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## **Report Name:** Citrus Annual

**Country:** Morocco

**Post:** Rabat

**Report Category:** Citrus

**Prepared By:** Mohamed Fardaoussi

**Approved By:** Benjamin Rau

### **Report Highlights:**

Post expects Morocco's Tangerine/mandarin production for MY 2024/25 to reach an estimated 1.1 million metric tons, increasing 16 percent over MY 2023/24, orange production should increase by 17 percent over the previous year to 960,000 MT, while lemon/lime production will reach 45,000 MT. Much of the increase in production is due to improved weather conditions during the flowering period compared to the previous season coupled with an increased adoption of drip irrigation techniques. Post estimates Morocco's MY 2024/25 tangerine/mandarin exports to reach 500,000 MT, increasing 27 percent higher than MY 2023/24 due to increased supplies while orange exports should increase by 17 percent to reach 90,000 MT and lemon/lime exports at 7,000 MT.

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## Executive Summary

Morocco's MY 2024/25 citrus production experienced significant improvement over the previous season, driven by favorable weather conditions during the growing period and wider adoption of advanced irrigation techniques and water management. Growers reported a promising production compared to last season. However, this year's output remains below the historical peak recorded in MY2018/19. Post expects Morocco's Tangerine/mandarin production for MY 2024/25 to reach an estimated 1.1 million metric tons, increasing 16 percent over MY 2023/24, orange production should increase by 17 percent over the previous year to 960,000 MT, while lemon/lime production will reach 45,000 MT.

The export season started as scheduled in early November. Post projects Morocco's MY 2024/25 tangerine/mandarin exports to reach 500,000 MT, increasing 27 percent higher than MY 2023/24 due to increased supplies while orange exports should increase by 17 percent to reach 90,000 MT and lemon/lime exports at 7,000 MT.

On December 11, 2024, The government of Morocco and [Atlas Marine](#) signed a memorandum of understanding to establish a new commercial maritime line between Agadir and Dakar. According to the citrus industry, the new maritime connection is expected to facilitate and increase citrus exports to the West African countries.

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

Citrus	MY 2023/2024			MY 2024/2025		
	Production	Domestic Consumption	Exports	Production	Domestic Consumption	Exports
Tangerines/Mandarins Fresh	950	500	392	1,100	600	500
Oranges, Fresh	820	715	60	960	815	90
Lemons/Limes Fresh	40	35	5	45	38	7
Orange Juice (65° brix)*	5	4.7	3.6	5.5	4.8	3.7

Source : Office des Changes, \* For import data see trade section.

**I. Tangerines/Mandarins, Fresh  
(HS-080520, 080521, 080522, 080529)**

**Production:** Post forecasts Morocco’s tangerine/mandarin production for MY 2024/25 at 1.1 Million MT, an increase of 16 percent compared to MY 2023/24 due to an increase in use of irrigation practices and high level of new plantings coming into full production for the Nadorcott and Afourer varieties. Growers in the southern region, particularly in the areas of Beni-Mellal and Marrakech, are adopting innovative techniques to address the challenges posed by climate change. One of the methods they are employing is the use of plastic mulch, a practice that has proven effective in conserving water by significantly reducing evaporation from the soil. This approach not only helps retain moisture in arid conditions but also minimizes the loss of vital nutrients essential for tree growth and productivity. The industry reported that at the start of production, the fruits were affected by strong winds, leading to external defect. However, the internal quality of the fruits remained largely unaffected. By the end of the season, they achieved favorable results, with higher Brix levels and excellent juice content, reflecting overall good fruit quality.

**Consumption:** Post forecasts domestic tangerine and mandarin consumption at 600,000 MT in MY 2024/2025, which represents a 7 percent increase compared to MY 2023/2024 based on available production and stable prices. Post also updates MY 2023/2024 fresh domestic consumption, reflecting remaining available supply in the balance sheet after accounting for year-end trade data.

**Trade:** The export season started as scheduled in early November. Post projects tangerine/mandarin exports for MY 2024/25 to reach 500,000 MT, 27 percent higher than MY 2023/24 due to increased supplies. The European Union remains the leading export destination for Moroccan tangerine/mandarin, capturing 30 percent of market share. While exports to Russia continue to decline due to the ongoing impact of the war. Post also updates MY23/24 exports based on year-end trade data (See table below). On December 11, 2024, The government of Morocco and [Atlas Marine](#) signed a memorandum of understanding to establish a new commercial maritime line between Agadir and Dakar. According to the citrus industry, the new maritime connection is expected to facilitate and increase citrus exports to the West African countries.

**Table 2: Tangerine/Mandarin Exports (1,000 MT) by Marketing Year (Sep-Aug)**

Partner Country	2019/20	2020/21	2021/22	2022/23	2023/24	% Change
EU 27	150,097	165,801	180,699	145,059	119,145	-18%
Russia	124,247	149,464	182,346	94,948	79,079	-17%
United States	38,244	43,208	109,254	82,139	73,341	-11%
Canada	53,824	54,160	69,033	73,049	60,910	-17%
Sub-Saharan Africa	26,830	30,364	52,388	37,338	42,339	13%
Middle East	14,093	18,007	18,801	15,376	12,422	-19%
Other	3,617	4,648	12,455	6,001	4,438	-26%
<b>Total</b>	<b>410,952</b>	<b>465,652</b>	<b>624,976</b>	<b>453,910</b>	<b>391,674</b>	<b>-14%</b>

Source: Office des changes

**Table 3: Production, Supply & Distribution: Tangerines/Mandarins, Fresh**

<b>Tangerines/Mandarins, Fresh</b>	<b>2022/2023</b>		<b>2023/2024</b>		<b>2024/2025</b>	
<b>Market Year Begins</b>	<b>Sep 2022</b>		<b>Sep 2023</b>		<b>Sep 2024</b>	
<b>Morocco</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Area Planted (HECTARES)</b>	59150	59150	59100	59100	0	59120
<b>Area Harvested (HECTARES)</b>	50000	50000	50050	50050	0	50060
<b>Bearing Trees (1000 TREES)</b>	17975	17975	17400	17400	0	17450
<b>Non-Bearing Trees (1000 TREES)</b>	6150	6150	6100	6100	0	6150
<b>Total No. Of Trees (1000 TREES)</b>	24125	24125	23500	23500	0	23600
<b>Production (1000 MT)</b>	927	927	950	950	0	1100
<b>Imports (1000 MT)</b>	0	0	0	0	0	0
<b>Total Supply (1000 MT)</b>	927	927	950	950	0	1100
<b>Exports (1000 MT)</b>	453	453	400	392	0	500
<b>Fresh Dom. Consumption (1000 MT)</b>	474	474	550	558	0	600
<b>For Processing (1000 MT)</b>	0	0	0	0	0	0
<b>Total Distribution (1000 MT)</b>	927	927	950	950	0	1100
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

## II. Oranges, Fresh (HS-080510)

**Production:** For MY 2024/2025 orange production is expected to increase by 17 percent, reaching 960,000 MT, due to improved weather conditions during the flowering and growing season compared to the last year, coupled with an increased adoption of drip irrigation techniques.

**Consumption:** Post estimates MY 2024/2025 domestic consumption of fresh oranges at 815,000 MT, an increase of 14 percent from the previous season. Deliveries to processors are estimated to increase to 55,000 MT due to available supplies. Post adjusts domestic consumption for MY 2023/2024, based on year-end trade figures.

**Trade:** Orange exports have not yet reached their previous levels, with total exports in MY2023/24 significantly lower than in MY2020/21 and MY2021/22. Moroccan exporters continue to face intense competition, particularly from Egypt and Turkey. However, there has been a notable increase in exports to the United States, driven by reduced production in California. Moroccan exporters have effectively filled this gap, leveraging their capacity to meet rising demand. Post projects orange exports for MY2024/2025 to reach 90,000 MT, a 50 percent increase from the MY 2023/2024 due to the available of supplies.

Post also updates the MY2023/2024 export number based on year-end trade data.

**Table 4: Orange Exports (MT) by Marketing Year (Oct-Sep)**

Partner Country	Marketing Year				Year to Date		
	2019/20	2020/21	2021/22	2022/23	10/22-09/23	10/23-09/24	%Δ
EU 27	84,191	52,011	51,284	5,915	5,915	10,249	73%
Canada	6,968	10,972	17,783	10,309	10,309	11,190	9%
United States	2,142	2,919	18,611	6,622	6,622	20,562	211%
Russia	9,909	9,609	20,307	6,343	6,343	6,721	6%
Sub-Saharan Africa	8,706	10,030	13,859	8,554	8,554	9,520	11%
Middle East	4,532	4,459	6,784	581	581	638	10%
Other	736	1,546	1,731	521	521	652	25%
<b>Total</b>	<b>117,184</b>	<b>91,546</b>	<b>130,359</b>	<b>38,845</b>	<b>38,845</b>	<b>59,532</b>	<b>53%</b>

*Source: Office des changes*

**Table 5: Production, Supply & Distribution: Oranges, Fresh**

<b>Oranges, Fresh</b>	<b>2022/2023</b>		<b>2023/2024</b>		<b>2024/2025</b>	
<b>Market Year Begins</b>	<b>Oct 2022</b>		<b>Oct 2023</b>		<b>Oct 2024</b>	
<b>Morocco</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Area Planted (HECTARES)</b>	58500	58500	58200	58200	0	58300
<b>Area Harvested (HECTARES)</b>	55100	55100	54900	54900	0	55000
<b>Bearing Trees (1000 TREES)</b>	17125	17125	17100	17100	0	17120
<b>Non-Bearing Trees (1000 TREES)</b>	1600	1600	1590	1590	0	1600
<b>Total No. Of Trees (1000 TREES)</b>	18725	18725	18690	18690	0	18720
<b>Production (1000 MT)</b>	783	783	820	820	0	960
<b>Imports (1000 MT)</b>	0	0	0	0	0	0
<b>Total Supply (1000 MT)</b>	783	783	820	820	0	960
<b>Exports (1000 MT)</b>	39	39	40	60	0	90
<b>Fresh Dom. Consumption (1000 MT)</b>	704	704	730	710	0	815
<b>For Processing (1000 MT)</b>	40	40	50	50	0	55
<b>Total Distribution (1000 MT)</b>	783	783	820	820	0	960
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

### III. Orange Juice (65° brix basis) (HS-200911, 200912, 200919)

**Production:** Post forecasts orange juice production for MY 2024/25 at 55,000 MT, 10 percent higher than MY 2023/24 and Post also adjusted MY 2023/24 production number based on industry reports.

**Consumption:** Post forecasts MY 2024/25 domestic consumption at 4,800 MT, up 0.5 percent over the previous season on higher available supply. Post revised its estimate for MY2023/24 following year-end trade figures.

**Trade:** For MY 2024/25, Post estimates that orange juice exports will reach 3,700 MT, about 23 MT higher than MY 2023/24. Post also expects Morocco to import 3,000 MT of orange juice, a decrease of 399 MT over the previous year. Decreased imports reflect domestic production increase.

**Table 5: Orange Juice Imports (MT @ 65°) by Marketing Year (Oct-Sep)**

Product	conv. factor	2019/20	2020/21	2021/22	2022/23	2023/24	% Change
2009.11: Frzn	1.0154	627	243	165	469	652	39%
2009.12: Not Frzn, ≤20 Brix	0.1815	5	9	8	15	18	20%
2009.19: Not Frzn, Other	1	1,054	1,304	1,607	2,451	2,729	11%
<b>Total (65° Basis)</b>		<b>1,687</b>	<b>1,556</b>	<b>1,780</b>	<b>2,934</b>	<b>3,399</b>	<b>16%</b>

Source: Office des Changes

**Table 6: Orange Juice Exports (MT @ 65°) by Marketing Year (Oct-Sep)**

Product	conv. factor	2019/20	2020/21	2021/22	2022/23	2023/24	% Change
2009.11: Frzn	1.0154	226	522	818	846	504	-40%
2009.12: Not Frzn, ≤20 Brix	0.1815	755	554	841	460	1,836	299%
2009.19: Not Frzn, Other	1	1,075	1,594	1,398	1,576	1,283	-19%
<b>Total (65° Basis)</b>		<b>2,056</b>	<b>2,670</b>	<b>3,057</b>	<b>2,882</b>	<b>3,622</b>	<b>26%</b>

Source : Office des Changes

**Table 7: Production, Supply & Distribution: Orange Juice (65° brix basis)**

Orange Juice	2022/2023		2023/2024		2024/2025	
Market Year Begins	Oct 2022		Oct 2023		Oct 2024	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	40000	40000	55000	50000	0	55000
Beginning Stocks (MT)	0	0	0	0	0	0
Production (MT)	4000	4000	5500	5000	0	5500
Imports (MT)	2934	2934	2000	3399	0	3000
Total Supply (MT)	6934	6934	7500	8399	0	8500
Exports (MT)	2882	2882	2500	3622	0	3700
Domestic Consumption (MT)	4052	4052	5000	4777	0	4800
Ending Stocks (MT)	0	0	0	0	0	0
Total Distribution (MT)	6934	6934	7500	8399	0	8500

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)



#### IV. Lemons/Limes, Fresh (HS-080550)

**Production:** Post forecasts lemon and lime production for MY 2024/25 to reach 45,000 MT, about 12.5 percent higher than MY 2023/24. Production increases are due to the increase in area harvested.

**Consumption:** Post forecasts MY 2024/25 fresh domestic consumption to be slightly up at 38,000 MT based on available supply.

**Trade:** Post projects lemon/lime exports for MY 2024/25 to reach 7,000 MT, about 2,000 MT higher than MY 2023/24. Post also updates MY2023/24 exports number based on year-end trade data.

**Table 8: Lemon/Lime Exports by Destination (MT)**

Partner Country	2019/20	2020/21	2021/22	2022/23	2023/24	%Δ
EU 27	2,434	891	1,164	1,595	870	-45%
Russia	6,477	4,242	2,091	1,615	53	-97%
Canada	1,073	649	1,642	1,203	116	-90%
United States	2	26	0	0	0	0%
Sub Saharan Africa	6,845	2,720	2,534	2,880	3,942	37%
Middle East	434	339	4	28	0	-100%
Other	54	42	2	3	0	-100%
Total	17,319	8,909	7,437	7,324	4,981	-32%

Source : Office des Changes

**Table 9: Production, Supply & Distribution: Lemons/Limes, Fresh**

Lemons/Limes, Fresh	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
Market Year Begins	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Morocco						
Area Planted (HECTARES)	3900	3900	3950	3950	0	3960
Area Harvested (HECTARES)	3000	3000	3050	3050	0	3055
Bearing Trees (1000 TREES)	1650	1650	1670	1670	0	1680
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	1650	1650	1670	1670	0	1680
Production (1000 MT)	35	35	40	40	0	45
Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	35	35	40	40	0	45
Exports (1000 MT)	7	7	4	5	0	7
Fresh Dom. Consumption (1000 MT)	28	28	36	35	0	38
For Processing (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	35	35	40	40	0	45
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

## V. Policy

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

**Table 10: Subsidies and Incentives for the Citrus Sector:**

<b>Program</b>	<b>Subsidy</b>
Phyto-Sanitary Assistance	\$100/ha for the mass trapping technique based on the use of Medfly female attractant.
Construction new packinghouse station	30% of the cost of construction
Export subsidy for citrus destined to Ukraine, China, Gulf countries	Since September 2017, exporters receive 500 DH/T for quantities that exceed the amount exported during the 2000/2001 export campaign.
Export subsidy for Countries other than Russia, Ukraine, China, Gulf countries, EU Members, and UK	Exporters receive 500MAD/MT for all exported quantities exceeding the levels exported between September 1, 2000 to August 31, 2001

Source: MoA/FDA-2024 [link](#).

On December 11, 2024, The government of Morocco and [Atlas Marine](#) signed a memorandum of understanding to establish a new commercial maritime line between Agadir and Dakar. This initiative aims to optimize the transport of goods including citrus products by addressing logistical challenges associated with land routes and enhancing trade between Morocco and West African countries. According to the citrus industry, the new maritime connection is expected to facilitate and increase citrus exports to the West African countries.

## VI. Field Trip Observations

The photos, captured on our field trip in the Beni-Mellal and Marrakech regions during the week of December 16<sup>th</sup>. Citrus crop production has significantly improved compared to last year.



### Attachments:

No Attachments