

WORLD CITRUS ORGANISATION

GLOBAL CITRUS CONGRESS

5 November 2020



World Citrus Organisation

Why creating a global platform for citrus?

- ▶ Need to face **common global challenges** like competition with other categories and increased global production:
 - ▶ Share of citrus in global exports in last 3 decade dropped from 30% to 18,5% at 16 Mio T
 - ▶ Growth of citrus export (133%) slower than production (139%)
- ▶ **Lessons learnt** from other sectors (WAPA, WAO, IBO, IKO)

Introducing the World Citrus Organisation: the global platform for the citrus community

► Our mission:

- 1) Discuss common issues affecting citrus producing countries.
- 2) Exchange information on production and market trends to prepare for 2030.
- 3) Foster dialogue on policy issues of common concern.
- 4) Identify and promote Research and Innovation projects specific to the citrus sector.
- 5) Liaise with public and private stakeholders on citrus-related matters to highlight the importance of citrus producers and the need for a fair return.
- 6) Promote the global consumption of citrus.

► Our team:

- WCO Secretariat based in Brussels
- WCO Technical Secretariat, CIRAD
- Co-chairmanship representing Northern and Southern Hemisphere (currently Spain & RSA)

Our Members

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



Our associated Members

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wco@worldcitrusorganisation.org

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 **CITRUSVIL**
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 **JANSSEN PMP**
PRESERVATION AND MATERIAL PROTECTION
a division of Janssen Pharmaceutica NV

 **MAFA**

 **ORANFRIVER**
Sicilian Experience

 **PCN**
PRO CITRUS NETWORK

 **Riverfront Packing**
A SCOTT FAMILY COMPANY

 **San Miguel**
THE GLOBAL CITRUS EXPERTS

ZALAR 
AGRI

About the forecast

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
- ▶ Northern Hemisphere forecast to cover in 2020 ten of the most important production regions:
 - ▶ EU: Spain, Italy, Greece
 - ▶ Other Mediterranean countries : Morocco, Tunisia, Egypt, Israel, Turkey
 - ▶ USA: California, Florida, Other States (Arizona, Texas...)

Southern Hemisphere - reminder

Soft citrus	%2020/2019	2020	2019	2018	2017	2016	2015
TOTAL PRODUCTION	0%	1.685.342,32	1.686.812,17	1.531.643,20	1.426.950,00	1.363.824,00	1.303.695,00
Destined to export	14%	823.100,70	723.278,17	674.397,20	556.962,00	514.483,00	464.595,00
Destined to processing	-11%	192.418,44	216.936,80	201.278,00	157.133,50	172.991,50	159.485,00
Destined to domestic market	-7%	694.823,18	746.597,20	655.968,00	695.821,50	663.233,50	679.615,00
Orange	%2020/2019	2.020,00	2.019,00	2.018,00	2.017,00	2.016,00	2.015,00
TOTAL PRODUCTION	-6%	3.584.993,67	3.834.212,64	3.554.387,10	3.332.853,00	3.268.203,00	3.574.878,00
Destined to export	3%	1.497.949,83	1.454.134,64	1.563.191,10	1.482.919,00	1.363.295,00	1.470.444,00
Destined to processing	-11%	845.323,26	954.994,10	780.985,00	565.108,00	648.151,00	707.800,00
Destined to domestic market	-13%	1.241.720,58	1.425.083,90	1.210.211,00	1.258.602,00	1.239.896,00	1.396.634,00
Lemon	%2020/2019	2.020,00	2.019,00	2.018,00	2.017,00	2.016,00	2.015,00
TOTAL PRODUCTION	0%	2.629.331,21	2.634.556,11	2.809.566,23	2.305.554,66	2.312.645,81	2.129.248,22
Destined to export	33%	915.241,59	689.308,53	689.047,90	626.547,06	622.101,65	513.350,78
Destined to processing	-19%	1.213.688,85	1.503.994,63	1.701.693,69	1.280.804,41	1.319.034,75	1.267.781,57
Destined to domestic market	13%	500.400,77	441.252,95	418.824,64	397.623,19	375.976,41	348.115,87
Grapefruit	%2020/2019	2.020,00	2.019,00	2.018,00	2.017,00	2.016,00	2.015,00
TOTAL PRODUCTION	3%	521.542,41	506.098,00	512.310,28	427.523,00	416.527,00	507.154,00
Destined to export	9%	260.456,82	238.856,83	274.769,28	233.216,00	214.791,00	232.518,00
Destined to processing	-5%	198.096,27	208.079,71	186.150,00	147.853,50	163.639,50	216.170,00
Destined to domestic market	7%	61.789,32	57.961,47	50.505,00	46.453,50	37.748,50	57.266,00
ALL CITRUSES	%2020/2019	2.020,00	2.019,00	2.018,00	2.017,00	2.016,00	2.015,00
TOTAL PRODUCTION	-3%	8.421.209,61	8.661.678,93	8.407.906,82	7.492.880,66	7.361.199,81	7.514.975,22
Destined to export	13%	3.496.748,94	3.105.578,17	3.201.405,49	2.899.644,06	2.714.670,65	2.680.907,78
Destined to processing	-15%	2.449.526,82	2.884.005,24	2.870.106,69	2.150.899,41	2.303.816,75	2.351.236,57
Destined to domestic market	-6%	2.498.733,85	2.670.895,52	2.335.508,64	2.398.500,19	2.316.854,41	2.481.630,87

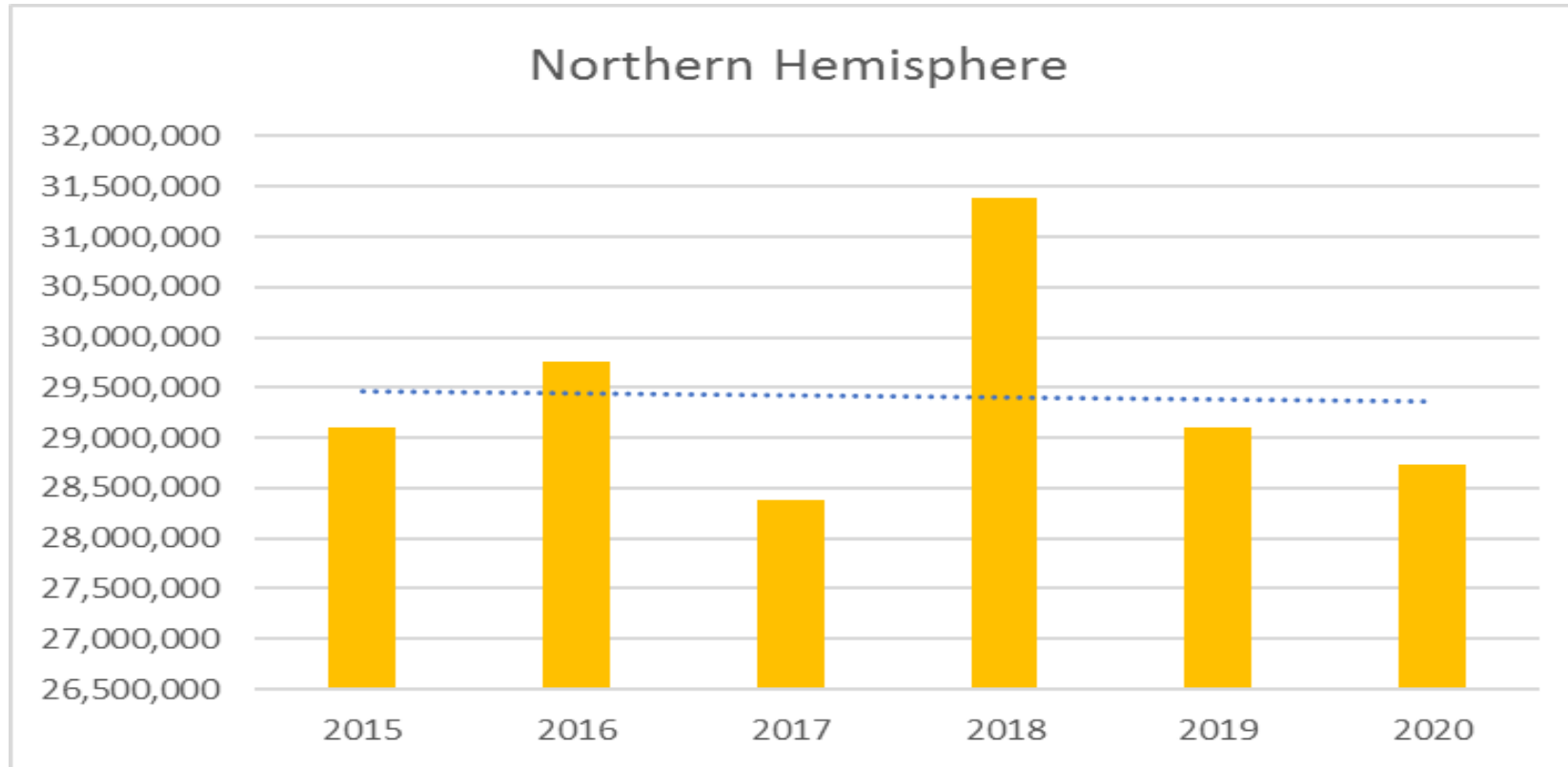
Covering:

- CL
- PE
- ARG
- UR
- RSA
- AUS
- + info of BR and BOL

Citrus 2020 v. 2019:
Slight decrease production (-3%)
Export up by 13%

Production	2020	2015	Variation
Soft citrus	1.685.342	1.303.695	29%
Oranges	3.584.993	3.574.878	0%
Lemons	2.629.331	2.129.248	23%
Grapefruit	521.542	507.154	3%
All citrus	8.421.209	7.514.975	12%

Northern Hemisphere overview - all citrus



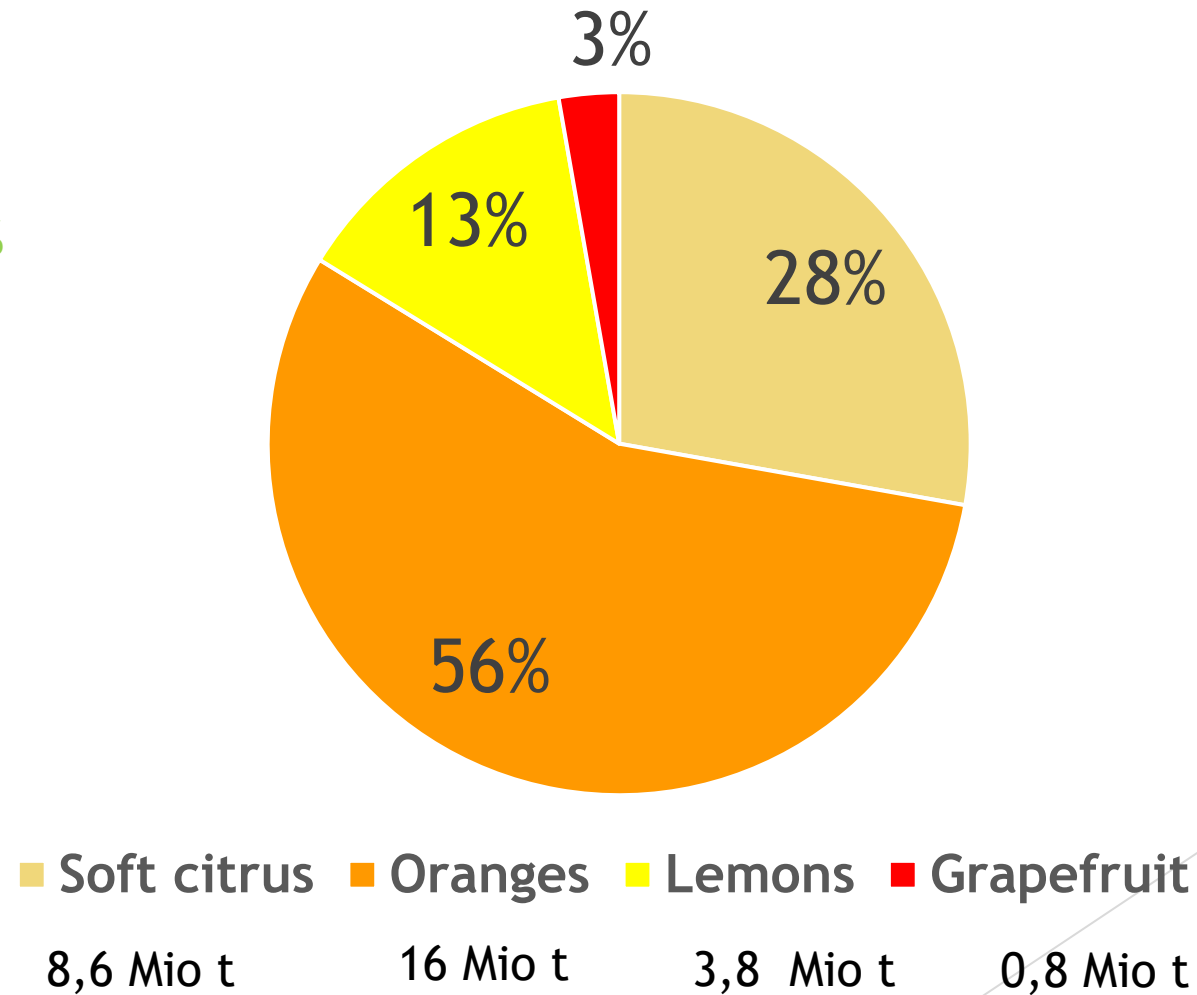
28,737,570 T => -1,27% to last year

		Variation
AV 5 Y	29,544,750	-1.27%
AV 3Y	29,623,325	-3.08%
YAGO	29,102,150	-1.27%

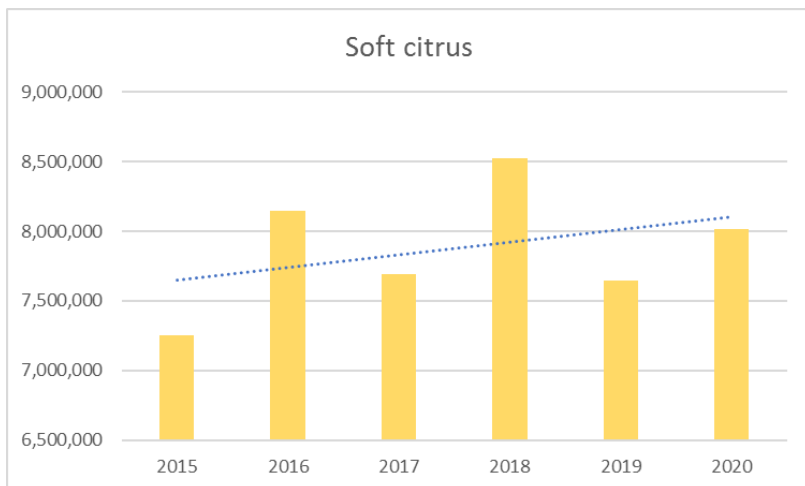
Share by citrus categories (2020)

Evolution from 2015 to 2020

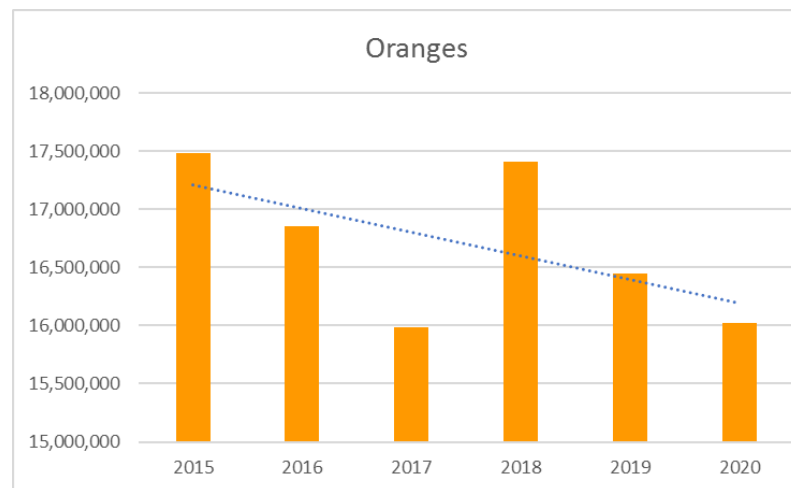
- Soft citrus: from 25 to 28%
- Oranges: from 60 to 56%
- Lemons: from 11 to 13%
- Grapefruit from 4 to 3%



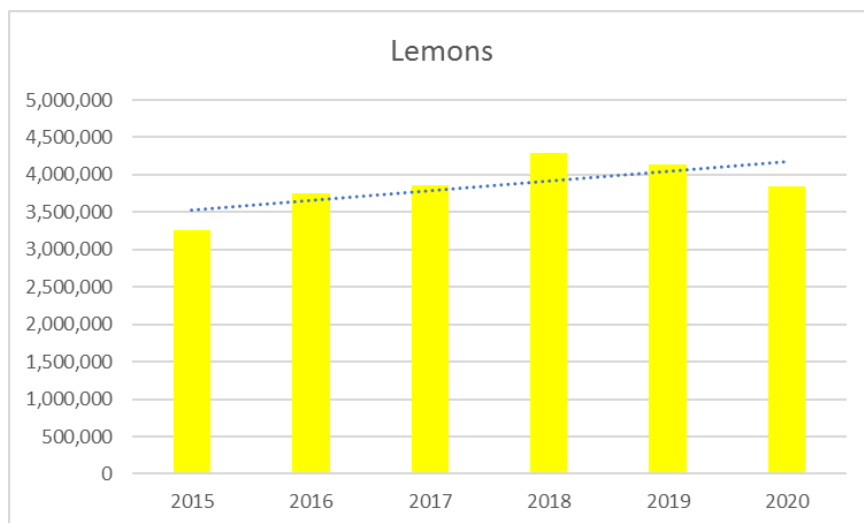
Summary NH by categories



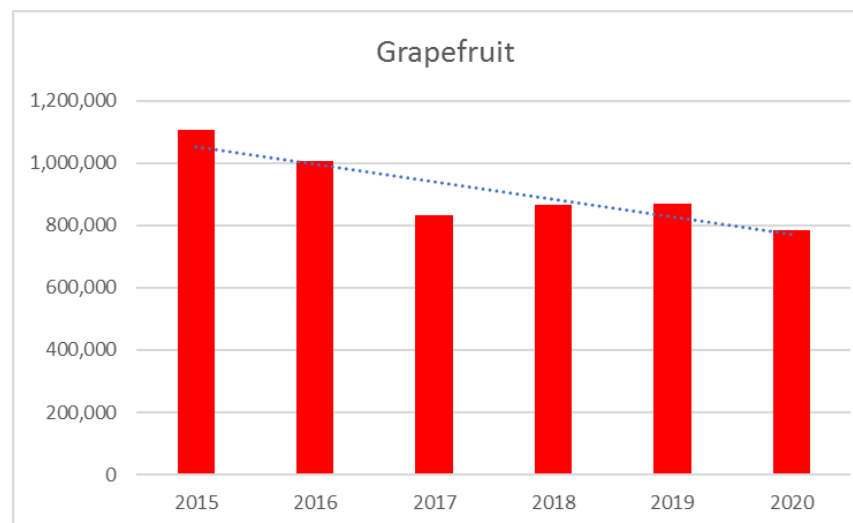
8.601.000 T = + 4,6 % to YAGO



16.023.000 T = -2,6 % to YAGO



3.838.000 T = +7,8 % to YAGO



786.000 T = -9,7 % to YAGO

Summary NH by regions

	Variation 2020/2019		
	Europe	Other Med	USA
Soft citrus	23%	-7%	5%
Orange	6%	-4%	-11%
Lemon	8%	-20%	-14%
Grapefruit	-13%	-13%	-4%
ALL CITRUS	10%	-8%	-9%

	2020		
	Europe	Other Med	USA
Soft citrus	3,366,567	3,767,795	881,859
Orange	6,243,443	5,620,900	4,158,730
Lemon	1,871,011	1,169,088	798,186
Grapefruit	78,942	395,572	311,338
ALL CITRUS	11,559,963	10,953,355	6,150,113

European Union



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Spain

- ▶ 12% increase to 7.181.000 T=> strong recovery of soft citrus at 2,3 Mio T, slight increase for oranges at 3,4 Mio T, strong lemon crop at 1,3 Mio T
- ▶ Earlier start on good market, possible decrease for citrus (small size) stimulation of demand as weather gets colder in EU

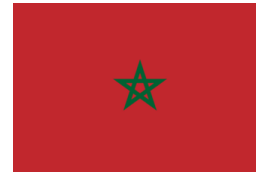
Italy

- ▶ Crop reaches historical high at 3,2 Mio T, up by 12% to last year . Oranges are up by 14% reaching almost 1,9 Mio T and soft citrus at up by 8% at 825.000 T
- ▶ Most volume for domestic EU market (2,6 Mio T), 250.000 T for exports and 360.000 T for processing.

Greece

- ▶ Crop of 1,173.000 T, with a decrease by 1% . Oranges are at 910.000 T (-1%) and soft at 175.000 T (-2%), lemons are up 5% at almost 90.000 T

Other Med countries



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Morocco

- ▶ Production at 2,003,000 T but could move down to similar figure as last year at 1,775.000 T, resulting from drought in Souss region, access to desalinated water and move of farms to other fruit (berries).
- ▶ Soft citrus production is at 1,040,000 T (+ 12%), Oranges at 920.000 T (+ 14%) to peak low crop in 2019

Egypt

- ▶ Slight decrease of production by 8% down to 4,473,000 T
- ▶ Main crop is oranges at 3,1 Mio T and will be up by 3% to last year. Main production decline is on soft citrus

Israel

- ▶ 440,000 T, -4% to previous year due to sharp decrease of grapefruit (-16%) at 120,000 T and also -2 % for oranges, while soft citrus are up by 3% at 185,000 T
- ▶ Normal timing and bigger size than last year, expecting no rain to come

Turkey

- ▶ Production forecasted 15% lower at 3,670,000 T. While soft citrus will be at similar level as last year at 1,450,000 T, all other category to be decreasing sharply: oranges 1,3 Mio T (-24%) in particular Naveina and Washington, lemons 700,000 T (-26%), in particular strong decline of Interdonato and grapefruit at 220.000 T (-12%)
- ▶ Strong concerns about the drought

Tunisia

- ▶ 20% increase to YAGO at 440.000 T, production similar to 2018
- ▶ Oranges up by 34% to 292,000 T

United States

Soft citrus	%2020/2019	2020	2019	2018	2017	2016	2015
TOTAL PRODUCTION	5%	881,859	842,132	1,004,104	728,912	933,288	848,265
Orange	%2020/2019	2020	2019	2018	2017	2016	2015
TOTAL PRODUCTION	-11%	4,158,730	4,680,726	4,826,531	3,442,404	4,562,585	5,457,143
Lemon	%2020/2019	2020	2019	2018	2017	2016	2015
TOTAL PRODUCTION	-14%	798,186	932,426	859,864	769,161	743,764	761,905
Grapefruit	%2020/2019	2020	2019	2018	2017	2016	2015
TOTAL PRODUCTION	-4%	311,338	324,830	326,236	287,438	458,776	554,195
ALL CITRUSES	%2020/2019	2020	2019	2018	2017	2016	2015
TOTAL PRODUCTION	-9%	6,150,113	6,780,113	7,016,735	5,227,914	6,698,413	7,621,508



All citrus in Florida at 2,547,000 T, -14% compared to last year



All citrus in California at 3,602,000 T, -5% to last year

Conclusions

- ▶ **Lower Southern Hemisphere crop:** -3% set last April at 8,421,209 t
- ▶ **Limited or no overlap** between SH and NH crop due to low crop and strong demand in first semester 2020 due to COVID-19 pandemic
- ▶ **Lower Northern Hemisphere crop:** -1,5 % at 28,737,570 T with different regional trends:
 - ▶ EU: +10% at 11,559,000 T
 - ▶ Other Med: -8% at 10,953,000 T
 - ▶ USA: -9% at 6,150,000 T
- ▶ Concerns in several regions about impact of **drought**
- ▶ Optimist in regard to **consumption trends** given renewed consumers perspective of health and nutritious benefit of citrus



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