

Required Report: Required - Public Distribution

Date: June 19, 2024

Report Number: MO2024-0008

Report Name: Citrus Semi-annual

Country: Morocco

Post: Rabat

Report Category: Citrus

Prepared By: Mohamed Fardaoussi

Approved By: Benjamin Rau

Report Highlights:

Post production forecasts for tangerines/mandarins, oranges, lemons, and orange juice remain unchanged from the December 20 Annual Citrus Report. MY 2023/24 export figures are revised based on trade data received from Morocco's office des changes.

Production Update:

Post's production forecasts for tangerines/mandarins, oranges, lemons, and orange juice remain unchanged from the December 20, 2023 Annual Citrus Report.

According to the citrus industry, two consecutive seasons of low production are due to higher temperatures and drought. The extreme heat of summer 2023 negatively impacted flowering, and the lack of rain had severe consequences. The industry describes MY2023/2024 as a weak campaign in terms of yield compared to MY 2021/22. While prices are higher than usual, they do not compensate for the reduced volume, and Post saw ample evidence of abandoned orchards during a recent visit to the Northeast region.

Trade Update:

Post has adjusted trade numbers down for fresh tangerines/mandarins and oranges in MY 2023/24 based on final data received from Morocco's office des changes. Tangerines/mandarins exports were revised down to 400,000 MT, orange exports decreased to 40,000 MT based on trade to date data.

Industry contacts mentioned that the geopolitical events, including the wars in Ukraine and Israel, have led to three major challenges for Moroccan exports: inflation of inputs and logistical costs, the closure of the Suez Canal and blocked access to markets in the Middle East and Asia, and increased competition from Spain, Chile, and Turkey. Chile produces a large volume of clementine and with new late season varieties has an extended its export season, adding to the competitive pressure on Moroccan citrus in the North American market. Typically, Morocco would enter the market on the North American East Coast in November, but with more late season varieties, Chile has cut into these exports.

For orange exports, Moroccan exporters are facing significant competition from Egypt. This season, production is declining, and prices are high in the local market, leading exporters to prefer selling more domestically.

Post revised its lemon/limes export numbers for MY 2023/24 downward to 4,000MT, based on current trade data and industry insights. Moroccan exporters have opted to prioritize the local market due to favorable pricing.

On April 2024, Brazil opens its market to Moroccan citrus during the 16th edition of the International Agricultural Show of Morocco ([SIAM 2024](#)). This development was emphasized by the signing of an action plan detailing the export terms. This will enable Moroccan exporters to send citrus products to the Brazilian market.

Tangerines/Mandarins, Fresh

HS-080520, 080521, 080522, 080529

Table 1: Morocco's Tangerine/Mandarin Exports by Destination (MT)

Partner Country	2020/21	2021/22	2022/23	09/22-03/23	09/23-03/24	%Δ
EU 27	165,801	180,699	145,059	142,703	115,469	-19.08
Russia	149,464	182,346	94,948	94,086	77,636	-17.48
United States	43,208	109,254	82,139	81,549	71,574	-12.23
Canada	54,160	69,033	73,049	73,005	60,038	-17.76
Sub-Saharan Africa	30,861	57,250	37,885	35,533	36,286	2.12
Middle East	18,007	18,801	15,376	15,202	11,901	-21.71
Other	4,152	7,594	5,452	5,452	3,374	-38.11
Total	465,652	624,976	453,910	447,531	376,281	-15.92

Source: Office des Changes

Consumption: Post adjusted its MY 2023/24 domestic consumption estimate for tangerines/mandarins to 550,000 MT, based on available remaining supplies.

Table 2: Production, Supply & Distribution: Tangerines/Mandarins, Fresh

Tangerines/Mandarins, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Sep 2021		Sep 2022		Sep 2023	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	65750	65750	59150	59150	59100	59100
Area Harvested (HECTARES)	58900	58900	50000	50000	50050	50050
Bearing Trees (1000 TREES)	20000	20000	17975	17975	17400	17400
Non-Bearing Trees (1000 TREES)	6820	6820	6150	6150	6100	6100
Total No. Of Trees (1000 TREES)	26820	26820	24125	24125	23500	23500
Production (1000 MT)	1360	1360	927	927	950	950
Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1360	1360	927	927	950	950
Exports (1000 MT)	625	625	453	453	450	400
Fresh Dom. Consumption (1000 MT)	735	735	474	474	500	550
For Processing (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	1360	1360	927	927	950	950
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Oranges, Fresh
HS-080510

Table 3: Morocco's Orange Exports by Destination (MT)

Partner Country	2020/21	2021/22	2022/23	2022/23 Oct-Mar	2023/24 Oct-Mar	%Δ
EU 27	52,011	51,284	5,915	3,208	1,861	-41.99
Canada	10,972	17,783	10,309	7,794	6,860	-11.98
United States	2,919	18,611	6,622	5,483	4,504	-17.86
Russia	9,609	20,307	6,343	6,026	4,846	-19.58
Sub-Saharan Africa	10,030	13,867	8,554	4,081	3,902	-4.39
Middle East	4,459	6,784	581	554	107	-80.69
Other	1,548	1,719	521	521	546	-4.8
Total	91,546	130,359	38,845	27,669	22,625	-18.23

Source: Office des Changes

Consumption: Post adjusted its MY 2023/24 orange domestic consumption estimate to 730,000 MT, based on available remaining supplies.

Table 4: Production, Supply & Distribution: Oranges, Fresh

Oranges, Fresh	2021/2022		2022/2023		2023/2024	
	Oct 2021		Oct 2022		Oct 2023	
Market Year Begins	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Morocco						
Area Planted (HECTARES)	59600	59600	58500	58500	58200	58200
Area Harvested (HECTARES)	56500	56500	55100	55100	54900	54900
Bearing Trees (1000 TREES)	17200	17200	17125	17125	17100	17100
Non-Bearing Trees (1000 TREES)	1635	1635	1600	1600	1590	1590
Total No. Of Trees (1000 TREES)	18835	18835	18725	18725	18690	18690
Production (1000 MT)	1150	1150	783	783	820	820
Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1150	1150	783	783	820	820
Exports (1000 MT)	130	130	40	39	55	40
Fresh Dom. Consumption (1000 MT)	965	965	703	704	715	730
For Processing (1000 MT)	55	55	40	40	50	50
Total Distribution (1000 MT)	1150	1150	783	783	820	820
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Orange Juice (65° brix basis)

HS-200911, 200912, 200919

Table 5: Morocco's Orange Juice Imports (MT)

Product	2020/21	2021/22	2022/23	2022/23 Oct-Mar	2023/24 Oct-Mar	%Δ
200919: Not Frzn, Other	1,304	1,607	2,451	1,065	1,286	20.75
200912: Not Frzn, <20 Brix	9	8	15	4	9	125
200911: Frzn	243	165	469	260	135	-48.08
Total (65° Basis)	1,556	1,780	2,934	1,329	1,431	7.67

Source: Office des Changes

Table 6: Morocco's Orange Juice Exports (MT)

Product	2020/21	2021/22	2022/23	2022/23 Oct-Mar	2023/24 Oct-Mar	%Δ
200919: Not Frzn, Other	1,594	1,398	1,576	867	364	-58.02
200912: Not Frzn, <20 Brix	554	841	460	232	463	99.57
200911: Frzn	522	818	846	586	171	-70.82
Total (65° Basis)	2,670	3,057	2,882	1,684	998	-40.74

Source: Office des Changes

Post adjusts the MY 2023/24 orange juice trade numbers based on available trade to date data.

Consumption: Post adjusted its MY 2023/24 domestic consumption estimate for orange juice to 5,000 MT, based on available remaining supplies.

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

Orange Juice	2021/2022		2022/2023		2023/2024	
Market Year Begins	Oct 2021		Oct 2022		Oct 2023	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	55000	55000	40000	40000	55000	55000
Beginning Stocks (MT)	0	0	0	0	0	0
Production (MT)	5500	5500	4000	4000	5500	5500
Imports (MT)	1780	1780	2934	2934	2000	2000
Total Supply (MT)	7280	7280	6934	6934	7500	7500
Exports (MT)	3057	3057	2882	2882	3000	2500
Domestic Consumption (MT)	4223	4223	4052	4052	4500	5000
Ending Stocks (MT)	0	0	0	0	0	0
Total Distribution (MT)	7280	7280	6934	6934	7500	7500
(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Lemons/Limes, Fresh:
HS-080550

Table 8:

Partner Country	2020/21	2021/22	2022/23	10/22-03/23	10/23-03/24	%Δ
EU 27	891	1,164	1,595	920	182	-80.22
Russia	4,242	2,091	1,615	1,615	53	-96.72
Canada	649	1,642	1,203	1,203	116	-90.36
Sub-Saharan Africa	2,720	2,534	2,880	1,769	2,104	18.94
Other	408	6	28	27	-	
Total	8,909	7,437	7,324	5,537	2,456	-55.64

Post revised its lemon/limes export numbers for MY 2023/24 downward, based on current trade data and industry insights. Moroccan exporters have opted to prioritize the local market due to favorable pricing.

Table 8: Production, Supply & Distribution: Lemons/Limes, Fresh

Lemons/Limes, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Oct 2021		Oct 2022		Oct 2023	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	4000	4000	3900	3900	3950	3950
Area Harvested (HECTARES)	3110	3110	3000	3000	3050	3050
Bearing Trees (1000 TREES)	1680	1680	1650	1650	1670	1670
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	1680	1680	1650	1650	1670	1670
Production (1000 MT)	45	45	35	35	40	40
Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	45	45	35	35	40	40
Exports (1000 MT)	7	7	7	7	7	4
Fresh Dom. Consumption (1000 MT)	38	38	28	28	33	36
For Processing (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	45	45	35	35	40	40
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments