2024 Citrus Australia
AUSTRALIAN CITRUS CONGRESS
SUNSHINE COAST, QUEENSLAND
5 March | AGM & Welcome Event
6 & 7 March | Congress

Global Production & Trade

Southern Hemisphere opportunities & challenges

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Production
166 million tonnes
FAOSTAT est in 2022

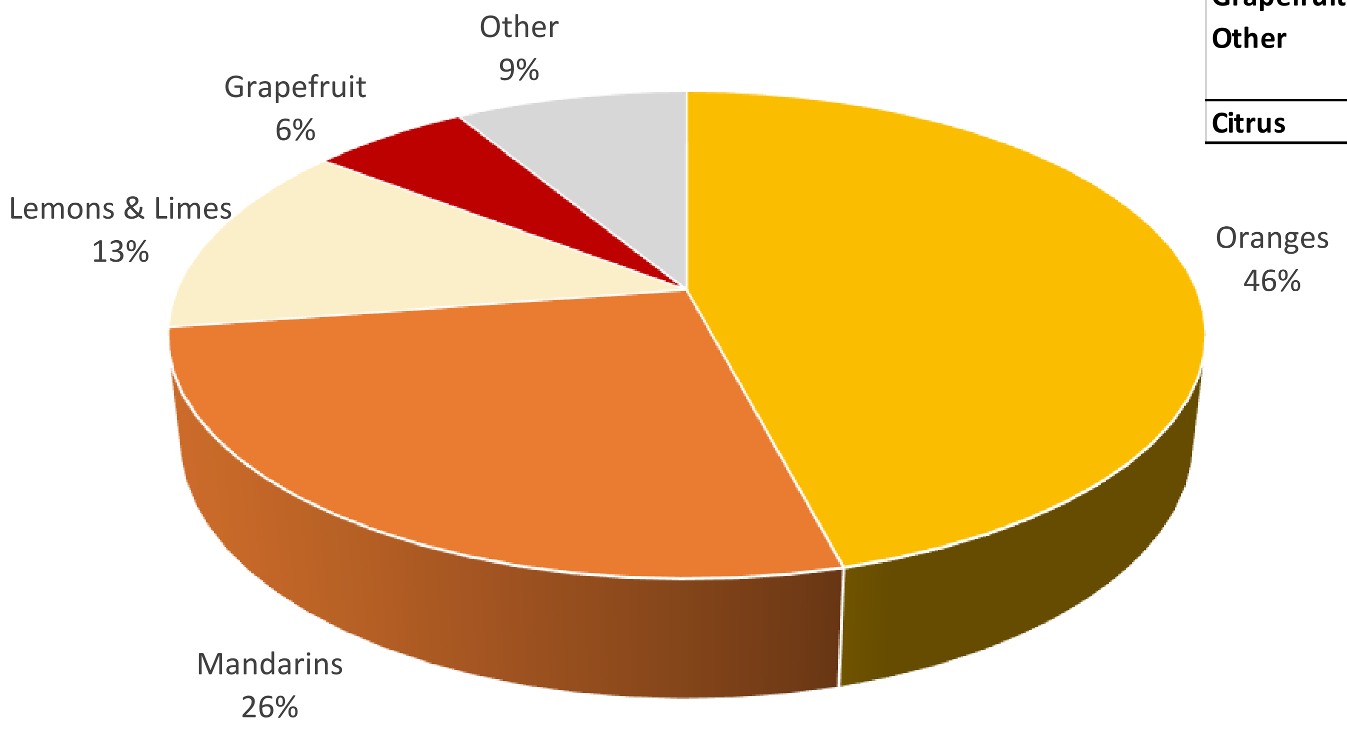
15.6 million tonnes (gross) traded in 2023
+1% (1 yr)

9.1 % of citrus is traded globally

Source: FAOASTAT, ITC Trademap, World Bank, Fresh Intelligence analysis

Global Citrus Production
166 Million Tonnes in 2022

	Mill Tonnes	1 yr change	5 yr trend (CAGR)	share
Oranges	**76.4**	0.1%	1.0%	**46%**
Mandarins	**44.2**	4.1%	6.4%	**27%**
Lemons & Limes	**21.5**	-0.1%	2.6%	**13%**
Grapefruit	**9.8**	0.6%	1.9%	**6%**
Other	**14.4**	2.8%	0.3%	**9%**
Citrus	**166.3**	**1.4%**	**2.5%**	**100%**



Global Citrus Production (2022)

166 million tonnes

North America	5.1
Share of global production	3.1%

Europe	10.5
Share of global production	6.3%

Asia	75.2
Share of global production	45.2%

Mexico & other	14.4
Share of global production	8.7%

MENA	21.4
Share of global production	12.9%

40 M t
24 %
S Hem

Australia Pacific	0.6
Share of global production	0.4%

South America	26.0
Share of global production	15.6%

Southern Africa	13.0
Share of global production	7.8%

Source: FAOSTAT; Fresh Intelligence analysis

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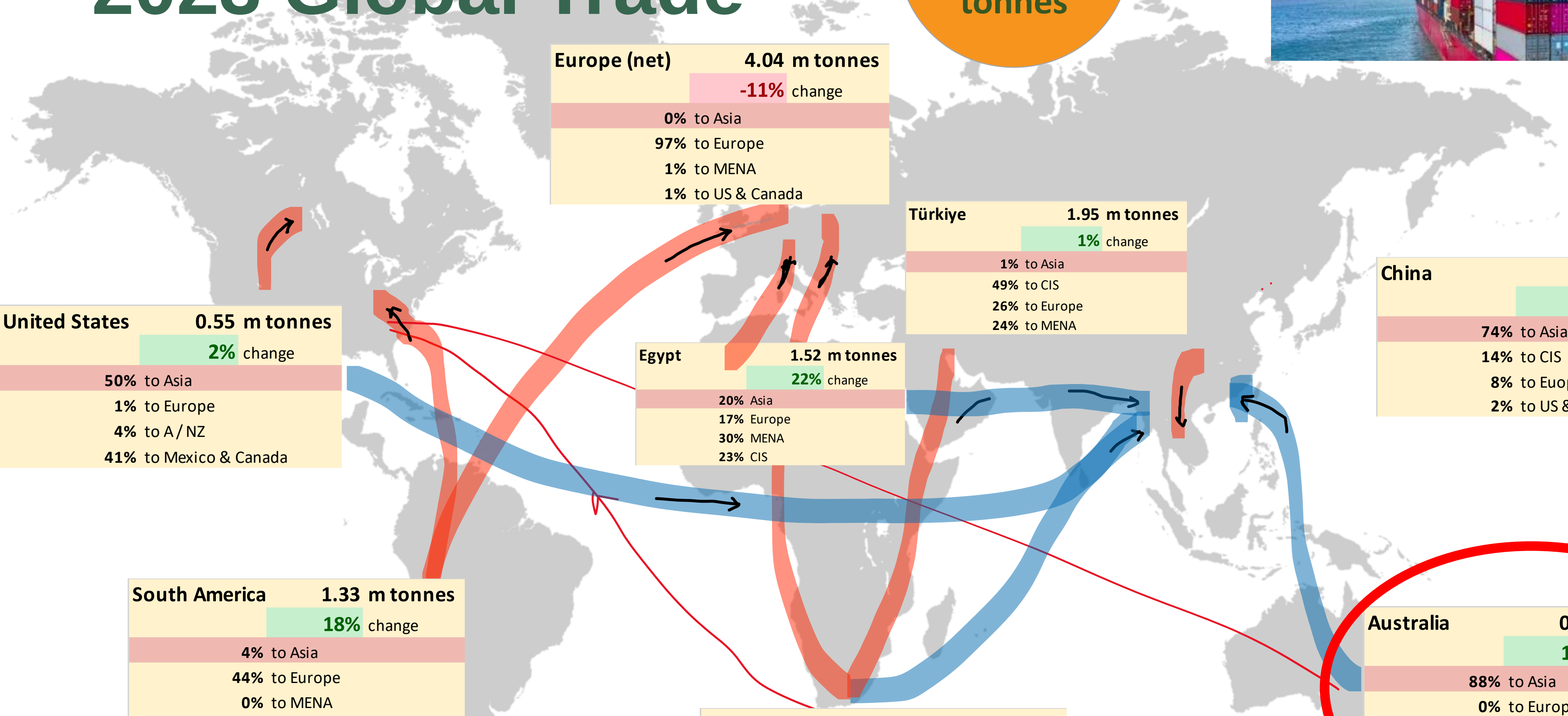
2023 Global Trade

15.6 million tonnes



Europe (net)	4.04 m tonnes
	-11% change
0%	to Asia
97%	to Europe
1%	to MENA
1%	to US & Canada

Türkiye	1.95 m tonnes
	1% change
1%	to Asia
49%	to CIS
26%	to Europe
24%	to MENA

China	1.22 m tonnes
	39% change
74%	to Asia
14%	to CIS
8%	to Euope
2%	to US & Canada

United States	0.55 m tonnes
	2% change
50%	to Asia
1%	to Europe
4%	to A / NZ
41%	to Mexico & Canada

Egypt	1.52 m tonnes
	22% change
20%	Asia
17%	Europe
30%	MENA
23%	CIS

South America	1.33 m tonnes
	18% change
4%	to Asia
44%	to Europe
0%	to MENA
45%	to US & Canada

South Africa	2.65 m tonnes
	1% change
21%	to Asia
48%	to Europe
19%	to MENA
8%	to US & Canada

Australia	0.26 m tonnes
	15% change
88%	to Asia
0%	to Europe
2%	to MENA
4%	to US & Canada

4.2 M t
28% from
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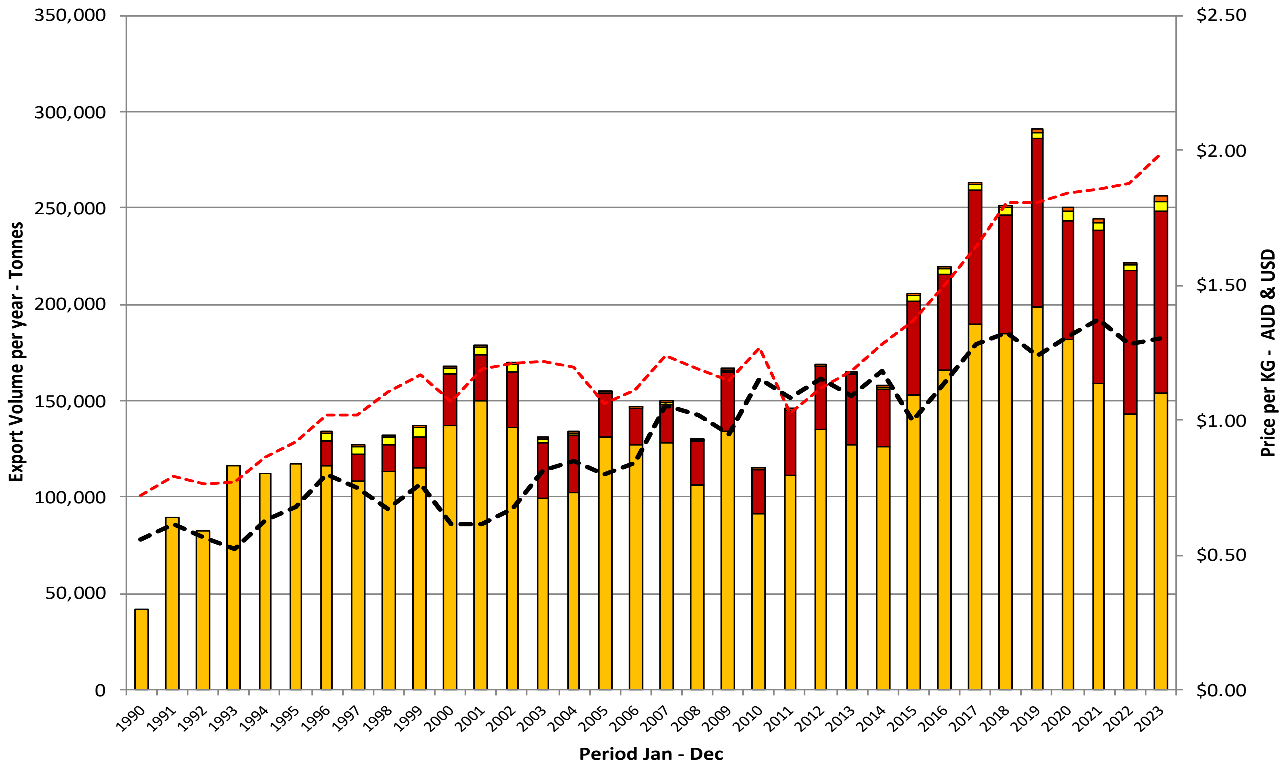
Source: ITC TradeMap; Fresh Intelligence analysis

Australian Citrus exports since 1990



Source: ABS data via S&P Global Trade Atlas; Fresh Intelligence analysis

2023 results

Volume	255,914	tonnes	…….. +	15.3%	
Value	506.7	million	…….. +	21.5%	
A$ per kg	$1.98		…….. +	5%	0.10

Australia	**0.26 m tonnes**
	15% change
88%	to Asia
0%	to Europe
2%	to MENA
4%	to US & Canada

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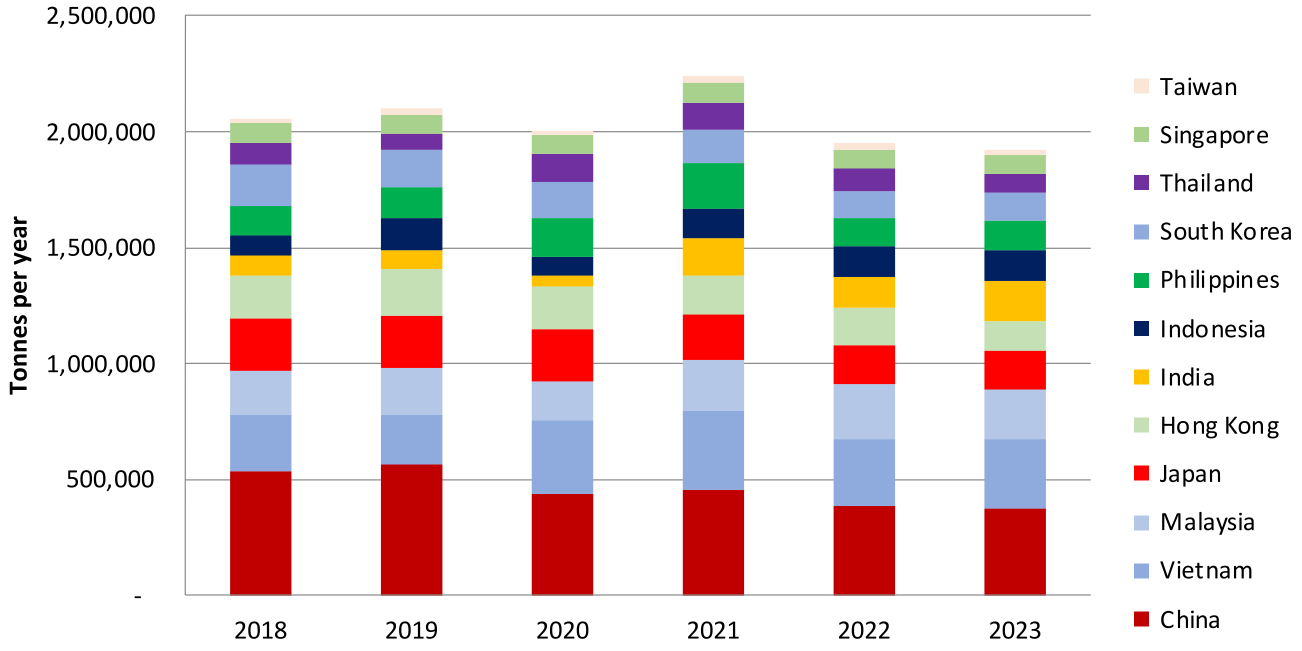
Citrus Imports by Asia 2018 – 2023



Source :ITC TradeMap; Fresh Intelligence analysis

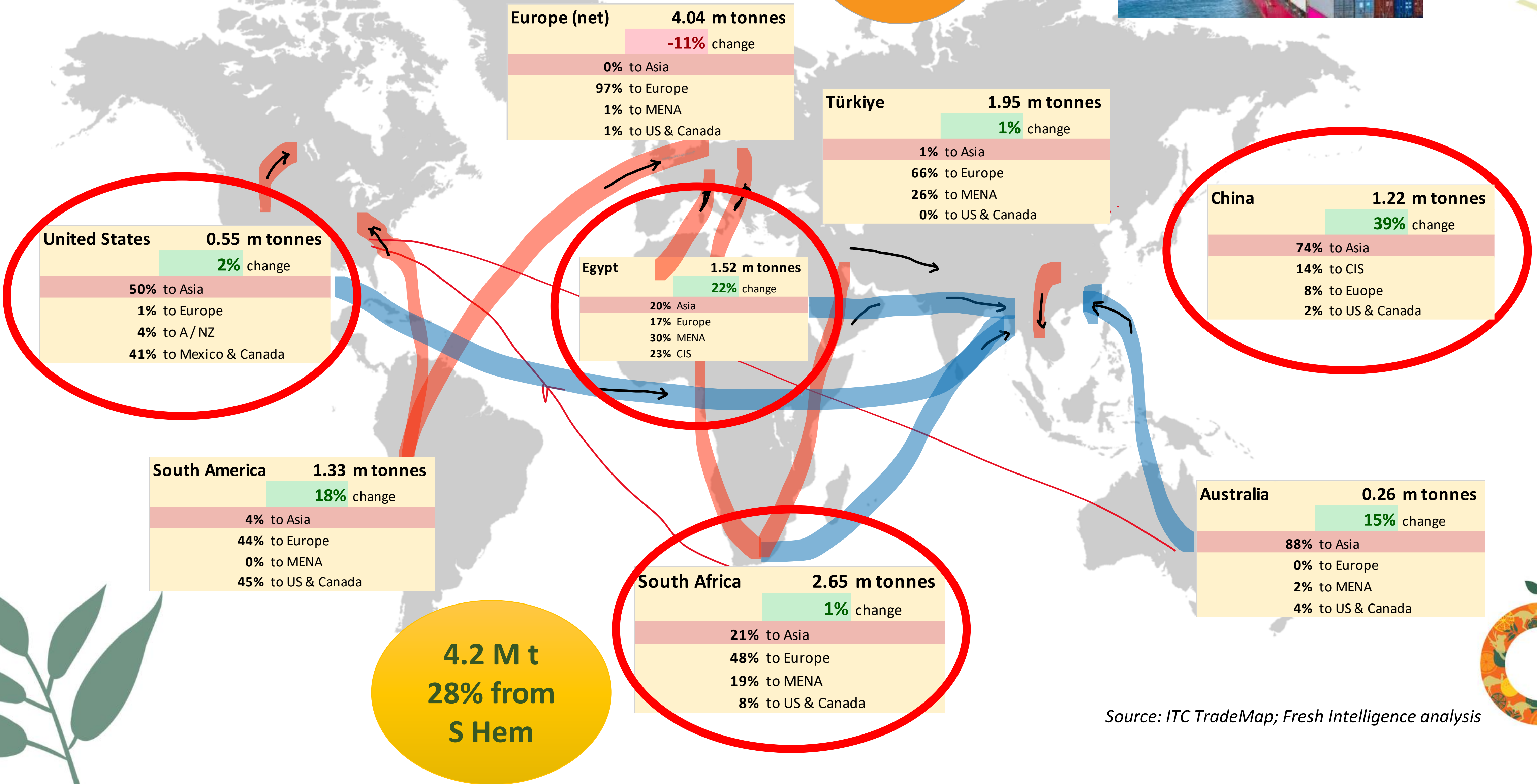
	Tonnes	1 yr chg	5 yr CAGR	Share
China	373,360	-3%	-10%	19%
Vietnam	302,407	4%	10%	16%
Malaysia	211,362	-10%	1%	11%
Japan	169,364	-1%	-7%	9%
Hong Kong	125,523	-21%	-11%	7%
India	174,467	30%	23%	9%
Indonesia	134,655	2%	-1%	7%
Philippines	123,579	0%	-2%	6%
South Korea	122,048	8%	-7%	6%
Thailand	83,345	-13%	5%	4%
Singapore	80,614	-5%	-1%	4%
Taiwan	22,941	-17%	-3%	1%
Total	**1,923,666**	**-1%**	**-2%**	**100%**

Source: ITC TradeMap; Fresh Intelligence analysis

1.9 million tonnes imported – 1 per cent lower than last year and trending 2 per cent lower per year over 5 years

2023 Global Trade

15.6 million tonnes



Source: ITC TradeMap; Fresh Intelligence analysis

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Big influencers in Asia

South Africa

- 3.5 million tonnes of Citrus production
- Largest competitor to Australia exporting 550,000 tonnes to Asia in same season

  - **Load Shedding** – power cuts interrupted irrigation, packing and cooling
  - **High Input Costs** – surge in general farming costs in 2023
  - **Floods** – devasted Western Cape in Citrusdal Valley (June)
  - **Logistics** – port congestion, dysfunctional rail impacted on freight.

  - **Unjustified Phytosanitary Regulations** by the EU against CBS and FCM
    - *Europe takes almost 50% though ongoing market access issues could mean they are forced to send more elsewhere including to Asia*

  - **Slow market access** – slow pace mainly in Asia

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Big influencers in Asia

Peru

- 1.6 million tonnes of Citrus production
- Smaller competitor to Australia exporting 12,000 tonnes of **mandarins** to China

  - **New Agrarian Law** – imposed higher minimum wage and is stifling investment
  - **Weather** – creating size and quality issues due to elevated temperatures
    - El Nino wreaking havoc on quality of production
  - **Quality** – often fruit does not meet appearance demanded by consumers
  - **Logistics** – higher shipping costs

  - **Expansion of production areas –** increasing supply and urgency to resolve challenges

Big influencers in Asia

Egypt

- 4.7 million tonnes of Citrus production, 1.5m tonnes exported
- Impact to Australia exporting over 200,000 tonnes to Asia just prior to Australia's season (Jan – May)

  - **Size** – mostly small sizes leads to lower prices – lowers price expectation
  - **Weather** – rain and hail affects production
  - **High Input Costs** – surge in input costs in 2023
  - **High Transport Costs** – container shortage, port congestion, increased freight costs

  - **Red Sea Crisis – very difficult to send to Asia in 2024**
    - *Egypt sends 20% of exports to Asia and 23% to Russia – both now have difficult transport logistics.*

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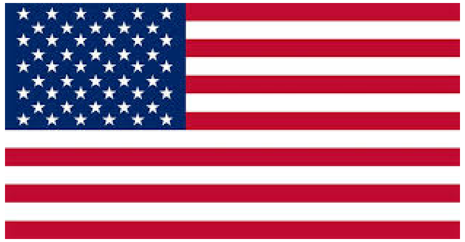
Big influencers in Asia



United States

- 4.7 million tonnes of Citrus production – ~ 10 per cent exported
- Impact to Australia exporting 240,000 tonnes to Asia just prior to Australia's season (Dec – May) mostly to South Korea and Japan.

  - **Production Loss** – From 16 million tonnes in 2000 to 4.7 million tonnes in 2023
    - mainly due to *Citrus Greening* disease in Florida
    - Loss of agricultural land to development

  - **High Labour Costs** – guest worker program costs are increasing
  - **Domestic demand** – now greater than supply – increasing import demand
  - **Logistics** – California port congestion.

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Big influencers in Asia

China

- 48 million tonnes of Citrus production – ~ 1.2 million tonnes exported
- Impact to Australia exporting 875,000 tonnes (mostly mandarins) to SE Asia prior to Australia’s season (Oct – May) Vietnam, Indonesia, Philippines, Malaysia, Thailand and others.
- Citrus production is expected to grow stronger, and doubled since 2013
    - **Production Increase** – reducing need for imports, particularly Northern Hemisphere, though longer season extend into start of southern season
    - **Domestic demand** – is strong in China for health (Vitamin C) benefits

Opportunities

- **Asia** is Australia's key markets for 88 per cent of exports
- **South Africa** the main player to watch – or even work with
  - South America is not a major threat – focus on US and Europe
- **Egypt** is more likely to disrupt earlier starts in China and other SE Asia though is less likely this year as the Red Sea crisis disrupts trade
  - The Red Sea crisis also thwarts opportunities in UK in 2023 even though the AUKFTA has wiped off 16% tariff this year.
- **United States** reduction in production and exports is providing an earlier start to our marketing year, particularly in Japan and South Korea
  - The United States is again becoming an opportunity in itself
  - Can we compete in the US with South America ?

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REFERENCES

- International Trade Centre, TRADE MAP www.trademap.org/
- IHS Global Trade Atlas
- FAOSTAT

DISCLAIMER

- Fresh Intelligence Consulting collated the data for Citrus Australia from data provided by the international trade databases as referenced.
- While every effort is made to ensure that the data is a true reflection of the trade, some errors may occur due to the reporting and Fresh Intelligence Consulting takes no responsibility for any losses that may occur as a result of decisions based on this data.
- Views expressed are personal and may not reflect the same views of Citrus Australia.

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