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Report Highlights:

The MY 2025/26 citrus season begun amid difficult conditions throughout southern Europe. Spain, Italy, and Greece—the region’s leading citrus production—are experiencing lower yields due to extreme weather, increased pest pressure, and changing market dynamics. Despite these challenges, the European citrus sector remains resilient and adaptable, benefiting from greater market transparency, advances in production methods, and new opportunities in sustainability-focused exports. MY 2025/26 will see a reduction in European Union (EU) orange, mandarin, and lemon production compared to previous season’s levels, while grapefruit output is expected to grow. In the context of a steady internal demand and regionalization of trade, intra-EU trade from producing areas to main consuming Member States is anticipated to prevail.

Disclaimer: This report presents the outlook for fresh oranges, orange juice, fresh tangerines/mandarins, fresh lemon/limes, and fresh grapefruits in the European Union (EU). This report presents the views of the authors and does not reflect the official views of the U.S. Department of Agriculture (USDA). The data is not official USDA data.

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Acknowledgements

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Executive Summary

In Marketing Year (MY) 2025/26, the total European Union (EU) production of citrus is projected to amount to 9.9 million metric tons (MT), down from the previous marketing year's high when it hit 10.5 million MT. In MY 2025/26, EU orange, mandarin, and lemon production contracted compared to MY 2024/25. Grapefruits are the only exception to the rule with an increase in output projected for MY 2025/26. Spain and Italy are the leading EU citrus producers, followed by Greece, Portugal, and Cyprus.

Overall, area planted to lemons and grapefruits in the EU has trended upward, area planted to oranges has been relatively stable, while area allocated to mandarins and tangerines has trended down. The reduction in area can be explained by abandonment of the less profitable orchards, and in some cases the lack of generational renewal. In some instances, citrus crops in the EU compete both in terms of area but also in terms of demand with alternative subtropical tree crops such as avocados.

Over the last several years, weather events—including extreme heat, drought-induced irrigation restrictions, hail, frost, flooding, and heavy rains—have threatened yields and affected quality factors such as fruit size and color in the EU's main citrus-producing regions. In some cases, these shifting conditions have also led to the emergence of new pests and diseases. Additionally, certain areas have reported a higher incidence of green peel on citrus fruit, a response to reduced temperature differences between day and night. While this does not affect the fruit's sugar content or flavor, it does impact marketability, creating a gap between total production and the volume that meets commercial standards. EU citrus producers remain alert to the risk of pests introduced from non-EU countries, especially as the availability of active ingredients for plant protection products continues to decline.

The challenges facing the citrus sector extend beyond agronomic resilience to include the economic viability of citrus farming. Farmers throughout the EU are contending with rising production costs, including higher prices for energy, labor, and plant protection products. At the same time, the ongoing difficulty in attracting new generations to farming threatens the sector's long-term sustainability. To address these issues, key strategies include improving water management, increasing mechanization of farm operations, adopting climate- and pest-resistant varieties, and optimizing the use of agricultural inputs.

The EU is a net importer of citrus fruits, with imports largely exceeding exports. Oranges followed by lemons represent the largest imported citrus. Large amount of trade takes place internally, from producing to non-producing EU Member States. EU neighboring citrus producers in the Mediterranean Basin (such as Egypt or Türkiye) are concentrating their export efforts in the EU. EU citrus producers continue to follow closely developments regarding the EU-Mercosur Agreement, given the prominent position of Mercosur members countries as suppliers of citrus, particularly in the off-season, and of citrus-based processed products, such as Frozen Concentrated Orange Juice (FCOJ).

Oranges

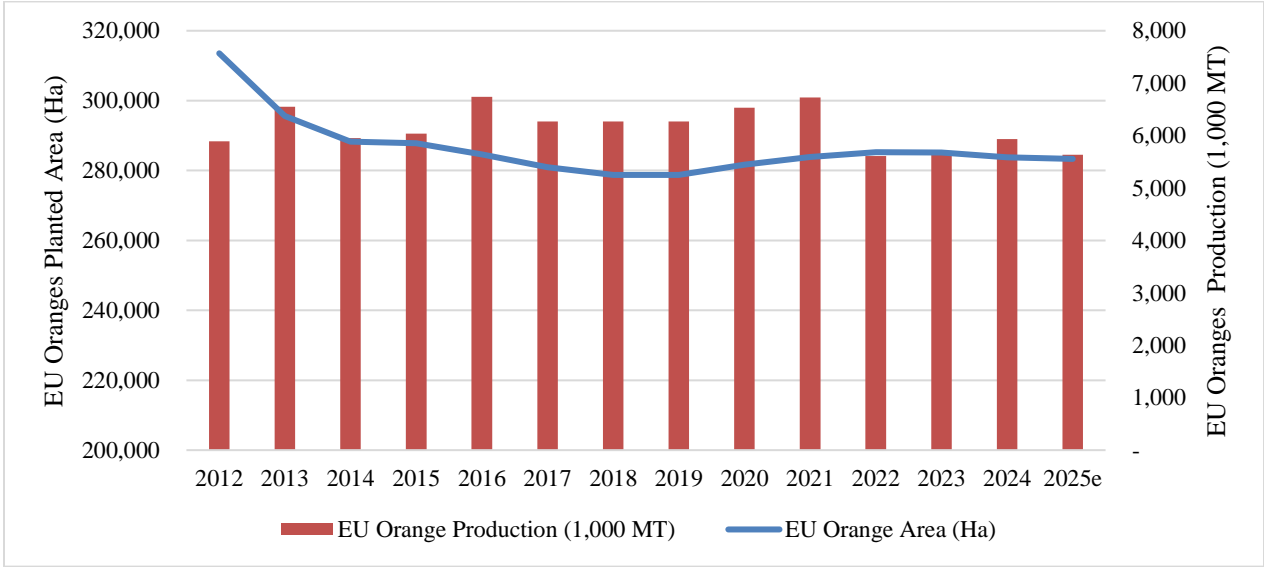
Table 1. EU Oranges Production, Supply, and Distribution

Oranges, Fresh Market Year Begins European Union	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	286,755	285,184	286,131	283,786	0	283,304
Area Harvested (HECTARES)	264,387	264,110	263,565	266,084	0	265,872
Production (1000 MT)	5,728	5,707	5,658	5,933	0	5,635
Imports (1000 MT)	938	942	950	961	0	1,000
Total Supply (1000 MT)	6,666	6,649	6,608	6,894	0	6,635
Exports (1000 MT)	307	308	325	314	0	310
Fresh Dom. Consumption (1000 MT)	5,660	5,641	5,635	5,780	0	5,575
For Processing (1000 MT)	699	700	648	800	0	750
Total Distribution (1000 MT)	6,666	6,649	6,608	6,894	0	6,635
(HECTARES), (1000 TREES), (1000 MT)						

Not official USDA data.

Sources: Trade for MY 2023/24 and 2024/25: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

Chart 1. EU Orange Production and Orange Planted Area 2012-2025



Source: FAS EU posts.

In MY 2025/26, EU orange production is projected at just above 5.6 million MT, down from the 5.9 million MT orange crop obtained in MY 2024/25. Orange production is the largest citrus category within the EU, and Spain accounts for 50 percent of the bloc's production.

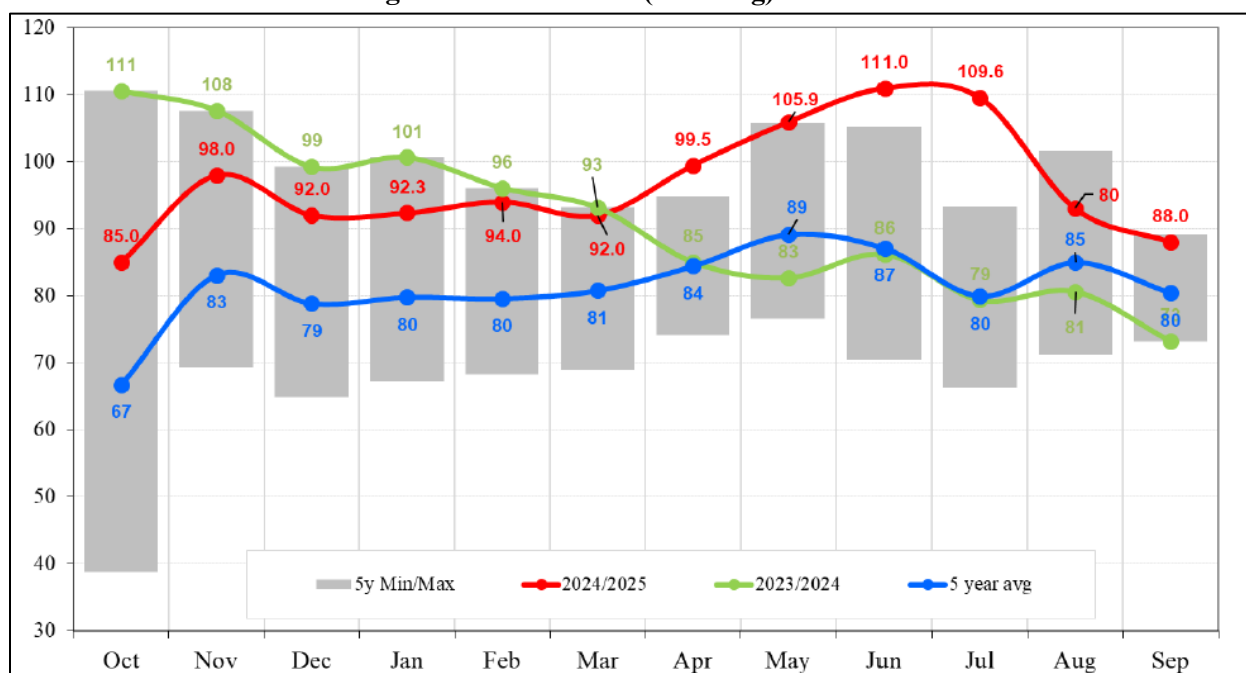
In Spain, the MY 2025/26 orange season has been a challenging one, marked by a drop in production of around six percent, reaching a 16-year low, according to the Ministry of Agriculture estimates. This was due primarily to adverse weather conditions like spring rains, high temperatures during fruit development stages, and damaging hailstorms, impacting overall citrus output despite some initial optimism for recovery after a drought-hit period. Hopes for improved harvest in regions such as Andalusia - Spain's largest growing orange region which suffered severe water allocation restrictions in the two former marketing years - faced significant setbacks from these weather challenges. In the Valencia region, in addition to the adverse climate conditions, long-term challenges like aging plantations, inadequate varietal mapping, and farm abandonment are contributing to the downward production trend.

Portugal's citrus production is concentrated in the Algarve region and mostly consists of orange production. This year, the growing cycle started later than usual due to irregular spring weather, including temperature fluctuations and a lack of rainfall which delayed vegetative growth and flowering. As a result, the production cycle is behind schedule, and fruit sizes are generally smaller this year. Despite these challenges, the overall quality of the fruit remains good, with healthy crops and balanced flavor.

Production in Italy and Greece is expected to remain stable. Italy's MY 2025/26 orange production was delayed but remains broadly in line with MY 2024/25, characterized by good quality and fruit size, high sugar content, and good coloration. Greece orange production is expected to remain flat compared to the previous year due to normal fruit set in most varieties, especially *Navelina* and *Commons*. Peloponnese and Etoloakarnania (western Greece), one of the main orange-producing areas, received higher rainfall than the other areas, while southern Greece areas suffered from summer drought. For information regarding main growing regions and varieties, please consult [Annex I](#) and [Annex II](#) respectively.

According to the [EU Citrus Dashboard](#), MY 2024/25 began with prices above five-year average levels. These prices were above the prices received by farmers at the beginning of MY 2023/24.

Chart 2. EU Orange Prices¹ Evolution (€/ 100 kg) MY 2023/24 - MY 2024/25



Source: [DG AGRI Dashboard: Citrus Fruit](#).

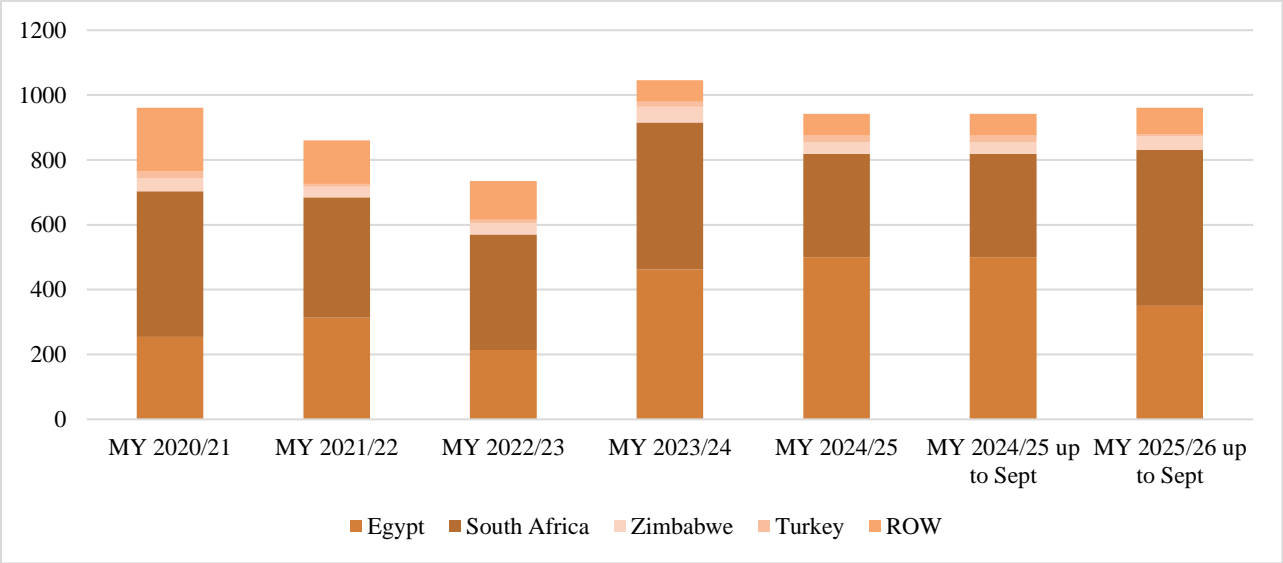
In MY 2025/26, fresh orange consumption is expected to decline compared to the previous season. Post forecast is based on the reduced production projected in Spain compared to MY 2024/25 levels, when the country registered a bumper orange crop, largely destined for fresh consumption. Nevertheless, Post continues to project the overall EU demand for fresh oranges to remain slightly above the pre-pandemic levels. Normally, the demand for citrus fruits begins to pick up in September, coinciding with the start of the school year. Factors that reinforce demand include the extension of the orange marketing season, thanks to high quality late season varieties, as well as popularity of freshly squeezed orange juice in outlets in stores. Orange processing is projected to decline in MY 2025/26, due to lower availability of oranges in Spain. For additional information see Orange Juice section below.

Post forecasts a stable import volume of oranges, destined for both fresh consumption and processing, for MY 2025/26. Fresh orange imports to the EU started slower in the new season compared to previous marketing year, with volumes down in early months. However, the pace of trade picked up as prices saw significant increases due to lower overall EU citrus production, especially from Spain. Post also notes shifts in supply dynamics, with South Africa strengthening its lead over Egypt, and Morocco and Türkiye also supplying significant volumes of oranges.

¹ Ex-packaging station.

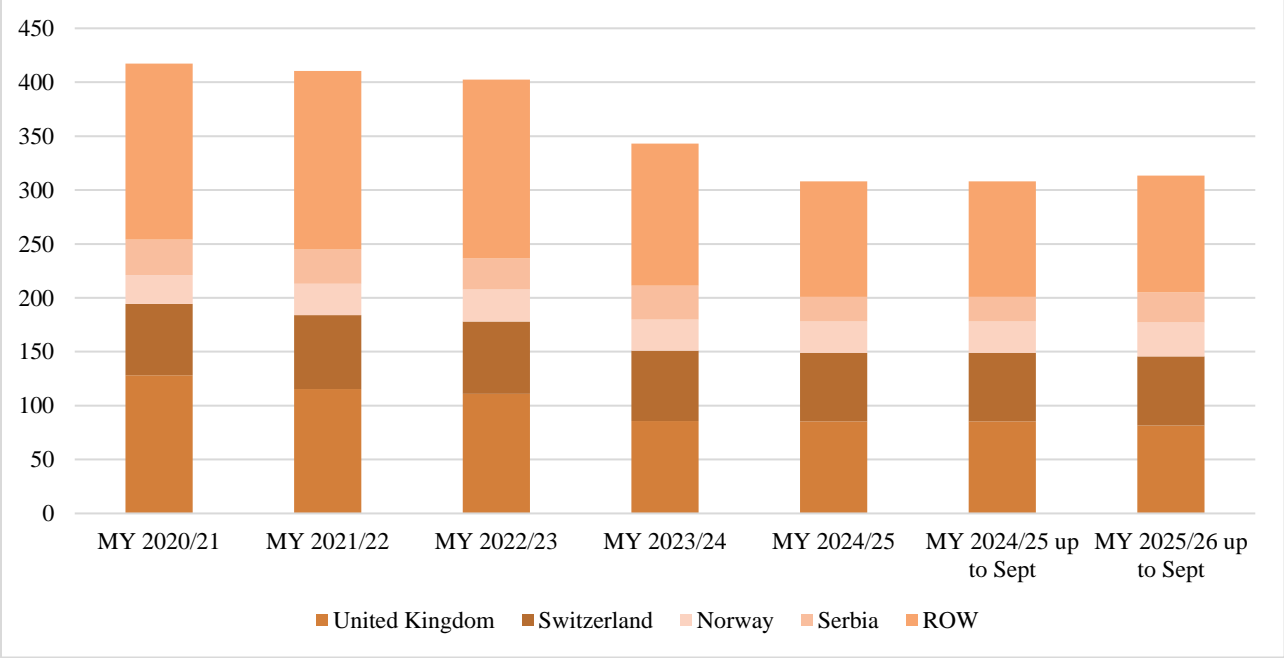
EU orange exports in MY 2025/26 are expected to continue remain low, due to the competition from other orange producers from the non-EU Mediterranean basin and the shorter supplies available in Spain. Main destinations for EU oranges, primarily exported out of Spain, include the United Kingdom, Switzerland, Norway, and Serbia.

Chart 3. MY EU Imports of Oranges by Origin (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Chart 4. MY EU Exports of Oranges by Destination (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

For additional information, please consult the Policy section at the end of this report.

Orange Juice

Table 2. Production, Supply, and Distribution (Brix 65)

Orange Juice Market Year Begins European Union	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	699,000	700,000	648,000	800,000	0	750,000
Beginning Stocks (MT)	15,000	15,000	15,000	15,000	0	15,000
Production (MT)	54,188	54,265	50,234	62,018	0	58,142
Imports (MT)	479,104	475,197	527,000	349,653	0	360,000
Total Supply (MT)	548,292	544,462	592,234	426,671	0	433,142
Exports (MT)	114,123	114,007	111,000	114,934	0	114,000
Domestic Consumption (MT)	419,169	415,455	466,234	296,737	0	304,142
Ending Stocks (MT)	15,000	15,000	15,000	15,000	0	15,000
Total Distribution (MT)	548,292	544,462	592,234	426,671	0	433,142
(MT)						

Not official USDA data.

Sources: Trade for MY 2023/24 and 2024/25: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

The lower availability of oranges in Spain in MY 2025/26 compared to the previous season is expected to result in reduced volumes devoted to processing. Hence EU orange juice production is expected to be down from previous season levels. In Italy, most oranges are consumed fresh. In MY 2025/26, the volume of oranges directed to processing is expected to remain stable. This volume depends on crop quality and on the quantity destined for the fresh market, both domestic and foreign.

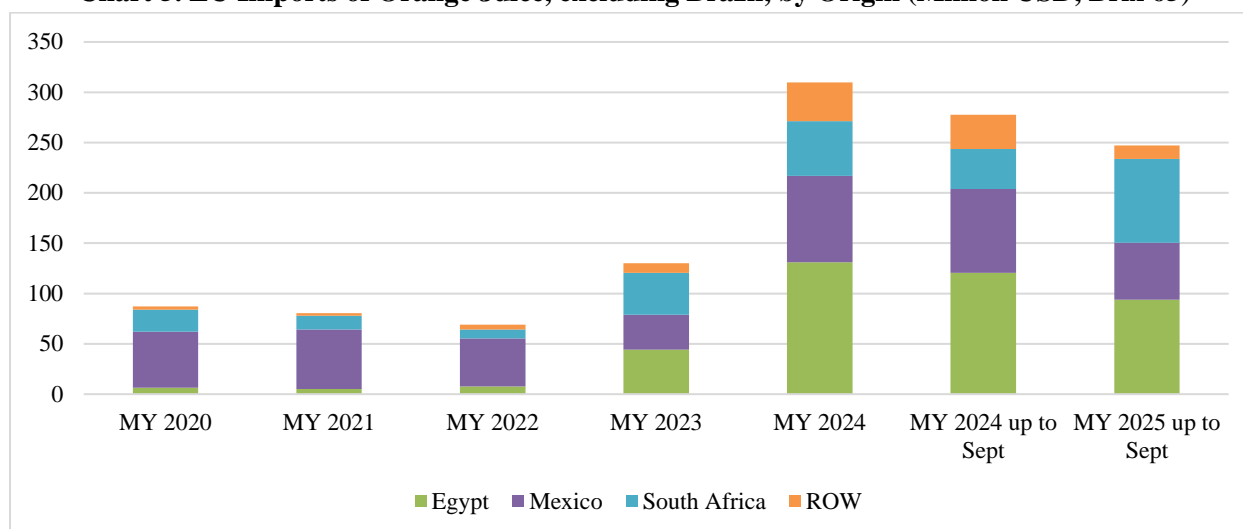
In MY 2025/26, EU's orange juice import levels are expected to increase compared to the previous season, when the tight global market balance and price surge pushed imports down. Egypt is the EU's second largest supplier of orange juice after Brazil, which accounts for over 85 percent of the EU's import market.

In MY 2025/26, EU orange juice exports are expected to decline in line with the smaller domestic supply and lower domestic processing volumes. The United Kingdom remains by far the largest destination of EU orange juice, accounting for over half of the EU's exports.

Demand continues to be the main concern in Europe. The general sentiment was that last season's high prices, associated with quality issues caused by weather affected consumer choices, who migrated to other products. The industry is trying to get back part of their consumers and thus, in MY 2025/26, orange juice consumption is expected to bounce back slightly after hitting low levels the previous season.

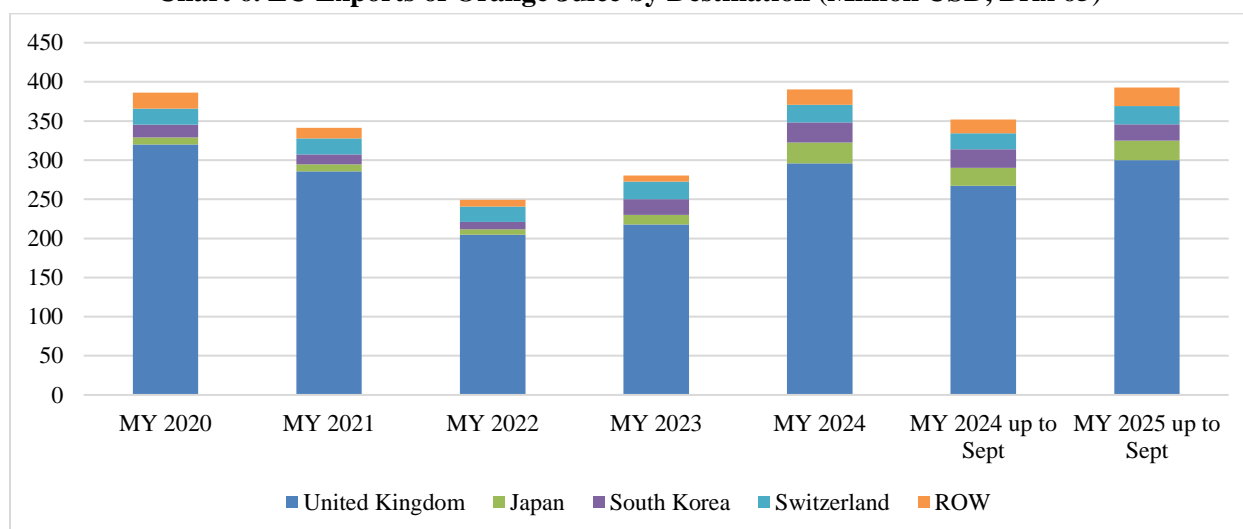
For additional information, please consult the Policy section at the end of this report.

Chart 5. EU Imports of Orange Juice, excluding Brazil, by Origin (Million USD, Brix 65)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Chart 6. EU Exports of Orange Juice by Destination (Million USD, Brix 65)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Tangerines/Mandarins

Table 3. Production, Supply, and Distribution

Tangerines/Mandarins, Fresh Market Year Begins European Union	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	146,913	144,681	146,699	144,442	0	144,120
Area Harvested (HECTARES)	137,346	137,127	137,221	135,671	0	134,794
Production (1000 MT)	2,955	2,920	2,845	2,970	0	2,794
Imports (1000 MT)	454	455	450	555	0	450
Total Supply (1000 MT)	3,409	3,375	3,295	3,525	0	3,244
Exports (1000 MT)	314	314	300	285	0	290
Fresh Dom. Consumption (1000 MT)	2,711	2,811	2,700	2,990	0	2,704
For Processing (1000 MT)	384	250	295	250	0	250
Total Distribution (1000 MT)	3,409	3,375	3,295	3,525	0	3,244
(HECTARES), (1000 TREES), (1000 MT)						

Not official USDA data.

Sources: Trade for MY 2023/24 and 2024/25: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

After years of constant contraction, EU's tangerine and mandarin area has stabilized at around 144 thousand Hectares (ha). While Spain mandarin and tangerine area continues to contract slightly, Italy reports stability and a tepid increase in area is projected in Greece. EU tangerine and mandarin production in MY 2024/25 is estimated at close to 2.8 MMT, down from the 2.9 MMT bumper crop registered in the previous season.

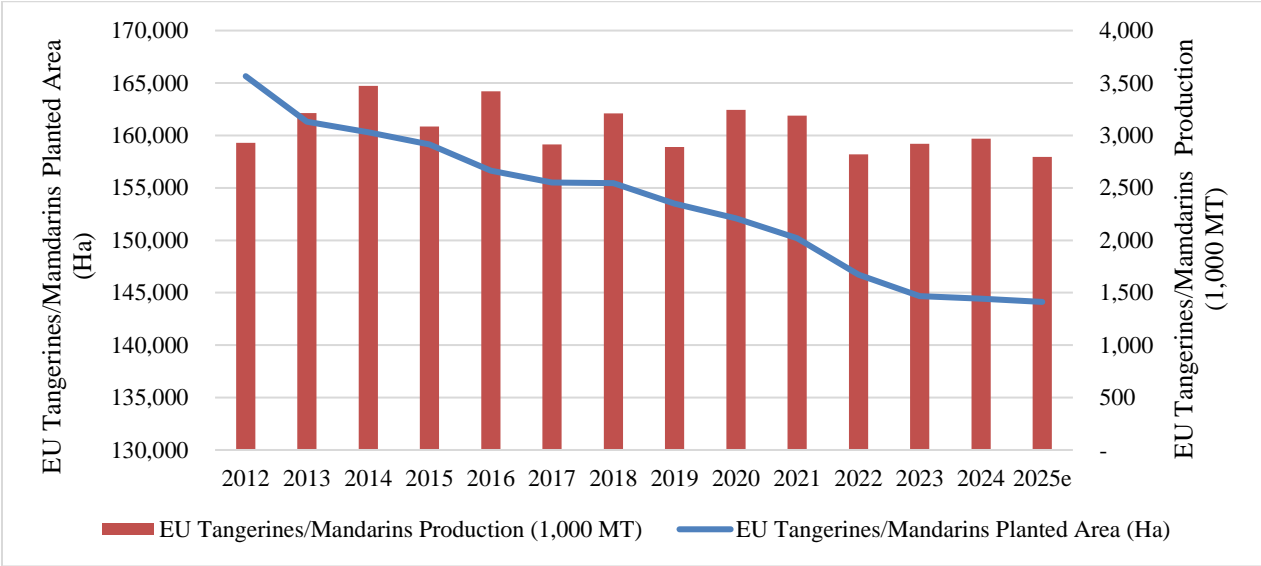
Although field prices were high in summer, the late ripening led to surplus and lower sales prices. Price recovery is needed to meet grower commitments as the surplus decreases. Despite occasional shortfalls in some Mediterranean countries, overall supply is rising due to new plantings, and strong international competition continues to challenge the entire supply chain's profitability. However, the consequences on the overall EU tangerine and mandarin output are expected to be limited.

In Spain, the EU's largest mandarin and tangerine EU growing Member State, MY 2025/26 production is projected down. Spain's citrus season has begun slowly, primarily due to delayed fruit ripening and increased competition from Southern Hemisphere mandarins, which now arrive over a longer period. Early domestic varieties face market pressure, while a reduced clementine harvest is expected for mid-season types like Clemenules and Clemenvilla. Early varieties are more available, and the latter part of the season is expected to yield a larger, higher-quality crop, ensuring a steady supply. For additional information for tangerines and mandarins variety flowering and harvesting season, please consult Annex III.

Italy's MY 2025/26 tangerine production is forecast to decrease, with smaller fruit sizes due to the summer heat. In addition, unstable spring weather, including cold spells during the flowering stage, compromised the initial fruit set. Quality is normal, with fruit reaching the necessary Brix levels for commercialization, though with a prevalence of smaller calibers. Greece's MY 2024/25 tangerine production is expected to remain flat compared to the previous year.

For information regarding main tangerine and mandarin growing regions and varieties, please consult Annex I and Annex II respectively.

Chart 7. EU Mandarins Production and Planted Area 2012-2025



Source: FAS EU posts.

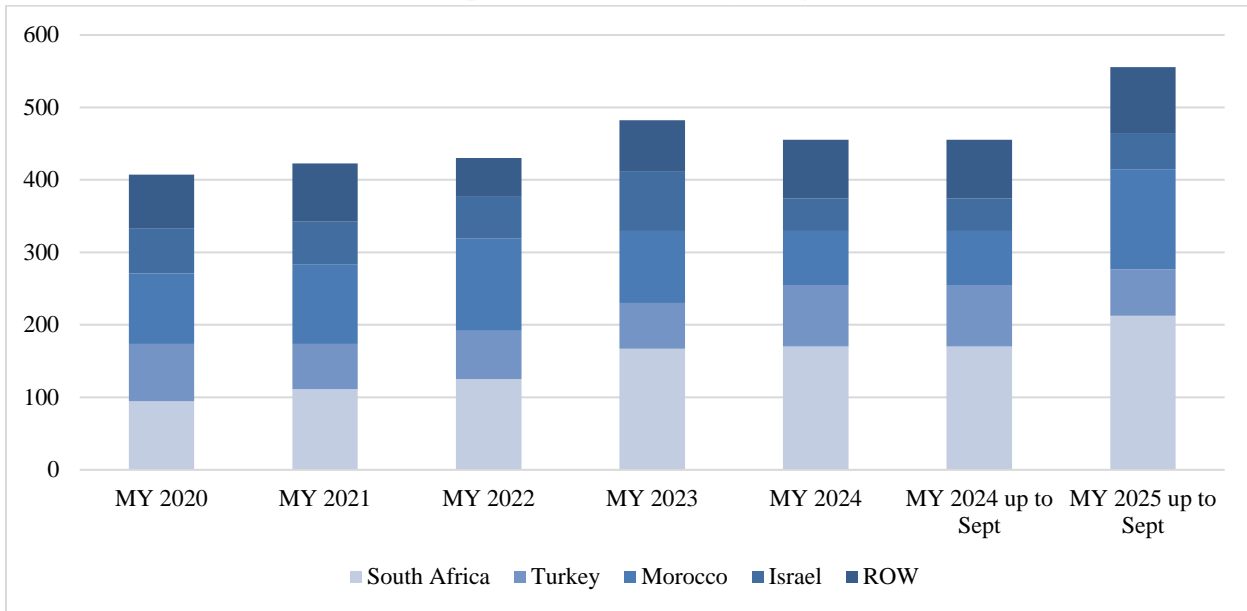
EU domestic tangerine and mandarin consumption levels are projected to remain stable in MY 2025/26. The improved availability of global orange juice supply is expected to reduce the use of tangerines and mandarins for processing purposes in the EU. Most tangerines are consumed fresh. Europeans, particularly in producing countries, consume large quantities of clementines and mandarins during winter when the bulk of production hits the market.

Tangerine and mandarin imports by the EU are forecast to remain stable in MY 2025/26 as the somewhat reduced availability in non-EU Mediterranean countries would preempt imports from expanding. South Africa, in the off-season, and Türkiye, Morocco, and Israel, and which overlap with the bloc’s crop, are the EU’s leading suppliers of mandarins and tangerines.

Reduced domestic availability, driven by the shorter EU crop, is expected to limit the bloc’s export potential. At the same time, lower supplies in non-EU producers may result in increased opportunities for EU tangerines and mandarins in non-EU European export destinations.

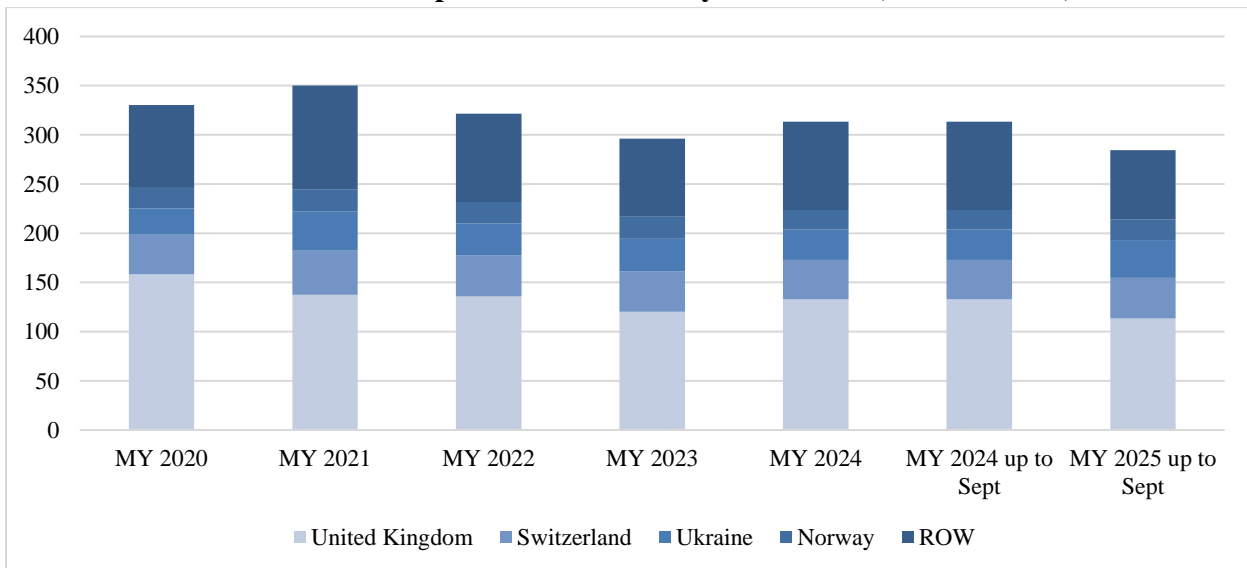
For additional information, please consult the Policy section at the end of this report.

Chart 8. MY EU Imports of Mandarins by Origin (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Chart 9. MY EU Exports of Mandarins by Destination (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Lemons/Limes

Table 4. Production, Supply, and Distribution

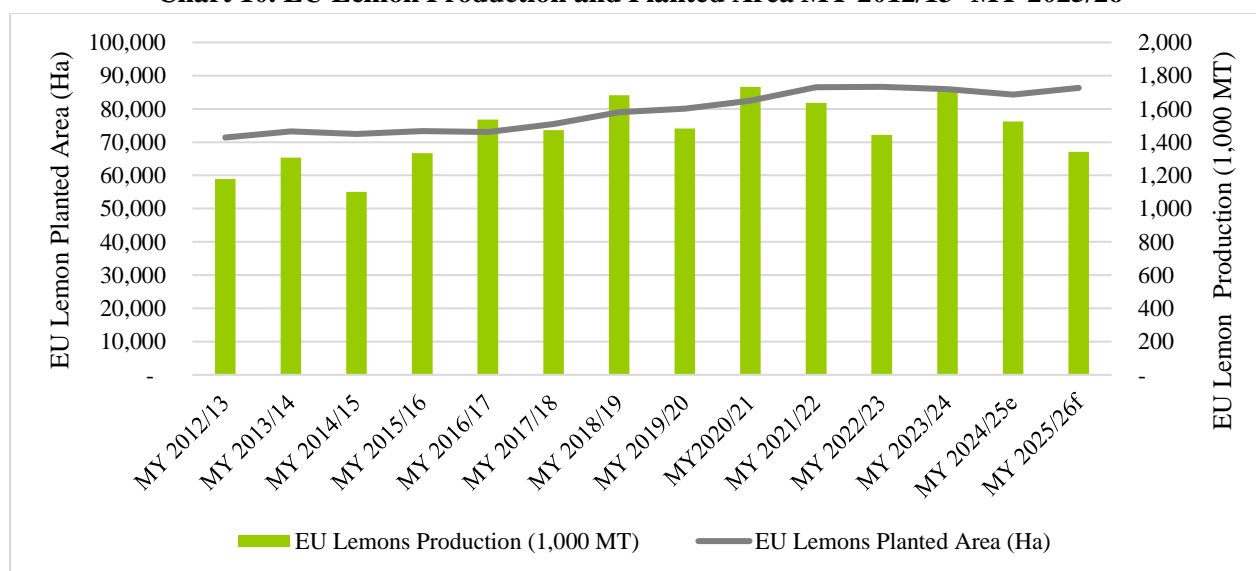
Lemons/Limes, Fresh Market Year Begins European Union	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	86,855	85,894	87,092	84,312	0	86,311
Area Harvested (HECTARES)	78,667	77,120	81,293	77,747	0	78,372
Production (1000 MT)	1,773	1,727	1,517	1,525	0	1,342
Imports (1000 MT)	502	503	550	623	0	600
Total Supply (1000 MT)	2,275	2230	2,067	2148	0	1942
Exports (1000 MT)	141	141	140	140	0	150
Fresh Dom. Consumption (1000 MT)	1,696	1,713	1,625	1,708	0	1,514
For Processing (1000 MT)	438	376	302	300	0	278
Total Distribution (1000 MT)	2,275	2230	2,067	2148	0	1942

(HECTARES), (1000 TREES), (1000 MT)

Not official USDA data.

Sources: Trade for MY 2023/24 and 2024/25: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

Chart 10. EU Lemon Production and Planted Area MY 2012/13 -MY 2025/26



Source: FAS EU posts.

For information regarding main lemon growing regions and varieties, please consult Annex I and Annex II respectively.

Post forecasts the overall area planted to lemons in Spain to continue to grow in response to EU and third country market demand. With over 11,500 Ha cultivated under organic practices, Spain organic lemon comprises more than 12 percent of the total planted area. The expansion has come in response to increased demand for organic lemon peel products.

Despite larger area planted, in MY 2025/26, EU lemon production is forecast to decrease for second year in a row, after the MY 2023/24 record crop, and amount to just over 1.3 million MT. Spain and Italy are the first and second largest EU lemon producers, accounting for nearly 65 and 30 percent of the EU's total lemon production respectively.

The production decline anticipated for MY 2025/26 is largely driven by the yield reduction registered in Spain (Spain production data do not include unharvested lemons.) The preliminary forecast for Fino lemon production in MY 2025/26 is 780,000 tons, representing a 10 percent decrease compared to MY 2024/25. Despite the lower volume, the quality and commercial yield for the fresh market are expected to improve, largely due to effective phytosanitary management against thrips. The reduction in harvest will become particularly evident during the second part of the Fino season, in the first quarter of 2026. This decline in production will lead to higher costs per kilo. Ongoing challenges from adverse weather events and pests like *Prays citri* continue to prevent lemon trees from reaching their full production potential.

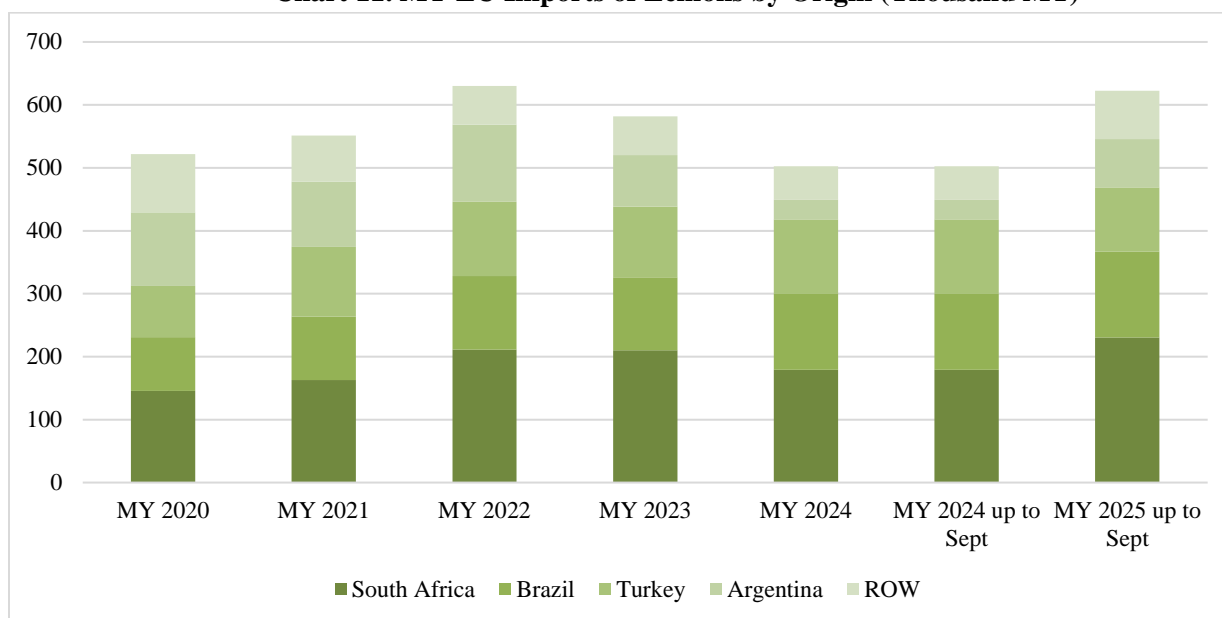
A decline in lemon production is also reported in Italy, whereas in Greece lemon output is projected to remain flat for MY 2025/26.

Consumption of lemons in the EU in MY 2025/26 is anticipated to remain steady. Lemons in the EU are primarily consumed fresh, although increasing opportunities for processing uses (food and industrial) continue to arise. Given the steady increase in area planted to lemons, oversupply like the one registered in MY 2023/24, with increased quantities being devoted for processing, cannot be ruled out in the future.

In light of the reduction in domestic supplies, EU lemon imports are expected to remain relatively stable for MY 2025/26. MY 2023/24 EU lemon imports declined significantly as there were ample supplies domestically. In MY 2024/25, imports originating in Türkiye, the EU's leading supplier in the Northern Hemisphere, and Egypt decreased. Conversely, imports originating in Southern Hemisphere suppliers such as South Africa, Argentina and Brazil grew significantly.

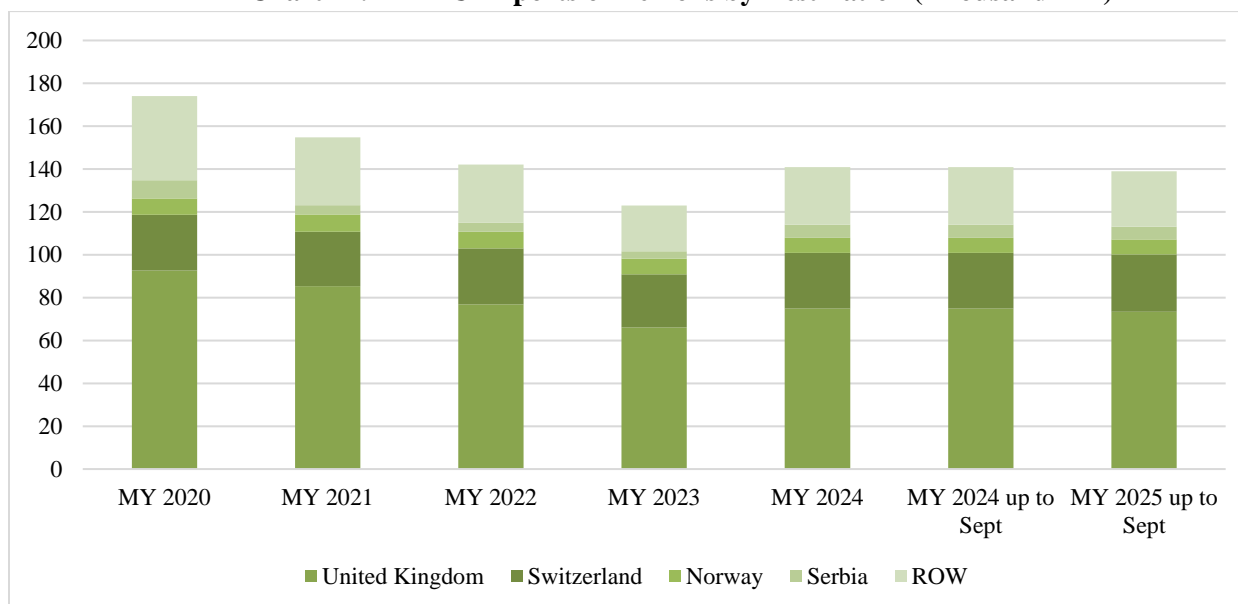
In MY 2025/26 exports are projected to stay at similar levels to MY 2024/25, when ample supplies resulted in an expansion of EU lemon exports, highly dominated by Spain. Main destinations for EU lemons are predominately neighboring markets such as the United Kingdom, Switzerland, Norway and Serbia. Within the EU, Germany and France are main destination markets for EU citrus, and the ample supply and steady demand have supported intra-EU trade from producing Member States to consumption markets.

Chart 11. MY EU Imports of Lemons by Origin (Thousand MT)²



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Chart 12. MY EU Exports of Lemons by Destination (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

For additional information, please consult the Policy section at the end of this report.

² HS Code 080550 includes lemons and limes combined. Products under this HS code originating in Brazil, Colombia and Mexico largely consist of limes.

Grapefruit

Table 5. Production, Supply, and Distribution

Grapefruit, Fresh Market Year Begins European Union	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	4,346	4,348	4,350	4,376		4,644
Area Harvested (HECTARES)	3,467	3,467	3,470	3,547		3,749
Production (1000 MT)	110	110	111	112		126
Imports (1000 MT)	215	215	214	200		190
Total Supply (1000 MT)	325	325	325	312		316
Exports (1000 MT)	19	19	23	21		23
Fresh Dom. Consumption (1000 MT)	288	288	290	277		278
For Processing (1000 MT)	18	18	12	14		15
Total Distribution (1000 MT)	325	325	325	312		316
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

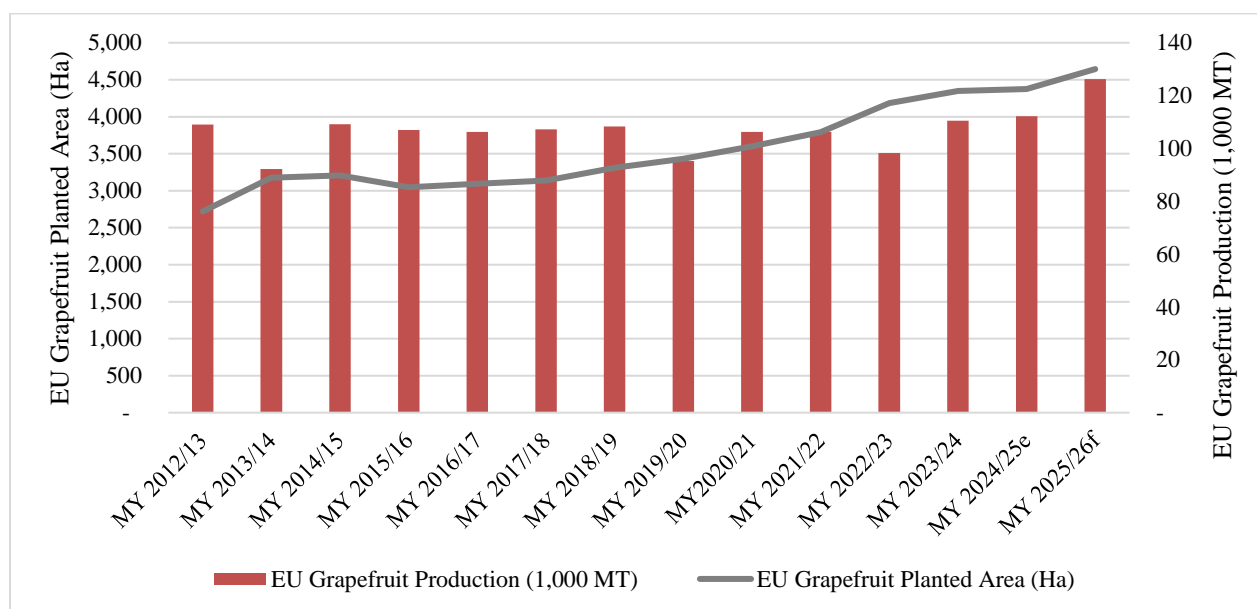
Not official USDA data.

Sources: Trade for MY 2023/24 and 2024/25: Trade Data Monitor, LLC (TDM). All other: FAS EU posts.

MY 2025/26 EU grapefruit production is forecast to amount to 126 thousand MT. The production increase can be entirely attributed to Spain, which concentrates over three quarters of the EU's grapefruit production. While production volumes of grapefruits are comparatively lower than other citrus fruits, Spain grapefruit area and production continues to expand. In Spain, the main factors driving increased grapefruit production are new plantations coming into production—primarily in Murcia—and the recovery of groves in Andalucía, which are returning to normal yields after last season's drought.

Spain now supplies 50 per cent of the grapefruit consumed in the EU, up from 36 per cent in MY 2020/21. The Spanish grapefruit interprofessional association anticipates that this season will be decisive in consolidating Spain's role as a strategic supplier in the European market, strengthening its position against competing countries. Grapefruit production is anticipated to remain stable in Greece, Italy and Portugal. For information regarding main grapefruit growing regions and varieties, please consult Annex I and Annex II respectively.

Chart 13. EU Grapefruit Production and Planted Area MY 2012/13-MY 2025/26f



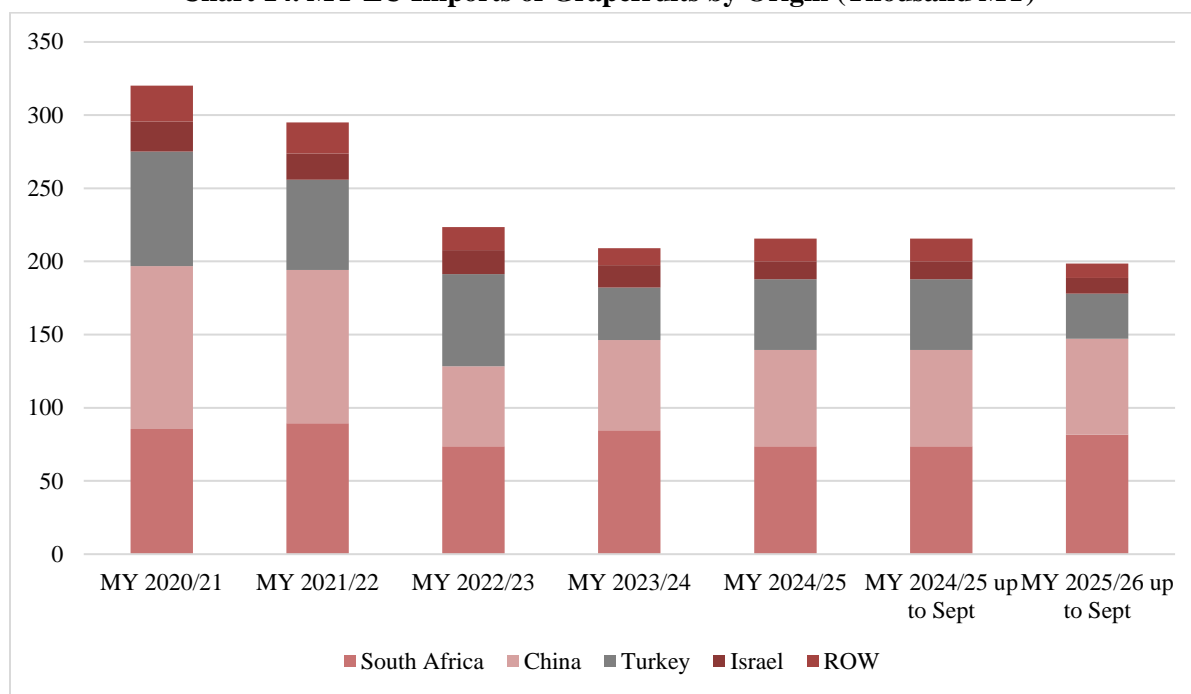
Source: FAS EU posts.

In MY 2025/26, EU grapefruit consumption is revised up in response to the ample domestic supplies and readily available imports mainly from South Africa.

In MY 2025/26, EU imports of grapefruit are expected to decline marginally given the anticipated ample internal availability. South Africa, especially in the off season, followed by China, Türkiye, and Israel, and the United States, to a much lesser extent, are the EU's main grapefruit suppliers. The conflict in the Middle East has reduced the presence of Israeli grapefruits in the EU market to the advantage of domestic Spanish grapefruits and imports from other origins. Since 2020, in the aftermath of EU duties on U.S. grapefruits and the lower production volumes, U.S. grapefruits to the EU plummeted. The United States has become a marginal supplier, yielding space in the market for Mediterranean grapefruits. After years of gradual decrease, imports from the United States plummeted again in MY 2024/25.

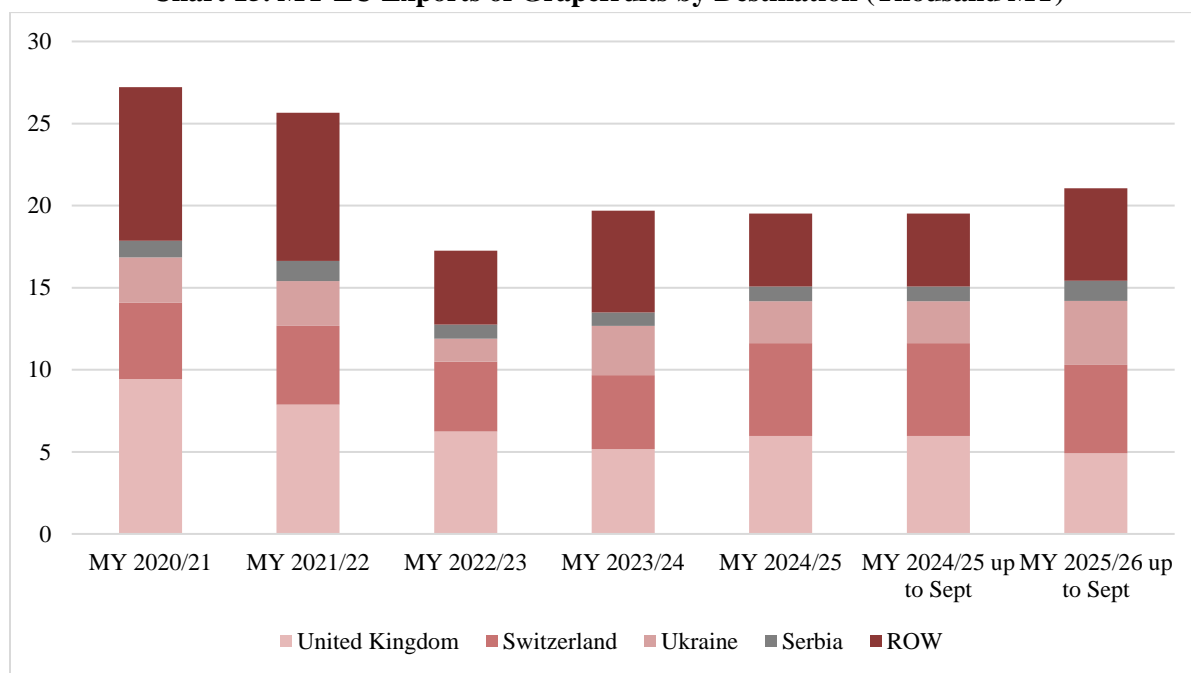
In MY 2025/26 EU grapefruits exports are projected to grow given the reduced competition by other non-EU Mediterranean producers. EU grapefruit exports are only minor and fairly concentrated to EU neighboring countries such as the United Kingdom, Switzerland, and to a lesser extent, Ukraine, Serbia, Belarus, and Norway. A large portion of grapefruit trade occurs within the EU from producing regions, mainly located in Spain, to consuming Member States such as Germany, France or the Netherlands.

Chart 14. MY EU Imports of Grapefruits by Origin (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

Chart 15. MY EU Exports of Grapefruits by Destination (Thousand MT)



Source: FAS Madrid based on Trade Data Monitor, LLC data.

For additional information, please consult the Policy section at the end of this report.

Policy

Common Agricultural Policy - Use of Crisis Measures

The new EU's Common Agricultural Policy (CAP) for 2023-2027 was [adopted](#) on December 2, 2021, and published in the Official Journal on December 6, 2021. The updates to the CAP were adopted in May 2024 and published as [Regulation 2024/1468](#). For more information, please see GAIN Report: [EU Commission Proposes Common Agricultural Policy Revisions Following Farmer Protests](#).

On May 14, 2025, the European Commission published a [proposal](#) to simplify the CAP. The proposed measures target the administrative burden, controls, implementation of the CAP as well as the CAP crisis management tools. Notably, the proposal simplifies environmental requirements (GAECs for good agro-environmental conditions) linked to eco-payments for farmers. On November 11, 2025, the EU institutions reached a [political agreement](#) on the proposal. The simplifications will therefore be published in the Official Journal before the end of the year for an implementation starting in 2026.

Use of crisis measures taken to support the EU agri-food sector: As part of the CAP, the Commission can allocate funds from the agricultural reserve to directly support farmers from countries who have been impacted by exceptional adverse climatic events. In February 2025, the Commission allocated €98,6 million (\$114 million) from the agricultural reserve to directly support farmers in Spain, Croatia, Cyprus, Latvia and Hungary who have been impacted by exceptional adverse climatic events and natural disasters since spring 2024, which affected the production of fruit and vegetables.

Marketing Standards

Fresh fruit and vegetable imports into the EU must comply with the EU-harmonized marketing standards. These standards apply at all marketing stages and include criteria such as quality, size, labeling, packaging, and presentation. EU marketing standards were revised in November 2023. They will enter into force on January 1, 2025. [Implementing Regulation \(EU\) 2023/2430](#) and [Delegated Regulation 2023/2429](#) provide for a general marketing standard for all fresh fruits and vegetables. Specific marketing standards are in place for citrus and are set out on pages 29-37 in Delegated Regulation 2023/2429.

Certification of Fruit and Vegetables

Fruits and vegetables exported to the EU require a phytosanitary certificate. A USDA/Animal Plant Health Inspection Service (APHIS) inspector issues these certificates. This standard-setting body coordinates cooperation between nations to control plant and plant product pests and to prevent their spread. [Regulation 2016/2031](#) concerning protective measures against pests of plants since December 14, 2019, contains provisions concerning compulsory plant health checks. This includes documentary, identity, and physical plant health checks to verify compliance with EU import requirements and uniform conditions for its implementation that are established in [Commission Implementing Regulation](#)

[\(EU\) 2019/2072](#). There is more information available on the DG SANTE website: [Trade in plants and plant products from non-EU countries](#).

The Commission monitors imports of fruit and vegetables on an annual basis to determine how to adjust the frequency of testing consignments. There is a reduced frequency of plant health checks for certain products when justified, as per [Commission Implementing Regulation \(EU\) 2022/2389](#) of December 07, 2022. There is more information available on the DG SANTE website: [Reduced frequency checks](#).

EU's Decision on Citrus Canker

The [Commission Implementing Regulation \(EU\) 2019/2072](#) establishes rules for citrus fruit and citrus hybrids exported from areas where *Xanthomonas citri* (Citrus canker) exists and requires that groves are appropriately managed and that the fruit is free of symptoms of canker. The rules state that exports of these fruits must be accompanied by a phytosanitary certificate.

EU's Restrictions on False Codling Moth

The European Union has approved new provisions for citrus exported from areas affected by *Thaumatotibia leucotreta* (False Codling Moth), such as Sub-Saharan African countries. The [Commission Implementing Regulation \(EU\) 2022/959](#) of June 16, 2022, amends Annex VII to [Commission Implementing Regulation \(EU\) 2019/2072](#) regarding new phytosanitary requirements for the protection of the Union against this pest. The new rules entered into force on July 14, 2022, and require that all Europe-bound exports of citrus fruit from countries affected by the disease must undergo specified mandatory cold treatment process (temperatures of - 2C up to 25 days) before importation.

Maximum Residue Levels (MRLs) for Citrus – Upcoming Reviews

Maximum Residue Levels (MRLs) for pesticides, including import tolerances, have been harmonized throughout the EU and can be found in the [EU MRL database](#). The following tables provide interested stakeholders with advance notice of active ingredients under review for renewal of approval in the EU and are listed with a U.S. MRL for citrus fruit in the [global MRL database](#).

Phosmet is the active ingredient in insecticides used by U.S. citrus growers to control a variety of insect pests. As it is no longer approved in the EU, the MRLs for *phosmet* have been lowered to 0.01 ppm for citrus and to 0.005 ppm for oranges since September 15, 2023 ([Commission Regulation \(EU\) 2023/1029](#)).

For additional information, please consult the [GAIN](#) page for reports with the EU Early Alerts.

Upcoming reviews for MRLs: [Article 12 review](#).

European School Fruit Scheme

The European “School Fruit Scheme” originated in 2009 as a measure to combat child obesity. It includes three elements: free distribution of fruit and vegetables in schools, informational campaigns on healthy eating habits, and monitoring and evaluation. For the school year 2025/2026, it allocated €130.6 million (\$150 million) for fruit and vegetables of EU funds to all the Member States. In addition to the school fruit scheme, fruit and vegetable consumption is also encouraged through the EU’s promotional budget for agricultural products and quality schemes. For more information, please see: [EU 2025 Promotion Programs for Agricultural Products](#).

Tariffs

Entry Price System: EU imports of fresh fruit and vegetables are subject to the Entry Price System, which has been in place in its current form since the Uruguay Round. It is a complex tariff system that provides a high level of protection to EU producers. In this system, fruits and vegetables imported at or above an established entry price are charged an ad valorem duty only. The tariff and statistical nomenclature and the Common Custom tariff levels are published in [Commission Implementing Regulation \(EU\) 2024/2522](#). This version applies as of January 01, 2025. The tariffs for citrus fruits can be found on pages 107-108.

First Come, First Served Principle: Regarding the administration of import tariff quotas, certain types of citrus fruit are subject to the “[first come, first served principle](#)”:

Product	Tariff codes	Quantity (kg)	Period	Origin	In-Quota Duty
<i>Sweet oranges</i>	0805 10 22 10 0805 10 24 10 0805 10 28 10	20,000,000	Feb 1-April 30	All third countries except Belarus, Russia, and the United Kingdom	10% ad valorem
<i>Minneola</i>	0805 29 00 21 0805 29 00 29	14,931,000	Feb 1-April 30	All third countries except Belarus, Russia, and the United Kingdom	2% ad valorem
<i>Frozen concentrated Orange Juice</i>	2009 11 99 11 2009 11 99 19	1,500,000	Jan 1-Dec 31	All third countries except Belarus, Russia, and the United Kingdom	13% ad valorem

Source: [Commission Implementing Regulation \(EU\) 2020/1988](#)

Additional EU Duties Targeting U.S. Citrus

EU Tariff Reductions: The European Union imposed retaliatory tariffs on U.S. orange juice and other products in 2018 in response to U.S. steel and aluminum measures. Following a 2021 agreement to end the dispute, the EU has repeatedly suspended these tariffs. The most recent suspension, under Implementing Regulation (EU) 2025/1727, extends the suspension as of August 7, 2025.

Separately, on August 28, 2025, the European Commission published two legislative proposals that would eliminate tariffs on a basket of U.S. agricultural goods including fresh or dried oranges, grapefruits, limes and other citrus fruits. The proposals are currently going through the EU legislative process; final adoption is expected sometime in early 2026.

U.S.-EU WTO Cases on Aircraft Subsidies and Suspension: On November 9, 2020, the European Union announced retaliatory tariffs against U.S. exports following the World Trade Organization's (WTO) ruling that authorized the EU to take such countermeasures due to U.S. subsidies to aircraft maker Boeing ([Regulation \(EU\) 1646/2020](#)). The European Commission published the list of products subject to a 25 percent additional tariff. **Fresh grapefruit** and **Frozen Orange Juice** were listed in the Regulation and hence subject to the additional tariff. On June 15, 2021, the European Union and the United States reached an understanding in the large civil aircraft dispute. On July 9, 2021, the European Commission adopted [Implementing Regulation 2021/1123](#) suspending the application of tariffs until July 11, 2026.

Trade Policy – EU Free Trade Agreements (FTAs)

The EU is negotiating and has implemented several Free Trade Agreements (FTAs) with other countries and regions that produce and export citrus including Chile, South Africa, Türkiye, Egypt, Morocco, and Israel. Additional information is available on the website of the [EC at Negotiations and Agreements](#).

Mercosur: On December 6, 2024, the European Commission announced that President von der Leyen and her counterparts from Argentina, Brazil, Paraguay, and Uruguay, finalized negotiations and reached a political agreement for an EU-Mercosur partnership agreement. For citrus, the agreement includes a progressive tariff removal for fresh citrus fruits and citrus-based processed products ranging from fresh and concentrated orange juice to lemon juice, lemon essential oil or citrus peel exports to the EU. While only a small portion of EU citrus fruits imports originate in Mercosur countries, they have a more prominent role in the EU's citrus-based processed product imports. The political agreement that was reached by the Commission must be approved by the European Parliament and the Council of the European Union to be officially adopted.

Bans Impacting Citrus Trade

Russian Import Ban on Agricultural Products: On August 7, 2014, the Russian government implemented a (then) one-year ban on a range of agricultural and food products, including citrus fruit from the United States, the EU, Canada, Australia, and Norway, in response to U.S. and EU sanctions

over Russian actions in Ukraine. Russia has continued to extend the ban every year. For more information, see the [Commission's website](#) regarding the Russian **ban**.

Trade Shows

Trade shows play a key role in presenting new products to the trade or in finding additional buyers and importers. The most important trade shows related to the fruit and vegetable sectors in the EU include:

FRUIT LOGISTICA Berlin, Germany (Interval: yearly) Target Market: Germany/EU/Central & Eastern Europe FRUIT LOGISTICA is the leading European trade show for fresh and dried fruit, nuts, and related products.	Next Edition: February 4-6, 2026
BIOFACH Nuremberg, Germany (Interval: yearly) Target Market: Germany/Europe The leading European trade show for organic food and non-food products.	Next Edition: February 10-13, 2026
FRUIT ATTRACTION Madrid, Spain (Interval: yearly) Target Market: Spain/EU/Latin America/International Fruit attraction is an international trade show for the fruit and vegetable industry sector with more than 2,000 exhibitor companies from around the world.	Next Edition: October 6-8 2026

Related Reports

Title	Date
EU Citrus Annual	12/27/2024
EU Citrus Semi-Annual	06/15/2024
EU Citrus Annual	12/15/2023
EU Citrus Semi-Annual	06/15/2023

These and other GAIN reports can be downloaded from the [USDA/FAS GAIN database](#).

Abbreviations and References used in this report:

EC	European Commission
EU	European Union
€	Euro
FAS	Foreign Agricultural Service
HA	Hectares
TDM	Trade Data Monitor
MY	Marketing Year (October/September for all citrus and products)
MS	EU Member State
MT	Metric ton (1,000 kg)
MMT	Million Metric Tons
OJ	Orange Juice
PS&D	Production, Supply, and Demand
ROW	Rest of the World
UK	United Kingdom
\$	U.S. Dollar

Harmonized System (HS) Codes:

Oranges : 080510

Orange Juice: 200911, 200912, 200919

Tangerines/Tangerines : 080520, 080521, 080522, 080529

Lemons/Limes : 080550

Grapefruits : 080540

Annex I. Main Citrus Producing Areas by Member State

Member State	Spain	Italy	Greece
Oranges	Comunidad Valenciana and Andalucía	Sicily and Calabria (combined account for approximately 86 percent of total production)	Peloponnese and Etoloakarnania
Tangerines/Mandarins	Comunidad Valenciana, Cataluña and Andalucía	Calabria, Sicily, and Puglia	Prefectures of Igoumenitsa, Arta, Mesologgi, and Thesprotia, and prefecture of Laconia in Peloponnese.
Lemons and Limes	Murcia	Sicily	Prefectures of Achaia, Korinthos, and Laconia, in the Peloponnese and the island of Crete.
Grapefruits	Murcia	Sicily	Island of Crete and Greek prefectures of Corinth and Kavala, together with the region of Thessaly

Source: FAS EU posts.

Annex II. Main Citrus Varieties by Member State

Member State	Spain	Italy	Greece
Oranges	<i>Navelate, Navelina, Valencia late, Salustiana and Navel.</i>	Blood varieties grown in Italy include <i>Tarocco, Moro, and Sanguinello</i> . <i>Naveline</i> and late varieties such as <i>Valencia</i> and <i>Ovale</i> , are the leading blond-orange varieties. <i>Ippolito</i> and <i>Meli</i> cultivars are gaining popularity.	<i>Washington Navel, Commons, Skaggs Bonanza, Navelina, New Hall, Lanelate, and Valencia.</i>
Tangerines/Mandarins	<i>Clementine</i> is the major tangerine group, new plantings include <i>Clemenrubi, Nova, Leanri</i> and <i>Oronules</i> .	<i>Comune, Oroval, and Monreal</i> are the leading clementine varieties grown, whereas <i>Avana</i> and <i>Tardivo di Ciaculli</i> are the main mandarin cultivars.	<i>Clementine</i> is the major tangerine group, new plantings include <i>Nova, Page</i> and <i>Ortanique</i> varieties.
Lemons and Limes	Verna and Mesero (Fino or Primofiori)	<i>Femminello Siracusano, Lunario, Interdonato, Limone di Sorrento, and Limone di Procida.</i>	The major variety grown in Greece is <i>Maglini</i> , along with the early varieties <i>Interdonato</i> and <i>Eureka</i> .

Grapefruits	<i>Star Ruby</i> and <i>Ruby Red</i>	<i>Star Ruby</i>	<i>Marsh Seedless</i> and <i>Star Ruby</i> .
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Source: FAS EU posts.

Annex III. Blooming and Harvesting Period by Citrus Type

Citrus Fruit Type Month ³	Blooming (% of Area)			Harvesting (% of Volume)					
	Mar	Apr	May	Oct	Nov	Dec	Jan	Feb	Mar
Sweet Orange Navel - Navelina	14	74	12	24	37	32	8	3	-
Sweet Orange Navel - Navel	14	61	25	-	6	3-	24	18	14
Sweet Orange Navel - Navelate	9	66	25	-	-	11	26	33	27
Sweet Orange White - Salustiana	5	7-	23	-	5	21	27	3-	17
Sweet Orange White - Other Whites	12	63	23	-	1	8	19	2-	9
Sweet Orange White - Valencia Late	3	58	36	-	-	-	26	47	23
Sweet Orange - Blood Orange	8	67	25	-	-	-	26	47	23
Bitter Orange	7	42	51	-	2	22	44	22	1
Mandarin Other Mandarins	3	67	3-	-	3	16	29	25	15
Grapefruit	11	74	15	15	23	33	16	9	4
Month ⁹	Mar	Apr	May	Apr	May	Jun	Jul	Aug	Sep
Lemon Verna	18	36	35	17	32	32	12	7	3
Month ⁹	Mar	Apr	May	Sep	Aug	Sep	Oct	Nov	Dec
Satsuma Mandarin	12	76	12	26	-	35	26	28	11
Lemon Primofiori	52	42	6	-	-	11	19	23	21
Clementine Mandarin	11	69	2-	17	7	17	25	36	35

Source: FAS Madrid based on Spanish Ministry of Agriculture data.

Attachments:

No Attachments

³ Only minor blooming, harvesting and marketing of local production occurs outside these months.