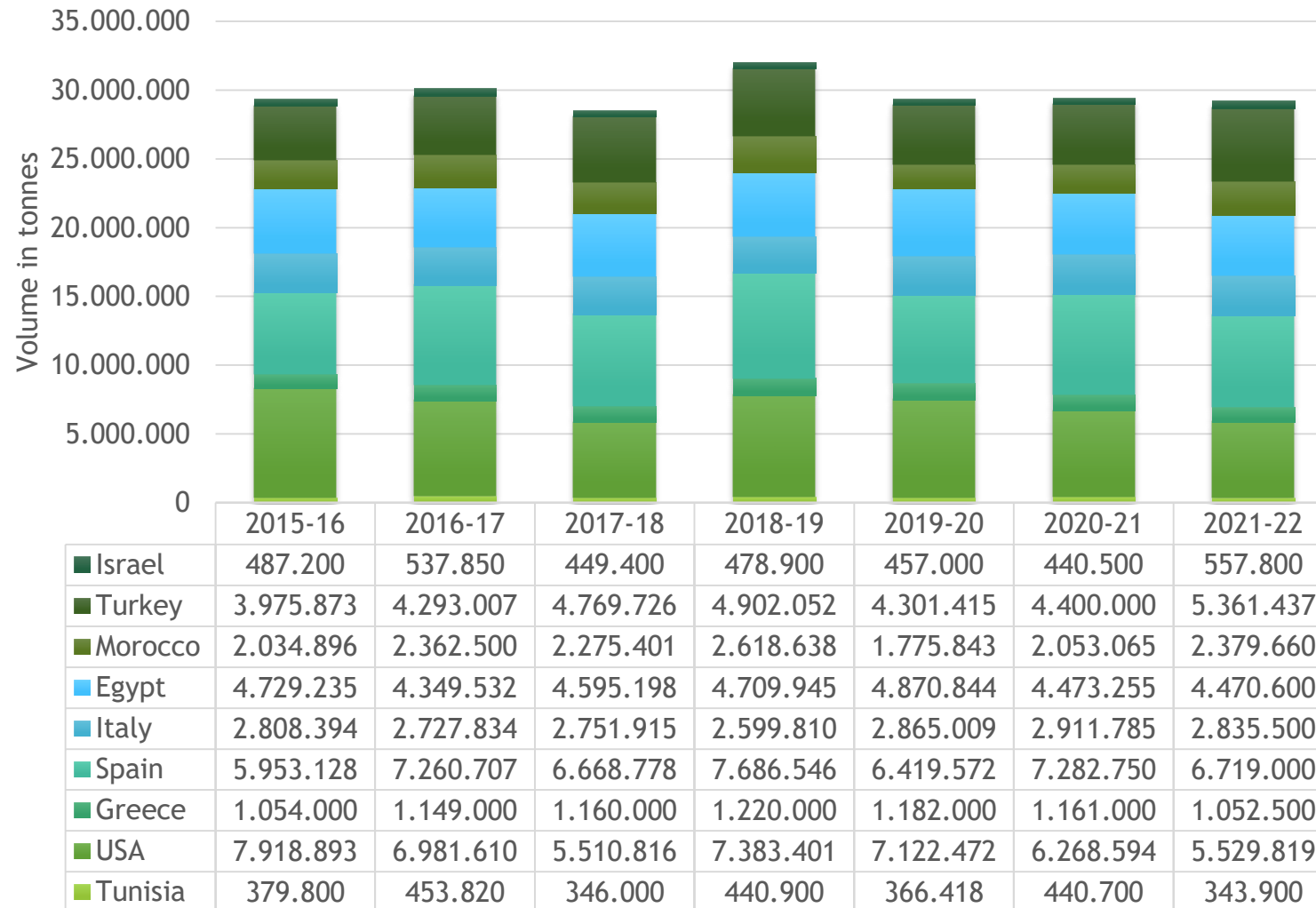
GRAPEFRUIT PRODUCTION NH (T)



AAGR for the total period -5%

Northern Hemisphere 2021 season -overview of citrus production & 2021/20 variation by producing country

NH Production evolution by country (T)



Tunisia: -22%*

USA: -12%*

Greece: -9%*

Spain: -8%*

Italy: -3%*

Egypt: 0%*

Morocco: +16%

Turkey: +22%*

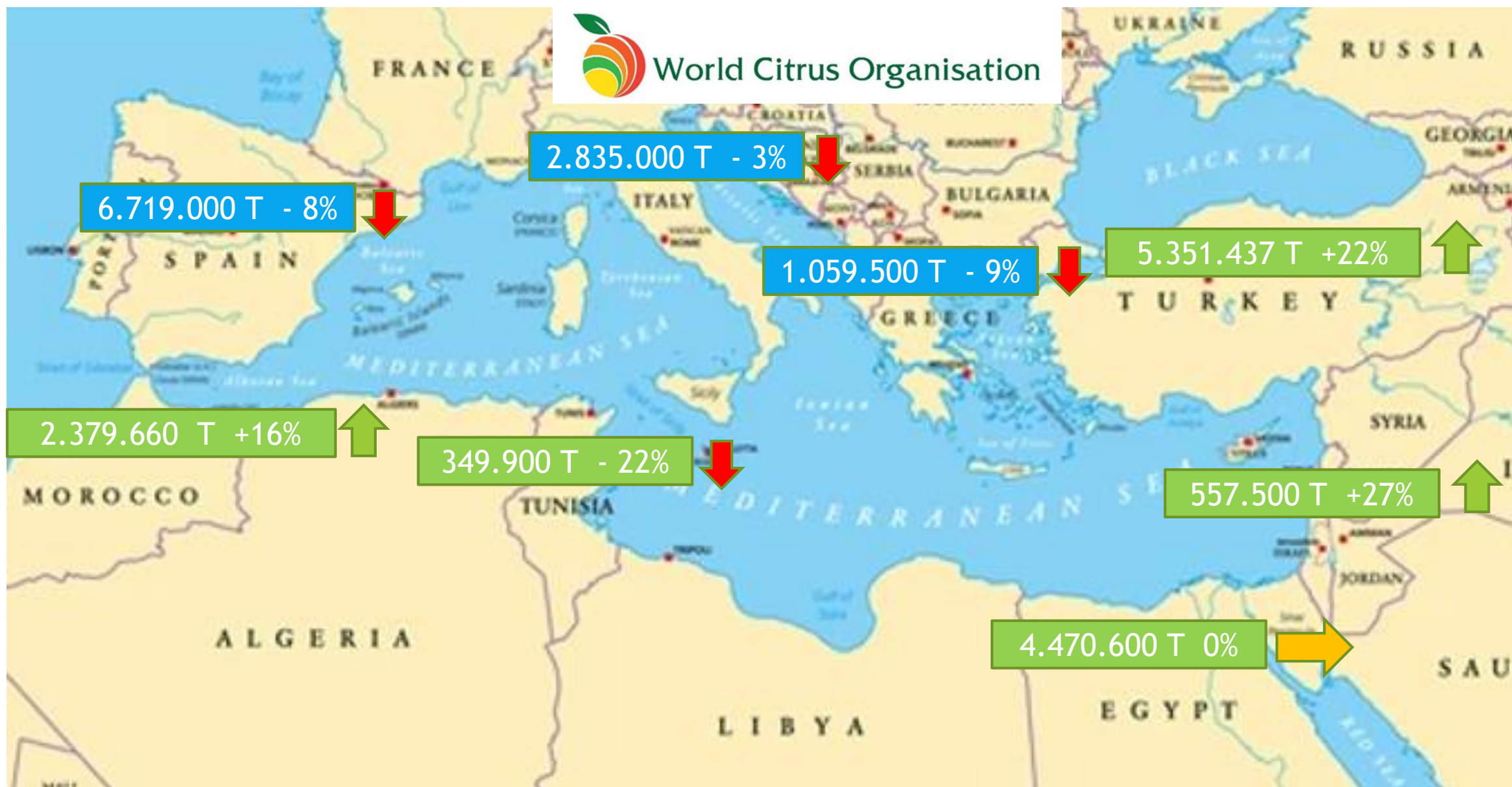
Israel: 27%

*%2021/2020.

Source: WCO data forecast

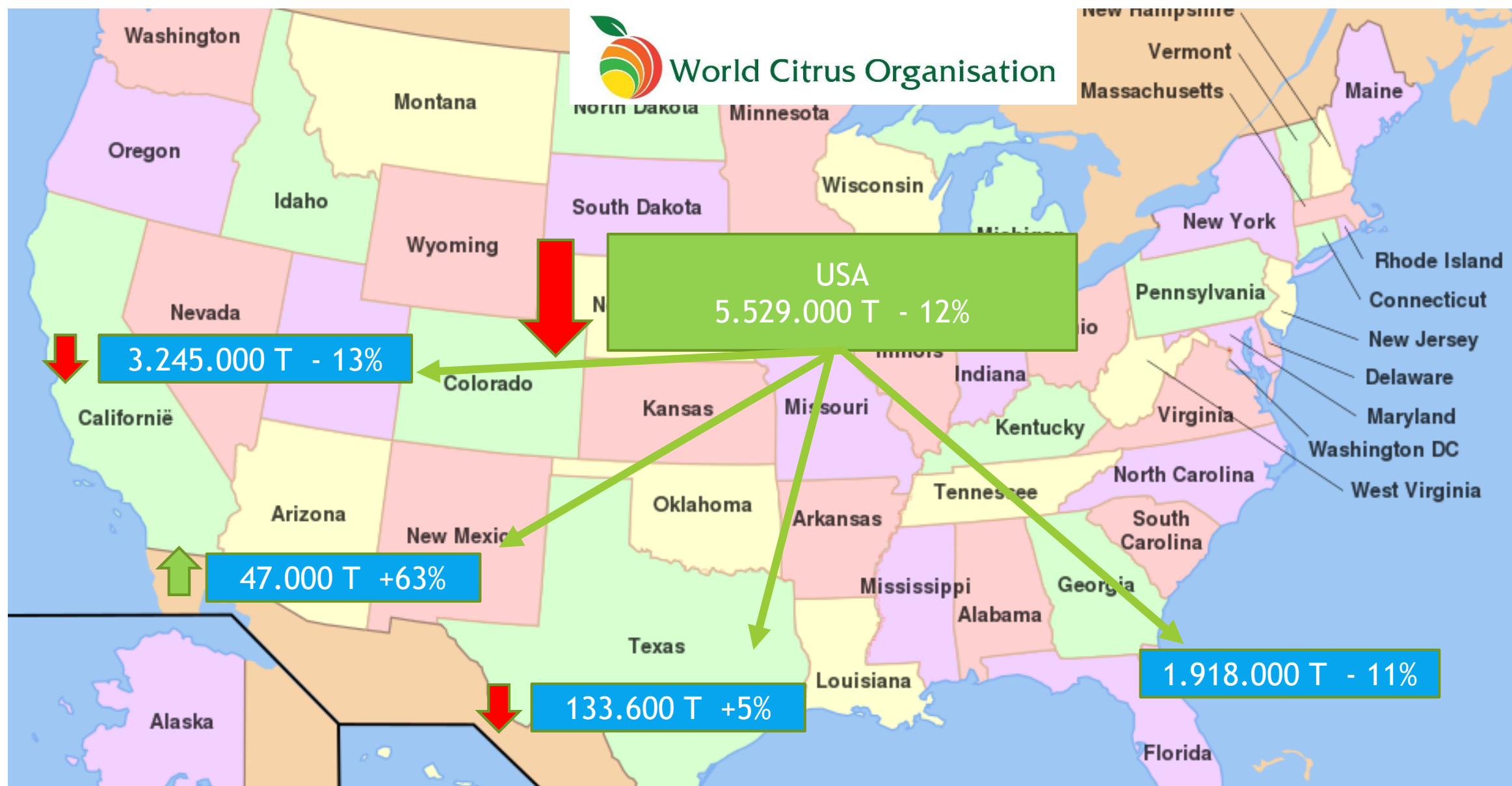


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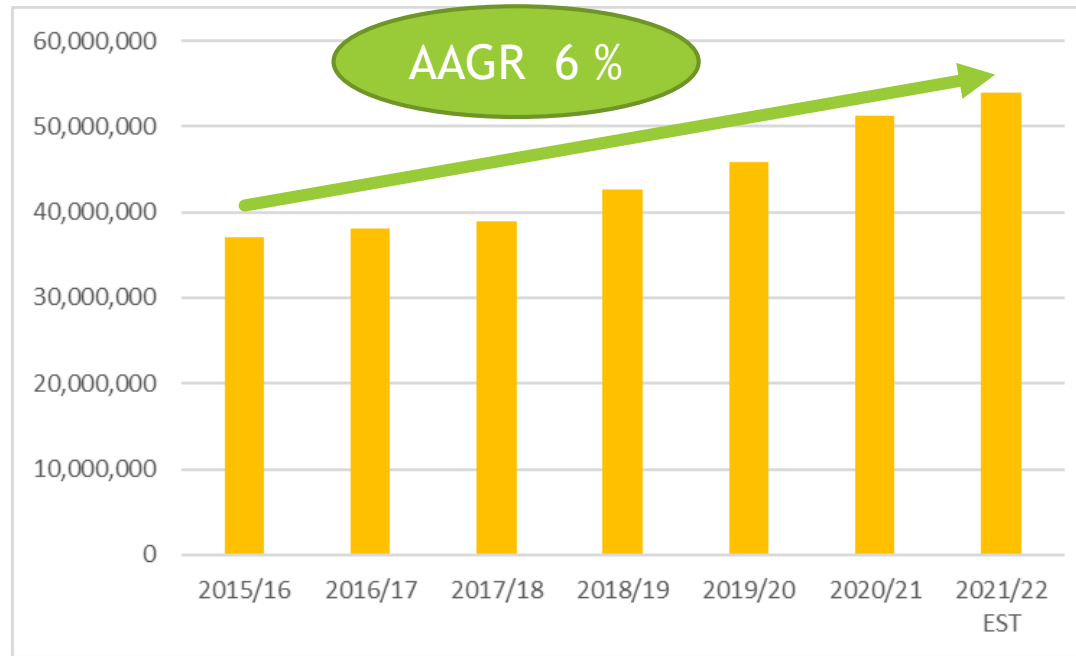




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Northern Hemisphere 2021 season - spotlight into Asia's main player: growing production



In 000 T	2020	2021 f	VAR
Lemon&Lime	2,300	2,695	17%
Grapefruit&Pomelo	5,227	5,929	13%
Orange	7,892	8,624	9%
Soft citrus	35,800	36,652	2%
TOTAL	51,219	53,900	5%

CONCLUSION: OVERALL TRENDS

- ▶ Steadily growing production in SH:
 - ▶ 2020/2021 variation: +9.6%
 - ▶ Average annual growth: +2%
- ▶ Stagnant production in NH with regional differences (e.g. increases for ES, TU, MO):
 - ▶ 2020/2021 variation: -1.27%
 - ▶ AAGR for the total period: 0%
- ▶ China & Brazil strong growth but broadly out of 'international' market
- ▶ Soft & lemon key drivers of growth in both hemisphere, lower dynamics for orange & grapefruit.
- ▶ Work ongoing within WCO to improve market intelligence (e.g. early & late varieties monitoring, trade monitoring for NH and acreages of production and new plantings ha).



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