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Post: Rabat

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Report Highlights:

Post expects Morocco's Tangerine/mandarin production for MY 2025/26 to reach an estimated 1.15 million MT, increasing 4 percent over MY 2024/25, orange production should increase by 1 percent over the previous year to 970,000 MT, while lemon/lime production will reach 48,000 MT. Much of the increase in production is due to improved weather conditions during the growing season coupled with the tree cycle. Post projects Morocco's MY 2026/24 tangerine/mandarin exports to reach 550,000 MT, about 2 percent higher than MY 2024/25 due to increased supplies while orange exports should be in line with MY2024/25 levels at 85,000 MT and lemon/lime exports at 10,000 MT.

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Executive Summary

Morocco's MY 2025/26 citrus production experienced improvement over the previous season, driven by favorable weather conditions during the growing period and the trees' cycle resulting in a higher fruit yield. Growers reported a promising production compared to last season. However, this year's production remains below the historical peak recorded in MY2018/19 while slightly above the 5-year production average. Post expects Morocco's tangerine/mandarin production for MY 2025/26 to reach an estimated 1.15 million metric tons, slightly up by 4 percent compared to the previous season. Orange production should increase by 1 percent over the previous year to 970,000 MT, while lemon/lime production will reach 48,000 MT.

The export season for tangerine/mandarin started about two weeks later than usual due to a delay in fruit maturation and the fruit reaching optimal size for export. Post projects Morocco's MY 2025/26 tangerine/mandarin exports to reach 550,000 MT, about 2 percent higher than MY 2024/25 due to increased supplies while orange exports should be in line with MY2024/25 levels at 85,000 MT and lemon/lime exports at 10,000 MT.

According to the 2025 Moroccan Agricultural Development Fund ([FDA](#)) report, the Moroccan government continues to provide a set of incentive measures to support citrus export and encourage new investment in citrus packinghouses.

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

Citrus	MY 2024/25			MY 2025/26		
	Production	Domestic Consumption	Exports	Production	Domestic Consumption	Exports
Tangerines/Mandarins Fresh	1,100	560	540	1,150	600	550
Oranges, Fresh	960	815	85	970	820	85
Lemons/Limes Fresh	45	35	10	48	38	10
Orange Juice (65° brix)*	6	4	3.7	6.5	4.3	4

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

I. Tangerines/Mandarins, Fresh

(HS-080520, 080521, 080522, 080529)

Production: For MY 2025/26, Morocco's tangerine and mandarin production is forecasted to reach 1.15 million MT, slightly up by 4 percent compared to the previous season. This increase is largely due to improved weather conditions during the growing season and the tree cycle resulting in a higher fruit yield. The late rainfall the country received in early November contributed to an increase in fruit size, resulting in greater availability of size 4 and 5 fruits.

According to packinghouses in Southern Morocco, producers are increasingly adapting salinity tolerant and water efficient rootstocks like *Macrophylla* and *Volkameriana* for new orchards.

Consumption: Post forecasts domestic tangerine and mandarin consumption at 600,000 MT in MY 2025/26, which represents a 7 percent increase compared to MY 2024/25 based on increased production and stable domestic prices. Post also updates MY 2024/25 fresh domestic consumption, reflecting remaining available supply in the balance sheet after accounting for year-end trade data.

Trade: The export season did not start until the second week of November due to a delay in fruit maturation and development of optimal size for export. Industry sources in the south reported that there is a higher availability of size 4 and 5 fruits for export. Post projects MY 2025/26 tangerine and mandarin exports to reach 550,000 MT, about 2 percent increase compared to the previous year, attributed to improved supply availability. The European Union and Russia continue to be the primary export destination for Morocco's tangerines and mandarins. Exports to West African markets has also increased, particularly for Senegal, Mauritania, and Ivory Coast.

Producers in the South of Morocco reported that they are facing competition from Chilean late season varieties, which enter the international market during Morocco's crucial November - December early season export window.

Post also updates MY 2024/25 export figures based on year-end trade data.

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

Partner Country	2020	2021	2022	2022/23	2023/24	2024/25	%Δ
EU 27	150,097	165,801	180,699	145,059	119,145	201,762	1%
Russia	124,247	149,464	182,346	94,948	79,079	98,674	25%
United States	38,244	43,208	109,254	82,139	73,341	78,120	7%
Canada	53,824	54,160	69,033	73,049	60,910	75,996	25%
Sub-Saharan Africa	27,510	31,977	58,665	39,701	44,288	63,640	44%
Middle East	14,069	18,007	18,792	15,376	12,422	16,771	35%
Other	2,960	3,036	6,188	3,636	2,505	5,253	1%
Total	410,952	465,652	624,976	453,910	391,693	540,217	38%

Source: Moroccan Office des Changes

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

Tangerines/Mandarins, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Sep 2023		Sep 2024		Sep 2025	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	59100	59100	59120	59120	0	59115
Area Harvested (HECTARES)	50050	50050	50060	50060	0	50040
Bearing Trees (1000 TREES)	17400	17400	17450	17450	0	17425
Non-Bearing Trees (1000 TREES)	6100	6100	6150	6150	0	6150
Total No. Of Trees (1000 TREES)	23500	23500	23600	23600	0	23575
Production (1000 MT)	950	950	1100	1100	0	1150
Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	950	950	1100	1100	0	1150
Exports (1000 MT)	392	392	500	540	0	550
Fresh Dom. Consumption (1000 MT)	558	558	600	560	0	600
For Processing (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	950	950	1100	1100	0	1150
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

II. Oranges, Fresh

(HS-080510)

Production: For MY 2025/26 orange production is expected to slightly increase by 1 percent, reaching 970,000 MT, due to improved weather conditions during the flowering and growing season compared to last year, coupled with an increased adoption of drip irrigation techniques for many farmers.

Consumption: Post estimates MY 2025/26 domestic consumption of fresh oranges at 820,000 MT, an increase of 1 percent from the previous season. Orange deliveries to processors are estimated to increase to 65,000 MT due to available supplies, alongside expanded capacity at the major concentrate juice company in the South.

Trade: Post projects Morocco's orange exports for MY 2025/26 to remain in line with 2024/25 levels at 85,000 MT, though still below the five-year average. Moroccan exporters continue to face intense competition from Egypt and Turkey, where production costs are significantly lower. In Egypt's case, a favorable exchange rate has strengthened price competitiveness, enabling exports at lower prices, while Morocco's higher labor costs and ongoing water constraints weigh on production. Post also updates the MY2024/25 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		
	2021/22	2022/23	2023/24	2024/25	10/23-09/24	10/24-09/25	%Δ
EU 27	52,011	51,284	5,915	10,249	10,249	20,778	103%
United States	2,919	18,611	6,622	20,562	20,562	18,236	-11%
Canada	10,972	17,783	10,309	11,212	11,212	18,590	66%
Russia	9,609	20,307	6,343	6,721	6,721	11,380	69%
Sub-Saharan Africa	10,095	13,892	8,555	9,522	9,522	12,702	33%
Middle East	4,459	6,784	581	638	638	3,001	370%
Other	1,483	1,694	520	653	653	837	28%
Total	91,546	130,359	38,845	59,555	59,555	85,523	44

Source: Moroccan Office des Changes

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

Oranges, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	58200	58200	58300	58300	0	58300
Area Harvested (HECTARES)	54900	54900	55000	55000	0	54950
Bearing Trees (1000 TREES)	17100	17100	17120	17120	0	17120
Non-Bearing Trees (1000 TREES)	1590	1590	1600	1600	0	1595
Total No. Of Trees (1000 TREES)	18690	18690	18720	18720	0	18715
Production (1000 MT)	820	820	960	960	0	970
Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	820	820	960	960	0	970
Exports (1000 MT)	60	60	90	85	0	85
Fresh Dom. Consumption (1000 MT)	710	710	815	815	0	820
For Processing (1000 MT)	50	50	55	60	0	65
Total Distribution (1000 MT)	820	820	960	960	0	970
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

III. Orange Juice (65° brix basis)

(HS-200911, 200912, 200919)

Production: Post forecasts orange juice production for MY 2025/26 at 65,000 MT, an 8 percent increase compared with the five-year average. This growth is driven by expanded processing capacity particularly in the southern region, along with greater availability of raw material in the domestic market. Post also revised its MY 2024/25 numbers accordingly based on the latest information received from the industry.

Consumption: Post forecasts MY 2025/26 domestic consumption at 4,300 MT, up 5 percent over the previous season on higher available supply. Post revised its estimate for MY2024/25 following year-end trade figures.

Trade: For MY 2025/26, Post estimates that orange juice exports will reach 4,000 MT, about 5 MT higher than MY 2025/26 due to available supply. Post also expects Morocco to import 1,800 MT of orange juice, a decrease of 69 MT over the previous year. Decreased imports reflect a domestic production increase. Morocco's imports for MY 2024/25 declined by 45 percent compared to the previous year reflecting strong availability of fruit in the domestic market and expanded local processing capacity. The decline was mainly from Brazil (down 81%) and Egypt (down 38%). Industry stakeholders aim to increase local production further and phase out imports of frozen concentrate. For exports, Morocco ships orange juice concentrates primarily to Middle Eastern and West African markets.

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

Product	conv. factor	2020/21	2021/22	2022/23	2023/24	2024/25	% Change
2009.11: Frzn	1.0154	243	165	469	652	133	-80%
2009.12: Not Frzn, ≤20 Brix	0.1815	9	8	15	18	15	-17%
2009.19: Not Frzn, Other	1	1,304	1,607	2,451	2,729	1,721	-13%
Total (65° Basis)		1,556	1,780	2,934	3,399	1,869	-45%

Source: Moroccan Office des Changes

Table 7: Orange Juice Exports (MT @ 65°) by Marketing Year (Oct-Sep)

Product	conv. factor	2020/21	2021/22	2022/23	2023/24	2024/25	% Change
2009.11: Frzn	1.0154	522	818	846	504	843	67%
2009.12: Not Frzn, ≤20 Brix	0.1815	554	841	460	1,836	2,112	15%
2009.19: Not Frzn, Other	1	1,594	1,398	1,576	1,283	1,283	-34%
Total (65° Basis)		2,670	3,057	2,882	3,622	3,790	4.64%

Source: Moroccan Office des Changes

Table 8: Production, Supply & Distribution: Orange Juice (65° brix basis)

Orange Juice	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	50000	50000	50000	60000	0	65000
Beginning Stocks (MT)	0	0	0	0	0	0
Production (MT)	5000	5000	5500	6000	0	6500
Imports (MT)	3399	3399	3000	1869	0	1800
Total Supply (MT)	8399	8399	8500	7869	0	8300
Exports (MT)	3622	3622	3700	3790	0	4000
Domestic Consumption (MT)	4777	4777	4800	4079	0	4300
Ending Stocks (MT)	0	0	0	0	0	0
Total Distribution (MT)	8399	8399	8500	7869	0	8300
(MT)						

IV. Lemons/Limes, Fresh

(HS-080550)

Production: Post forecasts lemon and lime production for MY 2025/26 to reach 48,000 MT, about 6 percent higher than MY 2024/25. Production increases are due to the improved weather during the growing season.

Consumption: Post forecasts MY 2025/26 fresh domestic consumption to be slightly up at 38,000 MT based on available supply. Post revised its estimate for MY2024/25 following year-end trade figures.

Trade: Post projects lemon/lime exports for MY 2025/26 to remain flat at 10,000 MT, unchanged from last year. West African markets are expected to remain the leading destination, followed by the EU. Post also updates MY2024/25 exports number based on year-end trade data.

Table 9: Lemon/Lime Exports by Destination (MT)

Partner Country	Marketing Year					Year to Date		
	2020	2021	2022	2023	2024	10/23-09/24	10/24-09/25	%Δ
EU 27	2,434	891	1,164	1,595	870	870	3,033	249
Russia	6,477	4,242	2,091	1,615	53	53	812	1432
Canada	1,073	649	1,642	1,203	116	116	644	455
United States	2	26	0	0	0	0	47	0
Sub Saharan Africa	6,855	2,723	2,529	2,864	3,941	3,941	5,031	0.28
Middle East	434	339	4	28	0	0	78	0
Other	44	40	7	16	0	0	51	0
Total	17,319	8,909	7,437	7,324	4,980	4,980	9,697	95

Source: Moroccan Office des Changes

Table 10: Production, Supply & Distribution: Lemons/Limes, Fresh

Lemons/Limes, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Morocco	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	3950	3950	3960	3960	0	3965
Area Harvested (HECTARES)	3050	3050	3055	3055	0	3055
Bearing Trees (1000 TREES)	1670	1670	1680	1680	0	1685
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	1670	1670	1680	1680	0	1685
Production (1000 MT)	40	40	45	45	0	45
Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	40	40	45	45	0	48
Exports (1000 MT)	5	5	7	10	0	10
Fresh Dom. Consumption (1000 MT)	35	35	38	35	0	38
For Processing (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	40	40	45	45	0	48
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

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 11: Subsidies and Incentives for the Citrus Sector:

Program	Subsidy
Phyto-Sanitary Assistance.	\$100 USD/ha for the mass trapping technique based on the use of Medfly female attractant.
Construction of a new packinghouse station.	30% of the cost of construction
Export subsidy for citrus destined to Ukraine, China, Gulf countries.	Since September 2017, exporters receive \$50 USD/MT 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 \$50 USD/MT for all exported quantities exceeding the levels exported between September 1, 2000 to August 31, 2001.

Source: MoA/FDA

On the 2025 [FDA](#) report, the government of Morocco supported small scale farmers through aggregation projects. Citrus growers benefited from a dedicated per-hectare aggregation incentive, \$225 USD/ha for small, aggregated areas, \$150 USD/ha for medium size area, and \$75 USD/ha for large areas. Organic citrus growers benefited (\$300/\$200/\$100 USD/ha respectively).

VI. Annex

Field Trip Observations:

Photos captured on Post's field trip in the Souss-Massa region during the week of December 8th, 2025.



Attachments:

No Attachments