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**Report Highlights:**

Korea's total citrus production for Marketing Year (MY) 2019/20 (October – September) is projected to increase six percent to 645,000 metric tons (MT) from 607,638 MT in MY 2018/19. The production increase is primarily driven by increased yields from open field “Unshu” orange production with an increased number of fruits per tree caused by an alternative fruit bearing cycle (high yield year) in the southern part of Jeju island (Seogwipo region), which is the main producing region on the island. In MY 2019/20, Korea's fresh orange imports are projected to increase about 7.1 percent (9,000 MT) to 135,000 MT from 126,000 MT in the previous marketing year due to the expected increased production of high-quality navel oranges in California and increased demand for premium oranges (black label) for dessert fruits.

## Tangerines / Mandarins

### PS&D Table

Tangerines/Mandarins, Fresh Market Begin Year Korea, Republic of	2017/2018		2018/2019		2019/2020	
	Oct 2017		Oct 2018		Oct 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	20140	20140	20100	20090	0	20040
Area Harvested	18932	18932	18894	18885	0	18880
Bearing Trees	23665	23665	23618	23606	0	23500
Non-Bearing Trees	6545	6545	6532	6529	0	6500
Total No. Of Trees	30210	30210	30150	30135	0	30000
Production	577	577	610	608	0	645
Imports	0	0	0	0	0	0
Total Supply	577	577	610	608	0	645
Exports	2	2	2	2	0	2
Fresh Dom. Consumption	503	503	548	543	0	558
For Processing	72	72	60	63	0	85
Total Distribution	577	577	610	608	0	645
(HECTARES), (1000 TREES), (1000 MT)						

### Production

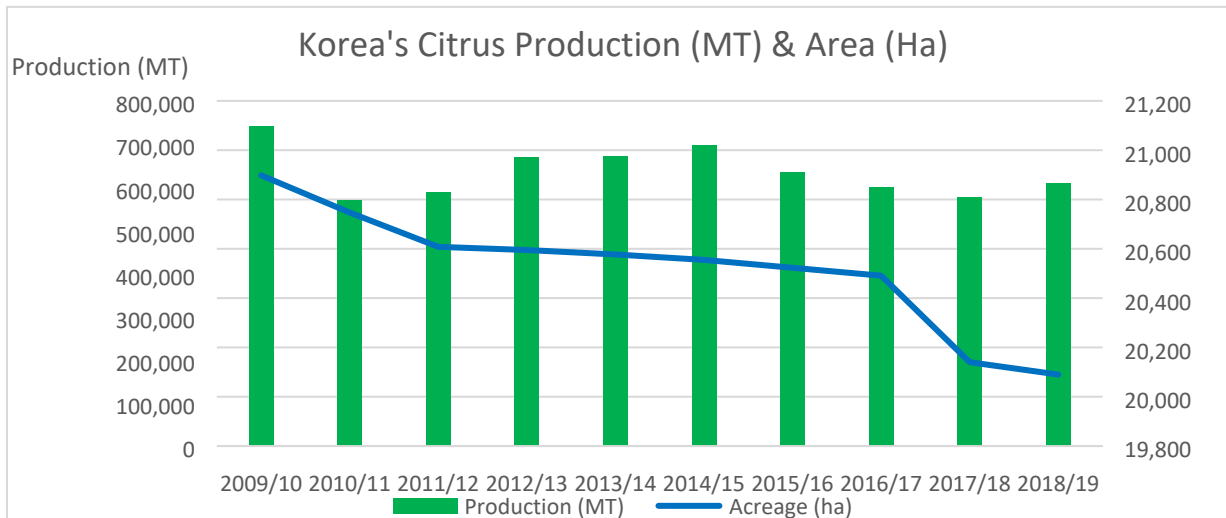
Korea's total citrus production for Marketing Year (MY) 2019/20 (October – September) is projected to increase six percent to 645,000 metric tons (MT) from 607,638 MT in MY 2018/19. The production increase is primarily driven by increased yields from open field "Unshu" orange production with an increased number of fruits per tree caused by an alternative fruit bearing cycle (high yield year) in the southern part of Jeju island (Seogwipo region), which is the main producing region on the island. Additionally, improved weather conditions compared to the previous year during the flowering and citrus growing period helped improve production in all areas.

Korea's citrus production averaged around 650,000 metric tons per year until MY 2015/16. Over the last three years, production dropped to around 600,000 MT due to unfavorable weather (cold weather during the flowering season, hot weather and drought during the citrus growing period) and the increasing number of older tangerine trees with lower productivity. As result, tangerine production in open field (the main citrus production pattern) decreased notably during this period.

In MY 2019/20, Korea's Unshu orange production in open fields is projected to rebound somewhat, increasing by eight percent (37,400 MT) to 505,000 MT from 467,600 MT in MY 2018/19 due to the aforementioned yield increases. However, the overall quality of Unshu oranges from open fields is expected to be lower than the previous year due to an increased incidence of scratch-damaged citrus caused by several typhoons right before the main harvest season in September through early October.

As a result of reduced production of quality tangerines (high sugar content and less acid level), many citrus growers with early maturing "Unshu" oranges delayed the harvest to increase the quality (increase sweetness level, while reduce acid level), driving the market price down in the beginning of tangerine season due to overlapped tangerine shipments between extremely early maturing tangerines and early maturing tangerines

during October and even in early November. The quality of early maturing open field tangerines significantly improved with ample sunshine following the last typhoon on October 3rd



Source: Jeju Citrus Growers Cooperative (JCGC)

### Open Field Tangerines (Unshu Orange)

Korea’s Unshu orange production in open fields accounted for 77 percent (467,600 MT) of total citrus production in MY 2018/19 (607,638 MT) and Unshu planted area covered about 74 percent (15,902 hectares) of total citrus planted area (20,090 hectares). Open field production areas have gradually decreased over the last decade due to increased competition from imported fruits and consumer demand for higher quality fruits. In response, more citrus growers shifted their citrus production to facility production such as greenhouse or rain proof cultivation for late maturing varieties, which are considered more value-added production methods that allow better competition with imported fruits like navel oranges from the United States.

As a result of the weather-related delayed harvest season for extreme early maturing Unshu oranges in October, the average retail price was down ten percent in the beginning of the tangerine season (October and November 2019). Accordingly, the Jeju tangerine industry destroyed about 10,000 MT of early maturing tangerines, (compensating producers with a public procurement subsidy of KRW 180 / Kilogram) to prevent further prices drops.

### Planted Area

In MY 2019/20, Korea’s citrus planted area is projected to decrease slightly by 0.25 percent (50 hectares) to 20,040 Ha as citrus production in open fields continues to gradually decrease. Open field production area is shrinking in Jeju as many farms are bought by property developers for tourism businesses and ageing citrus growers leave the industry or switch to more profitable crops. Meanwhile, citrus planted area on the southern

part of the mainland (South Jeolla and South Gyeongsang provinces) increased marginally to around 140 hectares (mainly late maturing citrus in greenhouse) over the past three to four years due to changes in climate.

As property values in Jeju Island increased over the past decade and competition with imported fruits rose, total citrus planted area in Jeju island (the main citrus production area in Korea) in MY2019/20 is forecast to decrease by 0.8 percent to 19,920 hectares from 20,090 hectares. This reduction marks the first sub 20,000 hectare level since the Korean citrus industry's high water mark of 25,860 Ha in MY 1997/98. By cultivar, planted area for regular "Unshu" orange (tangerine) production in open fields and winter greenhouse grown Unshu oranges are expected to decrease by 1.3 percent and 0.7 percent respectively due to reduced farm income. On the other hand, planted area for summer (heated) greenhouse production and late maturing varieties is expected to grow by 2.8 percent and 1.4 percent respectively due to increased consumer demand and higher farm income (said to be three times greater) compared to open field production.

#### Late Maturing Varieties & Protected Facility Farming

In MY 2019/20, Korea's planted area for late maturing citrus is forecast to increase by 2.4 percent to 4,094 Ha from 3,998 Ha in MY 2018/19 due to increased consumer demand for alternative high quality late maturing citrus over traditional "Hallabong" varieties. Late maturing citrus normally competes with imported navel oranges and some greenhouse fruits such as strawberries from February through May.

As late maturing citrus production promises better farm income to growers compared to regular Unshu open field production, greenhouse cultivation for winter Unshu, late maturing citrus (Hallabong, Cheonhyehyang, Redhyang and others), and summer citrus in heated greenhouses are expected to increase gradually in the coming years. However, planted area for "Hallabong" citrus, which covers about 40 percent of total late maturing citrus area, is expected to decrease by one percent in MY 2019/20 due to slightly reduced consumer demand caused by poor quality management (lower brix level than the main season in February) during the early season (late December and early January) in the previous year.

#### Greenhouse Tangerines

In MY 2019/20, Korea's Unshu orange production in heated greenhouses for the summer season (mainly produced during May – October) is forecast to increase by 4.8 percent to around 24,000 MT from 22,898 MT in MY 2018/19 due to better farm income and stable heating costs during the past several years.

The unit price (KRW / Kilogram) for greenhouse tangerines (KRW 3,539) in MY 2018/19 was about three times higher than the regular tangerine (open field) price of KRW 1,076. As result, planted area for heated greenhouses is forecast to increase slightly to 330 hectares from 321 hectares in MY 2018/19. Normally, the Korean tangerine industry produces around 20,000 – 22,000 MT of fresh tangerines in heated greenhouses every year during the tangerine off-peak season (between May and October period).

## Korea: Citrus Summer Greenhouse Production Situation

Year	Area (HA)	Production (MT)	Gross Income (Mil. Won)	Household	Price (Won/Kg)
2010	312	21,602	74,507	929	3,449
2011	295	21,807	70,818	867	3,247
2012	285	19,963	65,719	843	3,292
2013	262	19,555	77,859	732	3,982
2014	255	21,571	60,695	713	2,814
2015	250	20,401	63,021	659	3,089
2016	284	21,660	76,087	697	3,513
2017	301	22,637	80,771	737	3,568
2018	321	22,898	81,046	783	3,539
2019 1/	320	23,000	N/A	N/A	N/A

1/ Preliminary forecast by FAS Seoul

Source: Jeju Provincial Government & Korea Rural Economic Institute

## Price

Wholesale Prices for Greenhouse Tangerine, Nationwide (Unit: Korean Won per 3 Kilogram)

Month	2018	2019
May	23,865	22,007
Jun.	18,310	18,672
Jul.	14,390	15,832
Aug.	16,958	14,199
Sep.	13,464	12,184
Oct.	8,545	8,855
Nov.	8,222	-

Source: Jeju Special Self-Governing Province Citrus Marketing & Shipping Association

## Tangerines for Processing

In MY 2019/20, Jeju's tangerine industry plans to use about 85,000 MT of fresh tangerines for processing (mainly concentrate production), up 34 percent from the previous marketing year mainly due to increased volume of non-marketable fruits. Non-marketable fruits include inferior quality fruits such as overly large fruits, lower brix level, high acid level (caused by not enough sunshine and frequent rainfalls during autumn season) and fruits with skin damaged by storms. As result, the ratio of tangerines for processing out of total citrus production is expected to increase to 13 percent in MY 2019/20 from 10.3 percent in MY 2018/19.

The Jeju tangerine industry (represented by the Jeju provincial government and a producer's group) decided to maintain the 2019 public purchasing price for tangerines for processing at the level of KRW 180 (KRW 60 supported by the Provincial Government Fund and KRW 120 paid by three tangerine concentrate producers) per kilogram, which has been the support price since MY 2016/17.

## Prices

Korea: Average Retail Prices for Regular Unshu (tangerines), Nationwide  
(Unit: Korean Won per 10 Fruits)

Month	S size		M size	
	2018	2019	2018	2019
Jan.	2,675	2,547	3,356	3,124
Feb.	2,892	2,678	3,418	3,254
Mar.	-	-	-	-
April - September: N/A				
Oct.	3,047	2,727	3,503	3,413
Nov.	2,765	2,273	3,139	2,916
Dec.	2,563	-	2,951	-

Source: Agricultural & Fishery Marketing Corporation

Note: S size fruit diameter: 55 – 58 mm / M size fruit diameter: 59 – 62 mm

## Consumption

In MY 2019/20, Korea's citrus (Tangerine) consumption is forecast to increase about three percent to 558,000 MT from 543,000 MT in MY 2018/19 mainly due to an eight percent increase in Unshu orange production. As the other popular domestic fruits (apple, pears and persimmons) also saw increased production over the previous year, citrus consumption is expected to compete with these fruits as well.

Per capita citrus consumption in MY 2019/20 is also expected to increase slightly to 11.9 kilograms from 11.8 kilograms in MY 2018/19 due to increased domestic supply. As a result of reduced tangerine quality (less sweet than previous year), tangerine consumption may suffer amongst consumers who are looking for sweeter dessert fruits.

## Trade

In MY 2019/20, Korea's Unshu orange exports are forecast to increase by 25 percent to 2,500 MT from 1,996 MT due to an eight percent increased Unshu orange production in open field and increased competition in the domestic fruit market. As Korea exports mostly "Unshu" oranges produced in open fields, November and December are the peak season for fresh tangerine exports. In recent years Korea started to export a very small

quantity (around 20-25 metric tons) of late maturing citrus (mainly “Hallabong” variety) to the U.S. market. As shown in the trade table below, Russia and Canada are the main export markets for Korean citrus followed by the United States and Singapore. In MY 2018/19, Malaysia imported 313 MT of Korean tangerines, up 459 percent from the previous marketing year due in part to the rising popularity of Korean culture in south east Asian countries.

Export Matrix for Korean Tangerines

Export Trade Matrix				
Country: Korea				
Commodity: Tangerine (HS 0805.21/22/29) Unit: MT & US\$1,000				
Exports to	MY 2017/18 (Oct. 17 – Sep. 18)		MY 2018/19 (Oct. 18 – Sep. 19)	
	Volume	Value	Volume	Value
U.S.	415	651	290	565
Others				
Russia	493	344	455	326
Canada	303	306	301	296
Japan	10	15	0	3
Hong Kong	135	279	181	387
Guam	73	155	50	155
Indonesia	1	2	0	3
Malaysia	56	115	313	562
United Kingdom	0	0	0	0
Mongolia	76	106	149	209
Singapore	225	398	222	479
Others	83	204	35	108
Total for Others	1,455	1,924	1,706	2,528
Grand Total	1,870	2,575	1,996	3,093

Source: Trade Data Monitor LLC.

## Oranges

### PS&D Table

Oranges, Fresh Market Begin Year Korea, Republic of	2017/2018		2018/2019		2019/2020	
	Oct 2017		Oct 2018		Oct 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total No. Of Trees	0	0	0	0	0	0
Production	0	0	0	0	0	0
Imports	141	141	130	126	0	135
Total Supply	141	141	130	126	0	135
Exports	0	0	0	0	0	0
Fresh Dom. Consumption	141	141	130	126	0	135
For Processing	0	0	0	0	0	0
Total Distribution	141	141	130	126	0	135
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Production – There is no domestic production of Navel or Valencia oranges in Korea.

### Consumption

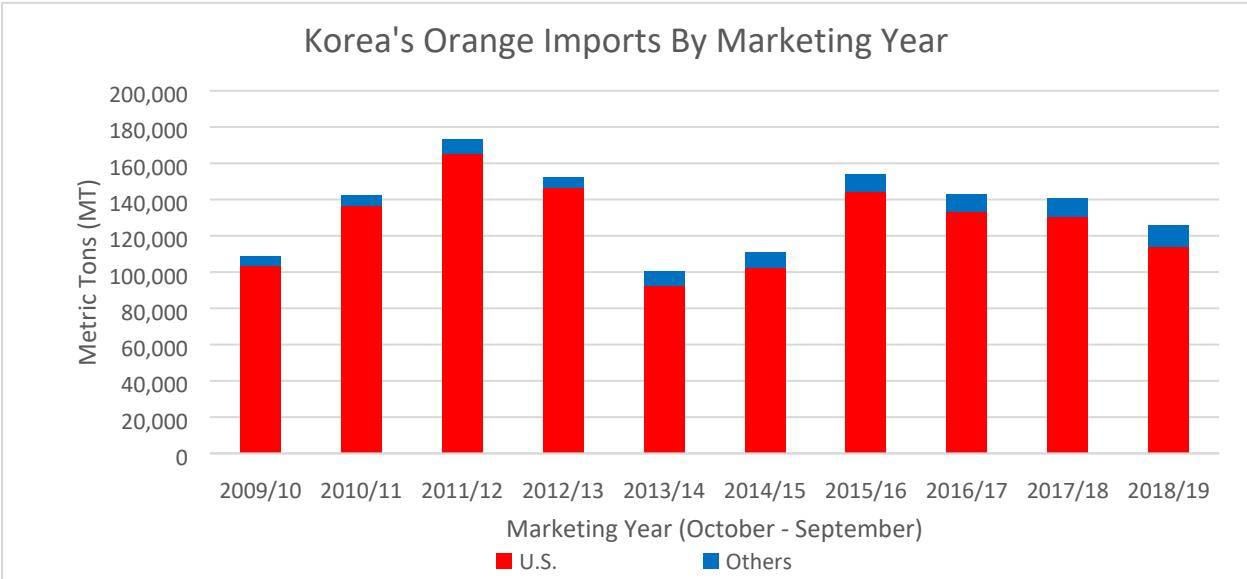
In MY 2019/20, Korea's orange consumption is forecast to increase by 7.1 percent (about 9,000 MT) to 135,000 MT from the previous marketing year (126,001 MT) due to growing demand for high quality dessert fruits. As more Korean consumers are willing to spend more for high quality and sweeter dessert fruits, demand for premium oranges (black label) is expected to increase in market share. On the other hand, orange consumption in MY 2018/19 dropped drastically by 10.4 percent to 126,001 MT from 140,667 MT in MY 2017/18 due to reduced imports of U.S. navel oranges from California caused by below average fruit quality following frequent rainfalls during the main harvest season in early Spring in 2019.

### Trade

In MY 2019/20, Korea's fresh orange imports are projected to increase about 7.1 percent (9,000 MT) to 135,000 MT from 126,000 MT in the previous marketing year due to the expected increased production of high-quality navel oranges in California. In MY 2018/19, U.S. orange exports to Korea dropped by 12.7 percent to 114,026 MT from 130,673 MT in MY 2017/18 mainly due to unfavorable weather condition during the main harvest season in early Spring in California, the main U.S. navel orange production area. To fill the shortfall of U.S. exports, South Africa increased orange exports to Korea by 52 percent to 4,843 MT in MY 2018/19 from the previous marketing year (3,190 MT) with more a competitive unit price (USD 1,046 / MT) over U.S. oranges (USD 1,680 / MT) during the August – October period, when the northern hemisphere is off-season.



### Korea's Orange Imports By Marketing Year



**Korea: Monthly Orange Imports**  
(Unit: MT)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
'19	5,424	5,700	41,025	48,408	12,121	1,709	2,098	2,047	1,631	1,647	-	-
'18	9,251	7,294	61,291	39,691	10,335	2,885	1,339	1,605	2,916	3,804	1,157	877
'17	5,918	11,421	60,543	40,549	8,925	3,471	1,946	2,067	2,669	1,357	1,012	1,694
'16	5,210	10,830	68,324	46,908	9,719	1,780	2,340	2,275	2,166	1,473	838	3079
'15	2,926	5,759	40,090	38,067	13,132	1,815	1,346	1,500	2,608	2,207	590	1,704
'14	4,124	12,289	36,914	29,366	3,584	2,857	1,554	1,461	2,408	1,796	362	1,656
'13	8,205	13,059	53,124	51,630	13,265	1,680	1,450	1,589	2,816	2,627	643	2,628

Source: Korea Customs Service & Trade Data Monitor LLC.

**Import Quota under the KORUS FTA (Unit: MT, %)**

HSK 10	Description	Base Rate	2018	2019	2020
0805100000	Oranges				
March1 – end Aug		50	Zero	Zero	Zero
Sept 1 – end Feb					
TRQ (MT)			2,985	3,075	3,167
In-quota Rate			0	0	0
Out of Quota Rate		50	50	50	50

Note: After year 5, the in-quota quantity increases by 3% per year, compounded annually.

Import Quota under the Korea-EU FTA (Unit: MT, %)

KOR-EU FTA	Description	Base Rate	2018	2019	2020
HS 0805100000	Oranges				
March1 – end Aug		50	5.0	Zero	Zero
Sept 1 – end Feb					
TRQ (MT)			40	40	40
In-quota Rate			0	0	0
Out of Quota Rate		50	50	50	50

Note: After year 12, the in-quota quantity shall remain the same as the quantity of year 12.

Import Quota under the Korea-Australia FTA (Unit: MT, %)

KOR-AUS FTA	Description	Base Rate	2018	2019	2020
HS 0805100000	Oranges				
April 1 – end Sep		50	10.0	5.0	Zero
Oct 1 – end March					
TRQ (MT)			20	20	30
In-quota Rate			0	0	0
Out of Quota Rate		50	50	50	50

Note: After year 10, the in-quota quantity shall remain the same as the quantity of year 10.

Import Matrix for Oranges

Import Trade Matrix				
Country: Korea				
Commodity: Orange (HS 0805.10)			Unit: MT & US\$1,000	
Imports from	MY 2017/18 (Oct. 17 – Sep. 18)		MY 2018/19 (Oct. 18 – Sep. 19)	
Country	Volume	Value	Volume	Value
U.S.	130,673	235,697	114,026	191,508
Others				
South Africa	3,190	3,671	4,843	5,067
Australia	3,183	5,728	2,463	4,281
Spain	2,744	3,670	2,989	3,465
Chile	659	893	1,324	1,728
Other	218	205	356	304
Total for Others	9,994	14,167	11,975	14,845
Grand Total	140,667	249,864	126,001	206,353

Source: Trade Data Monitor LLC.

Price

Korea: Average Retail Prices for Imported Oranges (Navel), Nationwide  
(Unit: Korean Won per 10 Fruits)

Year Month	2017	2018	2019	% Change from the previous year
Jan	11,681	11,999	12,246	2.1
Feb	12,758	11,737	12,311	4.9
Mar	10,957	9,860	11,037	11.9
Apr	9,886	9,243	9,955	7.7
May	10,412	9,446	8,951	-5.2
Jun	9,969	9,644	8,930	-7.4
Jul	-	-	8,584	-
Aug	-	-	-	-
Sep	11,464	-	-	-
Oct	12,035	-	-	-
Nov	11,411	-	-	-
Dec	10,914	13,909	-	-

Prices for high quality

Source: Agricultural & Fishery Marketing Corporation

Korea: Average Wholesale Prices for Imported Navel Oranges  
(Unit: Korean Won per 18 Kilogram box)

Month	High Quality		Medium Quality	
	2018	2019	2018	2019
Jan.	58,873	62,739	53,873	57,250
Feb.	60,678	64,574	55,578	58,500
Mar.	52,819	62,868	48,133	56,695
Apr.	47,848	54,955	43,248	49,355
May	49,550	49,143	44,950	43,686
Jun.	50,556	45,663	45,956	40,350
Jul.	-	45,000	-	41,000
Aug.	-	-	-	-
Sep.	-	-	-	-
Oct.	-	68,000	-	63,000
Nov.	-	-	-	-
Dec.	62,500	-	57,500	-

Source: Agricultural & Fishery Marketing Corporation

Korea: Wholesale Prices for Domestic Hallabong & Imported Navel Oranges  
(Unit: Korean Won per Kilogram)

Month	Imported Navel 1/		Hallabong 2/	
	2018	2019	2018	2019
Jan.	3,271	3,486	3,771	3,821
Feb.	3,371	3,587	4,254	3,027
Mar.	2,934	3,493	2,701	2,928
Apr.	2,658	3,053	2,580	4,294
May	2,753	2,730	3,480	4,138
Jun.	2,809	2,537	-	-

1/ High quality navel oranges

2/ Late variety Unshu oranges

Source: Agricultural & Fishery Marketing Corporation / Jeju Special Self-Governing Province Citrus Marketing & Shipping Association

## Orange juice

PS&D Table

Orange Juice Market Begin Year Korea, Republic of	2017/2018		2018/2019		2019/2020	
	Oct 2017		Oct 2018		Oct 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors	0	0	0	0	0	0
Beginning Stocks	2076	2076	3879	3879	0	3868
Production	0	0	0	0	0	0
Imports	18489	18489	15000	16767	0	16000
Total Supply	20565	20565	18879	20646	0	19868
Exports	186	186	180	278	0	250
Domestic Consumption	16500	16500	16000	16500	0	16500
Ending Stocks	3879	3879	2699	3868	0	3118
Total Distribution	20565	20565	18879	20646	0	19868
(MT)						

Production – There is no domestic production of orange juice in Korea.

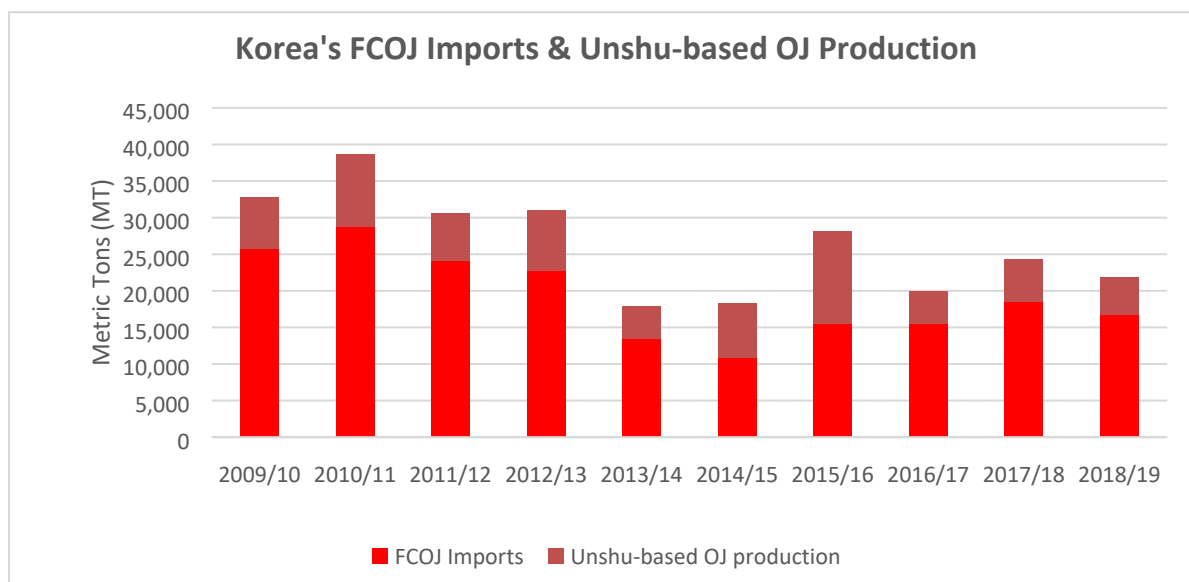
### Unshu-based Orange (Tangerine) Concentrate

In MY 2019/20, tangerine quantity for processing (mainly for Unshu-based concentrate production) is expected to increase by 34 percent to 85,000 MT from 63,402 MT in MY 2018/19 mainly due to 1) increased tangerine production in open fields and 2) increased volume of non-marketable fruits for reasons mentioned previously in this report.

Korea produces about 6,000 – 8,000 MT of Unshu-based orange juice concentrate every year sourced mostly from non-marketable Unshu oranges. Roughly 15,000 MT of frozen concentrate orange juice (FCOJ) is also

imported every year for fruit juice production, mainly from Spain (66 percent) and the United States (23 percent).

The Jeju tangerine industry has three tangerine concentrate producers: Jeju Development Corporation (owned by the Jeju Provincial Government) and two private companies, Ilhae and Lotte. The Jeju Development Corporation (JDC) has more public responsibility to procure tangerines for processing to stabilize marketable tangerines prices for Jeju citrus growers and uses subsidies to help control supply.



### Consumption

Orange juice (excluding tangerine juice) remains the leading product in the Korean fruit juice market, covering more than 50 percent of market share. However, the entire fruit juice market has gradually declined in size during the past decade (from around 25,000 MT in MY 2009/10 to 15,000 MT in MY 2018/19) due to consumer health perceptions regarding sugar.

### Trade

In MY 2019/20, Korea's frozen concentrate orange juice (FCOJ) imports are forecast to decline slightly by 4.6 percent to 16,000 MT from 16,767 MT in MY 2018/19 due to the continued decline in demand for fruit juice in the Korean market.

Until MY 2016/17 the United States had been the main FCOJ supplier to Korea, followed by Spain. However, starting in MY 2017/18, Spain began to dominate market share as a result of reduced OJ production in Florida (the main Valencia/juice orange production area) caused by hurricane Irma in 2017 and the spread of citrus greening disease. As result, Spain was able to increase market share in Korea from 26.5 percent to 66 percent during the past three marketing years (MY2016/17 – MY 2018/19) with more competitive unit prices—about 27 percent below the U.S. price.

Meanwhile, Korea exports around 1,500 MT of Unshu-based tangerine concentrate every year, mainly to Japan as Japanese tangerine production has also declined steadily for the past several years. In MY 2019/20, Korea's tangerine concentrate exports are forecast to stay around 1,500 MT, as Japanese demand is expected to remain steady.

#### Import Matrix for FOJC

Import Trade Matrix				
Country: Korea				
Commodity: FOJC (2009.11/12/19)			Unit: MT & US\$1,000	
Imports from	MY 2017/18 (Oct. 17 – Sep. 18)		MY 2018/19 (Oct. 18 – Sep. 19)	
	Volume	Value	Volume	Value
U.S.	6,536	23,686	3,795	11,010
Others				
Spain	9,160	22,591	10,994	27,313
Brazil	803	1,797	197	486
Australia	490	997	329	843
Thailand	416	508	509	655
Other	1,084	2,482	943	2,115
Total for Others	11,953	28,375	12,972	31,412
Grand Total	18,489	52,061	16,767	42,422

Source: Trade Data Monitor LLC.

#### Export Matrix for Frozen Orange Juice

Export Trade Matrix				
Country: Korea				
Commodity: Frozen Orange Juice (2009.11/12/19)			Unit: MT & US\$1,000	
Exports to	MY 2017/18 (Oct. 17 – Sep. 18)		MY 2018/19 (Oct. 18 – Sep. 19)	
	Volume	Value	Volume	Value
U.S.	0	0	0	5
Others				
Mongolia	41	40	68	62
China	41	172	150	164
Canada	46	48	0	0

Other	58	148	60	115
Total for Others	186	408	278	341
Grand Total	186	408	278	346

Source: Trade Data Monitor LLC.

## Lemons

Production – Domestic lemon production is essentially non-existent with no official data to report.

## Trade

In MY 2019/20, Korea’s lemon imports are forecast to increase slightly to 19,500 MT from 19,258 MT in the previous marketing year due to a steady increase in demand for lemons in the food service sector and for home use. In MY 2018/19, Korea imported 19,258 MT, up 15.4 percent (2,575 MT) from the previous marketing year as a result of increased lemon use for lemon drinks (aide) at cafés, and the growing use of lemon water at home and in restaurants. The United States is the dominant supplier with 79.7 percent share, followed by Chile with 20.3 a percent share in MY 2018/19.



## Import Matrix for Lemon

Import Trade Matrix	
Country: Korea	
Commodity: Lemon (0805.50.10)	Unit: MT & US\$1,000

Imports from	MY 2017/18 (Oct. 17 – Sep. 18)		MY 2018/19 (Oct. 18 – Sep. 19)	
	Volume	Value	Volume	Value
Country				
U.S.	12,991	32,976	15,340	35,468
Others				
Chile	3,629	8,073	3,908	8,007
Other	63	101	10	17
Total for Others	3,692	8,174	3,918	8,024
Grand Total	16,683	41,150	19,258	43,492

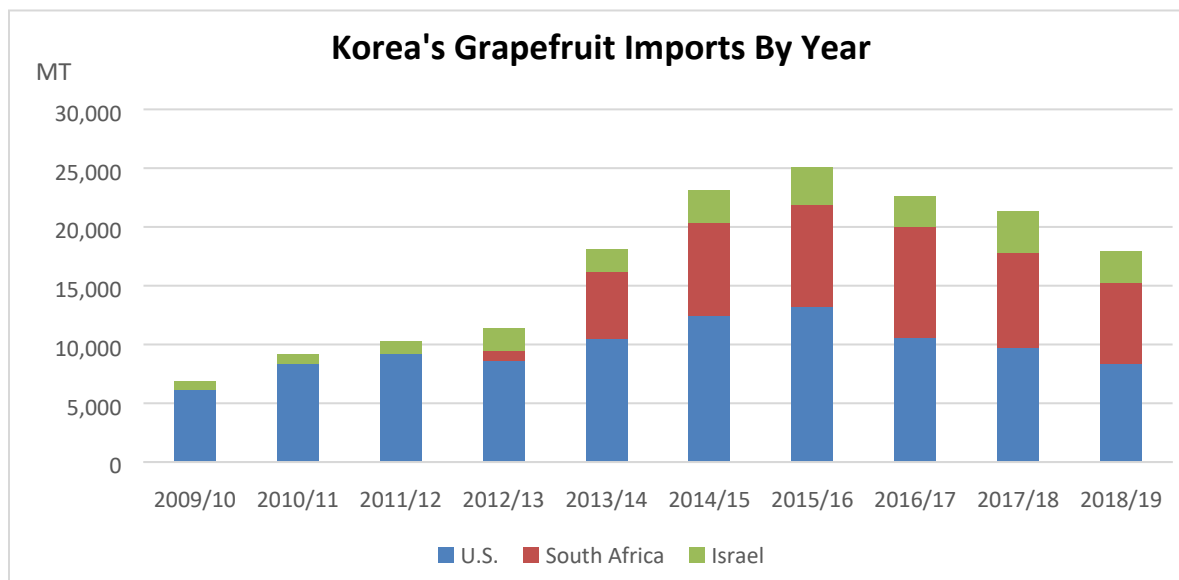
Source: Trade Data Monitor LLC.

## Grapefruit

Production - There is no domestic grapefruit production.

## Trade

In MY 2019/20, Korea's grapefruit imports are forecast to decrease slightly to 17,000 MT from 17,919 MT in the previous marketing year due to reduced popularity caused by negative media coverage (unsubstantiated press reports of women's health concerns), competition from other quality fruits, and limited use in food menus compared to lemons. Korea imported 17,919 MT of grapefruit in MY 2018/19, down 16 percent from the previous marketing year due to the aforementioned reasons and also reduced citrus production in Florida. Korea imported fresh grapefruits in MY 2018/19 mostly from the United States (47 percent), South Africa (38 percent), and Israel (15 percent).



## Korea: Average Wholesale Prices for Imported Lemon



(Unit: Korean Won per 17 Kilograms Box)

Month	High Quality		Medium Quality	
	2018	2019	2018	2019
Jan.	67,109	69,273	60,309	62,873
Feb.	67,356	66,094	60,556	59,706
Mar.	65,857	57,510	59,229	51,370
Apr.	61,295	52,727	54,924	46,627
May	57,250	53,305	51,050	46,981
Jun.	73,916	84,779	67,589	78,147
Jul.	92,927	83,670	86,327	78,087
Aug.	83,755	51,933	77,227	46,819
Sep.	76,400	60,389	70,000	55,495
Oct.	78,667	72,352	72,267	-
Nov.	72,500	-	66,100	-
Dec.	70,442	-	64,042	-

Source: Agricultural & Fishery Marketing Corporation

## Annex I. Korea's Citrus Production

Korea: Citrus Production Situation 1/

Year	Area (HA)	Production (MT)	Farm Household	Gross Income (Mil.won)
2010	20,747	568,478	30,905	668,484
2011	20,608	588,054	30,797	764,158
2012	20,595	668,610	31,070	801,175
2013	20,577	672,267	31,041	901,421
2014	20,555	696,763	31,404	670,739
2015	20,523	635,032	31,458	602,196
2016	20,491	599,642	31,525	911,392
2017	20,140	576,772	30,957	945,792
2018	20,090	607,638	30,846	940,239
2019 2/	20,040	645,000	N/A	N/A

1/ Calendar year basis including greenhouse

2/ Preliminary forecast by FAS Seoul

Source: Jeju Provincial Government

Korea: Citrus Utilization (Unit: MT)

Year	Total	Fresh	Processing	Other 1/
2010	568,478	385,456	81,117	101,905
2011	588,054	371,944	102,933	113,177
2012	668,610	432,058	55,814	180,738
2013	672,267	433,650	92,834	145,783
2014	696,763	400,712	158,371	137,680
2015	635,032	340,353	84,679	210,000
2016	599,642	351,826	56,372	191,444
2017	576,772	331,612	72,460	172,650
2018	607,638	354,172	63,402	190,064

1/ Other – including exports, military consumption and consumption within Jeju island

Source: Jeju Provincial Government

Korea: Purchasing Price of Processing Tangerine Oranges (Korean Won/kg)

Year	Price
2011	140
2012	160
2013	160
2014	160
2015	160
2016	160
2017	180
2018	180
2019	180

Source: Jeju Citrus Growers' Cooperative

Korea: Citrus Production as Ratio to Total Fruit Production (Unit: 1,000 MT, Ratio: Percent)

Year	Total Fruits	Citrus	Ratio
2009	2,500	727	29.1
2010	2,216	615	27.8
2011	2,102	645	30.7
2012	2,027	654	32.3
2013	2,207	655	29.7
2014	2,347	688	29.3
2015	2,364	640	27.1
2016	2,387	610	25.6
2017	2,358	597	25.3
2018	2,160	621	28.8

Source: Korea Statistical Information Service (KOSIS)

Korea: Total Fruits and Citrus Per Capita Consumption

Year	Total Fruits (Kg)	Total Tangerine (Kg)
2010	57.6	12.4
2011	58.1	13.6
2012	57.9	13.7
2013	59.6	13.4
2014	61.8	14.2
2015	59.8	12.5
2016	60.6	11.9
2017	61.2	11.6
2018	57.5	12.0

Source: Ministry for Food, Agriculture, Forestry, and Fisheries

**Annex II. Tariff**

Korea: WTO Import Quota and Tariff for Fresh Orange (Unit: MT, %)

Year	Quota	In-quota Tariff	Out-quota Tariff
2004	57,017	50	50
2017	57,017	50	50
2018	57,017	50	50
2019	57,017	50	50
2020	57,017	50	50

1/ HS 0805.10.0000

Korea: WTO Import Quota and Tariff for Other Citrus (Unit: MT, %)

Year	Quota	In-quota Tariff	Out-quota Tariff
2004	2,097	50	144
2017	2,097	50	144
2018	2,097	50	144
2019	2,097	50	144
2020	2,097	50	144

1/ HS 0805.21.1000, HS 0805.21.9000, HS0805.22.0000, HS0805.50.2020 & HS 0805.90.0000

### Annex III. Exchange Rate

Korea: Monthly Average Foreign Exchange Rate  
(Unit: Korean Won / 1U\$)

Month	2017	2018	2019
Jan.	1134.40	1066.70	1175.31
Feb.	1144.92	1079.58	1122.45
Mar.	1134.77	1071.89	1130.72
Apr.	1132.73	1067.76	1140.95
May	1125.28	1076.39	1183.29
Jun.	1130.04	1092.80	1175.62
Jul.	1134.40	1122.80	1175.31
Aug.	1130.79	1121.15	1208.98
Sep.	1131.59	1120.60	1197.55
Oct.	1131.57	1130.81	1184.13
Nov.	1105.04	1128.58	-
Dec.	1085.78	1122.90	-

Source: Industrial Bank of Korea

### Annex IV. Price Table

Korea: Average Wholesale Prices for Regular Unshu (tangerines) (Unit: Korean Won per 5 Kilogram)

Month	S size		M size	
	2018	2019	2018	2019
Jan.	16,483	15,409	13,339	12,509
Feb.	18,520	14,800	15,320	11,850
Mar.	-		-	
April - September: N/A				
Oct.	18,323	13,920	14,908	10,933
Nov.	16,309	-	13,218	-
Dec.	15,242	-	12,495	-

Source: Agricultural & Fishery Marketing Corporation Korea: Average Wholesale

Note: S size fruit diameter: 55 – 58 mm / M size fruit diameter: 59 – 62 mm

Korea: Average Retail Prices for Regular Unshu (tangerines), Nationwide  
(Unit: Korean Won per 10 Fruits)

Month	S size		M size	
	2018	2019	2018	2019
Jan.	2,675	2,547	3,356	3,124
Feb.	2,892	2,678	3,418	3,254
Mar.	-	-	-	-
April - September: N/A				
Oct.	3,047	2,727	3,503	3,413
Nov.	2,765	-	3,139	-
Dec.	2,563	-	2,951	-

Source: Agricultural & Fishery Marketing Corporation

Note: S size fruit diameter: 55 – 58 mm / M size fruit diameter: 59 – 62 mm

Korea: Wholesale Prices for Domestic Hallabong & Imported Navel Oranges  
(Unit: Korean Won per Kilogram)

Month	Imported Navel 1/		Hallabong 2/	
	2018	2019	2018	2019
Jan.	3,271	3,486	3,771	3,821
Feb.	3,371	3,587	4,254	3,027
Mar.	2,934	3,493	2,701	2,928
Apr.	2,658	3,053	2,580	4,294
May	2,753	2,730	3,480	4,138
Jun.	2,809	2,537	-	-

1/ High quality navel oranges

2/ Late variety Unshu oranges

Source: Agricultural & Fishery Marketing Corporation / Jeju Special Self-Governing Province Citrus Marketing & Shipping Association

**Attachments:** No Attachments