

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:

MY 2020/21 Moroccan citrus production is expected to reach 2.3 million metric tons, increasing 32 percent over the previous marketing year. The increase in production is based on increased area planted/new plantings coming into full production, as well as new irrigation which offset the long drought in 2020. Tangerine/mandarin production is estimated to increase by 30 percent over the previous year to 1.2 MMT, while orange production should increase by 27 percent to 1.1 MMT and lemon/lime production to reach 44,000 MT.

Executive Summary

MY 2020/21 Moroccan citrus production is expected to reach 2.3 million metric tons, increasing 32 percent over the previous marketing year. The increase in production is based on increased area planted/new plantings coming into full production, as well as new irrigation which offset the long drought in 2020. Tangerine/mandarin production is estimated to increase by 30 percent over the previous year to 1.2 MMT, while orange production should increase by 27 percent to 1.1 MMT and lemon/lime production to reach 44,000 MT.

The Moroccan citrus industry has set up a COVID-19 response committee, and the joint efforts from the Ministry of Agriculture and port authorities have been essential to ensure the stability of citrus exports. Tangerine/mandarin exports should total about 500,000 MT while orange exports should reach around 150,000 MT. Russia and the EU are expected to remain the top destination for Moroccan citrus, accounting for over 66 percent of imports.

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

Citrus	MY 2019/20			MY 2020/21		
	Production	Domestic Consumption	Exports	Production	Domestic Consumption	Exports
Tangerines/Mandarins Fresh	926	529	397	1,205	705	500
Oranges, Fresh	806	663	108	1,100	900	150
Lemons/Limes Fresh	43	26	17	44	29	15
Total Fresh Fruit	1,775	1,218	522	2,349	1,634	665
Orange Juice (65° brix)	3.5	2.7	2.9	5	4.2	3

Tangerines/Mandarins, Fresh

HS-080520, 080521, 080522, 080529

Production: Post forecasts Morocco's tangerine/mandarin production for MY 2020/21 at 1.2 MMT, an increase of 32 percent compared to MY 2019/20 due to an increase in area planted, irrigation and high level of new plantings coming into full production.

Consumption: Post forecasts tangerine/mandarin domestic consumption at 705,000 MT in MY2020/21, an increase of 33 percent over 2019/20 based on increased supplies. Post also updates MY 2019/20 fresh domestic consumption, reflecting remaining available supply in the balance sheet after accounting for year-end trade data.

Trade: Post projects tangerine/mandarin exports for MY 2020/21 to reach 500,000 MT, 26 percent higher than MY 2019/20 due to increased supplies. Russia and the European Union are the top two suppliers, accounting for 66 percent of imports. Post also updates MY19/20 exports based on year end trade data.

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

Partner Country	2015/16	2016/17	2017/18	2018/19	2019/20	% Change
Russia	188,023	205,389	205,091	303,330	124,247	-59%
EU	141,516	166,659	166,191	139,952	136,170	-3%
Canada	58,886	63,199	67,604	58,992	53,824	-9%
United States	38,549	42,804	55,561	49,728	38,244	-23%
Sub-Saharan Africa	25,328	26,017	25,791	23,789	26,609	12%
Middle East	12,692	9,925	15,385	15,762	14,093	-11%
Other	976	1,947	2,905	7,016	3,780	-46%
Total	465,995	515,913	538,554	622,823	396,967	-36%

Source: Office des Changes

Production, Supply & Distribution

Tangerines/Mandarins, Fresh	2018/2019		2019/2020		2020/2021	
Market Begin Year	Sep 2018		Sep 2019		Sep 2020	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	64,995	64,995	65,311	65,311		65,515
Area Harvested	58,673	58,673	58,772	58,772		58,850
Bearing Trees	19,900	19,900	19,950	19,950		19,975
Non-Bearing Trees	6,800	6,800	6,800	6,800		6,800
Total No. Of Trees	26,700	26,700	26,750	26,750		26,775
Production	1,375	1,375	926	926		1,205
Imports	0	0	0	0		0
Total Supply	1,375	1,375	926	926		1,205
Exports	599	622	385	397		500
Fresh Dom. Consumption	776	753	541	529		705
For Processing	0	0	0	0		0
Total Distribution	1,375	1,375	926	926		1,205

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

Oranges, Fresh

HS-080510

Production: Orange production for MY 2020/21 is forecast at 1.1 MMT, up 36 percent over MY 2019/20 due to improved weather and increased area as new orchards begin production.

Consumption: Post estimates MY 2020/21 domestic consumption of fresh oranges at 900,000 MT, an increase of 35 percent for the previous drought season. Deliveries to processors is estimated up to 50,000 MT due to available supplies. Post adjusts domestic consumption for MY 2019/20, based on year-end trade figures.

Trade: Post projects orange exports for MY 2020/21 to reach 150,000 MT, 38 percent more than MY 2019/20 due to increased supply. Post also updates MY2019/20 and MY2018/19 exports number based on year-end trade data.

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

Partner Country	2015/16	2016/17	2017/18	2018/19	2019/2020	% Change
EU	67,872	113,598	87,541	97,459	75,343	-23%
Russia	9,524	12,708	13,625	14,908	9,909	-34%
Sub-Saharan Africa	10,495	20,906	13,581	9,977	8,709	-13%
United States	0	3,276	10,806	6,244	2,142	-66%
Middle East	232	7,681	10,332	9,592	4,532	-53%
Canada	561	5,523	8,385	12,869	6,922	-46%
Other	1,148	1,570	904	3,637	732	-80%
Total	89,832	165,262	145,174	154,683	108,289	-30%

Source: Office des Changes

Oranges Production, Supply & Distribution

Oranges, Fresh	2018/2019		2019/2020		2020/2021	
Market Begin Year	Oct 2018		Oct 2019		Oct 2020	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	58,437	58,437	58,850	58,679		58,850
Area Harvested	54,938	54,938	55,350	55,350		55,405
Bearing Trees	17,000	17,000	17,100	17,100		17,150
Non-Bearing Trees	1,595	1,595	1,602	1,602		1,615
Total No. Of Trees	18,595	18,595	18,702	18,702		18,765
Production	1,183	1,183	806	806		1,100
Imports	0	0	0	0		0
Total Supply	1,183	1,183	806	806		1,100
Exports	148	155	105	108		150
Fresh Dom. Consumption	975	968	666	663		900
For Processing	60	60	35	35		50
Total Distribution	1,183	1,183	806	806		1,100

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

Orange Juice (65° brix basis)

HS-200911, 200912, 200919

Production: Post forecasts orange juice production for MY 2020/21 at 50,000 MT, 42 percent higher than MY 2019/20 based on industry contacts and supported by more available fruit for processing.

Consumption: Post forecasts MY 2020/21 domestic consumption at 4,000 MT up 28 percent over the previous season on higher available supplies. Post revised its estimate for MY2019/20 following year-end trade figures.

Trade: For MY 2020/21, Post estimates that orange juice exports will reach 3,000 MT, about 944 MT higher than MY 2019/20. Post also expects Morocco to import 2,000 MT of orange juice, an increase of 313 MT over the previous year. Increased imports reflect domestic production shortfalls.

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

Product	conv. factor	2015/16	2016/17	2017/18	2018/19	2019/20	% Change
2009.11: Frzn	1.0154	1,957	1,823	1,141	1,052	626	-40%
2009.12: Not Frzn, ≤20 Brix	0.1815	13	4	3	7	5	-28%
2009.19: Not Frzn, Other	1	1,244	1,251	1,006	1,320	1,054	-20%
Total (65° Basis)		3,213	3,078	2,149	2,379	1,687	-29%

Source: Office des Changes

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

Product	conv. factor	2015/16	2016/17	2017/18	2018/19	2019/20	% Change
2009.11: Frzn	1.0154	739	544	1,962	1,310	226	-83%
2009.12: Not Frzn, ≤20 Brix	0.1815	11	1,105	1,137	1,266	755	-40%
2009.19: Not Frzn, Other	1	2,156	2,157	1,962	1,707	1,075	-13.0%
Total (65° Basis)		2,906	3,806	4,293	4,283	2,056	-52%

Source: Office des Changes

Orange Juice Production, Supply & Distribution

Orange Juice	2018/2019		2019/2020		2020/2021	
	Oct 2018		Oct 2019		Oct 2020	
Market Begin Year	Oct 2018		Oct 2019		Oct 2020	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors	60,000	60,000	35,000	35,000		50,000
Beginning Stocks	0	0	0	0		0
Production	6,000	6,000	3,500	3,500		5,000
Imports	2,379	2,379	2,100	1,687		2,000
Total Supply	8,379	8,379	5,600	5,187		7,000
Exports	4,283	4,283	2,900	2,056		3,000
Domestic Consumption	4,096	4,096	2,700	3,131		4,000
Ending Stocks	0	0	0	0		0
Total Distribution	8,379	8,379	5,600	5,187		7,000
(MT)						

Lemons/Limes, Fresh

HS-080550

Production: Post forecasts lemon and lime production for MY 2020/21 to reach 44,000 MT, about 2 percent higher than MY 2020/21. Production increases are due to the increase in area planted, irrigation and yields.

Consumption: Post forecasts MY 2020/21 fresh domestic consumption to be relatively flat at 26,000 MT. Post revised its estimate for MY2019/20 following year-end trade figures.

Trade: Post projects lemon/lime exports for MY 2020/21 to reach 18,000 MT, a slight increase from MY 2019/20. Post also updates MY2019/20 exports number based on year-end trade data.

Lemon/Lime Exports by Destination (MT)

Partner Country	2014/15	2015/16	2016/17	2017/18	2018/19	2019/2020	% Change
Russia	2,978	3,737	6,834	3,709	5,151	6,477	26%
EU	1,272	3,217	1,757	861	818	2,434	198%
Canada	1,052	82	990	502	719	1,073	49%
United States	46	-	-	351	-	2	
Other	2,135	2,280	3,307	3,362	8,540	7,333	-14%
Total	7,483	9,316	12,888	8,785	15,228	17,319	14%

Source: Office des Changes

Lemons/Limes Production, Supply & Distribution

Lemons/Limes, Fresh Market Begin Year	2018/2019		2019/2020		2020/2021	
	Oct 2018		Oct 2019		Oct 2020	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	3,969	3,969	3,983	3,983		3,995
Area Harvested	3,044	3,044	3,095	3,095		3,100
Bearing Trees	1,600	1,600	1,650	1,650		1675
Non-Bearing Trees	0	0	0	0		0
Total No. Of Trees	1,600	1,600	1,650	1,650		1675
Production	45	45	43	43		44
Imports	0	0	0	0		0
Total Supply	45	45	40	43		44
Exports	15	15	14	17		18
Fresh Dom. Consumption	30	30	29	26		26
For Processing	0	0	0	0		0
Total Distribution	45	45	43	43		44

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

Policy

The citrus industry and the Ministry of Agriculture have deployed new sanitation and social distancing measures in agricultural production units to ensure the maintenance of regular production and export operations. The measures include strengthening staff hygiene systems in citrus packaging houses, disinfecting and cleaning surfaces in warehouse facilities, screening employees for symptoms before entering facilities, providing staff with protective equipment's (masks and gloves), and respecting safe distancing between personnel.

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](#)

Attachments:

No Attachments