

Required Report: Required - Public Distribution

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Report Name: Citrus Annual

Country: Morocco

Post: Rabat

Report Category: Citrus

Prepared By: Mohamed Fardaoussi

Approved By: Robert Wright

Report Highlights:

Post expects Morocco's citrus production for MY 2021/22 to reach an estimated 2.55 million metric tons, increasing 12 percent over MY 2020/21. Tangerine/mandarin production should increase by 13 percent over the previous year to 1.36 MMT, while orange production should increase by 11 percent to 1.15 MMT and lemon/lime production to reach 45,000 MT. Much of the increase in production is due to favorable weather conditions and increases in the area harvested. In MY 2021/22, Post forecasts Morocco's tangerine/mandarin exports should total about 500,000 MT while orange exports should reach around 120,000 MT and lemon/lime exports at 10,000 MT.

Executive Summary

Morocco's MY 2021/22 citrus production increased due to favorable weather conditions. Growers report good quality, with the notable exception of the Souss-Massa region, which experienced diminished fruit size and color due to high temperatures and low precipitation. Post expects Morocco's citrus production for MY 2021/22 to reach an estimated 2.55 million metric tons, increasing 12 percent over MY 2020/21. Tangerine/mandarin production should increase by 13 percent over the previous year to 1.36 MMT, while orange production should increase by 11 percent to 1.15 MMT and lemon/lime production to reach 45,000 MT.

The Moroccan citrus export season is looking normal with just a slight delay in delivery due to global supply chain/logistical challenges. Russia and the European Union remain Morocco's top export markets. Post estimates Morocco's MY 2021/22 tangerine/mandarin exports at approximately 500,000 MT while orange exports should reach around 120,000 MT and lemon/lime exports at 10,000 MT.

Summary of Post's Citrus PSDs (1,000MT)

Citrus	MY 2020/21			MY 2021/22		
	Production	Domestic Consumption	Exports	Production	Domestic Consumption	Exports
Tangerines/Mandarins Fresh	1,205	705	463	1,360	860	500
Oranges, Fresh	1,039	893	96	1,150	975	120
Lemons/Limes Fresh	44	34	10	45	35	10
Total Fresh Fruit	2,288	1,632	569	2,555	1,870	630
Orange Juice (65° brix)	5.5	4.5	2	5	4.7	2.3

Tangerines/Mandarins, Fresh

HS-080520, 080521, 080522, 080529

Production: Post forecasts Morocco's tangerine/mandarin production for MY 2021/22 at 1.36 MMT, an increase of 13 percent compared to MY 2020/21 due to favorable timing of rains and temperature. It should be noted that water scarcity in the southern region (Souss-Massa) has impacted fruit size and color.

Consumption: Post forecasts tangerine/mandarin domestic consumption at 860,000 MT in MY2021/22, an increase of 16 percent over 2020/21 based on increased supply. Post also updates MY 2020/21 fresh domestic consumption, reflecting remaining available supply in the balance sheet after accounting for year-end trade data.

Trade: The export season started well in September. Post projects tangerine/mandarin exports for MY 2021/22 to reach 500,000 MT, 8 percent higher than MY 2020/21 due to increased supply. Russia and the European Union remain Morocco's top export markets. Following the United Kingdom's departure from the European Union, Moroccan exporters are looking to increase tangerine/mandarin exports to the UK. Post also updates MY 2020/21 export figures based on year-end trade data.

Tangerine/Mandarin Exports (1,000 MT) by Marketing Year (Sep-Aug)

Partner Country	2016/17	2017/18	2018/19	2019/20	2020/21	% Change
Russia	206,688	200,844	303,330	124,247	147,194	18%
EU 27	158,220	148,115	123,770	117,330	115,073	-2%
Canada	63,199	67,604	64,492	53,824	53,515	-1%
United States	42,804	55,561	56,477	38,244	41,812	9%
United Kingdom	8,558	17,935	28,144	32,767	52,505	60%
Sub-Saharan Africa	25,797	25,873	23,956	26,778	30,829	15%
Middle East	10,044	14,866	15,154	12,599	15,597	24%
Other	1,921	3,269	7,601	5,216	6,882	32%
Total	517,231	534,067	622,924	411,005	463,407	13%

Source : Office des Changes

Production, Supply & Distribution: Tangerines/Mandarins, Fresh

HS-080520, 080521, 080522, 080529

Tangerines/Mandarins, Fresh	2019/2020		2020/2021		2021/2022	
	Sep 2019		Sep 2020		Sep 2021	
Market Year Begins	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Morocco						
Area Planted (HECTARES)	65,311	65,311	65,515	65,515	0	65,750
Area Harvested (HECTARES)	58,772	58,772	58,850	58,850	0	58,900
Bearing Trees (1000 TREES)	19,950	19,950	19,975	19,975	0	20,000
Non-Bearing Trees (1000 TREES)	6,800	6,800	6,800	6,800	0	6,820
Total No. Of Trees (1000 TREES)	26,750	26,750	26,775	26,775	0	26,820
Production (1000 MT)	926	926	1,205	1,205	0	1,360
Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	926	926	1,205	1,205	0	1,360
Exports (1000 MT)	411	411	500	463	0	500
Fresh Dom. Consumption (1000 MT)	515	515	705	742	0	860
For Processing (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	926	926	1,205	1,205	0	1,360
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Oranges, Fresh

HS-080510

Production: Orange production for MY 2020/21 is forecast at 1.15 MMT, up 11 percent over MY 2020/21 due to good weather conditions and increased area as new orchards begin production.

Consumption: Post estimates MY 2021/22 domestic consumption of fresh oranges at 975,000 MT, an increase of 9 percent for the previous season. Deliveries to processors is estimated up to 55,000 MT due to available supplies. Post adjusts domestic consumption for MY 2020/21, based on year-end trade figures.

Trade: Post projects orange exports for MY 2021/22 to reach 120,000 MT, 25 percent more than MY 2020/21 due to increased supply. Post also updates MY2020/21 export number based on year-end trade data.

Orange Exports (MT) by Marketing Year (Oct-Sep)

Partner Country	2016/17	2017/18	2018/19	2019/2020	2020/2021	% Change
EU 27	111,063	77,143	89,880	78,798	51,956	-34%
Russia	12,708	13,625	14,908	9,909	9,588	-3%
Canada	5,523	8,385	12,869	6,968	11,002	58%
United States	3,276	10,806	6,244	2,142	2,961	38%
United Kingdom	2,535	10,397	7,579	5,393	4,742	-12%
Sub-Saharan Africa	20,889	13,580	9,969	8,689	10,011	15%
Middle East	7,349	9,430	8,349	4,051	2,790	-31%
Other	1,919	1,808	4,885	1,234	3,323	169%
Total	165,262	145,174	154,683	117,184	96,373	-18%

Source: Office des Changes

Production, Supply & Distribution: Oranges, Fresh

HS-080510

Oranges, Fresh Market Year Begins	2019/2020		2020/2021		2021/2022	
	Oct 2019		Oct 2020		Oct 2021	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	58,679	58,679	58,850	58,850	0	59,600
Area Harvested (HECTARES)	55,350	55,350	55,405	55,405	0	56,500
Bearing Trees (1000 TREES)	17,100	17,100	17,150	17,150	0	17,200
Non-Bearing Trees (1000 TREES)	1,602	1,602	1,615	1,615	0	1,635
Total No. Of Trees (1000 TREES)	18,702	18,702	18,765	18,765	0	18,835
Production (1000 MT)	806	806	1,100	1,039	0	1,150
Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	806	806	1,100	1,039	0	1,150
Exports (1000 MT)	117	117	120	96	0	120
Fresh Dom. Consumption (1000 MT)	654	654	930	893	0	975
For Processing (1000 MT)	35	35	50	50	0	55
Total Distribution (1000 MT)	806	806	1,100	1,039	0	1,150
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Orange Juice (65° brix basis)

HS-200911, 200912, 200919

Production: Post forecasts orange juice production for MY 2021/22 at 55,000 MT, 10 percent higher than MY 2020/21 based on industry reports indicating more available fruit for processing.

Consumption: Post forecasts MY 2021/22 domestic consumption at 4,700 MT, up 4 percent over the previous season on higher available supply. Post revised its estimate for MY2020/21 following year-end trade figures.

Trade: For MY 2021/22, Post estimates that orange juice exports will reach 2,300 MT, about 244 MT higher than MY 2020/21. Post also expects Morocco to import 1,500 MT of orange juice, a decrease of 56 MT over the previous year. Decreased imports reflect domestic production upsurges.

Orange Juice Imports (MT @ 65°) by Marketing Year (Oct-Sep)

Product	conv. factor	2016/17	2017/18	2018/19	2019/20	2020/21	% Change
2009.11: Frzn	1.0154	1,823	1,141	1,052	627	243	-61.2%
2009.12: Not Frzn, ≤20 Brix	0.1815	4	3	7	5	9	80.0%
2009.19: Not Frzn, Other	1	1,251	1,006	1,320	1,054	1,304	23.7%
Total (65° Basis)		3,078	2,149	2,379	1,687	1,556	-7.8%

Source : Office des Changes

Orange Juice Exports (MT @ 65°) by Marketing Year (Oct-Sep)

Product	conv. factor	2016/17	2017/18	2018/19	2019/20	2020/21	% Change
2009.11: Frzn	1.0154	544	1,195	1,310	226	522	131%
2009.12: Not Frzn, ≤20 Brix	0.1815	1,105	1,137	1,266	755	554	-27%
2009.19: Not Frzn, Other	1	2,157	1,962	1,707	1,075	1,594	48%
Total (65° Basis)		3,806	4,293	4,283	2,056	2,670	30%

Source : Office des Changes

Production, Supply & Distribution: Orange Juice (65° brix basis)

HS-200911, 200912, 200919

Orange Juice	2019/2020		2020/2021		2021/2022	
	Oct 2019		Oct 2020		Oct 2021	
Market Year Begins	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	35,000	35,000	50,000	50,000	0	55,000
Beginning Stocks (MT)	0	0	0	0	0	0
Production (MT)	3,500	3,500	5,000	5,000	0	5,500
Imports (MT)	1,687	1,687	2,000	1,556	0	1,500
Total Supply (MT)	5,187	5,187	7,000	6,556	0	7,000
Exports (MT)	2,056	2,056	3,000	2,056	0	2,300
Domestic Consumption (MT)	3,131	3,131	4,000	4,500	0	4,700
Ending Stocks (MT)	0	0	0	0	0	0
Total Distribution (MT)	5,187	5,187	7,000	6,556	0	7,000
(MT)						

Lemons/Limes, Fresh

HS-080550

Production: Post forecasts lemon and lime production for MY 2021/22 to reach 45,000 MT, about 2 percent higher than MY 2020/21. Production increases are due to the increase in area harvested and yields.

Consumption: Post forecasts MY 2021/22 fresh domestic consumption to be slightly up at 35,000 MT. Post revised its estimate for MY2020/21 following year-end trade figures.

Trade: Post projects lemon/lime exports for MY 2021/22 to be flat at 10,000 MT. Post also updates MY2020/21 exports number based on year-end trade data.

Lemon/Lime Exports by Destination (MT)

Partner Country	2016/17	2017/18	2018/19	2019/20	2020/21	% Change
Russia	6,834	3,709	5,151	6,477	3,915	-40%
Sub-Saharan Africa	1,922	3,271	7,708	6,845	2,720	-60%
EU 27	1,707	594	703	2,117	1,874	-11%
United Kingdom	50	267	115	317	148	-53%
Canada	990	502	719	1,073	649	-40%
United States	-	351	-	2	50	2400%
Other	1,385	91	832	488	478	-2%
Total	12,888	8,785	15,228	17,319	9,834	-43%

Source : Office des Changes

Production, Supply & Distribution: Lemons/Limes, Fresh

HS-080550

Lemons/Limes, Fresh	2019/2020		2020/2021		2021/2022	
	Oct 2019		Oct 2020		Oct 2021	
Market Year Begins	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Morocco						
Area Planted (HECTARES)	3,983	3,983	3,995	3,995	0	4,000
Area Harvested (HECTARES)	3,095	3,095	3,100	3,100	0	3,110
Bearing Trees (1000 TREES)	1,650	1,650	1,675	1,675	0	1,680
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	1,650	1,650	1,675	1,675	0	1,680
Production (1000 MT)	43	43	44	44	0	45
Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	43	43	44	44	0	45
Exports (1000 MT)	17	17	15	10	0	10
Fresh Dom. Consumption (1000 MT)	26	26	29	34	0	35
For Processing (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	43	43	44	44	0	45
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Policy

The Moroccan government continues to provide a set of incentive measures to support citrus growers and encourage new investment in citrus production.

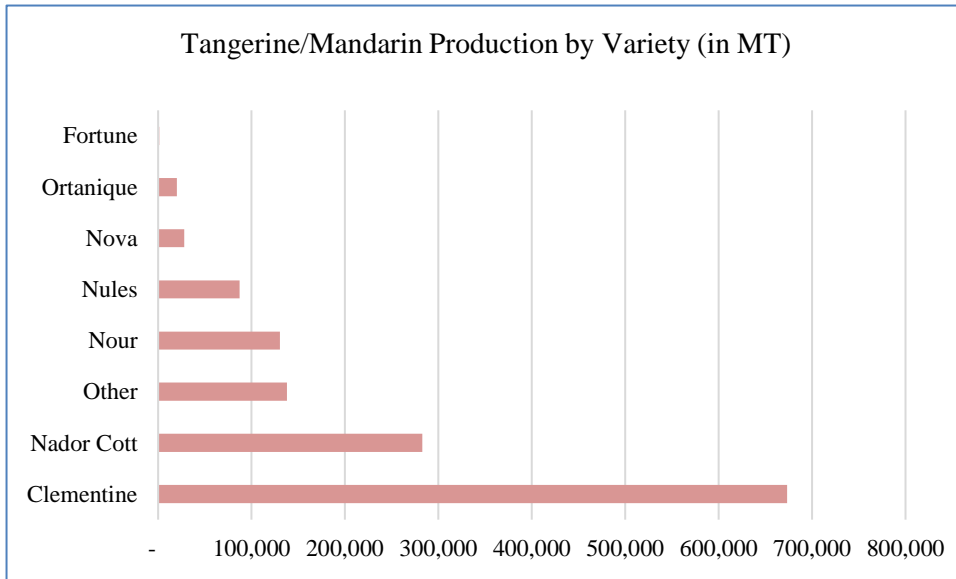
Subsidies and Incentives for the Citrus Sector

Program	Subsidy	Comment
Phyto-sanitary	\$100/ha for the mass trapping technique based on the use of Medfly female attractant.	Citrus-specific
Conditioning station	30% of the cost of construction	Citrus-specific
Investment premium for new citrus plantations	\$1,143/ha subsidy for the creation of new citrus plantations and the using a drip irrigation techniques (due date 02/05/2020)	Citrus-specific
Citrus replantation	\$2,800/ha for the replanting of citrus trees following a <i>tristeza</i> contamination	Citrus-specific
Export subsidy for citrus destined to Russia	Exporters receive 50MAD/MT against all exports to Russia. Exporters are paid 150MAD/MT for any export quantity exceeding export levels for periods between September 1, 2010 to August 31, 2013.	Citrus-specific
Export subsidy for citrus destined to Ukraine, China and Gulf Countries.	Exporters receive 500MAD/MT for all exported quantities exceeding the levels exported between September 1, 2000 to August 31, 2001.	Citrus-specific
Export subsidy for Countries other than Russia, Ukraine, China, Gulf countries and EU members	500MAD/MT for all exported quantities exceeding the levels exported between September 1, 2000 to August 31, 2001.	Citrus-specific

Source: [MoA/FDA– 2019 Link](#)

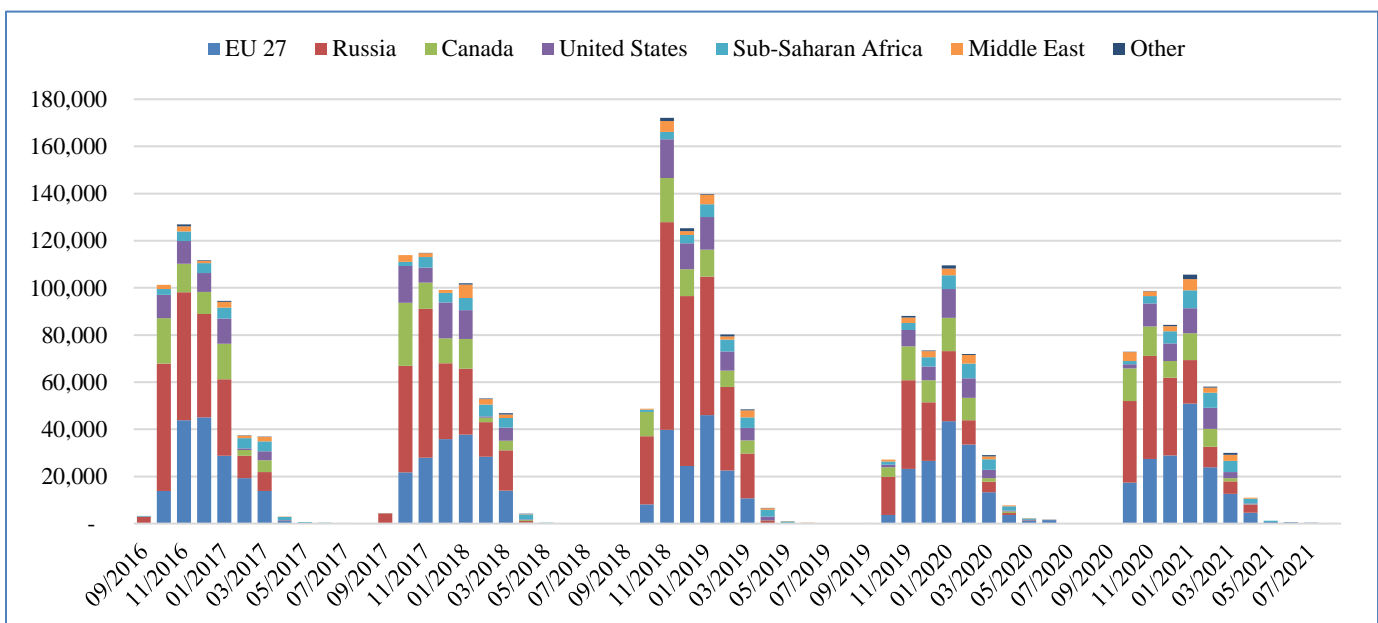
ANNEX

Figure 1: Morocco's Tangerine/Mandarin Production by Variety in (MT)



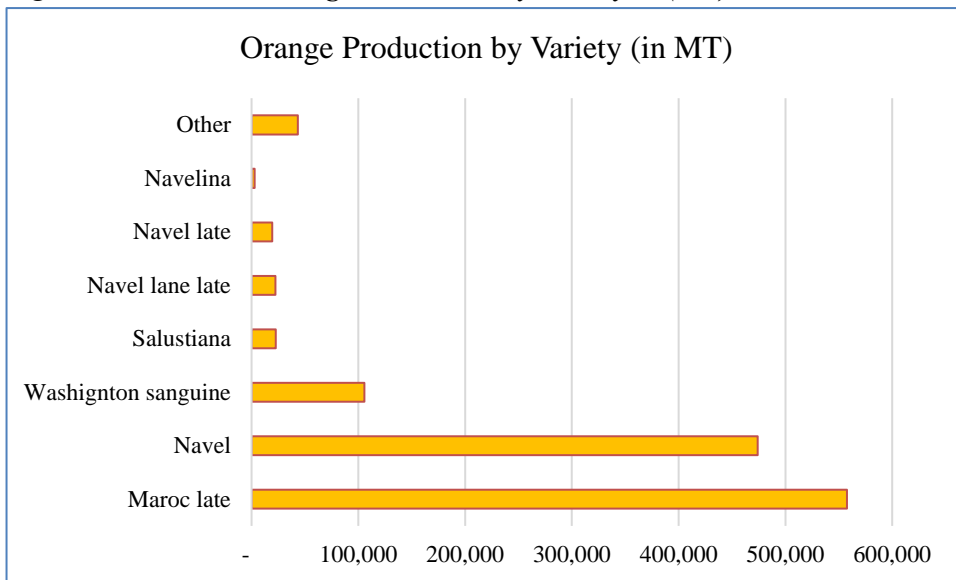
Source: MinAg, MY2021/22 forecast

Figure 2: Morocco's Tangerine/Mandarin Exports by Month



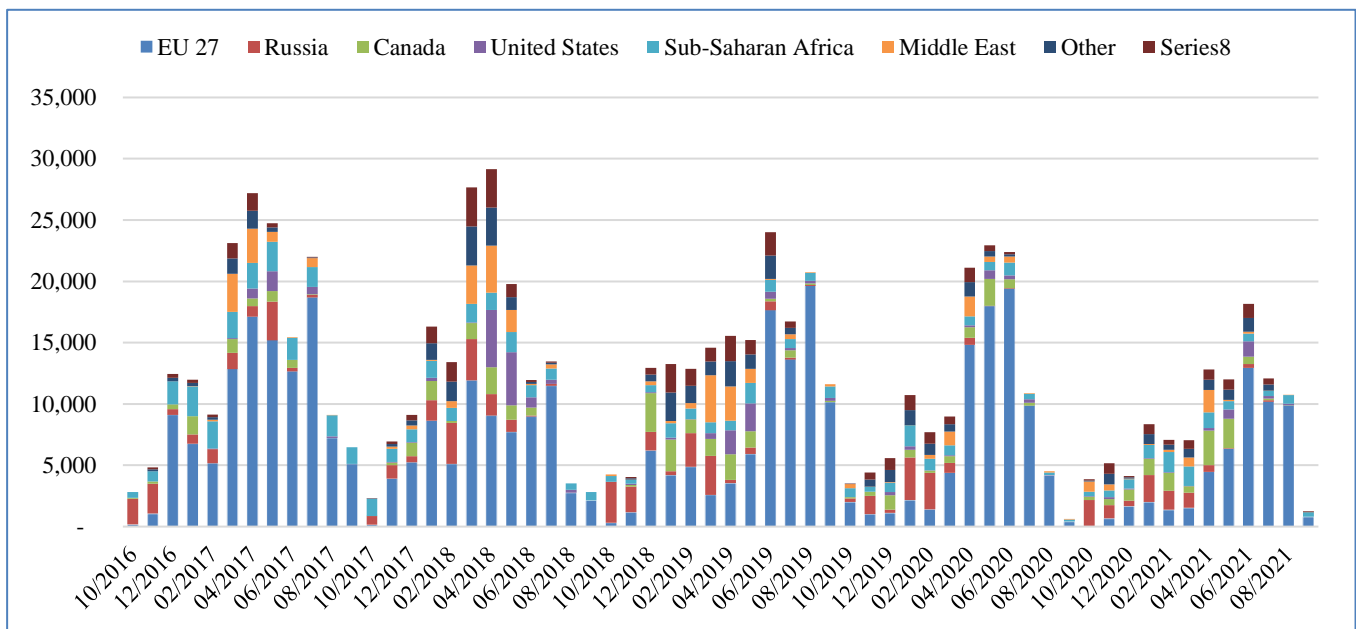
Source: Office des changes

Figure 3: Morocco's Orange Production by Variety in (MT)



Source: MinAg, MY 2021/22 forecast

Figure 4: Morocco's Orange Exports by Month



Source: Office des changes

Attachments:

No Attachments