



# World Citrus Organisation

## Annual General Meeting

- 1 June 2022 -



# Opening remarks



# Agenda

# Agenda

## Citrus market analysis

- Southern Hemisphere citrus forecast (WCO)
- Roundtable with members
- Citrus market developments (CIRAD)

## WCO statutory matters

- Elections of WCO Chairs
- Financial matters
- Membership update
- Health & Nutrition WG update
- Annual Conference 2022
- AOB





# Southern Hemisphere citrus forecast

# All citrus – Northern Hemisphere

Soft citrus	%2021-22/2020-21	2021-22	2020-21	2019-20	2018-19	2017-18	2016-17	2015-16
TOTAL PRODUCTION	-0.74%	8,334,862	8,397,368	7,642,001	8,540,917	7,740,787	8,186,364	7,126,423
Orange	%2021-22/2020-21	2021-22	2020-21	2019-20	2018-19	2017-18	2016-17	2015-16
TOTAL PRODUCTION	-2.39%	15,493,806	15,873,434	16,479,232	18,073,437	15,909,980	17,022,293	17,489,142
Lemon	%2021-22/2020-21	2021-22	2020-21	2019-20	2018-19	2017-18	2016-17	2015-16
TOTAL PRODUCTION	5.44%	4,440,327	4,211,173	4,185,982	4,343,543	3,868,380	3,730,454	3,228,565
Grapefruit	%2021-22/2020-21	2021-22	2020-21	2019-20	2018-19	2017-18	2016-17	2015-16
TOTAL PRODUCTION	-0.26%	947,221	949,673	1,071,942	1,080,243	998,361	1,182,842	1,281,417
ALL CITRUSES	%2021-22/2020-21	2021-22	2020-21	2019-20	2018-19	2017-18	2016-17	2015-16
TOTAL PRODUCTION	-0.73%	29,216,216	29,431,649	29,360,572	32,040,192	28,527,234	30,115,860	29,341,420

Based on figures from Egypt, Greece, Israel, Italy, Morocco, Spain, Tunisia, Turkey, and the United States (Arizona, California, Florida, and Texas)

# All citrus – Southern Hemisphere

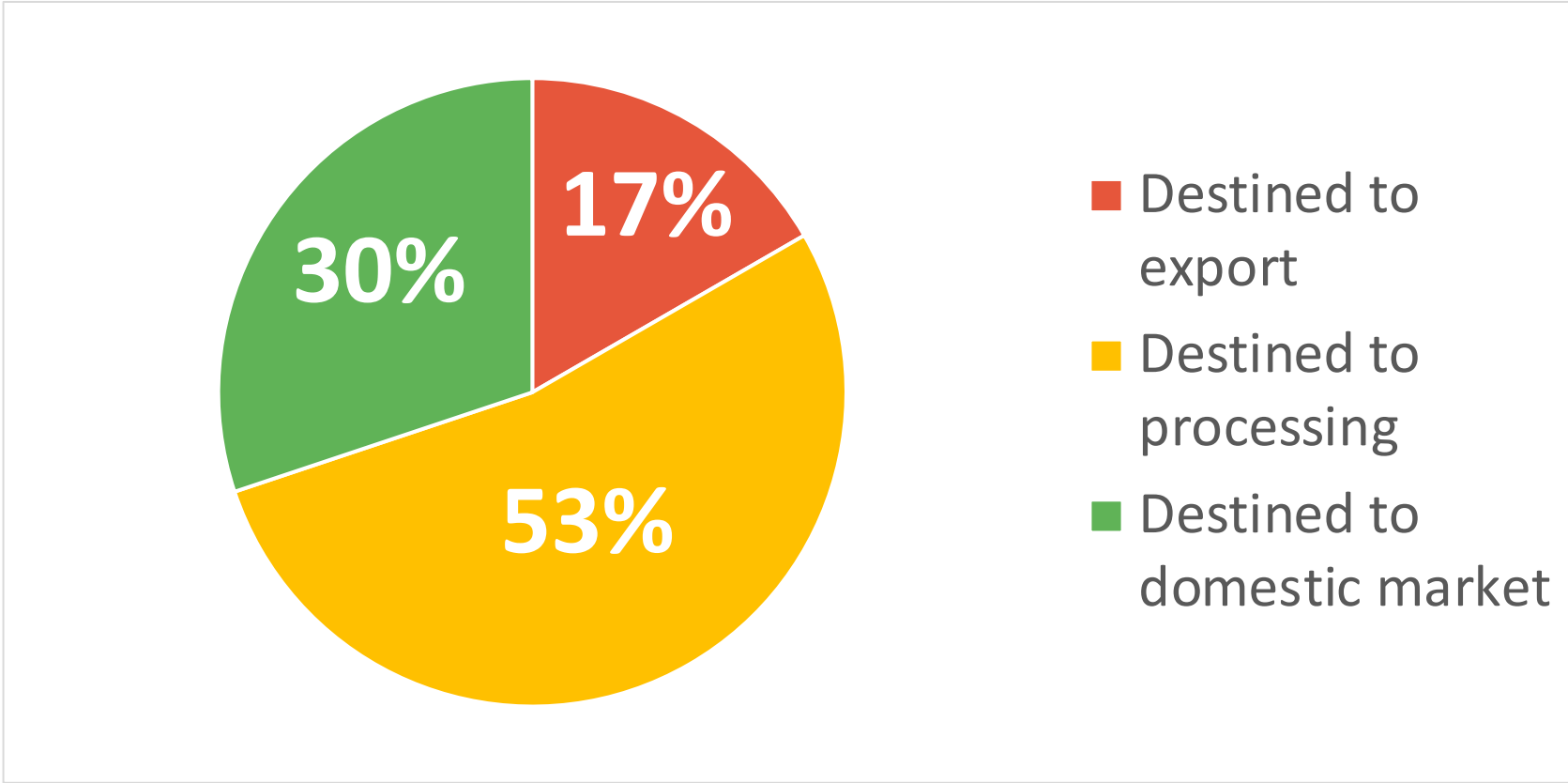
Production and export (T)



	2021	2022	%2022/2021
Production	23,683,082	24,832,270	4.85%
Export	3,946,900	4,140,547	4.91%

Trends and breakdown (T)

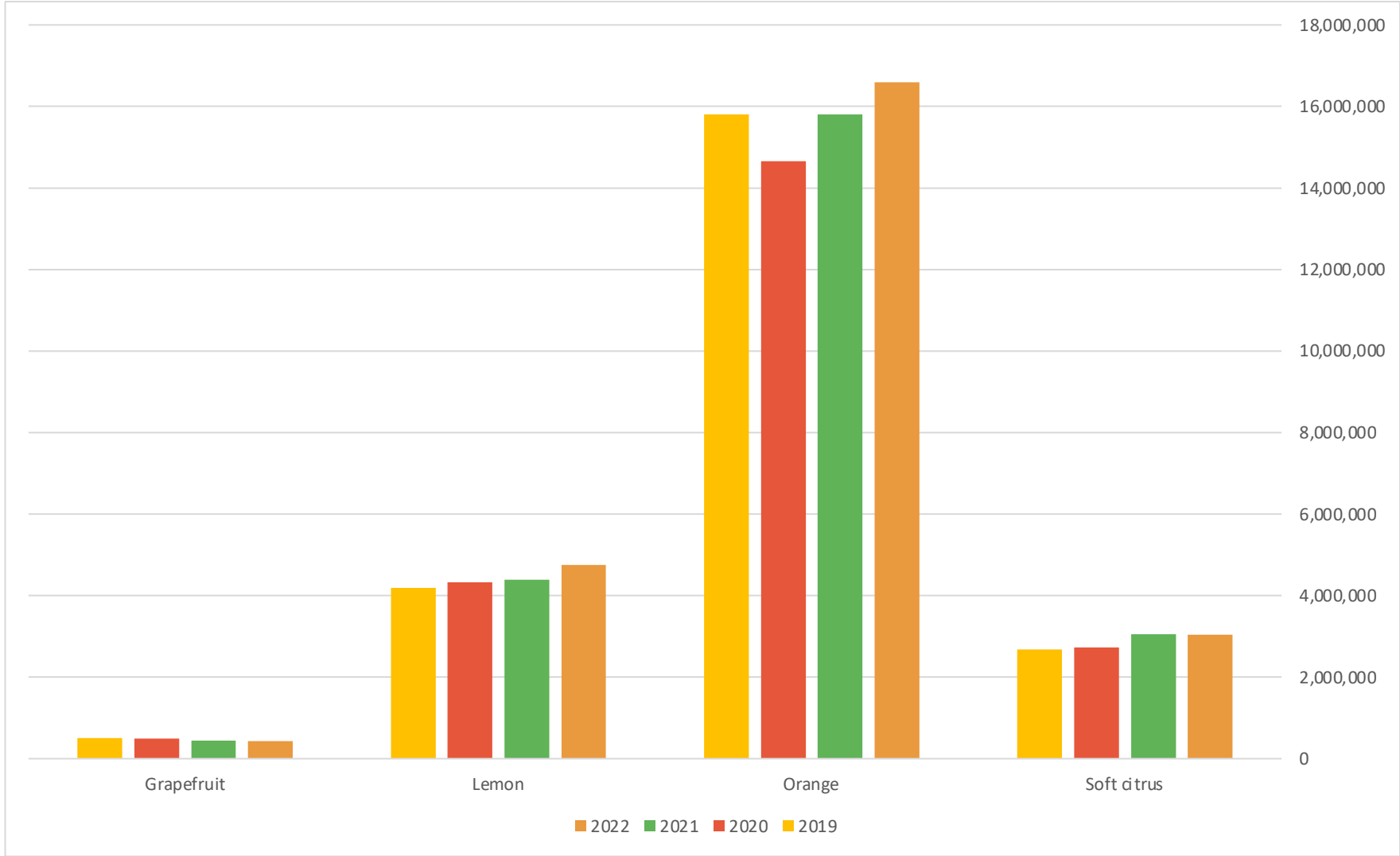
Product	2022	2021	2020	2019
Soft citrus	3,044,652	3,048,022	2,725,596	2,682,056
Orange	16,596,973	15,805,556	14,663,096	15,804,765
Lemon	4,754,260	4,390,553	4,330,779	4,195,203
Grapefruit	436,386	438,951	495,563	506,324
Total	24,832,270	23,683,082	20,715,635	21,707,026



# All citrus – Southern Hemisphere

ALL CITRUSES	%2022/2021	2022	2021	2020	2019	2018	2017	2016
TOTAL PRODUCTION	4.85%	24,832,270	23,683,082	20,715,635	21,707,026	21,150,006	20,595,952	20,160,692
Destined to export	4.91%	4,140,547	3,946,900	3,445,190	3,142,976	3,231,106	2,937,955	2,738,307
Destined to processing	8.32%	13,210,832	12,195,595	11,069,498	14,803,020	14,627,191	14,371,077	14,166,793
Destined to domestic market	-0.79%	7,480,891	7,540,587	6,200,947	3,761,030	3,291,708	3,286,920	3,255,593

Production by product and year (T)



Production by country (T)

Production	2022	%2022/2021
Brazil	15,323,060	3.57%
South Africa	3,325,667	7.98%
Argentina	3,010,000	8.28%
Peru	1,559,665	7.91%
Australia	802,936	-2.37%
Chile	438,200	-12.30%
Uruguay	321,742	34.65%
Bolivia	51,000	21.43%
Total	24,832,270	4.76%

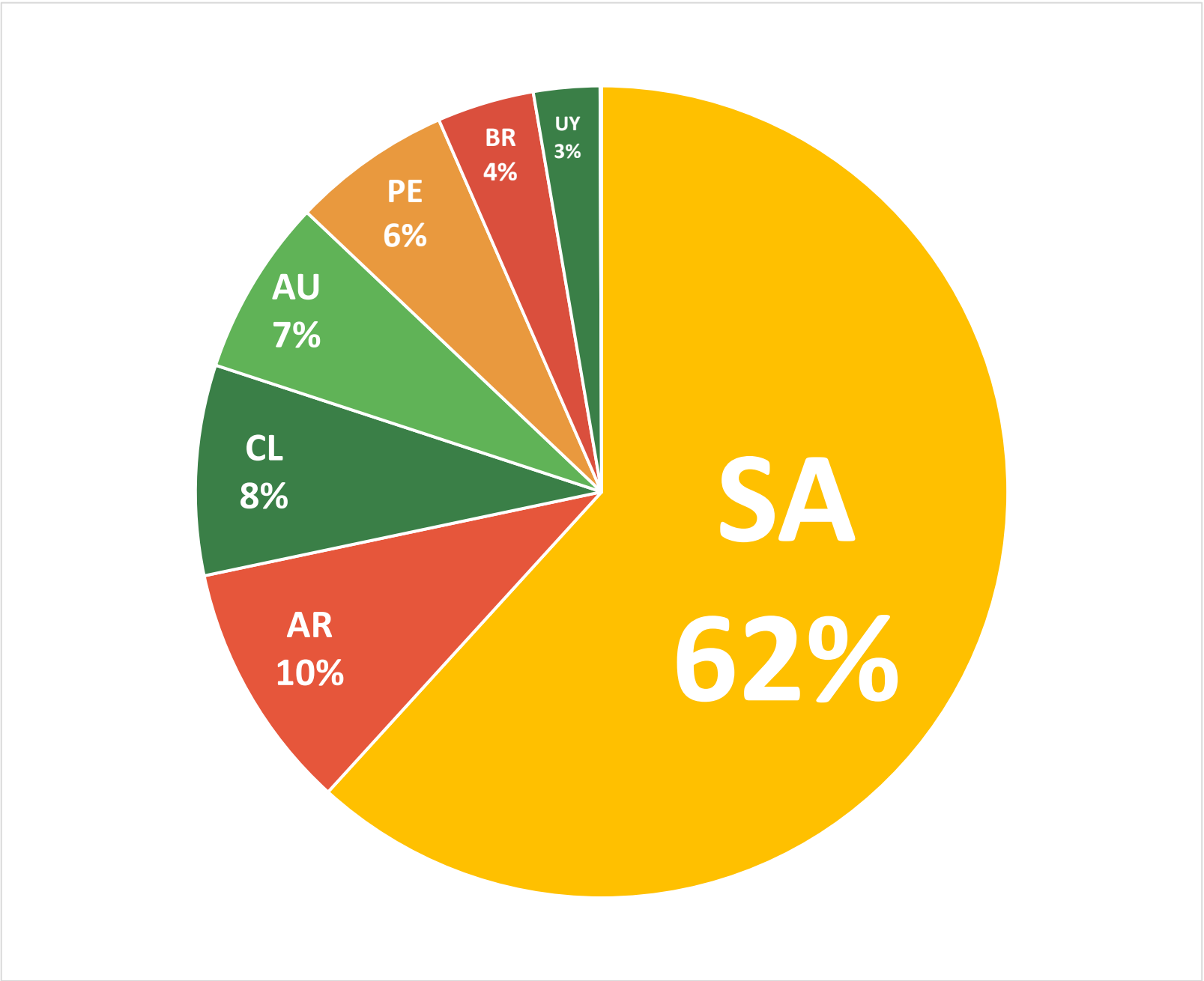


# Export trends by country

By country (T)

Export	2022	%2022/2021
South Africa	2,557,177	8.49%
Argentina	411,000	1.06%
Chile	346,300	-12.89%
Australia	291,221	3.56%
Peru	263,199	-1.26%
Brazil	160,000	28.00%
Uruguay	109,150	8.13%
Bolivia	2,500	-79.17%
Total	4,140,547	4.91%

By percentage



# Export trends by product

(T)

Soft citrus	2022	%2022/2021
South Africa	518,161	10.95%
Peru	212,994	-1.00%
Chile	165,000	-14.63%
Australia	68,479	-6.79%
Argentina	50,000	-4.59%
Uruguay	49,000	20.42%
Total	1,063,634	2.08%

Orange	2022	%2022/2021
South Africa	1,303,340	11.11%
Australia	216,582	8.12%
Argentina	90,000	2.33%
Chile	90,000	-12.76%
Uruguay	40,000	-0.67%
Peru	20,682	-15.38%
Total	1,760,604	6.43%

# Export trends by product

(T)

Lemon	2022	%2022/2021
South Africa	483,836	4.86%
Argentina	270,000	1.74%
Brazil	160,000	60.00%
Chile	90,000	-10.45%
Peru	27,258	8.66%
Uruguay	20,150	0.84%
Australia	4,624	-10.49%
Bolivia	2,500	-79.17%
Total	1,058,368	6.96%

Grapefruit	2022	%2022/2021
South Africa	251,840	-1.42%
Peru	2,265	20.16%
Australia	1,536	-32.07%
Chile	1,300	118.86%
Argentina	1,000	6.50%
Total	257,941	-1.23%

# Updated calendar

FORECAST	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
NORHTERN HEMISPHERE	3					4				1	2	
SOUTHERN HEMISPHERE					1	2	3				4	

1. Data collection

2. First publication

3. Data revision

4. Revision publication



Roundtable with  
the members

## WEATHER

- No potential effects or damages are predicted

## TIMING

- Average, except for lemons (more than a week late)

## QUALITY

- Average size, color, and plant health conditions

## TRADE

- Argentine peso devalued by 14,7% in 2021
- No new markets opened in 2021

## PROCESSING

- This season there will be low processing volumes due to the lower expected harvest in lemon
- Sweet citrus harvest returns to normal averages of recent years

## OTHER ASPECTS

# Argentina



Soft citrus	%2022/2021	2022	2021
TOTAL PRODUCTION	22.31%	420,000	343,387
Destined to export	-4.59%	50,000	52,407
Destined to processing	1.69%	60,000	59,000
Destined to domestic market	33.63%	310,000	231,980
Orange	%2022/2021	2022	2021
TOTAL PRODUCTION	18.27%	960,000	811,700
Destined to export	2.33%	90,000	87,954
Destined to processing	21.95%	250,000	205,000
Destined to domestic market	19.52%	620,000	518,746
Lemon	%2022/2021	2022	2021
TOTAL PRODUCTION	0.30%	1,560,000	1,555,377
Destined to export	1.74%	270,000	265,377
Destined to processing	0.00%	1,050,000	1,050,000
Destined to domestic market	0.00%	240,000	240,000
Grapefruit	%2022/2021	2022	2021
TOTAL PRODUCTION	0.85%	70,000	69,413
Destined to export	6.50%	1,000	939
Destined to processing	8.70%	50,000	46,000
Destined to domestic market	-15.46%	19,000	22,474
ALL CITRUSES	%2022/2021	2022	2021
TOTAL PRODUCTION	8.28%	3,010,000	2,779,877
Destined to export	1.06%	411,000	406,677
Destined to processing	3.68%	1,410,000	1,360,000
Destined to domestic market	17.35%	1,189,000	1,013,200



World Citrus Organisation

WEATHER

TIMING

Australia



QUALITY

TRADE

PROCESSING

OTHER ASPECTS

Soft citrus	%2022/2021	2022	2021
TOTAL PRODUCTION	-15.11%	182,657	215,161
Destined to export	-6.79%	68,479	73,468
Destined to processing	45.69%	30,964	21,254
Destined to domestic market	-30.91%	83,214	120,439
Orange	%2022/2021	2022	2021
TOTAL PRODUCTION	2.53%	546,885	533,400
Destined to export	8.12%	216,582	200,313
Destined to processing	10.63%	147,394	133,235
Destined to domestic market	-8.48%	182,909	199,852
Lemon	%2022/2021	2022	2021
TOTAL PRODUCTION	-2.95%	61,648	63,525
Destined to export	-10.49%	4,624	5,166
Destined to processing	216.90%	18,494	5,836
Destined to domestic market	-26.64%	38,530	52,523
Grapefruit	%2022/2021	2022	2021
TOTAL PRODUCTION	13.81%	11,746	10,321
Destined to export	-32.07%	1,536	2,261
Destined to processing	155.02%	4,111	1,612
Destined to domestic market	-5.41%	6,099	6,448
ALL CITRUSES	%2022/2021	2022	2021
TOTAL PRODUCTION	-2.37%	802,936	822,407
Destined to export	3.56%	291,221	281,208
Destined to processing	24.10%	200,963	161,937
Destined to domestic market	-18.06%	310,752	379,262



World Citrus Organisation

## WEATHER

- Potential droughts and lack of rainfall in Eastern Bolivia

## TIMING

- More than a week late (lemons)

## QUALITY

- Smaller size than usual
- Regular coloration
- Less disease more pest due to dry season

## TRADE

- Focused on neighbouring countries (Argentina, Brazil, Chile)

## PROCESSING

## OTHER ASPECTS

# Bolivia



Soft citrus	%2022/2021	2022	2021
TOTAL PRODUCTION		0	0
Destined to export		0	0
Destined to processing		0	0
Destined to domestic market		0	0
Orange	%2022/2021	2022	2021
TOTAL PRODUCTION		0	0
Destined to export		0	0
Destined to processing		0	0
Destined to domestic market		0	0
Lemon	%2022/2021	2022	2021
TOTAL PRODUCTION	21.43%	51,000	42,000
Destined to export	-79.17%	2,500	12,000
Destined to processing	80.00%	45,000	25,000
Destined to domestic market	-30.00%	3,500	5,000
Grapefruit	%2022/2021	2022	2021
TOTAL PRODUCTION		0	0
Destined to export		0	0
Destined to processing		0	0
Destined to domestic market		0	0
ALL CITRUSES	%2022/2021	2022	2021
TOTAL PRODUCTION	21.43%	51,000	42,000
Destined to export	-79.17%	2,500	12,000
Destined to processing	80.00%	45,000	25,000
Destined to domestic market	-30.00%	3,500	5,000



World Citrus Organisation



## WEATHER

- Second semester is predicted to have La Nina effects who can affect size/weight development and drop
- 2021 had a good weather during bloom and set period which boosted production compared to 2 later crops 2020/2021 that were very affected by drought

## TIMING

- Similar to the last 4 crops but in delay compared to the previous 10, too early to tell if this is the “new normal”

## QUALITY

- Soft citrus: slightly smaller, color will depend on winter, Alternaria getting worse each year
- Orange: good size for early crop, good coloration and good pest and disease situation

## TRADE

- Currency developments
- New markets: limes in Chile, oranges in New Zealand
- Developments of EU rules for oranges and limes related to the Use of products prohibited in the EU to counter weather issues
- SPS issues Black Spot for oranges and Citrus Canker for limes

## OTHER ASPECTS

- Lime is a key product for exports: increased acreage and can be delivered year-round

# Brazil



Soft citrus	%2022/2021	2022	2021
TOTAL PRODUCTION	-14.29%	900,000	1,050,000
Destined to export		0	0
Destined to processing		0	0
Destined to domestic market	-14.29%	900,000	1,050,000
Orange	%2022/2021	2022	2021
TOTAL PRODUCTION	3.27%	12,573,060	12,175,000
Destined to export	-100.00%	0	25,000
Destined to processing	5.48%	10,073,060	9,550,000
Destined to domestic market	-3.85%	2,500,000	2,600,000
Lemon	%2022/2021	2022	2021
TOTAL PRODUCTION	19.35%	1,850,000	1,550,000
Destined to export	60.00%	160,000	100,000
Destined to processing	58.00%	790,000	500,000
Destined to domestic market	-5.26%	900,000	950,000
Grapefruit	%2022/2021	2022	2021
TOTAL PRODUCTION		0	0
Destined to export		0	0
Destined to processing		0	0
Destined to domestic market		0	0
ALL CITRUSES	%2022/2021	2022	2021
TOTAL PRODUCTION	3.71%	15,323,060	14,775,000
Destined to export	28.00%	160,000	125,000
Destined to processing	8.09%	10,863,060	10,050,000
Destined to domestic market	-6.52%	4,300,000	4,600,000



World Citrus Organisation

## WEATHER

- Drought has impacted the country for over a decade resulted in less water availability
- The lack of precipitation is resulting in less water supplies, that depends on the valley an orchard is located in, with the highest rainfall deficits recorded in IV region

## TIMING

- Average

## QUALITY

- Average size, color, and plant health conditions

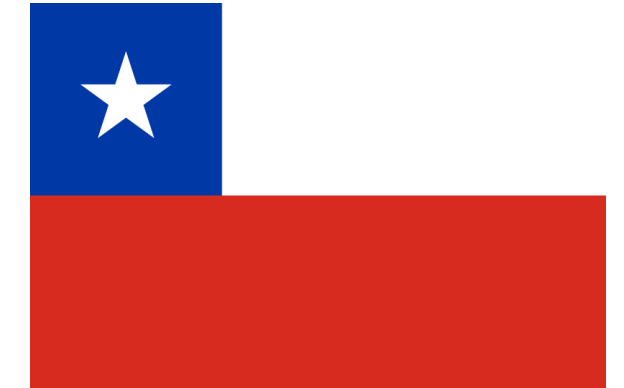
## TRADE

## OTHER ASPECTS

- Challenging season: Logistical and climatic issues have impacted overall volume, resulting in a 12% decrease from 2021

## PROCESSING

# Chile



Soft citrus	%2022/2021	2022	2021
TOTAL PRODUCTION	-14.63%	175,245	205,272
Destined to export	-14.63%	165,000	193,272
Destined to processing		0	0
Destined to domestic market	-14.63%	10,245	12,000
Orange	%2022/2021	2022	2021
TOTAL PRODUCTION	-12.76%	107,859	123,630
Destined to export	-12.76%	90,000	103,160
Destined to processing		0	0
Destined to domestic market	-12.76%	17,859	20,470
Lemon	%2022/2021	2022	2021
TOTAL PRODUCTION	-10.45%	151,433	169,100
Destined to export	-10.45%	90,000	100,500
Destined to processing		0	0
Destined to domestic market	-10.45%	61,433	68,600
Grapefruit	%2022/2021	2022	2021
TOTAL PRODUCTION	118.86%	3,664	1,674
Destined to export	118.86%	1,300	594
Destined to processing		0	0
Destined to domestic market	118.86%	2,364	1,080
ALL CITRUSES	%2022/2021	2022	2021
TOTAL PRODUCTION	-12.30%	438,200	499,676
Destined to export	-12.89%	346,300	397,526
Destined to processing		0	0
Destined to domestic market	-10.03%	91,900	102,150



World Citrus Organisation

## WEATHER

- Variations in temperatures and humidity since December 2021
- “La Niña” phenomenon

## TIMING

- Average, except for lemons (a few days early)

## QUALITY

- This season has presented a higher incidence of sucking biting pests (insects - mites), in the case of fungus pests with a significant growth and that is still showing due to high humidity

## TRADE

- Variable exchange rate due to the political situation
- 3 new markets: India, Argentina and Uruguay

## PROCESSING

## OTHER ASPECTS

# Peru



Soft citrus	%2022/2021	2022	2021
TOTAL PRODUCTION	7.49%	600,350	558,500
Destined to export	-1.00%	212,994	215,151
Destined to processing		0	0
Destined to domestic market	12.82%	387,356	343,349
Orange	%2022/2021	2022	2021
TOTAL PRODUCTION	8.04%	605,020	560,000
Destined to export	-15.38%	20,682	24,442
Destined to processing		0	0
Destined to domestic market	9.11%	584,338	535,558
Lemon	%2022/2021	2022	2021
TOTAL PRODUCTION	8.75%	348,305	320,277
Destined to export	8.66%	27,258	25,085
Destined to processing		0	0
Destined to domestic market	8.76%	321,047	295,192
Grapefruit	%2022/2021	2022	2021
TOTAL PRODUCTION	-7.85%	5,990	6,500
Destined to export	20.16%	2,265	1,885
Destined to processing		0	0
Destined to domestic market	-19.28%	3,725	4,615
ALL CITRUSES	%2022/2021	2022	2021
TOTAL PRODUCTION	7.91%	1,559,665	1,445,277
Destined to export	-1.26%	263,199	266,563
Destined to processing		0	0
Destined to domestic market	9.99%	1,296,466	1,178,714



World Citrus Organisation

## WEATHER

- Severe hail in Limpopo and Eastern Cape
- Drought in Eastern Cape Province

## TIMING

- Average, except for grapefruit (a few days early)

## QUALITY

- Slightly smaller (except for oranges), good coloration

## TRADE

- Rand is under pressure and is weakening against the dollar; largely driven by geopolitical conflict and natural disasters
- China revised their protocol for lemons meaning better access conditions
- SPS issues: EU in process of revising rules on oranges from RSA, Eswatini, and Zimbabwe

## OTHER ASPECTS

- Production and transport costs have increased to such an extent that most industry players believe that export volumes will probably be lower than present forecast

# South Africa



Soft citrus	%2022/2021	2022	2021
TOTAL PRODUCTION	10.98%	655,900	591,011
Destined to export	10.95%	518,161	467,020
Destined to processing	13.23%	91,826	81,100
Destined to domestic market	7.05%	45,913	42,891
Orange	%2022/2021	2022	2021
TOTAL PRODUCTION	10.58%	1,670,949	1,511,056
Destined to export	11.11%	1,303,340	1,173,068
Destined to processing	9.92%	267,352	243,220
Destined to domestic market	5.79%	100,257	94,768
Lemon	%2022/2021	2022	2021
TOTAL PRODUCTION	4.31%	653,832	626,791
Destined to export	4.86%	483,836	461,428
Destined to processing	3.56%	143,843	138,898
Destined to domestic market	-1.18%	26,153	26,465
Grapefruit	%2022/2021	2022	2021
TOTAL PRODUCTION	-1.73%	344,986	351,043
Destined to export	-1.42%	251,840	255,466
Destined to processing	-2.97%	89,696	92,440
Destined to domestic market	9.98%	3,450	3,137
ALL CITRUSES	%2022/2021	2022	2021
TOTAL PRODUCTION	7.98%	3,325,667	3,079,901
Destined to export	8.49%	2,557,177	2,356,982
Destined to processing	6.67%	592,717	555,658
Destined to domestic market	5.09%	175,773	167,261



World Citrus Organisation

## WEATHER

- Significant drought during summer and beginning of autumn, especially in the north, where most plantings are
- Now more frequent rains and high humidity levels

## TIMING

- Regular for lemons
- More than a few days in delay for oranges
- More than a week late for soft citrus

## QUALITY

- Smaller sizing for navels, soft citrus at the beginning of the season as well
  - Good coloration
- No pest and disease issues

## TRADE

- Dollar devaluation
- Critical increase of inflation and logistic costs
- New markets: India, working on Philippines, Vietnam, Mexico
  - UK main issues for duties

## PROCESSING

## OTHER ASPECTS

# Uruguay



Soft citrus	%2022/2021	2022	2021
TOTAL PRODUCTION	30.47%	110,500	84,691
Destined to export	20.42%	49,000	40,691
Destined to processing	8.33%	6,500	6,000
Destined to domestic market	44.74%	55,000	38,000
Orange	%2022/2021	2022	2021
TOTAL PRODUCTION	46.74%	133,200	90,770
Destined to export	-0.67%	40,000	40,270
Destined to processing	569.33%	50,200	7,500
Destined to domestic market	0.00%	43,000	43,000
Lemon	%2022/2021	2022	2021
TOTAL PRODUCTION	29.00%	78,042	60,500
Destined to export	18.53%	20,150	17,000
Destined to processing	43.70%	42,392	29,500
Destined to domestic market	10.71%	15,500	14,000
Grapefruit	%2022/2021	2022	2021
TOTAL PRODUCTION		0	0
Destined to export		0	0
Destined to processing		0	0
Destined to domestic market		0	0
ALL CITRUSES	%2022/2021	2022	2021
TOTAL PRODUCTION	36.35%	321,742	235,961
Destined to export	11.42%	109,150	97,961
Destined to processing	130.45%	99,092	43,000
Destined to domestic market	19.47%	113,500	95,000



World Citrus Organisation





# Citrus market developments

# Citrus Market Trends

## Russia & Ukraine Focus

---

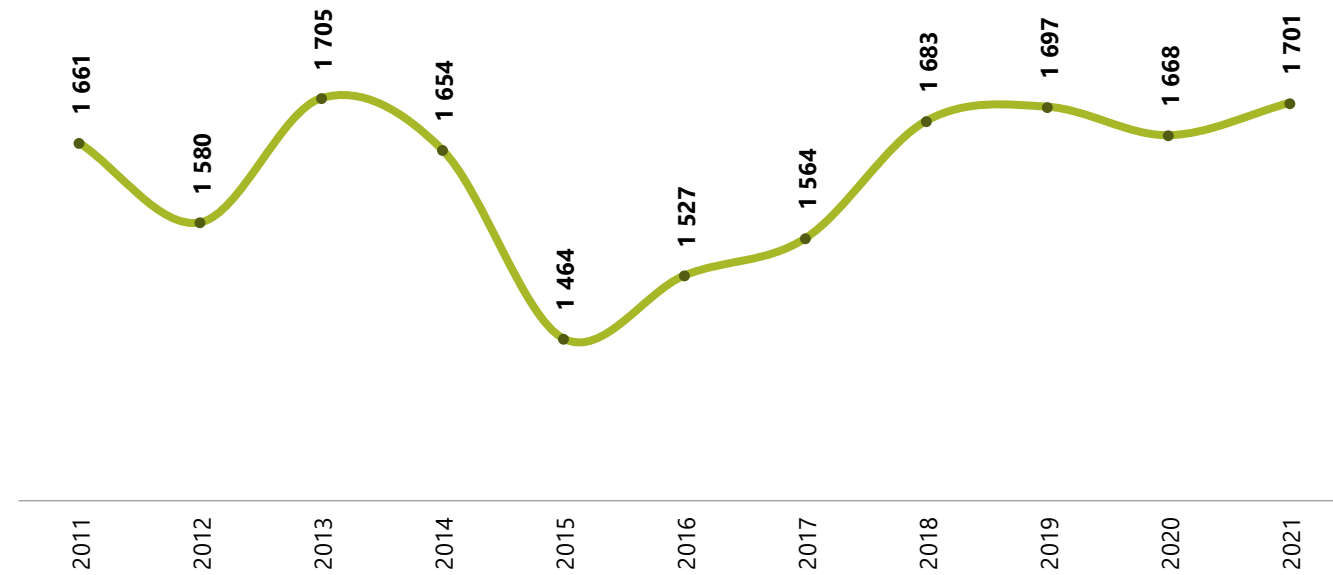
Anselme CLERON – Eric Imbert

CIRAD - PERSYST  
Market News Service  
Editor of FRUITROP Magazine  
[eric.imbert@cirad.fr](mailto:eric.imbert@cirad.fr)

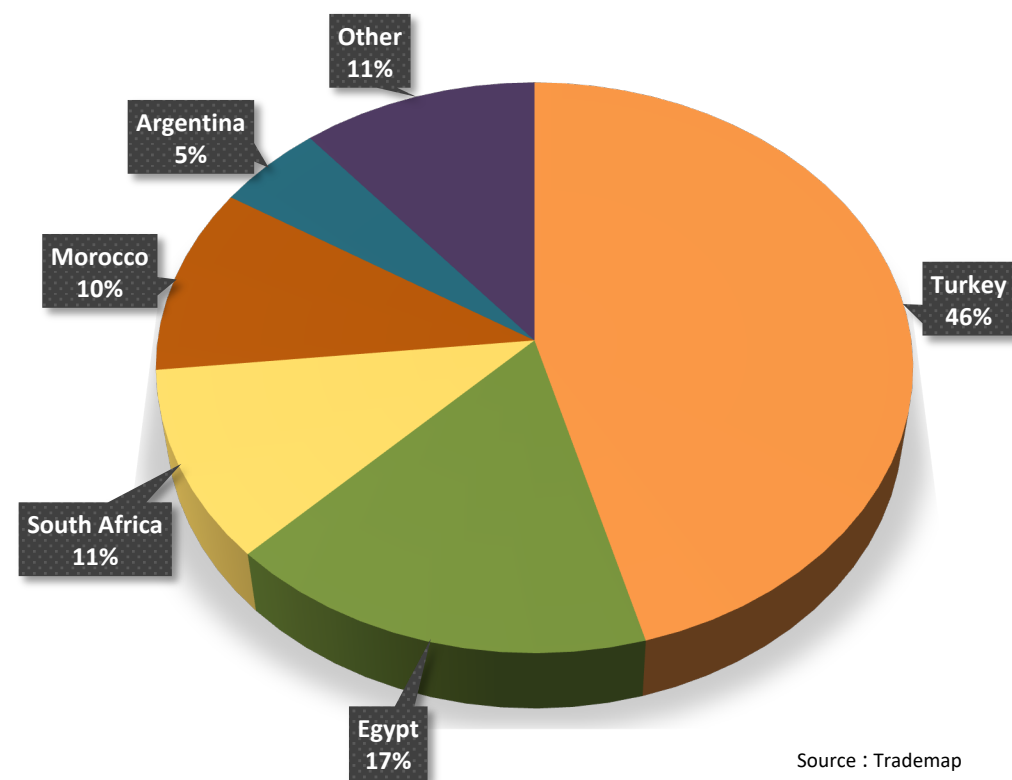


# Focus – Russia Citrus Market Overview

RUSSIA - Citrus Imports  
(in 000 | Source : Trademap )



RUSSIA - Citrus Imports 2021 -Main Suppliers



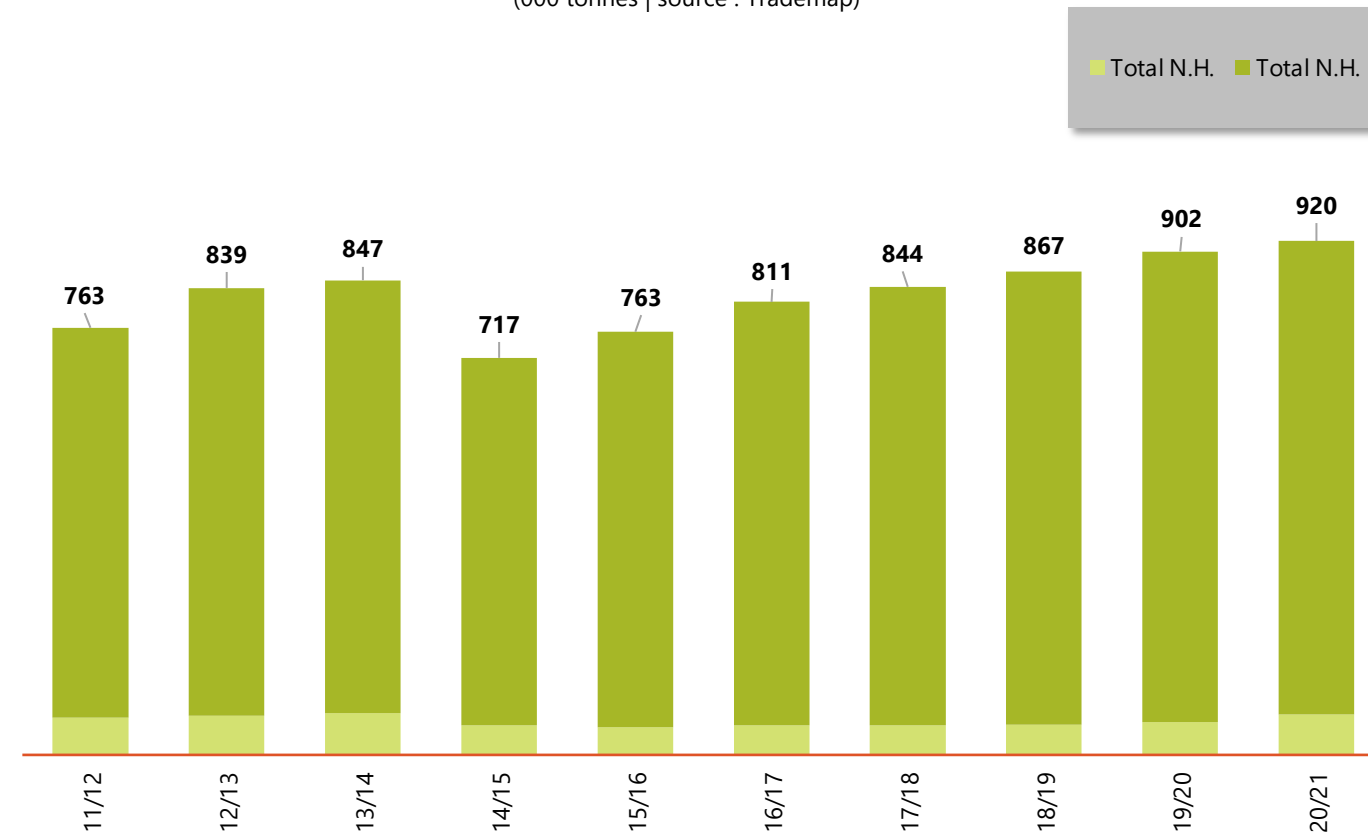
Source : Trademap

- **A 1.7 million tons market in 2021**
- **A constant growth since 2015**  
(+240 000 tons in 5 years)
- **Suppliers mainly from the Northern Hemisphere** (79% of total supply in 2021)
  - **Turkey's** first trading partner  
(40% of total citrus exports | 780 000 tons in 2021)
  - **Egypt** and **Morocco** dedicating between 20% and 30% of their citrus exports to Russia
- **Destination no less important for SH suppliers :**
  - **Argentina's** second largest trading partner  
(19% of total citrus exports | 75 000 tons in 2021)
  - **SAR** sending 7% to 10% of it's total exports annually  
(189 000 tons in 2021)

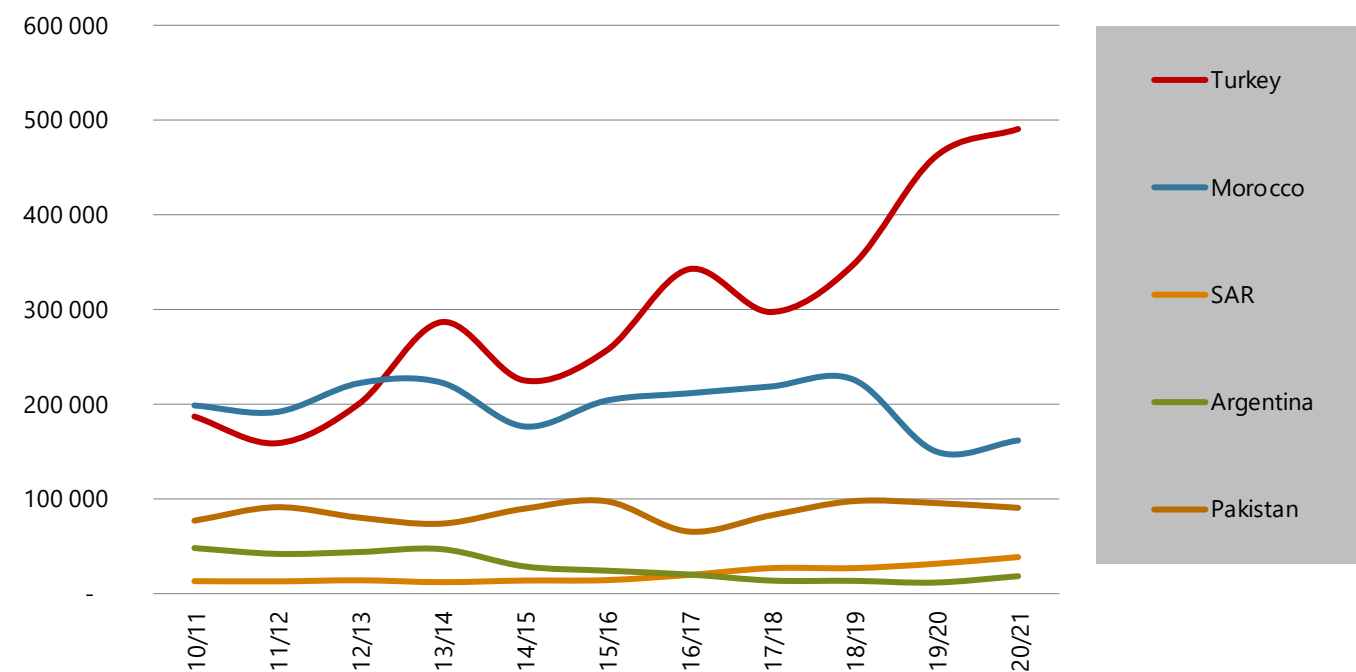


# Focus – Russia Soft-citrus Market

Soft-Citrus -RUSSIA - Imports  
(000 tonnes | source : Trademap)



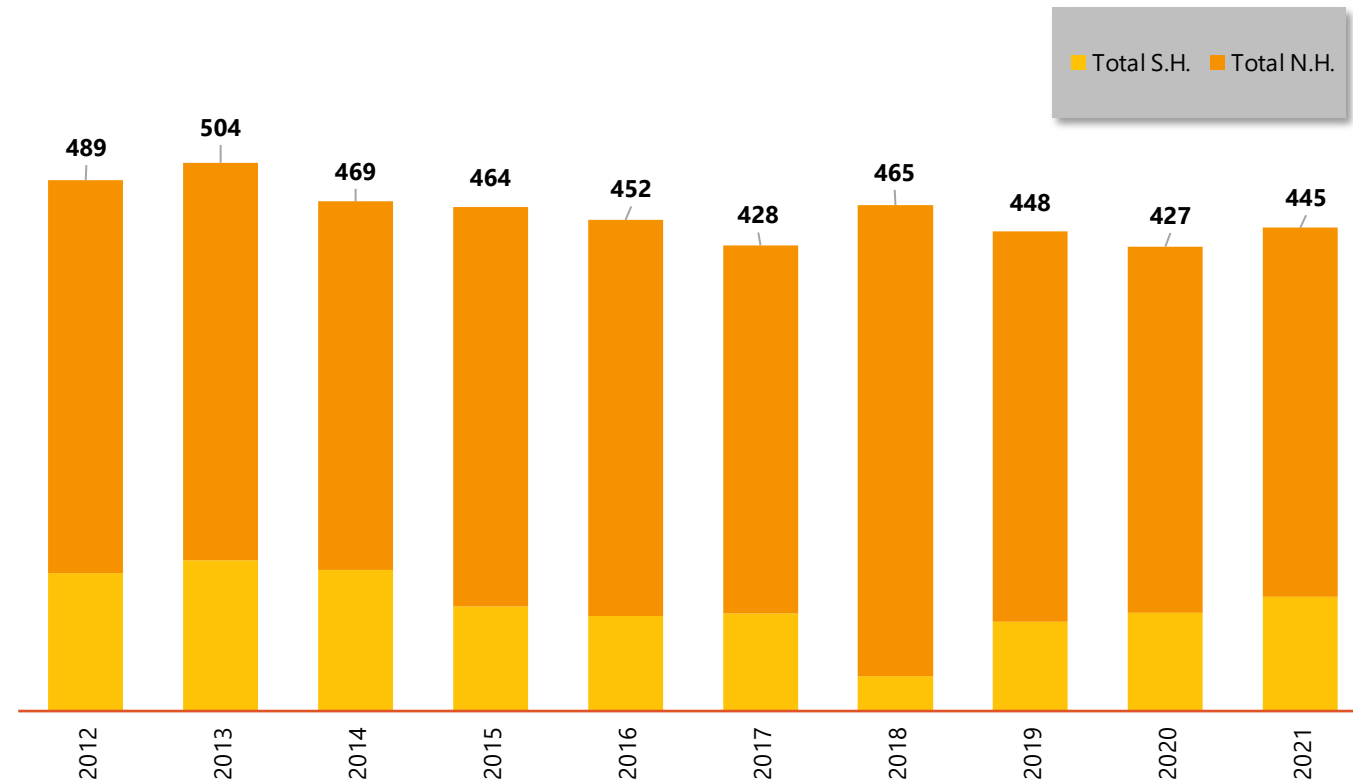
RUSSIA - Evolution of Soft Citrus imports from leading suppliers  
(in tonnes| sources:, Comtrade,)



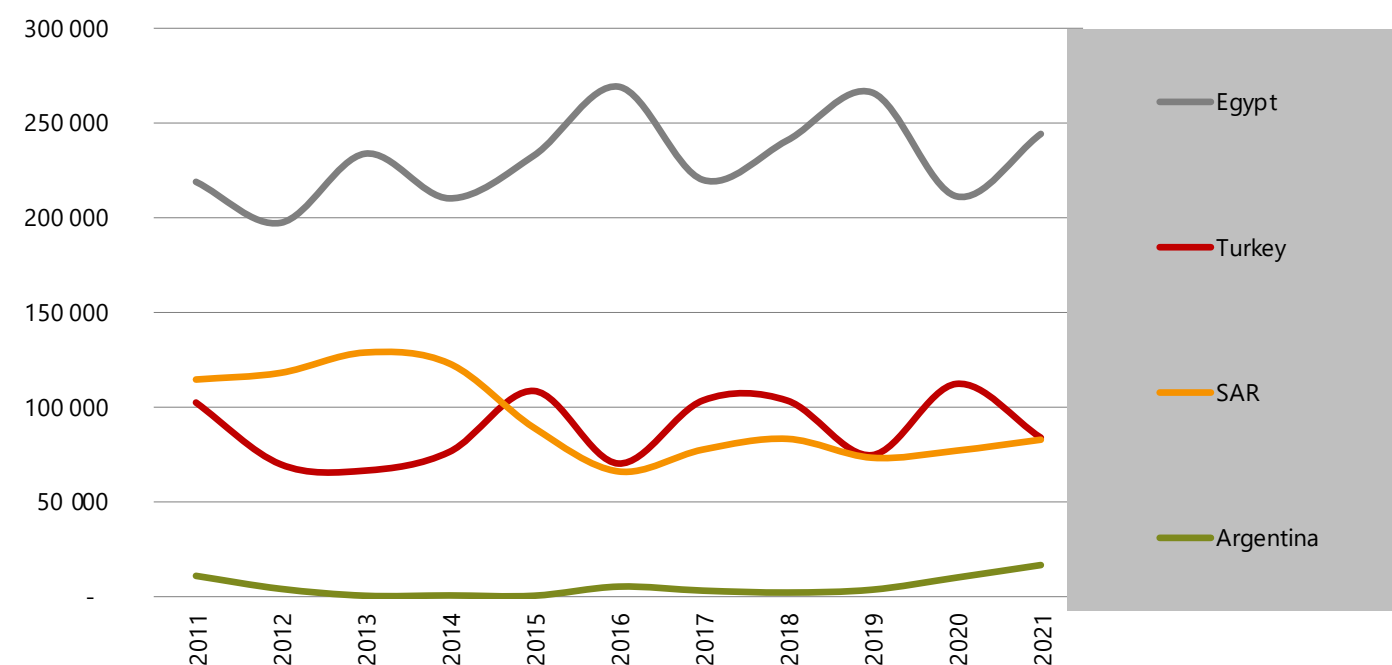
- **920 000 tons imported in 2021**
- **Constant progress since 2014-15 : +200 000 in the last 7 seasons**
- **Soft Citrus imports dominated by NH suppliers (92%)**
  - Strong development of Turkish imports (490 000 t in 2021 | +35%/ 4 season's average)
  - Erosion of Moroccan supply since 2018/19 (162 000 t in 2021 | -20%/4 season's average)
- **Secondary destination for SH suppliers (8%)**
  - 7% of total **SAR** soft citrus exports in 2021 (40 000 t)  
Steady progression in the last 4 years (+44%/ 4 year's average)
  - 38% of total **Argentina** soft citrus exports in 2021 (18 000 t)  
Also progressing gradually (+22%/ 4 year's average)

# Focus – Russia Orange market

Orange - RUSSIA - Imports  
(000 tonnes | source : Trademap)



RUSSIA - Evolution of orange imports from leading suppliers  
(in tonnes | sources: Comtrade,)

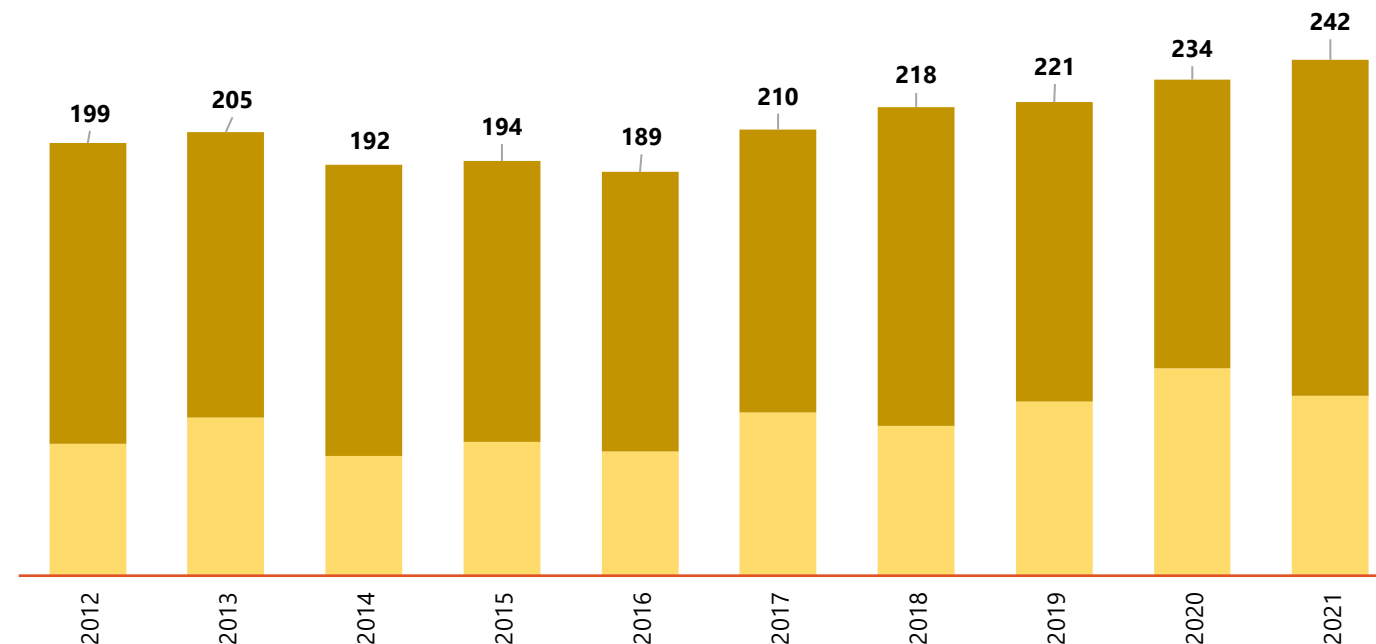


- **445 000 tons imported in 2021**
- **A slow decline over the last ten years:  
- 44 000 tonnes since 2012**
- **NH supply accounts for 76% of total orange imports**
  - Steady **Egyptian** supply despite a strong alternation effect (244 000 t imported in 2021 | +4%/ 4 year's average)
  - Slight decrease of Turkey over the last 5 years (83 000 t in 2021 | -15%/4 year's average)
- **SH supply tends to progress (+45%/ 4 year's average)**
  - 6% of total **SAR** orange exports in 2021 (40 000 t)  
Steady trend over the las 4 years (+4%/ 4 year's average)
  - 19% of total **Argentina** orange exports in 2021 (16 000 t)  
Imports have been soaring in the last 2 years

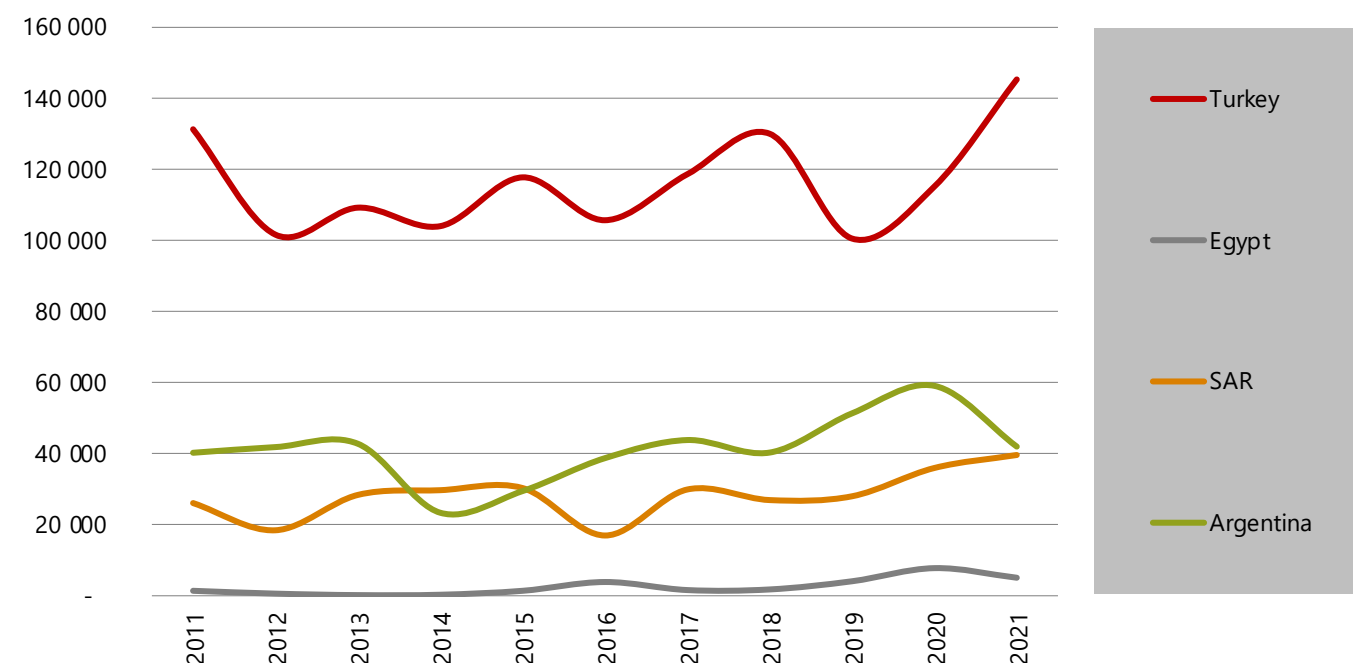
# Focus – Russia Lemon Market

Lemon - RUSSIA - Imports  
(000 tonnes | source : Trademap)

Total S.H. Total N.H.



RUSSIA - Evolution of lemon imports from leading suppliers  
(in tonnes| sources:, Comtrade,)

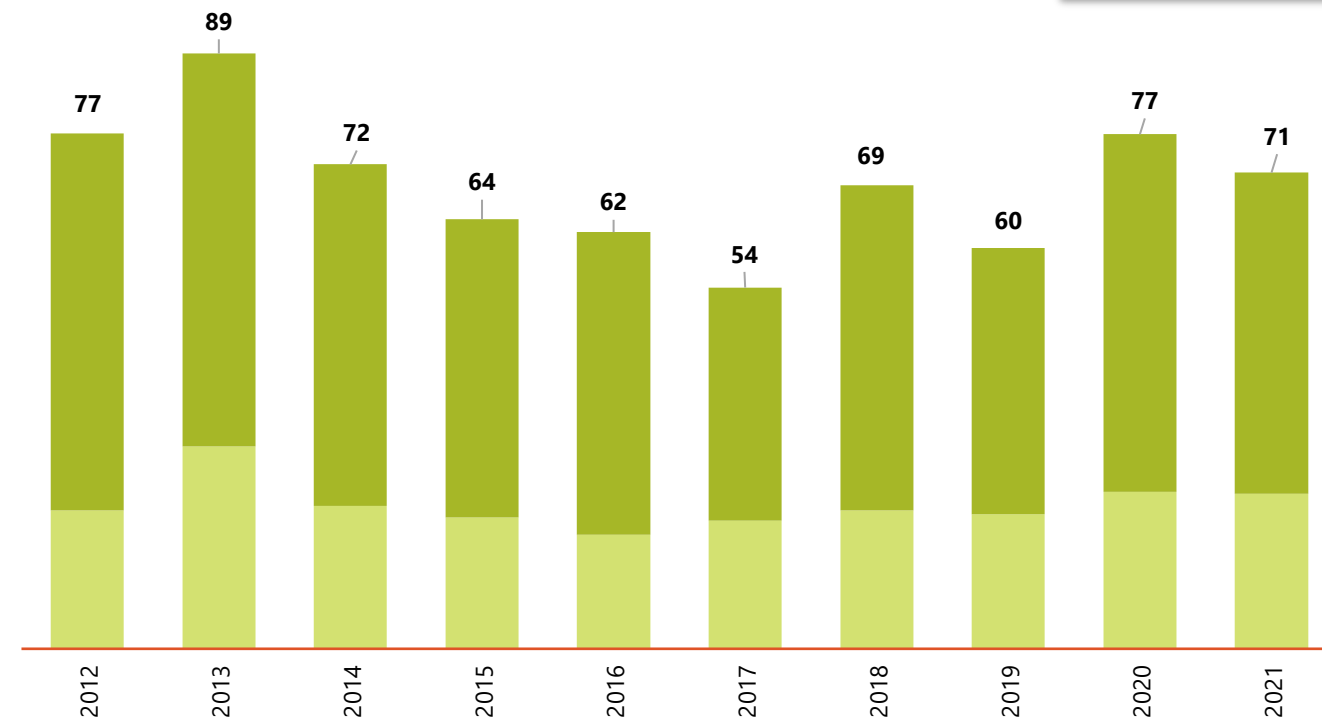


- **242 000 tonnes imported 2021**
- **Steady growth since 2016 : +10 000 t/year**
- **2/3<sup>rd</sup> of supply ensure by Mediterranean origins**
  - **Turkish** supply is soaring  
(145 000 t in 2021 | +25%/ 4 season's average)
  - **Egypt** is slightly gaining grounds  
(5 000 t in 2021 | +34%/4 year's average)
- **Strategic market for SH suppliers**
  - 1st recipient of **Argentinean** lemons  
(40 to 60 000 tons/year | 15% to 20% of lemon exports)
  - Early destination for **SAR** Lemons  
(25 to 40 000 tons a year | 8% to 10% of lemons exports)

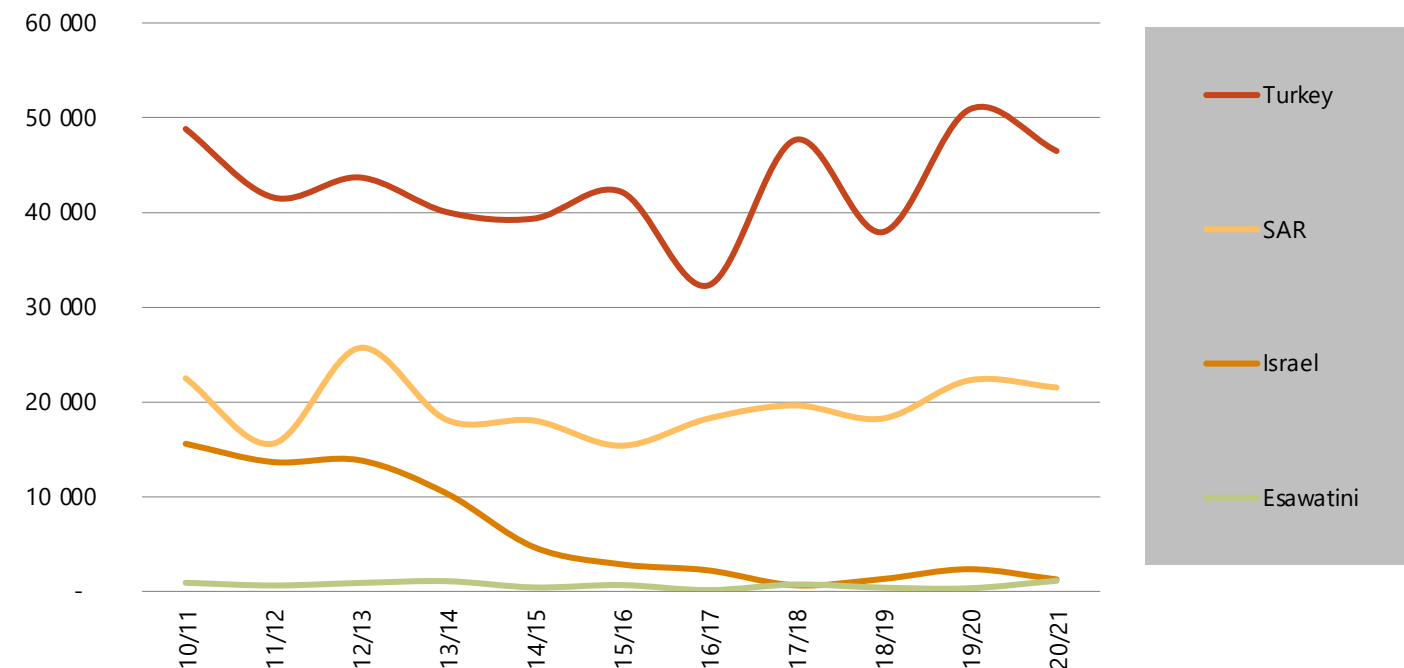
# Focus – Russia Grapefruit Market

Grapefruit - RUSSIA - Imports  
(000 tonnes | source : Trademap)

Total S.H. Total N.H.



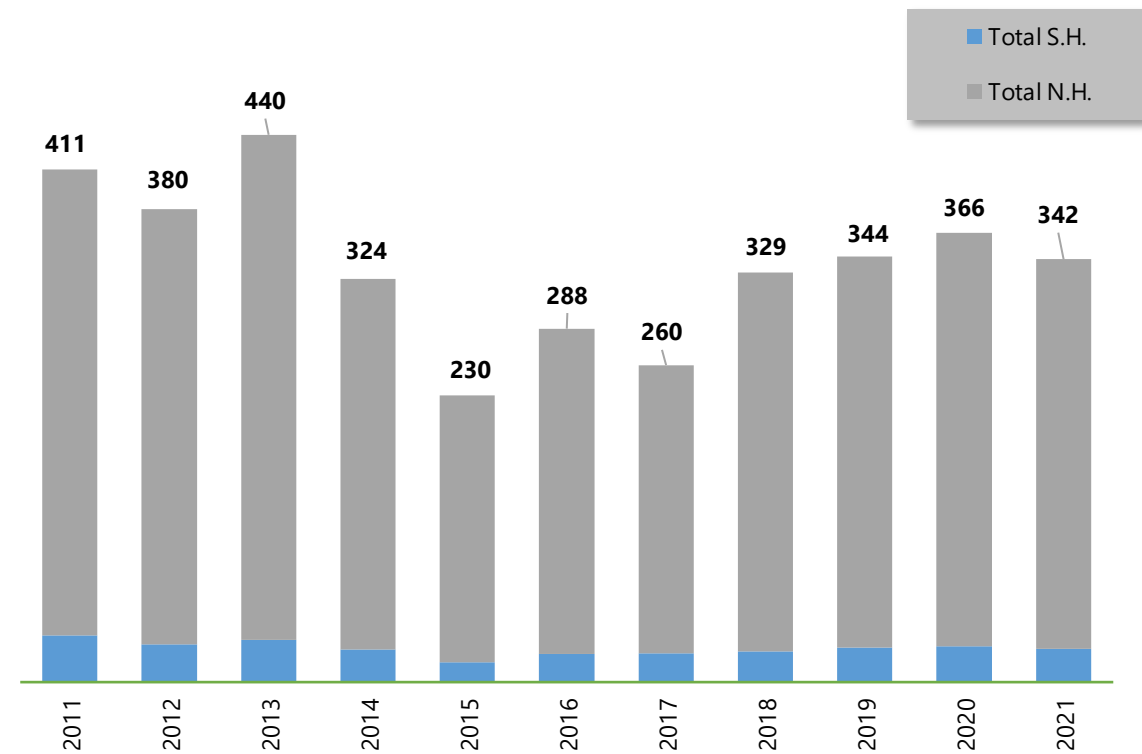
RUSSIA - Evolution of grapefruit imports from leading suppliers  
(in tonnes| sources:, Comtrade,)



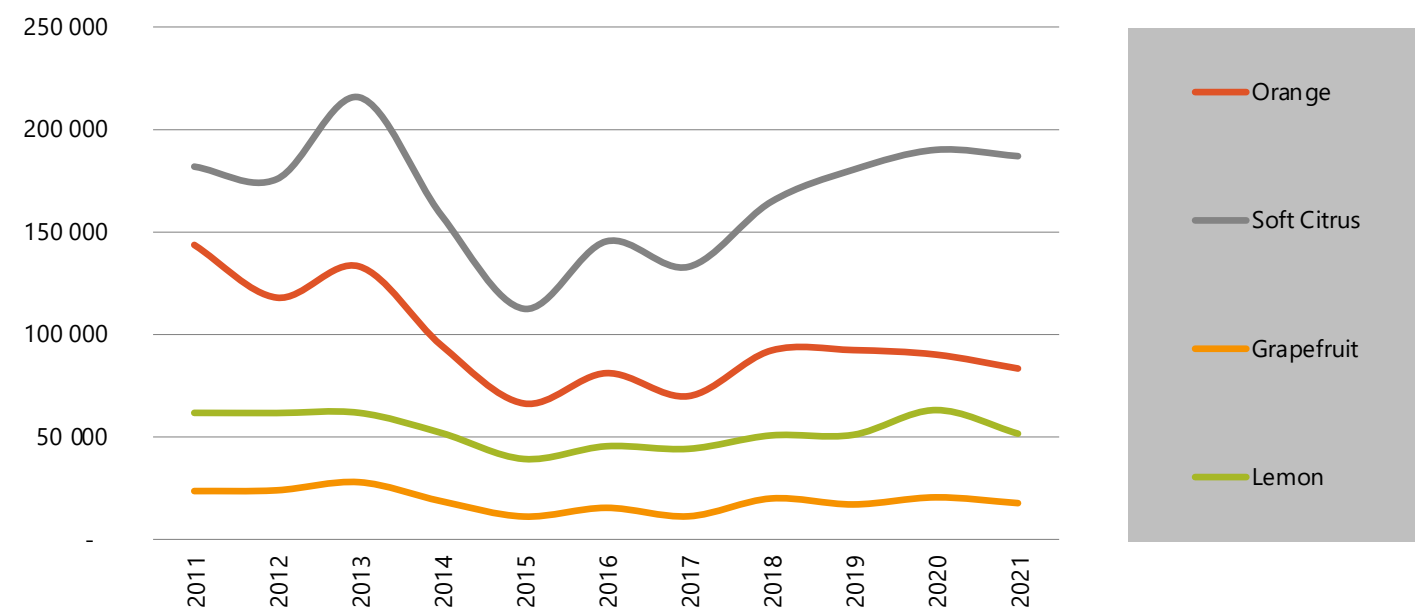
- **71 000 tons imported in 2021**
- **Steady imports over the last decade (+2%/10 years average)**
- **NH supply holds 67% of import shares**
  - Almost exclusively ensured by **Turkey**  
(46 000 t in 2021 | +10%/ 4 year's average)
  - Plummeting Israeli volumes over the last 8 years  
(-13 000 t in since 2013 | 1 300 t in 2021)
- **1/3<sup>rd</sup> of supply ensured by SH origins**
  - 13% of total **SAR** grapefruit exports in 2021 (22 000 t)  
Steady progress over the last 4 years (+10%/ 4 year's average)

# Focus – Ukraine Citrus Market

All citrus - UKRAINE - Imports  
(000 tonnes | source : Trademap)



UKRAINE - Imports by variety  
(In tonnes | sources: Comtrade)



- **A 342 000 tons market in 2021**
- **A good market recovery since 2015**  
(+112 000 tons in 7 years)
- **Suppliers mainly from the Northern Hemisphere** (91% of total supply in 2021)
  - **Turkey's** third trading partner  
(10% of total citrus exports | 780 000 tons in 2021)
  - **Egypt** dedicates 4% its citrus exports to Ukraine
- **Incidental destination for SH suppliers**
  - 11<sup>th</sup> recipient of **Argentinean** citrus  
(8 to 10 000 tons/year | 2% to 3% of total citrus exports)
  - **SAR** sending limited volumes to Ukraine  
(12 500 tons in 2021 | 0,05% of total exports)



# Focus – Russian Ukraine Citrus Market : 3

## main issues

- A difficult context :
  - An upsurge of freight costs (multiplied by 2,5 times compare to last season).
  - A soar in transit time due to congestion in ports and containers scanning process.
- Reduced shipping service to Russia: since March only MSC (Containerised) and Baltic Shipping (Conventional) have maintained their calls.

### Payments ?

- International credit insurance coverage of Russia is gone. Payment facilities are given solely at the shipper's risk.
- Only 7 Russian banks are excluded from SWIFT, payments can still be made through banks that are not under western sanctions.
- Financial instability remains, Russian central bank lower interest rates to limit inflation and maintain exchange rates.

### Consumption ?

- Retail price are soaring despite the effort to undermine the inflation
  - in April, retail prices of food were an average of 17.8%\* higher than a year to date.
  - Sugar suffers from a 67%\* increase, while fruits and vegetables retail prices rose up to 33%\*.

*\*Source: Russia's statistics agency*

- To week 17 departure, **SAR** lemon exports to Russia falling by 84% on a year to date basis
- To week 18 departure, **Argentina** lemon exports to Russia also diving by -16% on a year to date basis
- Since the outbreak of the conflict, exports of **Ecuadorian** bananas have fallen by 20% compare to 2021 (22 000 ton/week)



# Elections of WCO Chairs

# Elections of WCO Officials



WCO is chaired by two countries for a mandate of 2 years (renewable once).



Representative from the Northern Hemisphere & a representative from the Southern Hemisphere.



Only country members can nominate a Chairman.



The nominee's CV must be sent to the Secretariat in advance of the AGM, whereby the nominee must accept to stand for Chairman and the nominee must be seconded by one other country member.



If there is more than one nomination for the Northern Hemisphere and/or the Southern Hemisphere, then elections will take place at the AGM.



During the elections, each full country member is entitled to one vote.



World Citrus Organisation



# Elections of WCO Officials



## **Northern Hemisphere**

- Ailimpo, Spain -

*José Antonio Garcia Fernandez*



## **Southern Hemisphere**

- Citrus Growers' Association, South Africa -

*Justin Chadwick*



Financial matters

Income	2019-2020	2021
Fee	35.015,36 €	32.573,69 €
GCG	7.980,13 €	
<b>Total</b>	<b>42.995,49 €</b>	<b>32.573,69 €</b>
Expenditure	2019-2020	2021
Secretariat	22.000,00 €	27.000,00 €
CIRAD	0,00 €	5.250,00 €
Bank costs	15,75 €	21,00 €
GCC	1.210,00 €	
Meeting	0,00 €	
Miscellaneous	1.747,24 €	174,24 €
<b>Total</b>	<b>24.972,99 €</b>	<b>32.445,24 €</b>
<b>Balance</b>	<b>18.022,50 €</b>	<b>128,45 €</b>
<b>GRD BALANCE</b>	<b>18.022,50 €</b>	<b>18.150,95 €</b>

## 2021

- Financial year in balance for 2021
- Contribution:
  - 2,500 € for full members
  - 500 € associated members
- Pending payment of Fruitnet of GCC of 19.750 €
- No meeting costs
- Secretariat and CIRAD costs
- Approval of the account 2021
- Discharge
- Account of WCO incorporated into Freshfel fiscal declaration

## 2022

- Statu quo membership fee and secretariat cost
- GCC income/cost TBC
- Support of statistical tool upgrade



# Membership update

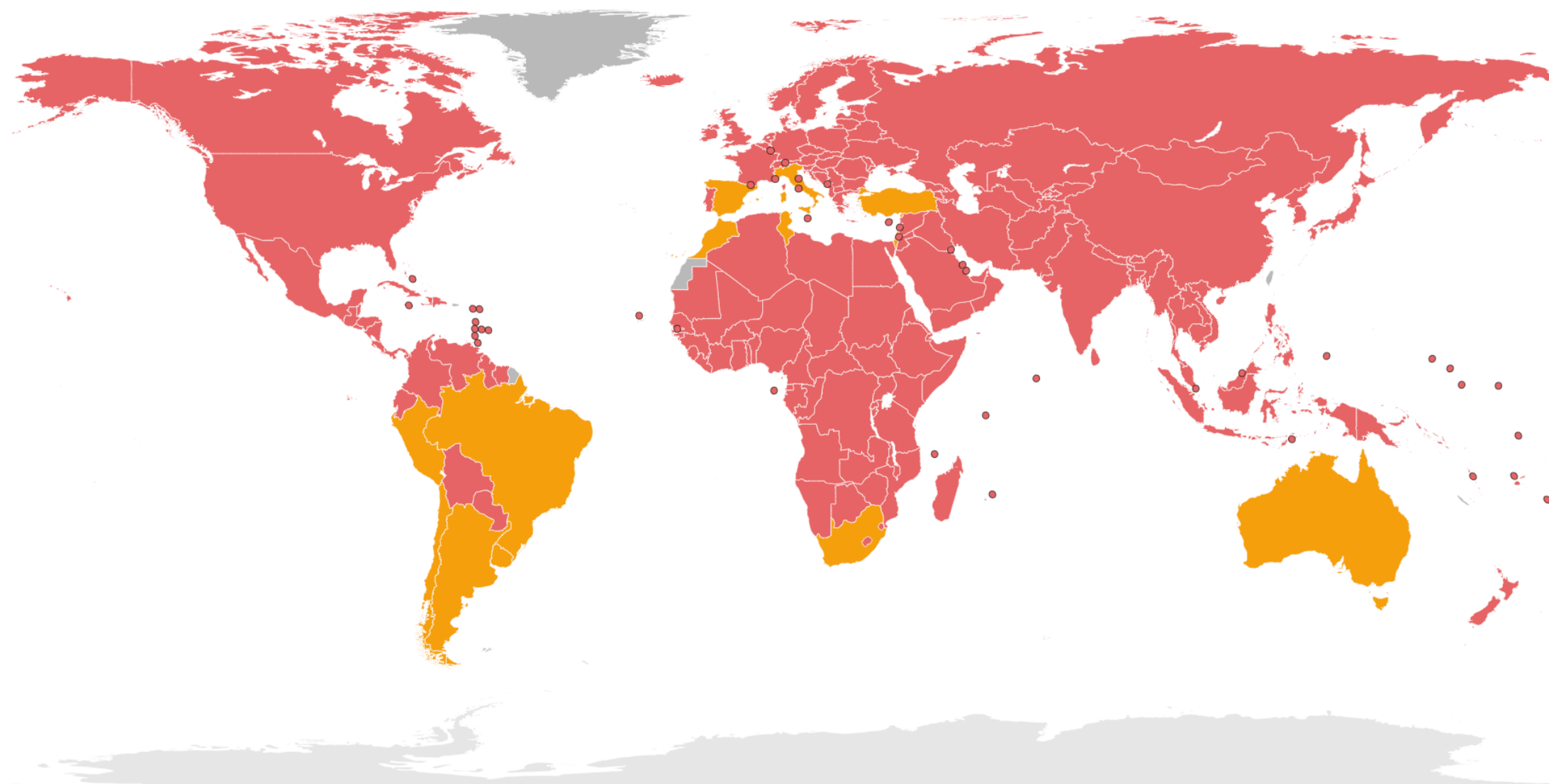


# Membership update

**Steadily growing Association membership!**



**WCO full members**



**World Citrus Organisation**



# Membership update

## New members



Argentina *(full member)*



Fruit Market International (FMI) BV *(affiliated member)*



Apeel Sciences *(affiliated member)*



World Citrus Organisation



# Health & Nutrition Working Group update



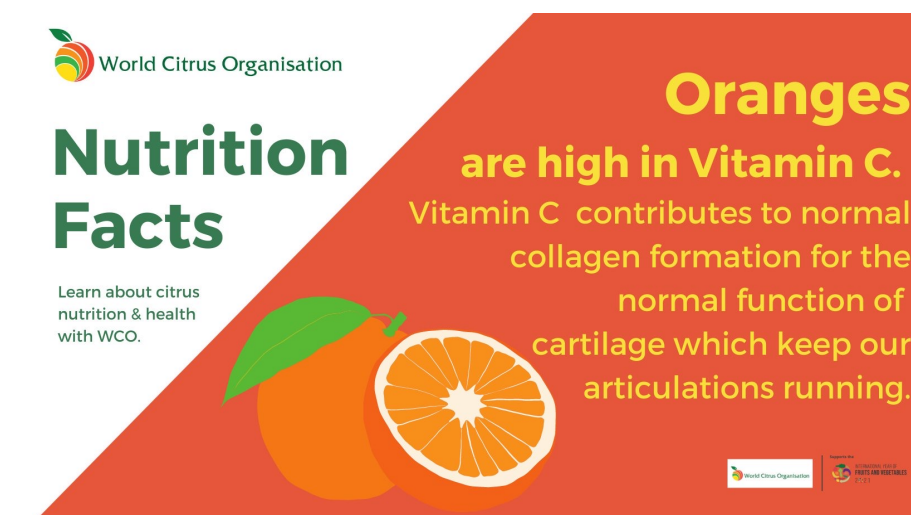
# Health & Nutrition Working Group update

## WG meeting on 26 October 2021

- **Feasibility assessment of World Citrus Nutritional Values Studies with support from CIRAD**
  - Possibility to begin study focusing on Mediterranean production (literature available)
  - Collect necessary data with support from WCO members (eg. Florida & Brazil) on tropical areas.
  - Further research to fill 'gaps' via CIRAD & WCO membership literature/evidence
  - Budget required
- **EU nutrition & health claims presentation - 5aldia**
  - Claims at EU level so far rejected due to lack of robust scientific evidence or human trials
  - Avenues for further exploration WHO & FAO

## WCO social media pilot campaign 2021

- Nutrition facts per product
- Twitter & LinkedIn
- 1 post every 2 weeks





# Health & Nutrition Working Group update

**Health & Nutrition Working Group – CIRAD pre-study – C Dhuique-Mayer PHD**



**Project: presenting the most complete and innovative databank on nutrition – citrus fruits**

- Including the most relevant varieties per citrus family (ex: EP – clementine/late hybrids)
- Including the two main growing conditions: “Mediterranean and Tropical”
- Macronutrient AND micronutrients (minerals/vitamins) AND phytonutrients (Carotenoids,...)

**Challenges shown by the preliminary study led in 2021**

- Lack of information on tropical citrus – only partial information available
- Mediterranean citrus:
  - Only generic information for macronutrients (oranges/lemon/...)
  - Information available for micro/phytonutrients (need of shifting to another variety sometime)

**What can be done:**

- A technical sheet by citrus family, presenting generic information on macronutrients + details for relevant citrus varieties for micro/phytonutrients – Mediterranean climate
- Financial proposal – delivery of the study by spring 2023
- Continuing to investigate (WCO network?) to find information for tropical citrus





# Annual Conference 2022

# Options to be considered

- Topical session with face-to-face meeting during Fruit Attraction (4-6 October 2022) and a technical visit prior to the event (3 October 2022?)
- Ongoing collaboration with Fruitnet for a half-a-day citrus session including the Northern Hemisphere citrus forecast in November (online event)
- Any other suggestions



AOB



# Contact the WCO Secretariat



Philippe Binard  
Secretary General



Nicola Pisano  
Policy Advisor



Gil Kaufman  
Data Advisor

[wco@worldcitrusorganisation.org](mailto:wco@worldcitrusorganisation.org)



Thank you!