

Required Report: Required - Public Distribution

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Report Name: Citrus Annual

Country: Morocco

Post: Rabat

Report Category: Citrus

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Report Highlights:

Post expects Moroccan MY 2019/20 citrus production to fall 32 percent to 1.7 million metric tons due to unfavorable weather in southern Morocco. Tangerine and mandarin production are expected to decrease by 35 percent from the previous year to 910,000 MT, while orange production should fall by 31 percent to 815,000 MT. Lemon and lime production will reach 40,000 MT, an 11 percent decline from MY 2018/19. Morocco's citrus exports will be negatively impacted by a poor harvest brought on by high temperatures in July-August

Executive Summary

High temperatures in July-August 2019 created unfavorable conditions during the Moroccan citrus crop's blossoming and fruit-setting stages. The southern region of Souss-Massa was the most effected production area. As a result, 2019/20 tangerine and mandarin production is estimated to fall 34 percent to 910,000 metric tons. Mandarin and tangerine exports and consumption will also decline. July-August heat stress will also drive down orange and orange juice production. 2019/20 orange production is estimated at 815,000 metric tons, down 368,000 metric tons from the previous year. 2019/20 orange juice production is estimated at 3,500 metric tons (65 degrees brix), down 42 percent from the previous year. Morocco's lemon and lime production for MY 2019/20 is estimated to reach 40,000 MT, about 11 percent lower than MY 2018/19.

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

Citrus	MY 2018/19			MY 2019/20		
	Production	Domestic Consumption	Exports	Production	Domestic Consumption	Exports
Tangerines/Mandarins Fresh	1,375	742	633	910	550	360
Oranges, Fresh	1,183	979	144	815	815	110
Orange Juice	6	4	4.2	3.5	3.4	3.6
Lemons/Limes Fresh	45	30	15	40	29	11
Total Fresh Fruit	2,603	1,751	792	1,765	1,394	481

Tangerines/Mandarins, Fresh

HS-080520, 080521, 080522, 080529

Production: High temperatures hit the region of Souss (southern Morocco) during the citrus crop's blossoming and fruit-setting period. According to trade sources, many orchards in Souss suffered 40-45 percent losses during fruit-setting. These losses were slightly offset by the northern production region near Berkane, which experienced typical production levels. Berkane produces about 20 percent of Morocco's tangerine and mandarin crop. As a result, Post forecasts Morocco's MY 2019/20 tangerine and mandarin production at 910,000 MT, a decline of 34 percent from the previous season.

Consumption: Post forecasts tangerine/mandarin domestic consumption to tumble nearly 26 percent to 550,000 MT as a result of lower production. Post also revises MY 2018/19 fresh domestic consumption down based on year-end trade data.

Trade: Post projects MY 2019/20 tangerine and mandarin exports to reach 360,000 MT, 43 percent lower than MY 2018/19, based on lower exportable supplies. Russia and the European Union remain Morocco's primary export markets. According to the industry contacts, MY 2019/20 exports to the United States will increase by 10 percent from the Berkane region due to production declines in Souss. Post also updates MY 2017/18 exports from 550,000 MT to 632,600 MT based on year-end trade data.

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

Partner Country	2014/15	2015/16	2016/17	2017/18	2018/19	% Change
Russia	139,339	188,023	205,389	205,091	337,290	64%
EU	104,057	141,516	166,659	166,191	139,952	-16%
Canada	40,155	58,886	63,199	67,604	58,992	-13%
United States	45,016	38,549	42,804	55,561	49,728	-10%
Sub-Saharan Africa	8,373	25,328	26,017	25,817	23,860	-8%
Middle East	8,958	12,692	9,925	15,385	15,762	2%
Other	1,024	976	1,947	2,905	7,016	142%
Total	346,917	465,995	515,913	538,554	632,600	17%

Source: Office des Changes

Production, Supply & Distribution

Tangerines/Mandarins, Fresh	2017/2018		2018/2019		2019/2020	
	Sep 2017		Sep 2018		Sep 2019	
Market Begin Year	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Morocco						
Area Planted	64,516	0	64,995	64,995	0	65,550
Area Harvested	57,321	0	58,673	58,673	0	58,850
Bearing Trees	19,850	0	19,900	19,900	0	19,950
Non-Bearing Trees	6,750	0	6,800	6,800	0	0
Total No. Of Trees	26,600	0	26,700	26,700	0	19,950
Production	1,185	0	1,375	1,375	0	910
Imports	0	0	0	0	0	0
Total Supply	1,185	0	1,375	1,375	0	910
Exports	539	0	595	633	0	360
Fresh Dom. Consumption	646	0	780	742	0	550
For Processing	0	0	0	0	0	0
Total Distribution	1,185	0	1,375	1,375	0	910

(HECTARES) ,(1000 TREES) ,(1000 MT)

Oranges, Fresh

HS-080510

Production: Morocco's MY 2019/20 orange production is expected to decline 31 percent to 810,000 MT due to unfavorable weather and water shortages.

Consumption: Post estimates MY 2019/20 domestic consumption of fresh oranges at 670,000 MT, a decline of 31 percent. Deliveries to processors is estimated to fall 35,000 MT due to lower supplies. Post adjusts domestic consumption for MY 2018/19, based on year-end trade figures.

Trade: Post projects orange exports for MY 2019/20 to reach around 110,000 MT, 31 percent lower than MY 2018/19 on remaining available supplies. Post also updates MY18/19 exports number based on year-end trade data.

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

Partner Country	2014/15	2015/16	2016/17	2017/18	2018/19	% Change
EU	83,763	67,872	113,598	87,541	88,982	2%
Russia	14,721	9,524	12,708	13,625	14,821	9%
Sub-Saharan Africa	23,919	10,495	20,906	13,581	9,928	-27%
United States	1,813	0	3,276	10,806	6,244	-42%
Middle East	610	232	7,681	10,332	9,591	-7%
Canada	4,114	561	5,523	8,385	10,511	25%
Other	1,261	1,148	1,570	904	3,637	302%
Total	130,201	89,832	165,262	145,174	143,714	-1%

Source: Office des Changes

Oranges Production, Supply & Distribution

Oranges, Fresh	2017/2018		2018/2019		2019/2020	
Market Begin Year	Oct 2017		Oct 2018		Oct 2018	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	57,255	57,255	58,437	58,437	0	58,850
Area Harvested	52,750	52,750	54,938	54,938	0	55,350
Bearing Trees	16,950	16,950	17,000	17,000	0	17,100
Non-Bearing Trees	1,590	1,590	1,595	1,595	0	0
Total No. Of Trees	18,540	18,540	18,595	18,595	0	17,100
Production	1,021	1,021	1,183	1,183	0	815
Imports	0	0	0	0	0	0
Total Supply	1,021	1,021	1,183	1,183	0	815
Exports	145	145	130	144	0	110
Fresh Dom. Consumption	826	826	993	979	0	670
For Processing	50	50	60	60	0	35
Total Distribution	1,021	1,021	1,183	1,183	0	815

(HECTARES) ,(1000 TREES) ,(1000 MT)

Orange Juice (65° brix basis)

HS-200911, 200912, 200919

Production: Post forecasts orange juice production for MY 2019/20 to fall to 35,000 MT, nearly 42 percent lower than the previous year, based on lower oranges supplies.

Consumption: Post forecasts MY 2019/20 domestic consumption at 3,400 MT, 15 percent lower than the previous season. Declines in consumption reflect production shortfalls in southern Morocco. Post revised its MY2018/19 estimate from 4,900 MT to 4,096 MT to reflect year-end trade figures.

Trade: For MY 2019/20, Post estimates that orange juice exports will reach 3,600 MT, about 1,600 MT lower than MY 2018/19. Post also expects Morocco to import 3,500 MT of orange juice, an increase of 1,100 MT over the previous year. Increased imports reflect domestic production shortfalls.

Orange Juice Imports (MT @ 65°)

Product	conv. factor	2014/15	2015/16	2016/17	2017/18	2018/19	% Change
2009.11: Frzn	1.0154	333	1,957	1,823	1,141	1,052	-8%
2009.12: Not Frzn, <20 Brix	0.1815	1	13	4	3	7	133%
2009.19: Not Frzn, Other	1	1,050	1,244	1,251	1,006	1,320	31%
Total (65° Basis)		1,384	3,213	3,078	2,149	2,379	11%

Source: Office des Changes

Orange Juice Exports (MT @ 65°)

Product	conv. factor	2014/15	2015/16	2016/17	2017/18	2018/19	% Change
2009.11: Frzn	1.0154	982	739	544	1,962	1,310	-33.2%
2009.12: Not Frzn, <20 Brix	0.1815	66	11	1,105	1,137	1,266	11.3%
2009.19: Not Frzn, Other	1	2,568	2,156	2,157	1,962	1,707	-13.0%
Total (65° Basis)		3,616	2,906	3,806	4,293	4,283	-0.2%

Source: Office des Changes

Orange Juice Production, Supply & Distribution

Orange Juice	2017/2018		2018/2019		2019/2020	
Market Begin Year	Oct 2017		Oct 2018		Oct 2019	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors	50,000	0	60,000	60,000	0	35,000
Beginning Stocks	0	0	0	0	0	0
Production	5,000	0	6,000	6,000	0	3,500
Imports	2,148	0	3,200	2,379	0	3,500
Total Supply	7,148	0	9,200	8,379	0	7,000
Exports	4,282	0	4,300	4,283	0	3,600
Domestic Consumption	2,866	0	4,900	4,096	0	3,400
Ending Stocks	0	0	0	0	0	0
Total Distribution	7,148	0	9,200	8,379	0	7,000
(MT)						

Lemons/Limes, Fresh

HS-080550

Production: Post forecasts lemon and lime production for MY 2019/20 to reach 40,000 MT, about 11 percent lower than MY 2018/19. Production declines are due to heat stress during the growing season.

Consumption: Post forecasts MY 2019/20 fresh domestic consumption at 29,000 MT, reflecting a slight decrease in per capita consumption.

Trade: Post projects lemon/lime exports for MY 2019/20 to reach 11,000 MT, a 27 decrease from MY 2018/19. Export declines reflect lower production.

Lemon/Lime Exports by Destination (MT)

Partner Country	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	% Change
Russia	4,411	2,978	3,737	6,834	3,709	5,151	39%
EU28	1,527	1,272	3,217	1,757	861	818	-5%
Canada	827	1,052	82	990	502	719	43%
United States	417	46	-	-	351	-	-
Other	7,821	2,135	2,280	3,307	3,362	8,542	154%
Total	15,003	7,483	9,316	12,888	8,785	15,230	73%

Source: Office des Changes

Lemons/Limes Production, Supply & Distribution

Lemons/Limes, Fresh	2017/2018		2018/2019		2019/2020	
Market Begin Year	Oct 2017		Oct 2018		Oct 2019	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	3,910	3,910	3,969	3,969	0	3,970
Area Harvested	2,980	2,980	3,044	3,044	0	3,095
Bearing Trees	1,570	1,570	1,600	1,600	0	1,650
Non-Bearing Trees	385	385	0	0	0	0
Total No. Of Trees	1,955	1,955	1,600	1,600	0	1,650
Production	36	36	45	45	0	40
Imports	0	0	0	0	0	0
Total Supply	36	36	45	45	0	40
Exports	9	9	15	15	0	11
Fresh Dom. Consumption	27	27	30	30	0	29
For Processing	0	0	0	0	0	0
Total Distribution	36	36	45	45	0	40

(HECTARES) ,(1000 TREES) ,(1000 MT)

Policy

The Moroccan government plans to continue supporting an ambitious strategy to increase Morocco's citrus production. Morocco's citrus programs are summarized below.

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](#)

Image 1: Clemantine, Navel Oranges, and a Packing House Near Berkane, Morocco, December 17, 2019



Attachments:

No Attachments