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Report Highlights:

In MY 2024/25, a reduction in European Union (EU) orange, mandarin, and lemon production is anticipated compared to previous season's levels, while grapefruit output is expected to grow marginally. However similar trends in other Northern Hemisphere citrus producers will prevent EU imports from expanding, at least until off-season produce enters the market. In the context of a steady internal demand and regionalization of trade, intra-EU trade from producing areas to main consuming Member States is anticipated to prevail.

Disclaimer: This report presents the outlook for fresh oranges, orange juice, fresh tangerines/mandarins, fresh lemon/limes, and fresh grapefruits in the European Union (EU). This report presents the views of the authors and does not reflect the official views of the U.S. Department of Agriculture (USDA). The data is not official USDA data.

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Executive Summary

In Marketing Year (MY) 2024/25, the total European Union (EU) production of citrus is projected to amount to 10.1 million metric tons (MT), down from the previous marketing year's high when it hit 10.5 million MT. In MY 2024/25, EU orange, mandarin, and lemon production contracted compared to MY 2023/24. Grapefruits are the only exception to the rule with an increase in output projected for MY 2024/25. EU citrus production is concentrated in the Mediterranean region. Spain and Italy represent the leading EU citrus producers, followed by Greece, Portugal, and Cyprus.

While area planted to lemons and grapefruits in the EU follows an upwards trend, area planted to oranges is relatively stable and mandarins and tangerine area is trending down. The reduction in area can be explained by abandonment of the less profitable orchards, and in some cases the lack of generational renewal. In some instances, citrus crops in the EU compete both in terms of area but also in terms of demand with alternative subtropical tree crops such as avocados or mangoes.

Climate alterations ranging from extreme heat to drought leading to irrigation water limitations, hail, frost, flooding or torrential rains have jeopardized yields and impacted quality aspects (fruit size, fruit color) in the EU's main citrus producing areas. In some instances, these changing conditions have triggered the surge of new pest and diseases. Similarly, in some producing areas, while it has no impact over the fruit's sugar content or flavor, an increased occurrence of green peel aspect has been reported as citrus fruit respond to the reduced day and night temperature difference. The resulting existence of non-commercial quality fruits results in a gap between what is produced (gross production) and what reaches the market (net production). EU citrus producers remain vigilant to pests imported from third countries that have the potential to damage EU citrus production in a context where active ingredients for plant protection products become increasingly less available.

Not only the agronomic resilience of citrus crops is being tested, but also citrus-farming economics. In MY 2024/25, farmers across the EU continued facing increased costs ranging from energy costs (fuel, electricity) to labor and plant protection products. Similarly, the difficulty in generational renewal continues to pose a challenge in the continuation of farming activity. Improved water management systems, crop operations mechanization, access to climate and pest resilient varieties, as well as optimization in the use of agricultural inputs are seen as key to address the above-mentioned challenges.

The EU is a net importer of citrus fruits, with imports largely exceeding exports. Oranges followed by lemons represent the largest imported citrus. Large amount of trade takes place internally, from producing to non-producing EU Member States. A regionalization of trade has taken place as Asian routes become increasingly challenging. EU neighboring citrus producers in the Mediterranean Basin (such as Egypt or Türkiye) are concentrating their export efforts in the EU. EU citrus producers are following closely developments regarding the EU-Mercosur Agreement, given the prominent position of Mercosur members countries as suppliers of citrus, particularly in the off-season, and citrus-based processed products, such as Frozen Concentrated Orange Juice (FCOJ). EU fresh citrus exports in MY 2024/25 are expected to contract in line with the EU's short crop.

After hitting record volumes during the pandemic, fresh citrus consumption has returned to pre-pandemic levels. However, growing consumption is projected for eastern EU Member States, and to a lesser extent, in more mature markets such as France.

Oranges

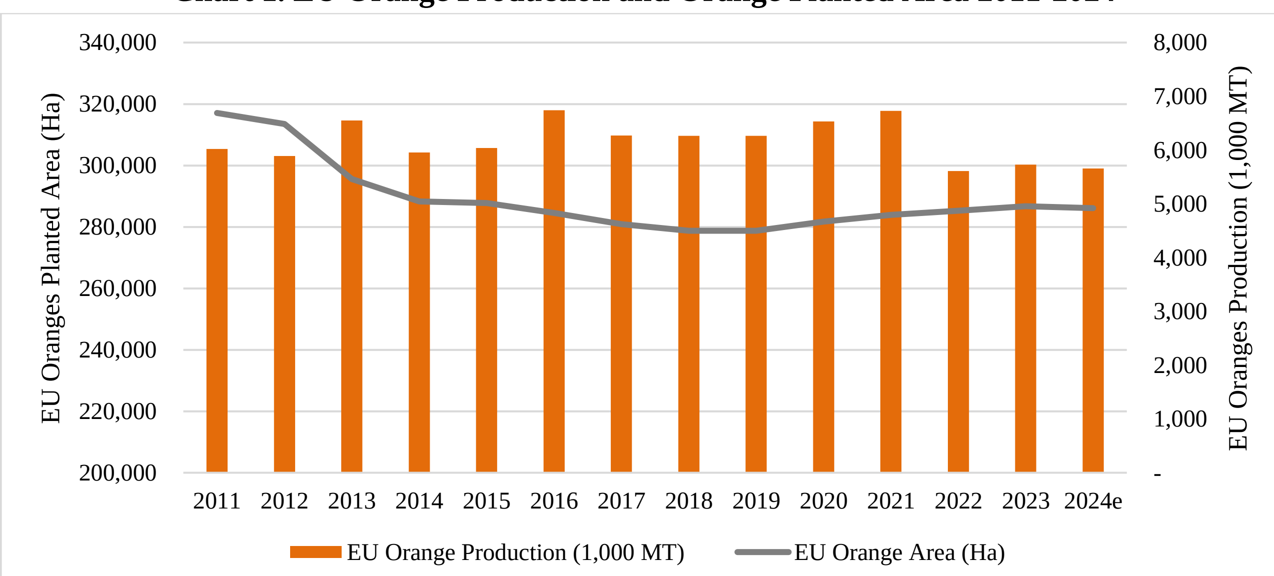
Table 1. EU Oranges Production, Supply, and Distribution

Oranges, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Oct 2022		Oct 2023		Oct 2024	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	285,348	285,224	286,863	286,755		286,131
Area Harvested (HECTARES)	264,632	264,352	265,831	264,387		263,565
Production (1000 MT)	5,580	5,610	5,475	5,728		5,658
Imports (1000 MT)	1,047	1,046	1,090	938		950
Total Supply (1000 MT)	6,627	6,656	6,565	6,666		6,608
Exports (1000 MT)	343	343	300	307		325
Fresh Dom. Consumption (1000 MT)	5,660	5,640	5,625	5,660		5,635
For Processing (1000 MT)	624	673	640	699		648
Total Distribution (1000 MT)	6,627	6,656	6,565	6,666		6,608
(HECTARES), (1000 TREES), (1000 MT)						

Not official USDA data.

Sources: Trade for MY 2022/23 and 2023/24: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

Chart 1. EU Orange Production and Orange Planted Area 2011-2024



Source: FAS EU posts.

In MY 2024/25, EU orange production is projected at just above 5.6 million MT, down from the 5.7 million MT orange crop obtained in MY 2023/24. Orange production is the largest citrus category within the EU, and Spain accounts for 50 percent of the bloc's production.

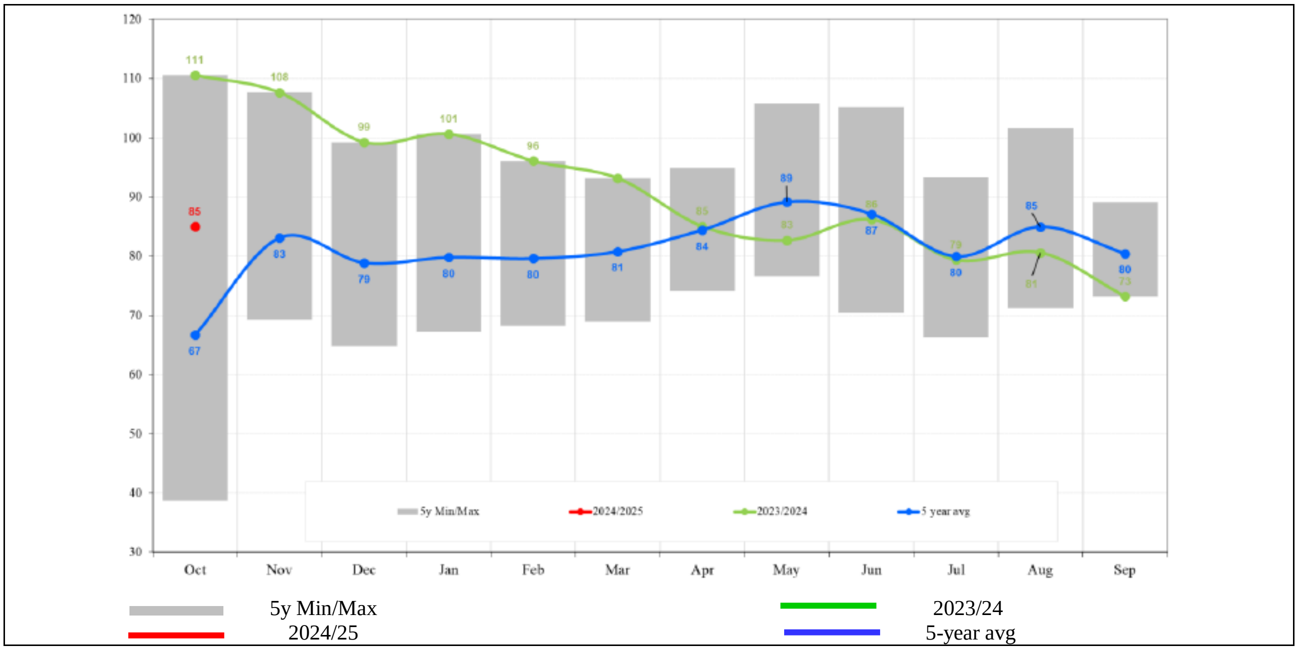
The larger production estimated for Spain and Portugal did not offset the reduced crop projected in Italy, where drought pushed productivity down and negatively affected fruit sizes. Greece orange production is also projected down for MY 2024/25. Peloponnese (southern Greece) and Etoloakarnania (western Greece) are the main orange-producing areas. Although Etoloakarnania received higher rainfall levels, drought caused yield reduction in Peloponnese.

In Spain, the abundant precipitation across the crop cycle restored soil moisture and filled dams, securing sufficient water supplies for orange production in Andalucia and increasing production expectations in this region. Andalucia, Spain's largest growing orange region, suffered severe water allocation restrictions in the two former marketing years. Torrential rain and flooding caused by the DANA (a Spanish acronym for a High-Altitude Isolated Depression) on October 29, 2024, had devastating consequences in certain areas in the Valencia region of Spain. Farmers across the affected areas report the loss of the current harvest due to the excessive humidity, hail damage to the fruit, or dehiscence from the trees. Tree crops in this area registered permanent damage, as the force of the water uprooted tree crops or caused damage in the wood that may ultimately end with the death of the plant. However, consequences on the overall EU orange output are expected to be limited.

Portugal's citrus production is concentrated in Algarve and mostly consists of orange production. In MY 2024/25, irrigation water restrictions limited yields and preempted area from expanding. For information regarding main orange growing regions and varieties, please consult Annex I and Annex II respectively.

According to the EU Citrus Dashboard, MY 2024/25 began with prices above five-year average levels, partially due to the larger fruit sizes and the lower presence of South Hemisphere oranges at the beginning of the North Hemisphere marketing year. However, these were still well below prices received by farmers at the beginning of MY 2023/24.

Chart 2. EU Orange Prices[1] Evolution (€/ 100 kg) MY 2022/23 - MY 2023/24



Source: [DG AGRI Dashboard: Citrus Fruit](#).

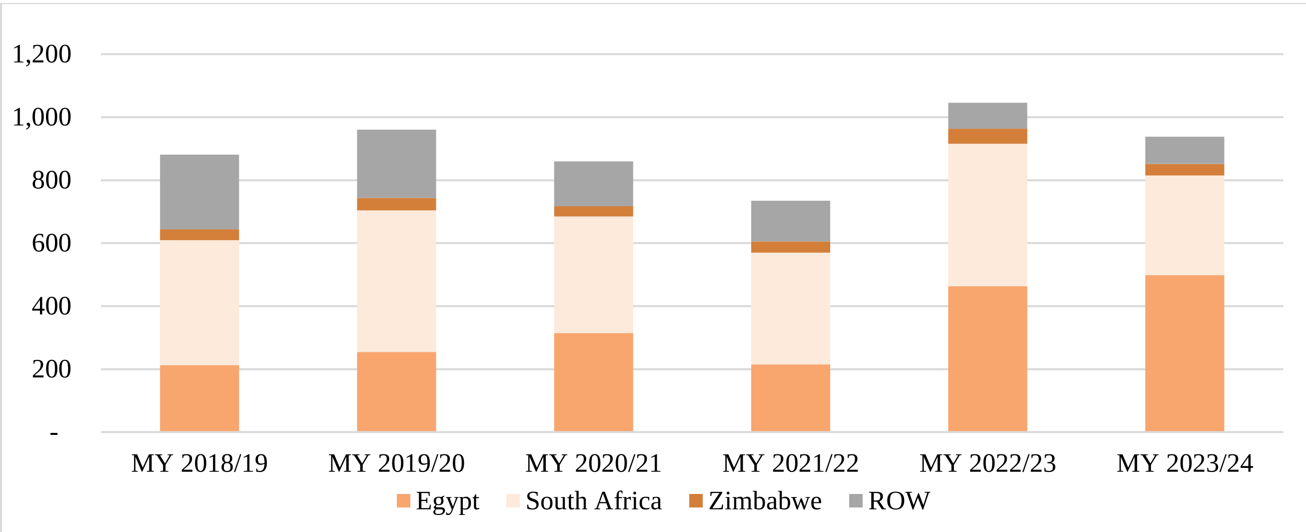
In MY 2024/25, fresh orange consumption is expected to decline compared to the previous season. This responds to the sharply reduced production projected in Italy compared to MY 2023/24 levels, when the country registered a bumper orange crop, largely devoted for fresh consumption. The demand for citrus fruits begins to pick up in September, coinciding with the start of the school year. The extension of the orange marketing season, thanks to high quality late season varieties, together with the boost of freshly squeezed orange juice in outlets in stores, contributes to keeping EU fresh orange demand slightly above pre-pandemic levels. Orange processing is projected to decline in MY 2024/25, despite the relatively larger availability of oranges in Spain, where a larger share of processing use takes place, given the reportedly improved caliber of fruits. For additional information see [Orange Juice](#) section below.

In MY 2024/25, a stable volume of oranges, ultimately for both fresh consumption and processing, is anticipated to be imported to the EU. Despite a drop in domestic production, South African oranges were not that present in the EU market at the beginning of the Northern Hemisphere marketing year. Currently, all eyes are on the pace of imports of oranges from Egypt, whose season overlaps with the EU's crop season. This is particularly critical, given that non-EU Mediterranean orange producers are giving priority to their sales in the EU over the more challenging or costly Asian routes.

[1] Ex-packaging station.

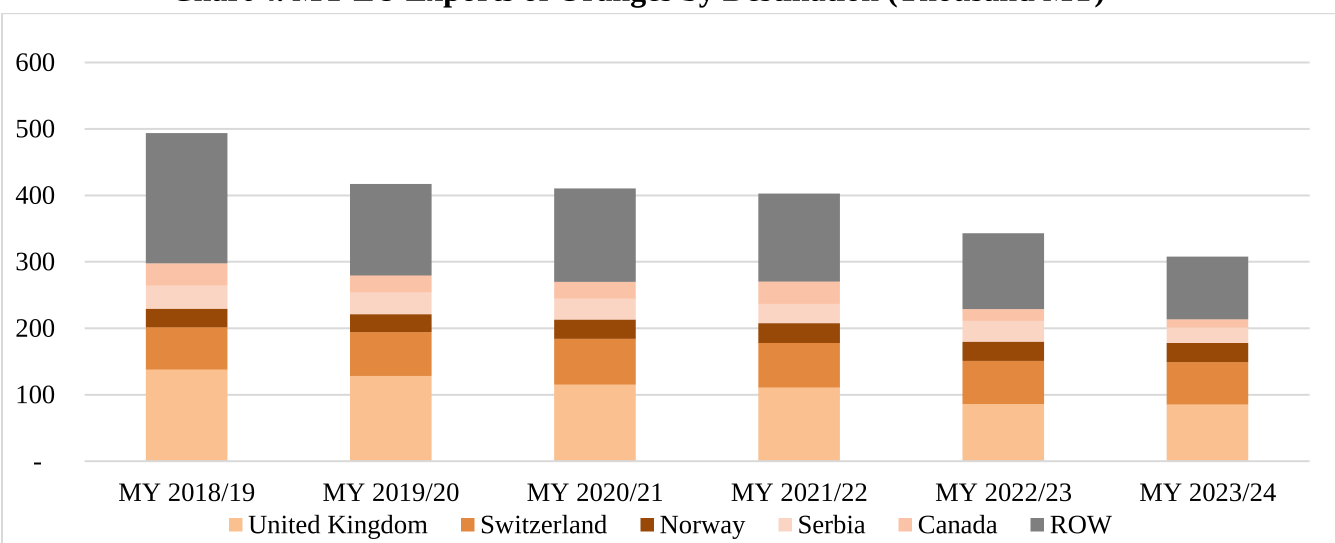
EU orange exports in MY 2024/25 are expected to recover, after hitting bottom in MY 2023/24, considering the reduced competition by other orange producers in the non-EU Mediterranean basin producers and the larger supplies available in Spain, the EU's largest orange producer and exporter. Main destinations for EU oranges, primarily exported out of Spain, include the United Kingdom, Switzerland, Serbia, Norway, and Canada.

Chart 3. MY EU Imports of Oranges by Origin (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Chart 4. MY EU Exports of Oranges by Destination (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

For additional information, please consult the Policy section at the end of this report.

Orange Juice

Table 2. Production, Supply, and Distribution (Brix 65)

Orange Juice	2022/2023		2023/2024		2024/2025	
Market Year Begins	Oct 2022		Oct 2023		Oct 2024	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	624,000	673,000	640,000	699,000		648,000
Beginning Stocks (MT)	15,000	15,000	15,000	15,000		15,000
Production (MT)	48,374	52,172	49,614	54,188		50,234
Imports (MT)	525,090	530,846	528,000	479,104		527,000
Total Supply (MT)	588,464	598,018	592,614	548,292		592,234
Exports (MT)	110,798	111,158	116,000	114,123		111,000
Domestic Consumption (MT)	462,666	471,860	461,614	419,169		466,234
Ending Stocks (MT)	15,000	15,000	15,000	15,000		15,000
Total Distribution (MT)	588,464	598,018	592,614	548,292		592,234
(MT)						

Not official USDA data.

Sources: Trade for MY 2022/23 and 2023/24: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

The improved caliber of oranges in Spain in MY 2024/25 compared to the previous season are expected to result in reduced volumes devoted to processing. Hence EU orange juice production is expected down from previous season levels. A smaller number of oranges is expected to be devoted to orange juice also in Italy, where citrus production is largely intended for fresh consumption.

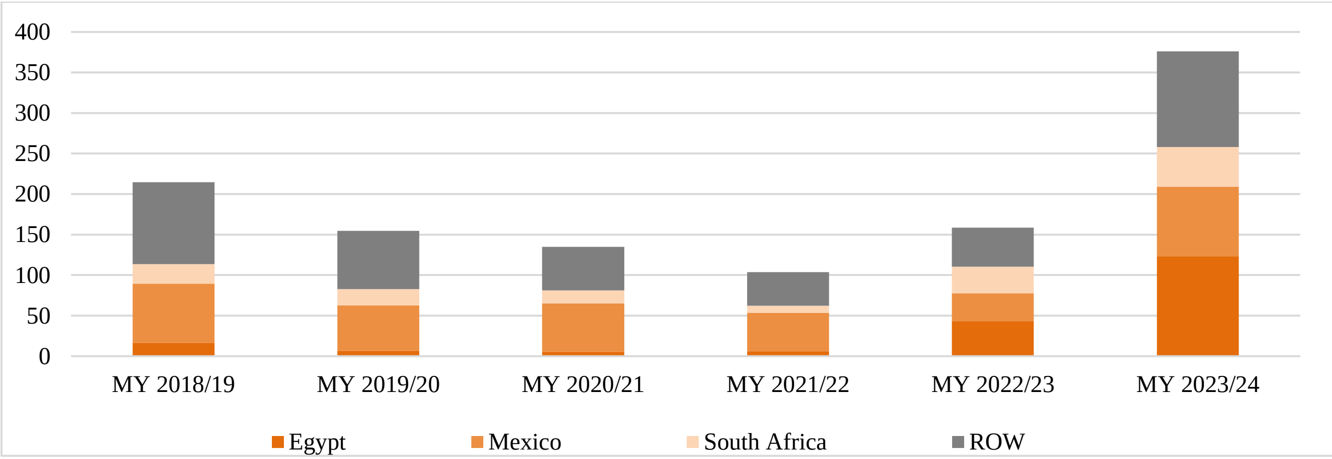
In MY 2024/25, orange juice import levels are expected to increase compared to the previous season, when the tight global market balance and price surge pushed imports down. Egypt is the EU's second largest supplier of orange juice after Brazil, which accounts for over 85 percent of the EU's import market.

In MY 2024/25, EU orange juice exports are expected to decline in line with the smaller domestic supply. The United Kingdom remains by far the largest destination of EU orange juice, accounting for over half of the EU's exports.

In MY 2024/25, orange juice consumption is expected to bounce back to an average level after hitting low levels the previous season.

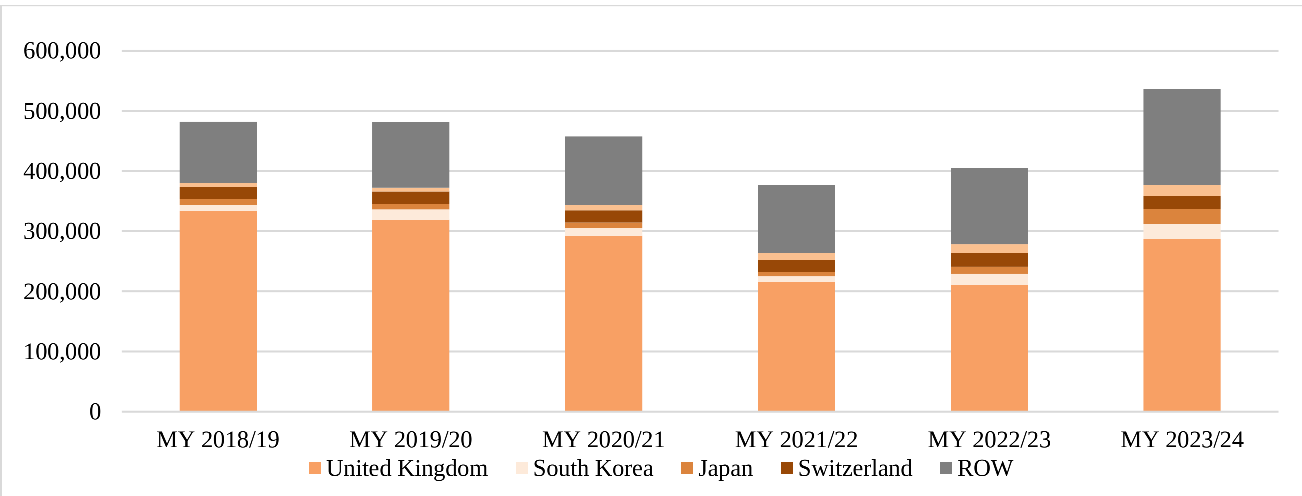
For additional information, please consult the Policy section at the end of this report.

Chart 5. EU Imports of Orange Juice, excluding Brazil, by Origin (Million USD, Brix 65)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Chart 6. EU Exports of Orange Juice by Destination (Million USD, Brix 65)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Tangerines/Mandarins

Table 3. Production, Supply, and Distribution

Tangerines/Mandarins, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Oct 2022		Oct 2023		Oct 2024	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	146,120	146,717	142,000	146,913		146,699
Area Harvested (HECTARES)	136,458	136,346	132,485	137,346		137,221
Production (1000 MT)	2,947	2,821	2,650	2,955		2,845
Imports (1000 MT)	482	482	470	452		450
Total Supply (1000 MT)	3,429	3,303	3,120	3,407		3,295
Exports (1000 MT)	296	296	295	313		300
Fresh Dom. Consumption (1000 MT)	2,913	2,711	2,575	2,710		2,700
For Processing (1000 MT)	220	296	250	384		295
Total Distribution (1000 MT)	3,429	3,303	3,120	3,407		3,295
(HECTARES), (1000 TREES), (1000 MT)						

Not official USDA data.

Sources: Trade for MY 2022/23 and 2023/24: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

EU tangerine and mandarin production in MY 2024/25 is estimated at 2.8 MMT, down from the 2.9 MMT bumper crop registered in the previous season. In Spain, the EU's largest mandarin and tangerine EU growing Member State, MY 2024/25 production is projected down. Mandarins and tangerines have ripened about two weeks ahead of normal. Fruit sizes are reportedly good thanks to the persistent rains prevailing between the end of October and mid-November. Satsuma tangerines and early season clementines are the exception to the rule as part of the production was already harvested when the long-awaited rains arrived.[2] The colder temperatures since early December are favoring proper fruit ripening for the second half of the season. In some instances, saturated soils resulted in delays in harvesting operations. Torrential rain and flooding caused by the DANA (a Spanish acronym for a High-Altitude Isolated Depression) on October 29, 2024, had devastating consequences in certain areas in the Valencia region of Spain. However, the consequences on the overall EU tangerine and mandarin output are expected to be limited.

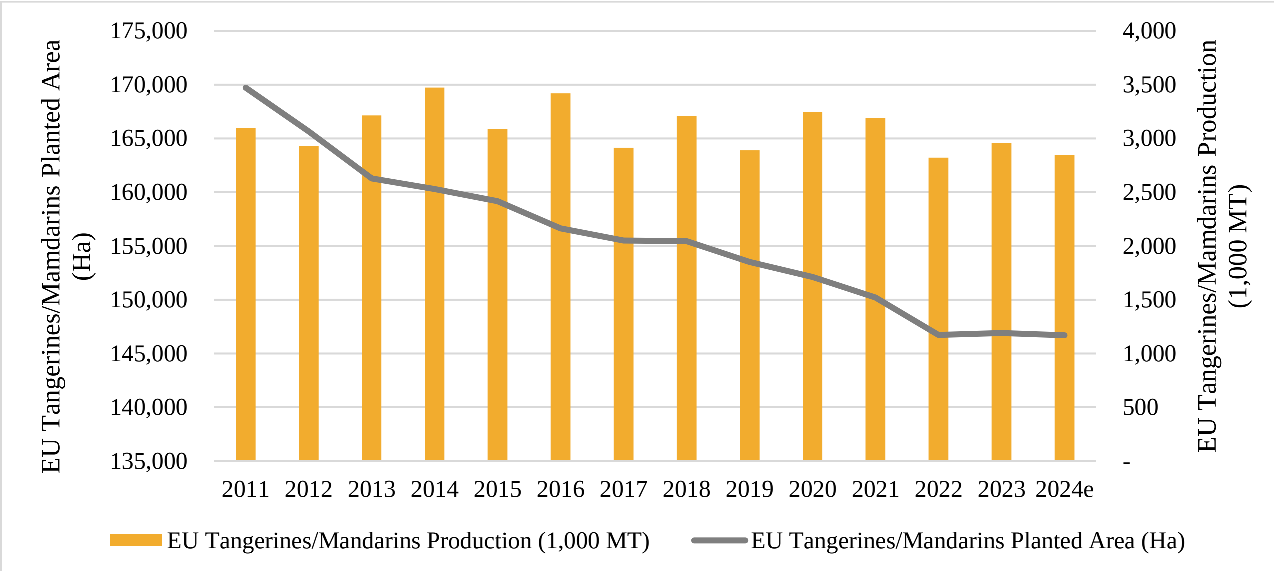
Italy's MY 2024/25 tangerine and mandarin production is forecast to decline compared to MY 2023/24 due to the summer drought that hit Sicily and Calabria, some of Italy's largest growing regions. Italy's tangerine production consists of over 80 percent seedless clementines and nearly 20 percent mandarins. Greece's MY 2024/25 tangerine production is expected to remain flat compared to the previous year.

After years of constant contraction, EU's tangerine and mandarin area has stabilized at around 146 thousand Hectares. While Spain mandarin and tangerine area continues to contract slightly, Greece reports stability and a tepid increase in area is projected in Italy.

For information regarding main tangerine and mandarin growing regions and varieties, please consult Annex I and Annex II respectively.

[2] For additional information for tangerines and mandarins variety flowering and harvesting season, please consult Annex III.

Chart 7. EU Mandarins Production and Planted Area 2011-2024



Source: FAS EU posts.

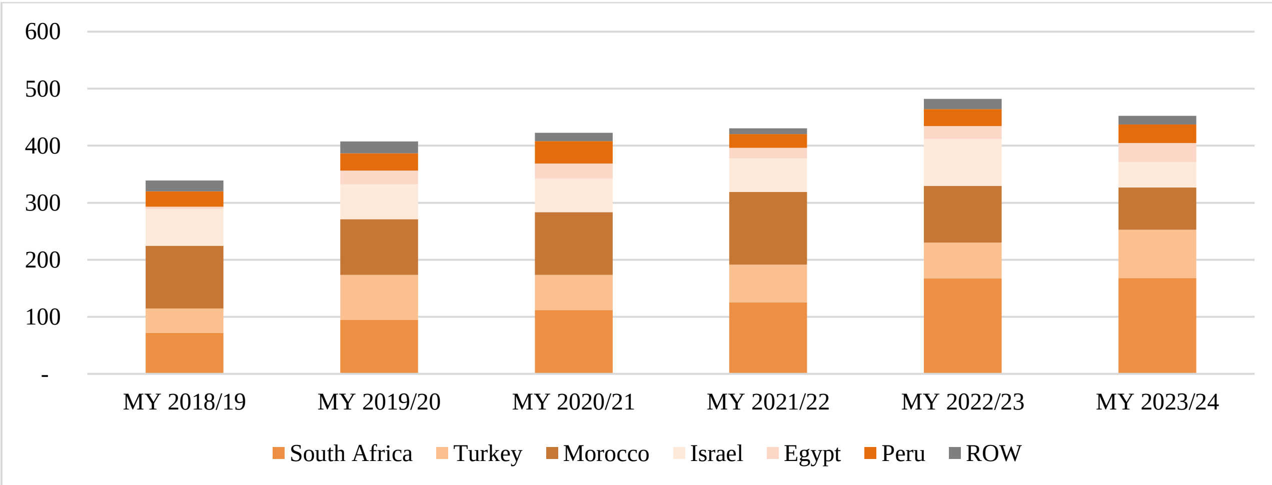
EU domestic tangerine and mandarin consumption levels are projected to remain stable and similar to pre-pandemic levels in MY 2024/25. The improved availability of global orange juice supply is expected to reduce the use of tangerines and mandarins for processing purposes in the EU. Most tangerines are consumed fresh. Europeans, particularly in producing countries, consume large quantities of clementines and mandarins during winter when the bulk of production hits the market.

Tangerine and mandarin imports by the EU are forecast to remain stable in MY 2024/25 as the somewhat reduced availability in non-EU Mediterranean countries would preempt imports from expanding. South Africa, in the off-season, and Morocco, Israel, and Türkiye, which overlap with the bloc's crop, are the EU's leading suppliers of mandarins and tangerines.

Reduced domestic availability, driven by the shorter EU crop, is expected to limit the bloc's export potential. At the same time, lower supplies in non-EU producers can result in increased opportunities for EU tangerines and mandarins in non-EU European countries such as the United Kingdom, Switzerland, Ukraine, Norway, and Serbia.

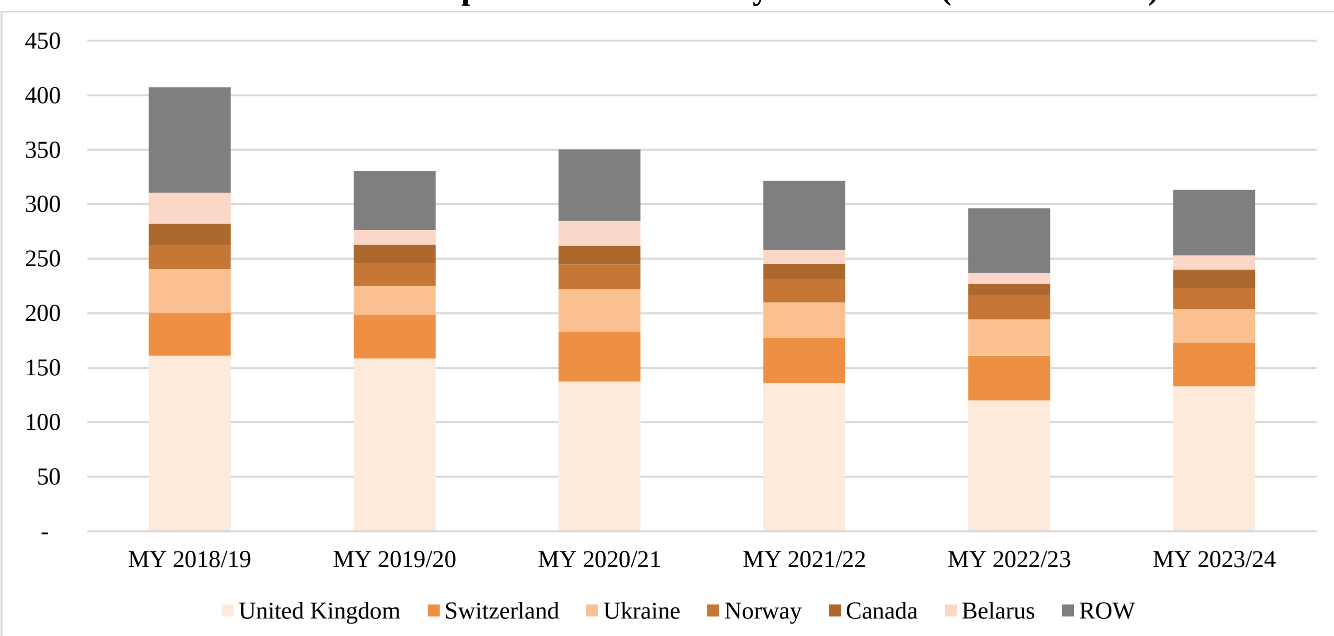
For additional information, please consult the Policy section at the end of this report.

Chart 8. MY EU Imports of Mandarins by Origin (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Chart 9. MY EU Exports of Mandarins by Destination (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Lemons/Limes

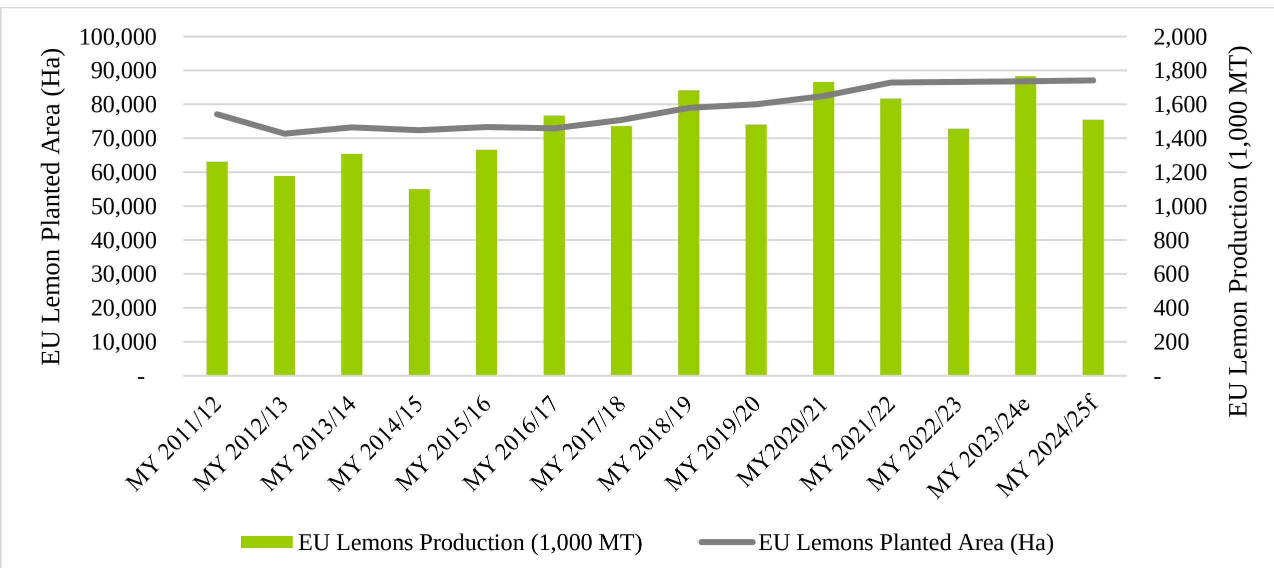
Table 4. Production, Supply, and Distribution

Lemons/Limes, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Oct 2022		Oct 2023		Oct 2024	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	87,838	86,630	89,043	86,855		87,092
Area Harvested (HECTARES)	77,192	76,565	78,539	78,667		81,293
Production (1000 MT)	1,453	1,444	1,673	1,773		1,517
Imports (1000 MT)	581	582	600	501		550
Total Supply (1000 MT)	2,034	2,026	2,273	2,274		2,067
Exports (1000 MT)	122	123	140	141		140
Fresh Dom. Consumption (1000 MT)	1,650	1,605	1,780	1,695[3]		1,625
For Processing (1000 MT)	262	298	353	438		302
Total Distribution (1000 MT)	2,034	2,026	2,273	2,274		2,067
(HECTARES), (1000 TREES), (1000 MT)						

Not official USDA data.

Sources: Trade for MY 2022/23 and 2023/24: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

Chart 10. EU Lemon Production and Planted Area MY 2011/12 -MY 2024/25



Source: FAS EU posts.

For information regarding main lemon growing regions and varieties, please consult Annex I and Annex II respectively.

[3] According to industry sources, part of the bumper lemon crop remained unharvested, hence artificially increasing consumption volumes in the balance.

In MY 2024/25, EU lemon production is forecast to revert to average levels after the bumper crop registered in MY 2023/24, and amount to just over 1.5 million MT. Spain and Italy are the first and second largest EU lemon producers, accounting for nearly 65 and 30 percent of the EU's total lemon production respectively.

The production decline anticipated for MY 2024/25 is largely driven by the yield reduction registered in Spain,[4] which saw its MY 2024/25 lemon production decline by twenty percent down from the historically record levels registered in MY 2023/24. The production reduction is anticipated to be steeper for Verna lemons than for Primofiori lemons.[5] A decline in lemon production is also reported in Italy, where area is picking up, whereas in Greece a slightly higher lemon output is projected for MY 2024/25.

With over 11,500 Ha cultivated under organic practices, Spain organic lemon area continues to expand in response to increased demand for organic lemon peel products. Similarly, overall area planted to lemons in Spain continues to grow in response to EU and third country market demand.

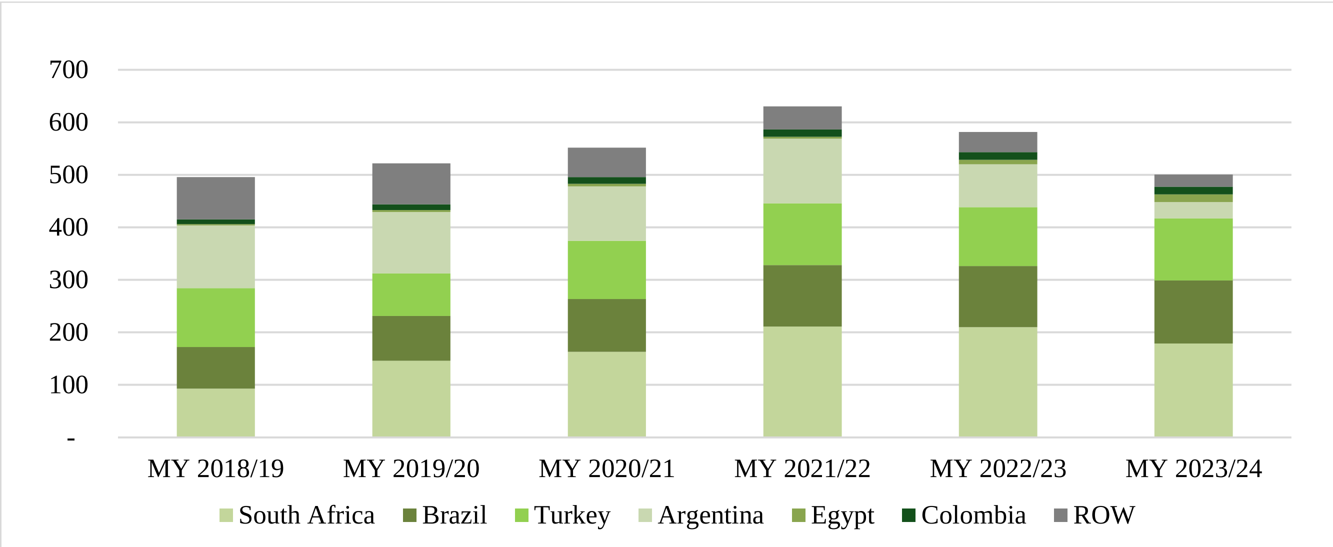
Consumption of lemons in the EU in MY 2024/25 is anticipated to remain steady. Lemons in the EU are primarily consumed fresh, although increasing opportunities for processing uses (food and industrial) continue to arise. Given the steady increase in area planted to lemons, oversupply like the one registered in MY 2023/24, with increased quantities being devoted for processing, cannot be ruled out in the future.

In light of the reduction in domestic supplies, EU lemon imports are revised up for MY 2024/25. MY 2023/24 EU lemon imports declined significantly as there were ample supplies domestically. However, imports originating in Türkiye, the EU's leading supplier in the Northern Hemisphere, and Egypt grew. Conversely, imports originating in Southern Hemisphere suppliers such as South Africa and Argentina witnessed declines. Brazil, whose exports to the EU largely consist of limes, is the exception to the rule and managed to keep its exports to the EU steady.

In MY 2024/25 exports are projected to stay at similar levels to MY 2023/24, when ample supplies resulted in an expansion of EU lemon exports, highly dominated by Spain. Likewise, MY 2023/24. The ample domestic supply, particularly of Verna lemons, allowed for the export expansion. Main destinations for EU lemons are predominately neighboring markets such as the United Kingdom, Switzerland, Norway and Serbia. Within the EU, Germany and France are main destination markets for EU citrus, and the ample supply and steady demand have supported intra-EU trade from producing Member States to consumption markets.

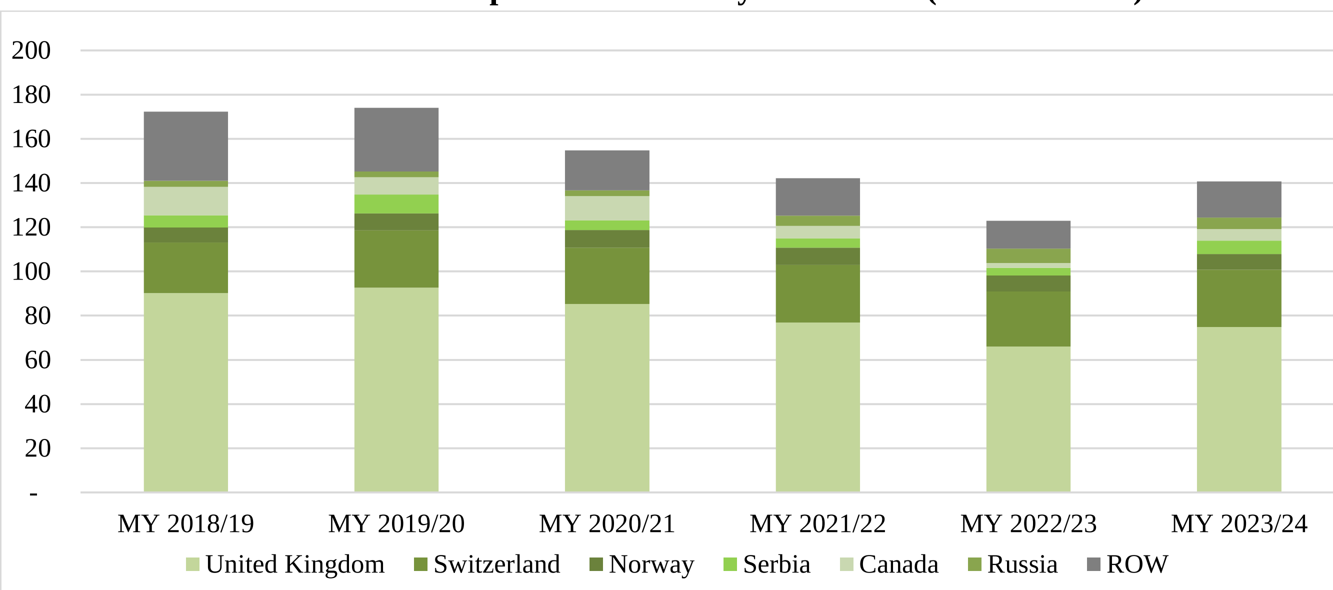
[4] Spain production data do not include unharvested lemons.
[5] For additional information regarding for flowering and harvesting season by lemon varieties, consult Annex III.

Chart 11. MY EU Imports of Lemons by Origin (Thousand MT)[6]



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Chart 12. MY EU Exports of Lemons by Destination (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

For additional information, please consult the Policy section at the end of this report.

[6] HS Code 080550 includes lemons and limes combined. Products under this HS code originating in Brazil, Colombia and Mexico largely consist of limes.

Grapefruit

Table 5. Production, Supply, and Distribution

Grapefruit, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Oct 2022		Oct 2023		Oct 2024	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	4,230	4,183	4,614	4,346		4,350
Area Harvested (HECTARES)	3,323	3,328	3,735	3,467		3,470
Production (1000 MT)	98	98	108	110		111
Imports (1000 MT)	209	209	210	215		214
Total Supply (1000 MT)	307	307	318	325		325
Exports (1000 MT)	20	20	20	19		23
Fresh Dom. Consumption (1000 MT)	276	277	284	288		290
For Processing (1000 MT)	11	10	14	18		12
Total Distribution (1000 MT)	307	307	318	325		325
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data.

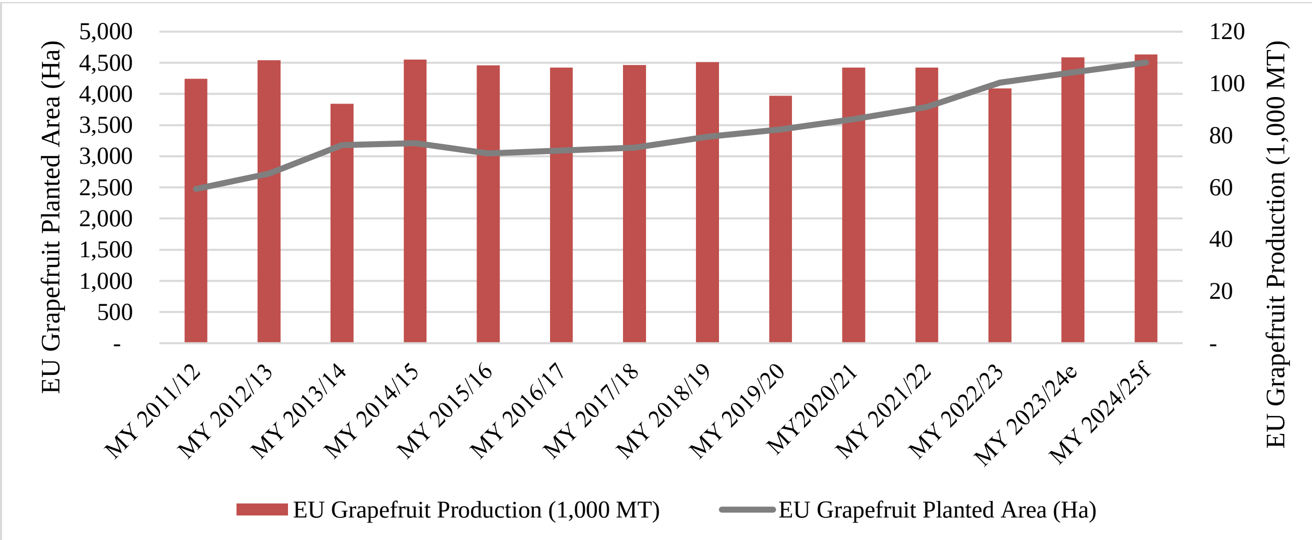
Sources: Trade for MY 2022/23 and 2023/24: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

MY 2024/25 EU grapefruit production is forecast to amount to 111 thousand MT. The production increase can be entirely attributed to Spain, which concentrates over three quarters of the EU's grapefruit production. Grapefruit production is anticipated to remain stable in Greece, Italy and Portugal. In Spain, new plantations entering production, primarily in Murcia, and drought-hit groves in Andalucía bouncing back to normal production after the previous drought-hit season, are the main drivers for the higher grapefruit output.

The Spanish grapefruit harvest started about two weeks ahead of normal. Despite the somewhat larger crop anticipated, the reduced presence of South African grapefruits in the EU at the end of the Southern hemisphere season has allowed EU producers to place their early harvest in the market. While production volumes of grapefruits are comparatively lower than other citrus fruits, Spain grapefruit area and production continues to expand.

For information regarding main grapefruit growing regions and varieties, please consult Annex I and Annex II respectively.

Chart 13. EU Grapefruit Production and Planted Area MY 2011/12-MY 2024/25f



Source: FAS EU posts.

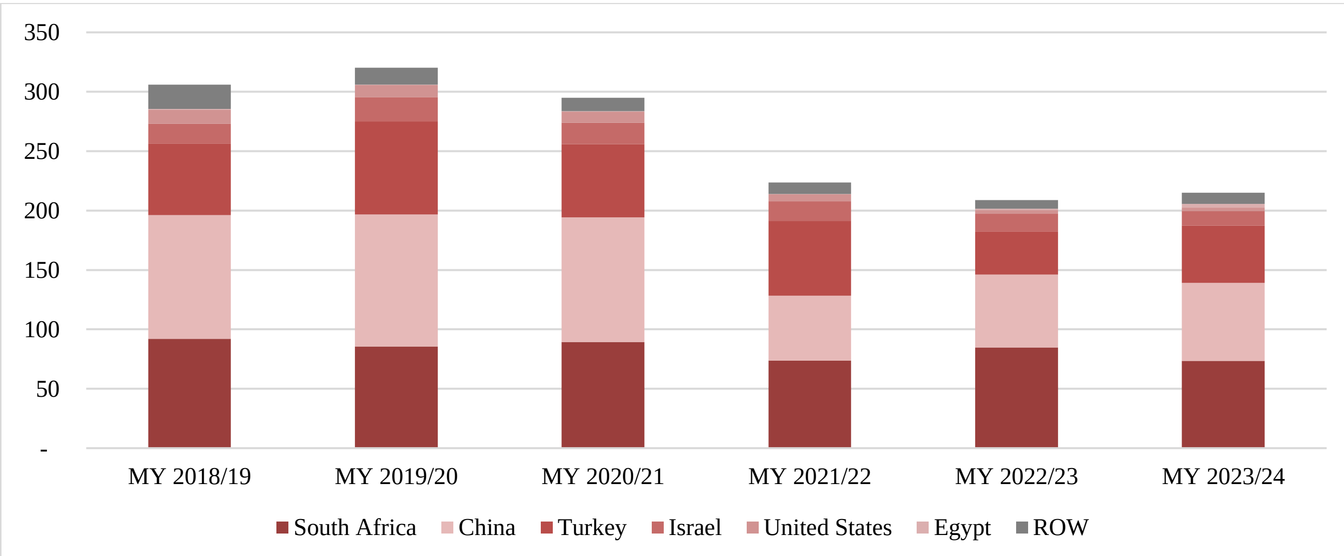
In MY 2024/25, EU grapefruit consumption, which largely takes place fresh, is revised up only slightly in response to the ample domestic supplies and readily available imports from South Africa. Germany and France are the EU's largest markets for grapefruits.

In Germany, with just five percent of total citrus consumption, grapefruits are a niche product. Nonetheless, they are considered important for the fruits section in supermarkets. Grapefruits are considered healthy due to their high content of vitamin C, but because of their bitter taste, they are more popular with older generations than with families with children. German consumption largely depends on imports and thus increased in MY 2023/24, given the larger availability from Spain, the country's main supplier, followed by China, South Africa, United States, the Netherlands (mostly consisting of transshipments), and Türkiye. French grapefruit demand, which used to be the largest in the EU, is slowly fading as Florida grapefruit presence becomes increasingly rare and expensive and consumers do not perceive other grapefruit varieties, especially the white-fleshed ones, as a substitute for this niche product because of their bitter taste.

In MY 2024/25, EU imports of grapefruit are expected to decline marginally given the anticipated ample internal availability and the reduced availability in main EU's trade partners. In MY 2023/24, imports of grapefruit held steady thanks to the influx from Türkiye. South Africa, especially in the off season, followed by China, Türkiye, and Israel, and the United States, to a much lesser extent, are the EU's main grapefruit suppliers. The conflict in the Middle East has reduced the presence of Israeli grapefruits in the EU market to the advantage of domestic Spanish grapefruits and imports from Türkiye. Since 2020, in the aftermath of EU duties on U.S. grapefruits and the lower production volumes, U.S. grapefruits to the EU plummeted. The United States has become a marginal supplier, yielding space in the market for Mediterranean grapefruits. After years of gradual decrease, imports from the United States substantially increased in MY 2023/24.

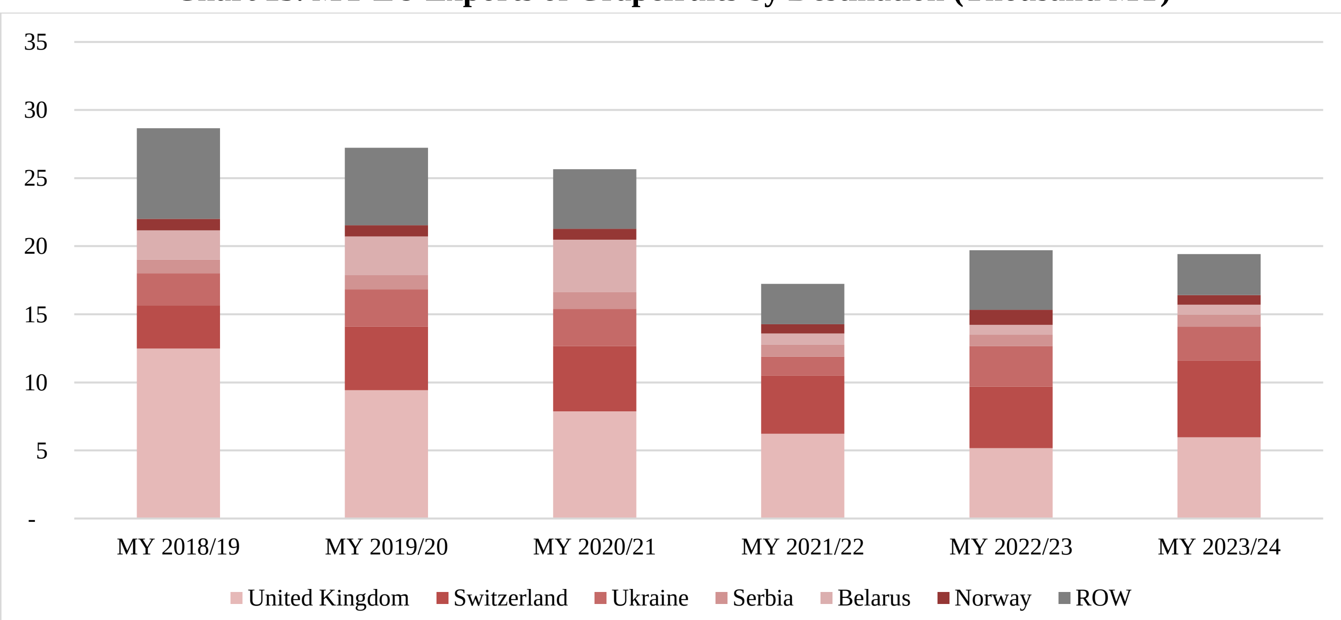
In MY 2024/25 EU grapefruits exports are projected to grow given the reduced competition by other non-EU Mediterranean producers. EU grapefruit exports are only minor and fairly concentrated to EU neighboring countries such as the United Kingdom, Switzerland, and to a lesser extent, Ukraine, Russia, Norway, and Serbia. A large portion of grapefruit trade occurs within the EU from producing regions, mainly located in Spain, to consuming Member States such as Germany, France or the Netherlands.

Chart 14. MY EU Imports of Grapefruits by Origin (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Chart 15. MY EU Exports of Grapefruits by Destination (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

For additional information, please consult the Policy section at the end of this report.

Policy

Common Agricultural Policy - Use of Crisis Measures

The new EU's Common Agricultural Policy (CAP) for 2023-2027 was adopted on December 2, 2021, and published in the Official Journal on December 6, 2021. The updates to the CAP were adopted in May 2024 and published as Regulation 2024/1468. For more information, please see GAIN Report: EU Commission Proposes Common Agricultural Policy Revisions Following Farmer Protests.

Use of crisis measures taken to support the EU agri-food sector: As part of the CAP, the Commission can allocate funds from the agricultural reserve to directly support farmers from countries who have been impacted by exceptional adverse climatic events. In November 2023, the Commission allocated $46.6 million (€43.1 million) to Greece following wildfires and severe floodings during the 2023 summer. In September 2024, the Commission allocated $40.5 million (€37.4 million) to Italy after the unusually warm temperatures and dry conditions in the first half of 2024, which affected the production of fruit and vegetables.

Marketing Standards

Fresh fruit and vegetable imports into the EU must comply with the EU-harmonized marketing standards. These standards apply at all marketing stages and include criteria such as quality, size, labeling, packaging, and presentation. EU marketing standards were revised in November 2023. They will enter into force on January 1, 2025. Implementing Regulation (EU) 2023/2430 and Delegated Regulation 2023/2429 provide for a general marketing standard for all fresh fruits and vegetables. Specific marketing standards are in place for citrus and are set out on pages 29-37 in Delegated Regulation 2023/2429.

Certification of Fruit and Vegetables

Fruits and vegetables exported to the EU require a phytosanitary certificate. A USDA/Animal Plant Health Inspection Service (APHIS) inspector issues these certificates. This standard-setting body coordinates cooperation between nations to control plant and plant product pests and to prevent their spread. Regulation 2016/2031 concerning protective measures against pests of plants since December 14, 2019, contains provisions concerning compulsory plant health checks. This includes documentary, identity, and physical plant health checks to verify compliance with EU import requirements and uniform conditions for its implementation that are established in Commission Implementing Regulation (EU) 2019/2072. There is more information available on the DG SANTE website: Trade in plants and plant products from non-EU countries.

The Commission monitors imports of fruit and vegetables on an annual basis to determine how to adjust the frequency of testing consignments. There is a reduced frequency of plant health checks for certain products when justified, as per Commission Implementing Regulation (EU) 2022/2389 of December 07, 2022. There is more information available on the DG SANTE website: Reduced frequency checks.

EU's Decision on Citrus Canker

The Commission Implementing Regulation (EU) 2019/2072 establishes rules for citrus fruit and citrus hybrids exported from areas where *Xanthomonas citri* (Citrus canker) exists and requires that groves are appropriately managed and that the fruit is free of symptoms of canker. The rules state that exports of these fruits must be accompanied by a phytosanitary certificate.

EU's Restrictions on False Codling Moth

The European Union has approved new provisions for citrus exported from areas affected by *Thaumatotibia leucotreta* (False Codling Moth), such as Sub-Saharan African countries. The Commission Implementing Regulation (EU) 2022/959 of June 16, 2022, amends Annex VII to Commission Implementing Regulation (EU) 2019/2072 regarding new phytosanitary requirements for the protection of the Union against this pest. The new rules entered into force on July 14, 2022, and require that all Europe-bound exports of citrus fruit from countries affected by the disease must undergo specified mandatory cold treatment process (temperatures of - 2C up to 25 days) before importation.

Maximum Residue Levels (MRLs) for Citrus – Upcoming Reviews

Maximum Residue Levels (MRLs) for pesticides, including import tolerances, have been harmonized throughout the EU and can be found in the EU MRL database. The following tables provide interested stakeholders with advance notice of active ingredients under review for renewal of approval in the EU and are listed with a U.S. MRL for citrus fruit in the global MRL database.

Phosmet is the active ingredient in insecticides used by U.S. citrus growers to control a variety of insect pests. As it is no longer approved in the EU, the MRLs for *phosmet* have been lowered to 0.01 ppm for citrus and to 0.005 ppm for oranges since September 15, 2023 (Commission Regulation (EU) 2023/1029).

For additional information, consult the FAS/Brussels' website on EU Early Alerts.

Upcoming reviews for MRLs: Article 12 review.

Upcoming reviews for active substances:

Active substance	**Expiration date**
Flucapyroxad	05/31/2025
Bixafen	05/31/2025
Pyriofenone	01/31/2025
Disodium phosphonate	01/31/2026
Penflufen	05/31/2025
Sedaxane	05/31/2025
Benalaxyl-	04/30/2025
Pyroxsulam	04/30/2025
Penthiopyrad	05/31/2025
1,4-Dimethylnaphthalene	06/30/2025
Pyridalyl	06/30/2025

European School Fruit Scheme

The European "School Fruit Scheme" originated in 2009 as a measure to combat child obesity. It includes three elements: free distribution of fruit and vegetables in schools, informational campaigns on healthy eating habits, and monitoring and evaluation. For the school year 2024/2025, it allocated $239 million (€221 million) of EU funds to all the Member States. In addition to the school fruit scheme, fruit and vegetable consumption is also encouraged through the EU's promotional budget for agricultural products and quality schemes. For more information about the EU's promotion program please see GAIN Reports EU 2024 Promotion Programs for Agricultural Products.

Tariffs

Entry Price System: EU imports of fresh fruit and vegetables are subject to the Entry Price System, which has been in place in its current form since the Uruguay Round. It is a complex tariff system that provides a high level of protection to EU producers. In this system, fruits and vegetables imported at or above an established entry price are charged an ad valorem duty only. The tariff and statistical nomenclature and the Common Custom tariff levels for 2023 are published in Commission Implementing Regulation (EU) 2023/2364. This version applies as of January 01, 2024. The tariffs for citrus fruits can be found on page 747-755.

First Come, First Served Principle: Regarding the administration of import tariff quotas, certain types of citrus fruit are subject to the "first come, first served principle":

Product	Tariff codes	Quantity (kg)	Period	Origin	In-Quota Duty
Sweet oranges	0805 10 22 10 0805 10 24 10 0805 10 28 10	20,000,000	Feb 1-April 30	All third countries except the United Kingdom	10% ad valorem
Minneola	0805 29 00 21 0805 29 00 29	14,931,000	Feb 1-April 30	All third countries except the United Kingdom	2% ad valorem
Frozen concentrated Orange Juice	2009 11 99 11 2009 11 99 19	1,500,000	Jan 1-Dec 31	All third countries except the United Kingdom	13% ad valorem

Additional EU Duties Targeting U.S. Citrus

EU retaliation on U.S. Section 232 Safeguard Measures on EU Steel and Aluminum Temporary Suspension: On June 22, 2018, the EU imposed additional tariffs of 25 percent to several commodities, including orange juice products, in retaliation against U.S. safeguard measures on EU steel and aluminum as published in Commission Implementing Regulation (EU) 2018/886. On October 30, 2021, the United States and the European Union agreed to end the dispute over U.S. steel and aluminum tariffs. **Orange juice** was listed in the Regulation and hence subject to the additional tariff. On November 26, 2021, under Commission Implementing Regulation (EU) 2021/2083, the EU suspended tariffs affecting U.S. agricultural products from January 1, 2022, until December 31, 2023. In December 2023, the EU announced a 15-month extension of the truce until March 31, 2025.

U.S.-EU WTO Cases on Aircraft Subsides and Suspension: On November 9, 2020, the European Union announced retaliatory tariffs against U.S. exports following the World Trade Organization's (WTO) ruling that authorized the EU to take such countermeasures due to U.S. subsidies to aircraft maker Boeing (Regulation (EU) 1646/2020). The European Commission published the list of products subjected to a 25 percent additional tariff. **Fresh grapefruit** and **Frozen Orange Juice** were listed in the Regulation and hence subject to the additional tariff. On June 15, 2021, the European Union and the United States reached an understanding in the large civil aircraft dispute. On July 9, 2021, the European Commission adopted Implementing Regulation 2021/1123 suspending the application of tariffs until July 11, 2026.

Trade Policy – EU Free Trade Agreements (FTAs)

The EU is negotiating and has implemented several Free Trade Agreements (FTAs) with other countries and regions that produce and export citrus including Chile, South Africa, Türkiye, Egypt, Morocco, and Israel. Additional information is available on the website of the EC at Negotiations and Agreements.

Mercosur: On December 6, 2024, the European Commission announced that President von der Leyen and her counterparts from Argentina, Brazil, Paraguay, and Uruguay, finalized negotiations and reached a political agreement for an EU-Mercosur partnership agreement. For citrus, the agreement includes a progressive tariff removal for fresh citrus fruits and citrus-based processed products ranging from fresh and concentrated orange juice to lemon juice, lemon essential oil or citrus peel exports to the EU. While only a small portion of EU citrus fruits imports originate in Mercosur countries, they have a more prominent role in the EU's citrus-based processed product imports. The political agreement that was reached by the Commission must be approved by the European Parliament and the Council of the European Union to be officially adopted.

Bans Impacting Citrus Trade

Russian Import Ban on Agricultural Products: On August 7, 2014, the Russian government implemented a (then) one-year ban on a range of agricultural and food products, including citrus fruit from the United States, the EU, Canada, Australia, and Norway, in response to U.S. and EU sanctions over Russian actions in Ukraine. Russia has continued to extend the ban every year. For more information, see the Commission's website regarding the Russian ban.

Trade Shows

Trade shows play a key role in presenting new products to the trade or in finding additional buyers and importers. The most important trade shows related to the fruit and vegetable sector in the EU include:

FRUIT LOGISTICA Berlin, Germany (Interval: yearly) Target Market: Germany/EU/Central & Eastern Europe FRUIT LOGISTICA is the leading European trade show for fresh and dried fruit, nuts, and related products. https://www.fruitlogistica.de/en/	Next Edition: February 5-7, 2025
BIOFACH Nuremberg, Germany (Interval: yearly) Target Market: Germany/Europe The leading European trade show for organic food and non-food products. http://www.biofach.de/en	Next Edition: February 11-14, 2025
FRUIT ATTRACTION Madrid, Spain (Interval: yearly) Target Market: Spain/EU/International Fruit attraction is an international trade show for the fruit and vegetable industry sector with more than 2,000 exhibitor companies from around the world. http://www.fruitattraction.com	Next Edition: September 30 - October 2, 2025

Related Reports

Title	Date
EU Citrus Semi-Annual	06/15/2024
EU Citrus Annual	12/15/2023
EU Citrus Semi-Annual	06/15/2023
EU Citrus Annual	12/23/2022
EU Citrus Semi-Annual	07/19/2022
EU Citrus Annual	12/23/2021
EU Citrus Semi-Annual	06/17/2021

These and other GAIN reports can be downloaded from the USDA/FAS GAIN database: https://gain.fas.usda.gov/#/search.

Abbreviations and References used in this report:

EC	European Commission
EU	European Union
€	Euro
FAS	Foreign Agricultural Service
HA	Hectares
TDM	Trade Data Monitor
MY	Marketing Year (October/September for all citrus and products)
MS	EU Member State
MT	Metric ton (1,000 kg)
MMT	Million Metric Tons
OJ	Orange Juice
PS&D	Production, Supply, and Demand
ROW	Rest of the World
UK	United Kingdom
$	U.S. Dollar

Harmonized System (HS) Codes:
Oranges : 080510
Orange Juice: 200911, 200912, 200919
Tangerines/Tangerines : 080520, 080521, 080522, 080529
Lemons/Limes : 080550
Grapefruits : 080540

Annex I. Main Citrus Producing Areas by Member State

Member State	Spain	Italy	Greece
Oranges	Comunidad Valenciana and Andalucía	Sicily and Calabria (combined account for approximately 86 percent of total production)	Peloponnese and Etoloakarnania
Tangerines/ Mandarins	Comunidad Valenciana, Cataluña and Andalucía	Calabria, Sicily, and Puglia	Prefectures of Igoumenitsa, Arta, Mesologgi, and Thesprotia, and prefecture of Laconia in Peloponnese.
Lemons and Limes	Murcia	Sicily	Prefectures of Achaia, Korinthos, and Laconia, in the Peloponnese and the island of Crete.
Grapefruits	Murcia	Sicily	Island of Crete and Greek prefectures of Corinth and Kavala, together with the region of Thessaly

Source: FAS EU posts.

Annex II. Main Citrus Varieties by Member State

Member State	Spain	Italy	Greece
Oranges	*Navelate, Navelina, Valencia late, Salustiana* and *Navel.*	Blood varieties grown in Italy include *Tarocco*, *Moro*, and *Sanguinello*. *Naveline* and late varieties such as *Valencia* and *Ovale*, are the leading blond-orange varieties. *Ippolito* and *Meli* cultivars are gaining popularity.	*Washington Navel*, *Commons*, *Skaggs Bonanza*, *Navelina*, *New Hall*, *Lanelate*, and *Valencia*.
Tangerines /Mandarins	*Clementine* is the major tangerine group, new plantings include *Clemenrubi*, *Nova*, *Leanri* and *Oronules.*	*Comune*, *Oroval*, and *Monreal* are the leading clementine varieties grown, whereas *Avana* and *Tardivo di Ciaculli* are the main mandarin cultivars.	*Clementine* is the major tangerine group, new plantings include *Nova*, *Page* and *Ortanique* varieties.
Lemons and Limes	Verna and Mesero (Fino or Primofiori)	*Femminello Siracusano*, *Lunario*, *Interdonato*, *Limone di Sorrento*, and *Limone di Procida.*	The major variety grown in Greece is *Maglini*, along with the early varieties *Interdonato* and *Eureka*.
Grapefruits	*Star Ruby* and *Ruby Red*	*Star Ruby*	*Marsh Seedless* and *Star Ruby*.

Source: FAS EU posts.

Annex III. Blooming and Harvesting Period by Citrus Type

Citrus Fruit Type	Blooming (% of Area)			Harvesting (% of Volume)					
Month[7]	**Mar**	**Apr**	**May**	**Oct**	**Nov**	**Dec**	**Jan**	**Feb**	**Mar**
Sweet Orange Navel - Navelina	14	74	12	24	37	32	8	3	-
Sweet Orange Navel - Navel	14	61	25	-	6	3-	24	18	14
Sweet Orange Navel - Navelate	9	66	25	-	-	11	26	33	27
Sweet Orange White - Salustiana	5	7-	23	-	5	21	27	3-	17
Sweet Orange White - Other Whites	12	63	23	-	1	8	19	2-	9
Sweet Orange White - Valencia Late	3	58	36	-	-	-	26	47	23
Sweet Orange - Blood Orange	8	67	25	-	-	-	26	47	23
Bitter Orange	7	42	51	-	2	22	44	22	1
Mandarin Other Mandarins	3	67	3-	-	3	16	29	25	15
Grapefruit	11	74	15	15	23	33	16	9	4
Month[9]	**Mar**	**Apr**	**May**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**
Lemon Verna	18	36	35	17	32	32	12	7	3
Month[9]	**Mar**	**Apr**	**May**	**Sep**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Satsuma Mandarin	12	76	12	26	-	35	26	28	11
Lemon Primofiori	52	42	6	-	-	11	19	23	21
Clementine Mandarin	11	69	2-	17	7	17	25	36	35

Source: FAS Madrid based on Spanish Ministry of Agriculture data.

Attachments:

No Attachments

[7] Only minor blooming, harvesting and marketing of local production occurs outside these months.