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# Report Name: Citrus Annual

**Country:** Mexico

**Post:** Monterrey ATO

**Report Category:** Citrus

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**Report Highlights:**

In market year (MY) 2023/24, total citrus production in Mexico is expected down slightly by 1.5 percent versus the previous year, driven primarily by a reduction in fresh lime production. While fresh orange production is projected up fractionally, increasingly erratic conditions such as prolonged drought and high temperatures affected the main producing regions in the current year and reduced harvest quality. Post expects that with the recovery of the trees, larger fruit with higher juice content will be harvested in MY 2023/24. Despite higher delivery of oranges for processing in the current MY, orange juice production and thus exportable supply is expected to decline due to the smaller, drier product. It is projected that fresh juice concentrate production will rebound somewhat in MY 2023/24 as the quality of fresh fruit normalizes. Exports of fresh citrus fruit are projected to remain stable for most varieties, except for a decrease in fresh lemons/limes exports due to the decline in production.

**Executive Summary:**

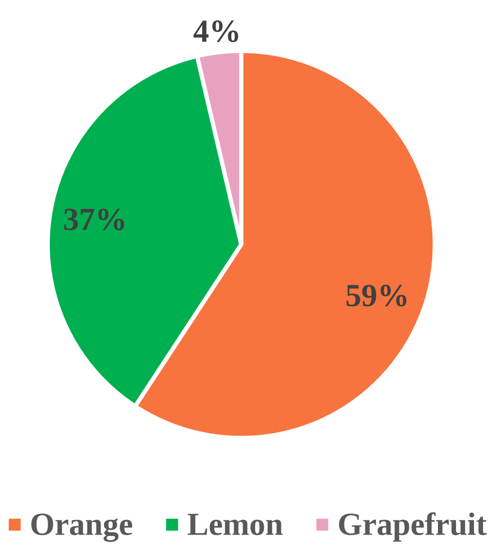
MY 2023/2024 total production in Mexico of fresh oranges, lemons/limes, and grapefruit is expected down slightly by 1.5 percent versus the previous year. Mexican citrus production continues to confront adverse effects of climate change, such as prolonged drought and high temperatures that affected many of the main producing regions in the country. It is expected that as trees recover, larger fruit with higher juice content will be harvested in MY 2023/24, particularly regarding oranges. It is also estimated that this will translate to increased production of fresh juice concentrate.

Mexico's total domestic consumption is down less than one percent across fresh citrus. Although it is estimated that more product will be available for domestic consumption, the economic environment may be an important element in consumer purchasing behavior. While included in Mexico's basic food basket, or "Canasta Basica", citrus and other fruit products are generally not considered 'staples' by price-sensitive households. High pricing in the foodservice sector also limits consumption growth.

Export demand remains strong, with orange and grapefruit exports projected up marginally. However, the overall export of fresh citrus is projected to be lower than previous MY due to fewer available lemons/limes for export.

In 2022, according to Mexico's Agri-food and Fisheries Information Service (SIAP), total planted area for citrus fruits covered in this report (oranges, lemons/limes, and grapefruit) exceeded 589,800 hectares (ha). Planted area for orange production represents over 50 percent of total planted area, followed by lemons with 37 percent.

**Figure 1: Total Citrus Planted Area, 2022 (% of Area)**




Source: SIAP

**Table 1: Mexico Fresh Oranges – Production, Supply, and Distribution**

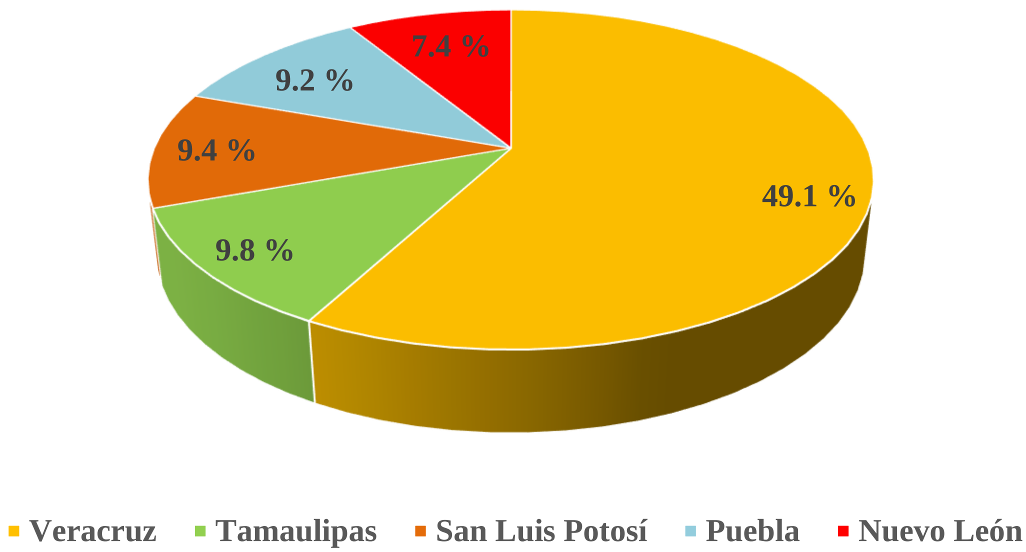
| Oranges, Fresh | 2021/2022 | | 2022/2023 | | 2023/2024 | |
|---|---|---|---|---|---|---|
| Market Year Begins | Nov 2021 | | Nov 2022 | | Nov 2023 | |
| Mexico | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| **Area Planted** (HECTARES) | 344285 | 344285 | 352000 | 349000 | 0 | 349500 |
| **Area Harvested** (HECTARES) | 331438 | 331438 | 314600 | 336873 | 0 | 337000 |
| **Bearing Trees** (1000 TREES) | 64800 | 64800 | 64200 | 64200 | 0 | 64200 |
| **Non-Bearing Trees** (1000 TREES) | 5500 | 5500 | 5200 | 5200 | 0 | 5200 |
| **Total No. Of Trees** (1000 TREES) | 70300 | 70300 | 69400 | 69400 | 0 | 69400 |
| **Production** (1000 MT) | 4595 | 4595 | 4200 | 4854 | 0 | 4870 |
| **Imports** (1000 MT) | 22 | 20 | 25 | 29 | 0 | 28 |
| **Total Supply** (1000 MT) | 4617 | 4615 | 4225 | 4883 | 0 | 4900 |
| **Exports** (1000 MT) | 76 | 74 | 67 | 62 | 0 | 70 |
| **Fresh Dom. Consumption** (1000 MT) | 2391 | 2391 | 2398 | 2436 | 0 | 2526 |
| **For Processing** (1000 MT) | 2150 | 2150 | 1760 | 2385 | 0 | 2300 |
| **Total Distribution** (1000 MT) | 4617 | 4615 | 4225 | 4883 | 0 | 4898 |
| | | | | | | |
| (HECTARES) ,(1000 TREES) ,(1000 MT) | | | | | | |

## Planted Area

For MY 2023/24 (November/October), Post projects orange planted area at 349,500 hectares (ha), slightly above the previous MY. In some productive regions, orange trees were damaged by adverse weather conditions. Therefore, some farmers are evaluating best agricultural practices that should be implemented to make this crop more profitable, and some growers are considering changing to other horticultural crops that have faster return on investment like leafy greens. At a national level, over the last three years, high temperatures and lack of rainfall have remained key factors that have limited production and led to lower quality crops, especially in terms of size and juice content of the harvest. For MY 2022/23, farmers growing in orchards that lack irrigation systems are finding that the fruit is smaller in volume and drier. On the other hand, farmers with irrigation systems expect fruit to grow more and their juice content to increase with the arrival of late rainfall in September. For this reason, harvest/cutting of fruit produced in irrigated orchards is sometimes delayed as growers expect to enter the market with better product, at a higher price.

Based on available official data, Mexico's MY 2022/23 planted area is estimated to be 349,000 ha, a marginal 1.8 percent increase from MY 2021/22. As mentioned above, farmers have doubts about the productive conditions of the area planted and are assessing the damage to trees caused by adverse climate change effects. For growers from the affected producing states of Veracruz, Tamaulipas, and Nuevo Leon, it will take around eight months to one year to evaluate full extent of tree damage due to prevailing weather conditions in MY 2022/23. In 2022, the majority of Mexico's orange planted area was located in the following states: Veracruz (49.1 percent), Tamaulipas (9.8 percent), San Luis Potosí (9.4 percent), Puebla (9.2 percent), and Nuevo Leon (7.4 percent).

**Figure 2: Total Orange Planted Area, 2022 (% of Area)**




Source: SIAP

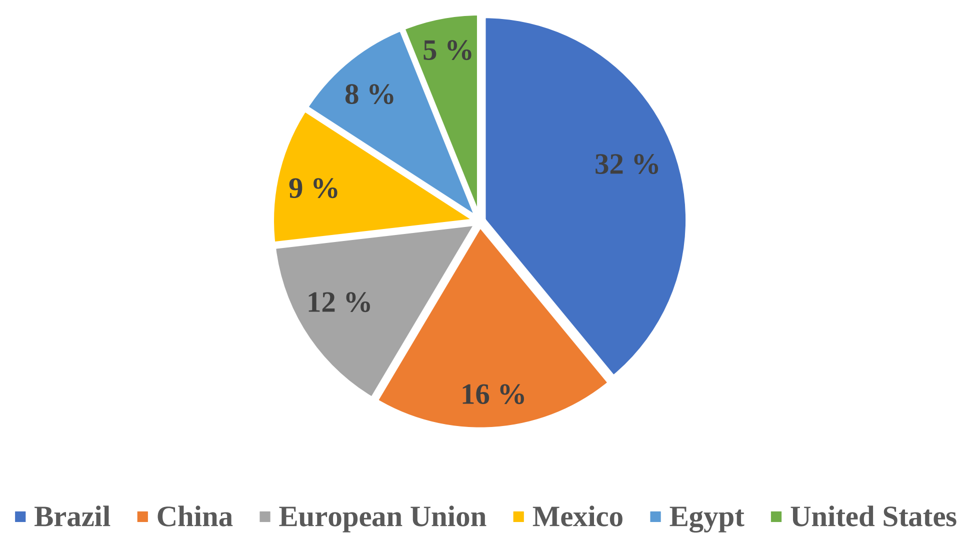
**Production**

Post forecasts orange production for MY 2023/24 at 4.87 million metric tons (MMT), marginally above than the previous MY considering that farmers expect that the late rainfall in the northeastern states of Tamaulipas and Nuevo Leon will render fruit of larger size.

Mexico’s MY 2022/23 orange production is estimated at 4.85 MMT based on available data. This represents 6 percent increase versus MY 2021/22. In recent years, atypical conditions such as high temperatures and more erratic precipitation have led to decreasing water availability and less predictable growing seasons, affecting major orange producing states. While in the current year this more erratic conditions did not translate to lower production, the quality of the harvest is below average and much of the fruit has a lower juice content. Based on Post estimates for Mexico and USDA official data for MY 2022/23, Mexico is estimated to be the fourth-largest orange producer in the world behind Brazil, China, and the European Union.

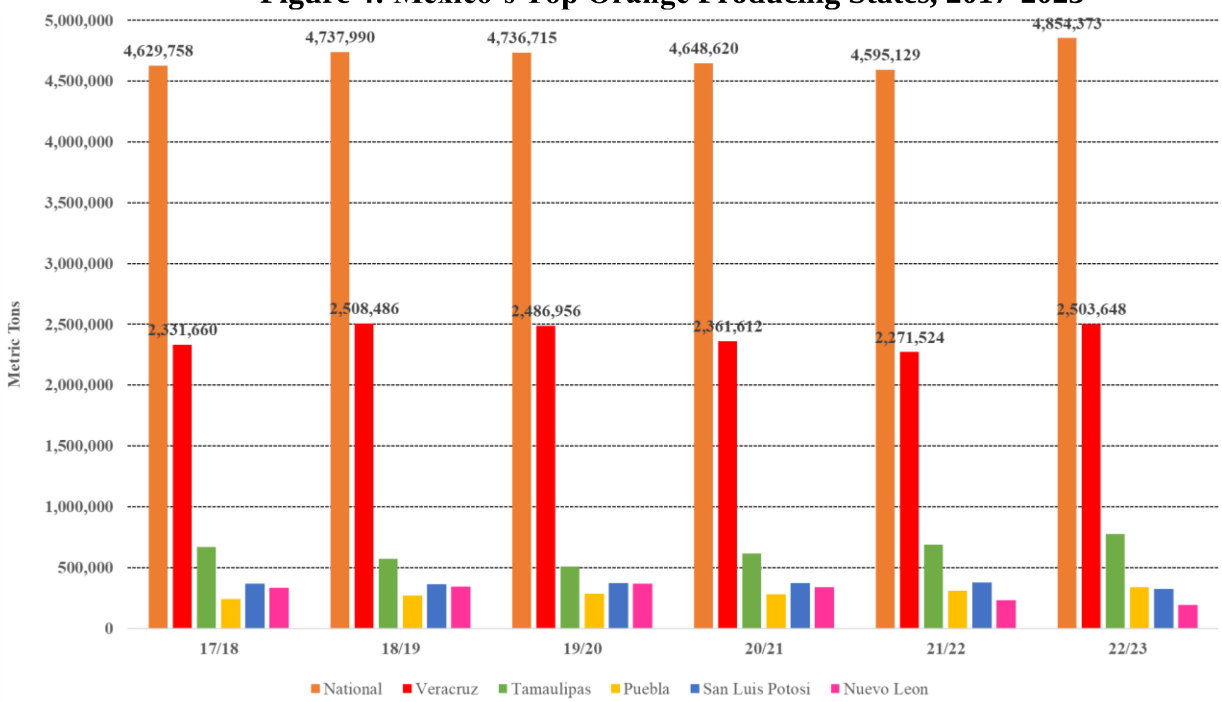
With available data, Post’s national orange yield for MY 2022/23 is estimated at 14.4 metric tons per hectare (MT/ha), 3.8 percent above the previous MY as farmers reported that trees were loaded with small size and low juice content fruit. Growers also report that fertilizer use went down in the current year because it is not a good agricultural practice to fertilize stressed trees. However, this could have knock-on impact for productivity in MY 2023/24. Post considers that the environmental factors mentioned above will continue to impact citrus planting, harvesting, and overall yields in MY 2023/24.

**Figure 3: Orange Top Producers, Percent of Global Production-MY 2022/23**




Source: USDA Production, Supply & Distribution (PS&D)

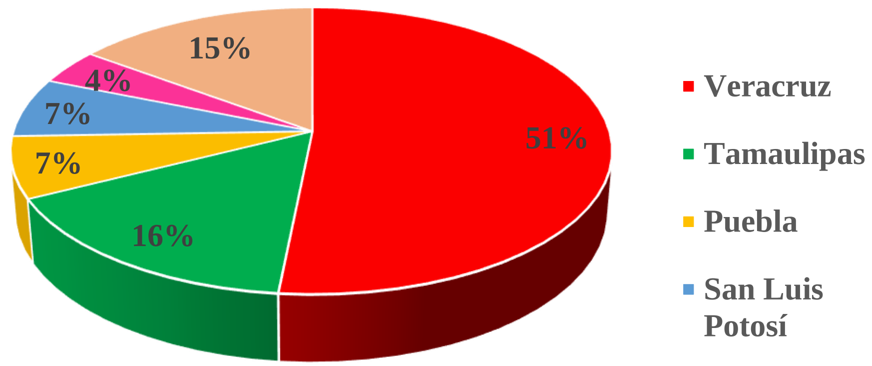
**Figure 4: Mexico's Top Orange Producing States, 2017-2023**




Source: SIAP

According to SIAP official data, orange production in MY 2022/23 is above the previous MY as production in Veracruz, the largest producing state, increased 10 percent. Also, production in Tamaulipas, the second largest producer, increased 12.5 percent versus the year prior. These increases more than offset the 16.9 percent production decline in Nuevo Leon. Although most orchards in Nuevo Leon are irrigated, fruit production suffered from a prolonged drought and high temperatures. In addition to the lack of rainfall, citrus growers in Nuevo Leon, by agreement with the state government, ceded part of their water concession from the Pilon River used to irrigate the state's main citrus producing region (Montemorelos) to supply the Monterrey Metropolitan Area. Nuevo Leon ranks in fifth place with over 7 percent of total national orange production.

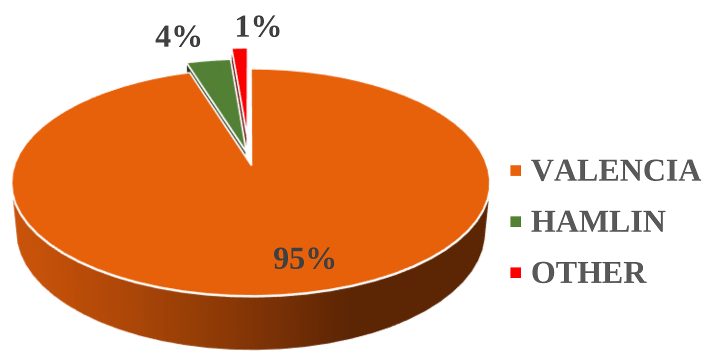
**Figure 5: Mexico's Top Orange Producing States, 2022 (% of Volume)**




Source: SIAP

Based on available data, in 2022, national orange production exceeded 4.85 MMT. The predominant variety is the Valencia with 95 percent of national orange production followed by the Hamlin variety with 4 percent. The remaining 1 percent of production corresponds to the Marrs, Navel, and Criolla varieties.

**Figure 6: Orange Varieties in 2022 (% of Volume)**




Source: SIAP

**Phytosanitary Issues**

Citrus greening, or *Huanglongbing* (HLB) is an imminent sanitary hazard to citrus growers. To mitigate the impact of HLB, Mexico's federal and state governments work together to implement ongoing measures, such as biological control and integrated field management, in addition to training to promote good agricultural practices.

**Table 2: Production by State MY 2022/23**

| Orange | Planted Area (ha) | Harvested Area (ha) | Production (mt) | Yield (mt/ha) |
|---|---|---|---|---|
| **Total** | **349,399** | **336,872** | **4,854,373** | **14.4** |
| Veracruz | 171,719 | 171,054 | 2,503,648 | 14.6 |
| Tamaulipas | 34,351 | 32,174 | 774,611 | 24.1 |
| Puebla | 31,976 | 25,833 | 335,960 | 13.1 |
| San Luis Potosí | 32,862 | 32,358 | 325,199 | 10.1 |
| Nuevo León | 25,944 | 25,347 | 193,141 | 7.6 |
| Others | 52,545 | 50,104 | 721,812 | 14 |

Source: Agri-food and Fisheries Information Service (SIAP)

**Consumption**

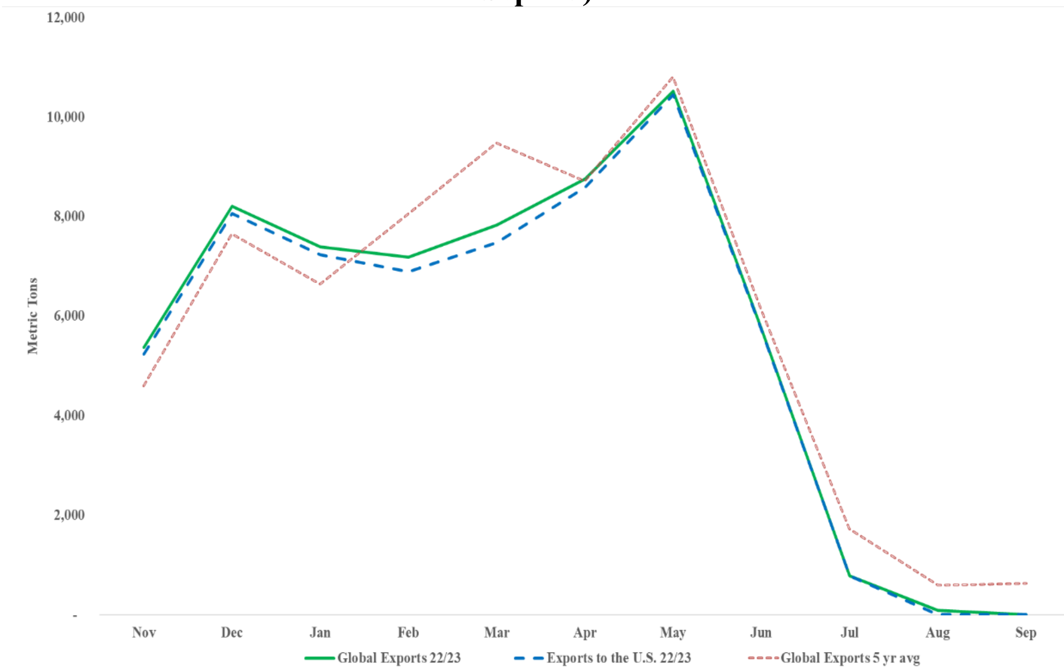
Post forecasts Mexico's domestic fresh orange consumption at 2.5 MMT in MY 2023/24, a marginal increase from MY considering that the available fruit does not have the quality desired by the consumer and the price is not in proportion to the size and juice content of the fruit. In addition, household purchasing power continues to decline. According to Consejo Nacional de Evaluación de la Política de Desarrollo Social (CONEVAL), during September 2023, the cost of the basic food basket in urban areas grew 6.1 percent year-over-year, from 2,114 pesos per month per person to 2,243 pesos per month. With the rising price of food, middle and low-income consumers are cutting back or avoiding products such as oranges and other fruits that, though included in the basic food basket or "Canasta Básica", compete with products such as eggs and poultry. Consumption in MY 2022/23 is estimated to be 2.44 MMT.

**Trade**

For MY 2023/24, Post forecasts Mexico's exports of fresh orange at 70,000 MT, 13 percent above the previous year based marginally increased supply and decreased delivery for processing. In MY 2022/23, exports are estimated at 62,000 MT based on available data and current pace of trade. Orange production in Nuevo Leon, which is a large exporter to the United States relative to its production volume, a 16.9 percent production decline versus MY 2021/22 pushes down exportable supply. According to some growers/packers/producers, even though the fruit is not of optimal quality in the current year, sales are more profitable in the domestic market, both for industry and consumption in the wholesale and self-service markets. Over the last five marketing years, Mexico's total exports of fresh orange remained consistent with no abrupt changes. More than 97 percent of Mexico's fresh orange exports go to the U.S. market.

The Post forecast for MY 2023/24 fresh orange imports is 28,000 MT, unchanged from the previous MY due to stable domestic production volume and lower supply from the United States. Mexico imports fresh oranges solely from the United States, which go primarily to retail and wholesale markets in the border region.

**Figure 7: Mexico's Orange Exports to the World and to the U.S. – MY 2022/2023 YTD (Nov '22 Sep '23)**




Source: U.S. Census Bureau

**Table 3: Wholesale Valencia Orange Prices (Pesos/Kg) Mexico City**

| Month | 2022 | 2023 |
|---|---|---|
| **January** | 14.50 | 15.00 |
| **February** | 13.00 | 15.00 |
| **March** | 11.70 | 13.60 |
| **April** | 14.20 | 17.00 |
| **May** | 15.90 | 17.50 |
| **June** | 18.00 | 20.00 |
| **July** | 21.00 | 24.00 |
| **August** | 24.50 | 23.00 |
| **September** | 18.30 | 18.00 |
| **October** | 16.50 | 16.80 |
| **November** | 12.90 | 10.50 |
| **December** | 12.60 | 11.50 |

Source: National Market Information Service (SNIIM)

Table 3 (above) shows the wholesale price per kilo per month for fresh orange wholesale prices in the Central de Abastos de Iztapala in Mexico City. In 2022, from June to September the wholesale price maintained high levels going from 20.00 pesos/kg in June to 18.00 pesos/kg in September, the price per kilo reached its highest in July with 24.00 pesos, 14.2 percent above same month in 2022. While food price inflation remains a concern in Mexico, prices also follow expected seasonal patterns of supply and demand.

## Policy

Export of fresh oranges, grapefruit, and tangerines from Mexico to the United States is allowed for compliant product under current USDA/APHIS and SADER/SENASICA work plans. The state of Sonora is declared as a fruit fly free zone and product from this state is not regulated by applicable citrus work plans.

## Frozen Concentrated Orange Juice (FCOJ) $65^0$ Brix

### Table 4: Mexico Orange Juice – Production, Supply, and Distribution

| Orange Juice | 2021/2022 | | 2022/2023 | | 2023/2024 | |
|---|---|---|---|---|---|---|
| Market Year Begins | Nov 2021 | | Nov 2022 | | Nov 2023 | |
| Mexico | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| **Deliv. To Processors** (MT) | 2150000 | 2150000 | 1760000 | 2385000 | 0 | 2300000 |
| **Beginning Stocks** (MT) | 2000 | 2000 | 2000 | 2000 | 0 | 2000 |
| **Production** (MT) | 215000 | 215000 | 176000 | 140000 | 0 | 155000 |
| **Imports** (MT) | 1750 | 1750 | 2000 | 5000 | 0 | 2000 |
| **Total Supply** (MT) | 218750 | 218750 | 180000 | 147000 | 0 | 159000 |
| **Exports** (MT) | 210000 | 210000 | 171000 | 139000 | 0 | 150000 |
| **Domestic Consumption** (MT) | 6750 | 6750 | 7000 | 6000 | 0 | 7000 |
| **Ending Stocks** (MT) | 2000 | 2000 | 2000 | 2000 | 0 | 2000 |
| **Total Distribution** (MT) | 218750 | 218750 | 180000 | 147000 | 0 | 159000 |
| | | | | | | |
| (MT) | | | | | | |

## Production

For MY 2023/24, Post´s production forecast for fresh concentrated orange juice (FCOJ) is 155,000 MT, a 10 percent increase from Post's MY 2022/23 estimate of 140,000 MT, but 20 percent below than the current USDA official figure of 176,000 MT for MY 2022/23, and well off the 215,000 MT figure for MY 2021/22. This forecast is based on the expected slight increase of .3 percent in fruit production in 2023/24 versus the previous MY. Additionally, the increased availability of fruit in 2023/24 is expected to have better size and higher juice content. Depending on fresh fruit availability and quality, Mexico generally sends around 40 to 50 percent of its orange production into juice processing.

While delivery to processors in MY 2022/23 has increased, Post's FCOJ production estimate is 140,000 MT based on industry reports on available supply of small-size oranges with low juice content, thus necessitating more fresh volume delivered. The 2023/24 production forecast reflects the industry's expectation for a harvest of bigger fruit with higher juice content, and thus a slight decline in the amount of fresh product delivered to processors.

## Consumption

Post's MY 2023/24 FCOJ domestic consumption forecast is 7,000 MT, 14 percent higher than the previous MY, yet bearing in mind lower supply in the current year. MY 2022/23 FCOJ domestic consumption is estimated at 6,000 MT. According to industry, less than 5 percent of Mexico's orange juice/concentrate production goes towards domestic juice and beverage industries. Mexico's domestic FCOJ consumption also ultimately depends on U.S. demand, as juice producers first look to supply the export market.

## Trade

The Post export forecast for MY 2023/2024 is 150,000 MT, 8 percent above Post's previous MY estimate due to higher available supply of larger fruit with more juice content and thus higher juice yield/production. Post forecasts MY 2023/2024 imports at 2,000 MT, as Mexico continues to import small amounts of orange juice for supermarkets or small processors. According to industry the majority of FCOJ imports is juice produced in Mexico that was shipped for bottling/packaging to the United States and reimported for sale in supermarkets. The U.S. market is preferred by Mexican exporters due to proximity and logistics.

## Fresh Lemons/Limes

### Table 5: Mexico Fresh Lemons/Limes – Production, Supply, and Distribution

| Lemons/Limes, Fresh | 2021/2022 | | 2022/2023 | | 2023/2024 | |
|---|---|---|---|---|---|---|
| Market Year Begins | Nov 2021 | | Nov 2022 | | Nov 2023 | |
| Mexico | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| **Area Planted** (HECTARES) | 215167 | 215167 | 217000 | 218837 | 0 | 219500 |
| **Area Harvested** (HECTARES) | 193284 | 193284 | 194219 | 200878 | 0 | 202500 |
| **Bearing Trees** (1000 TREES) | 49700 | 49700 | 50000 | 50000 | 0 | 50000 |
| **Non-Bearing Trees** (1000 TREES) | 7000 | 7000 | 6500 | 6500 | 0 | 6500 |
| **Total No. Of Trees** (1000 TREES) | 56700 | 56700 | 56500 | 56500 | 0 | 56500 |
| **Production** (1000 MT) | 2954 | 2954 | 2800 | 3101 | 0 | 2950 |
| **Imports** (1000 MT) | 9 | 9 | 5 | 6 | 0 | 6 |
| **Total Supply** (1000 MT) | 2963 | 2963 | 2805 | 3107 | 0 | 2956 |
| **Exports** (1000 MT) | 686 | 678 | 780 | 746 | 0 | 690 |
| **Fresh Dom. Consumption** (1000 MT) | 1977 | 1885 | 1775 | 2011 | 0 | 1866 |
| **For Processing** (1000 MT) | 300 | 400 | 250 | 350 | 0 | 400 |
| **Total Distribution** (1000 MT) | 2963 | 2963 | 2805 | 3107 | 0 | 2956 |
| | | | | | | |
| (HECTARES) ,(1000 TREES) ,(1000 MT) | | | | | | |

## Planted Area

Post's forecast for MY 2023/24 (Nov-Oct) planted area is 219,500 ha, with harvested area forecasted at 202,500 ha. The forecast is derived from updated official information from SIAP and takes into account that in the last three years the area planted in Michoacán, Mexico's second largest lemon-producing state (but 1st in planted area), has increased by less than one percent. In 2022, Michoacan represents 29 percent of total planted area followed by Veracruz with 24 percent, Oaxaca with 10 percent, and Colima with 10 percent. Table 6 below lists the states with the largest planted area and corresponding harvested fruit in 2022.

**Figure 8: Lemons/Limes, Planted Area (Hectares), 2011-2022**

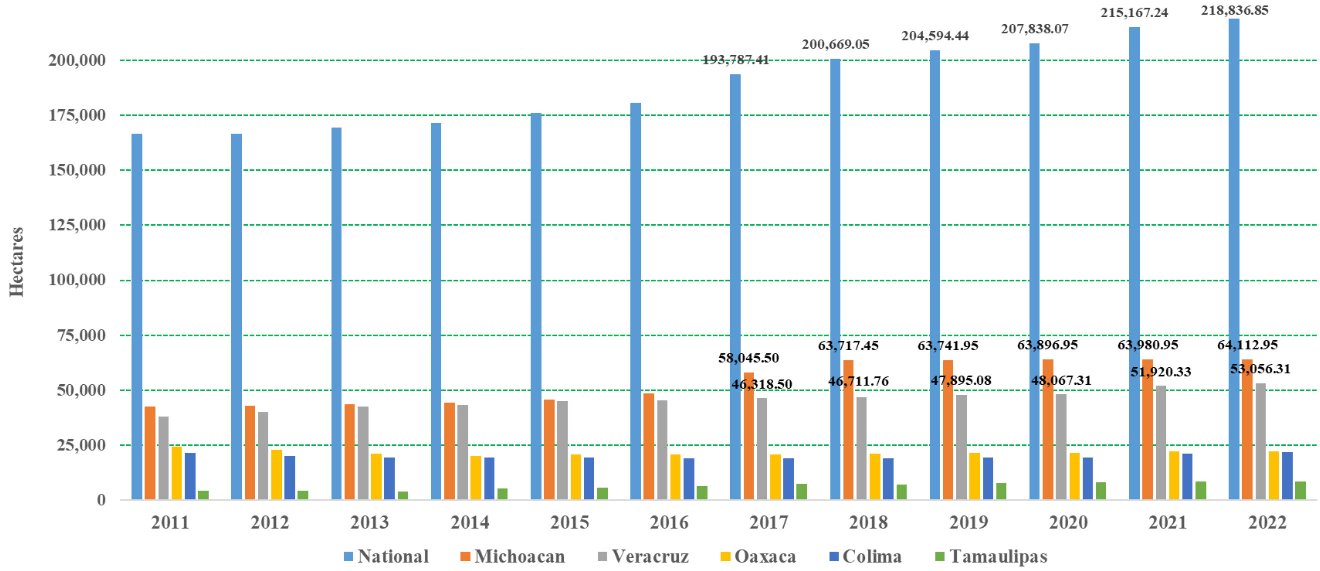
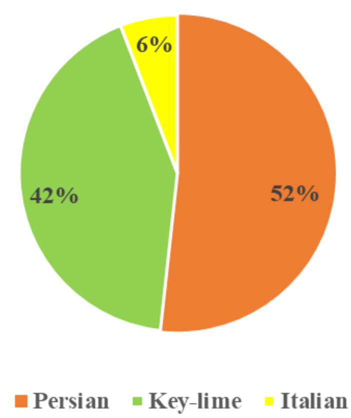



**Figure 9: Mexico Lime Varieties in 2022 (% of National Volume)**




Source: SIAP

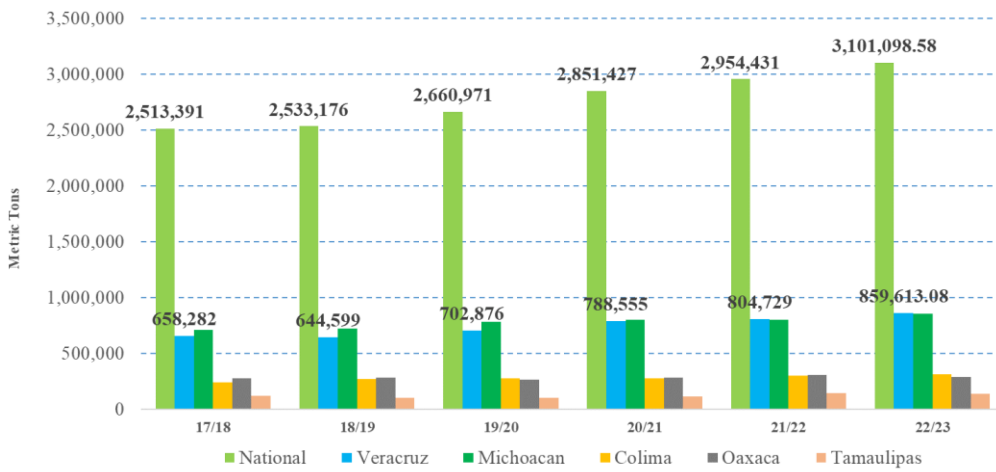
**Production**

Post's production forecast for MY 2023/24 is 2.95 MMT, 5 percent below the previous MY. Although a slight increase in planted area is forecast, a moderate year-to-year production volume decrease of 5 percent is expected, taking into account that growers expect less production yield due HLB damage to productive and non-productive trees. Growers, shippers, and packers in Michoacan and Colima, second and third largest producers behind Veracruz respectively, report that lime production also faces obstacles that destabilize the supply chain, such as insecurity in some growing areas.

MY 2022/23 production is estimated to be 3.1 MMT based upon available data. During this year, growers from Michoacan and Colima continued to transition to different crops because of the HLB virus disease damaging a great number of producing trees. Some growers look to move away from a crop that is increasingly prone to insecurity that results in higher costs of production. In 2022, lemons and limes continue as the second largest category of citrus fruit produced in Mexico behind oranges. Nationally, lemons and limes account for 37 percent of total citrus production covered in this paper. In 2022, the principal producing states in descending order are Veracruz, Michoacán, Colima, Oaxaca, and Tamaulipas. The states of Veracruz and Michoacan are the largest producers, each with 28 percent of production, followed by Colima with 10 percent and Oaxaca with 9.3 percent.

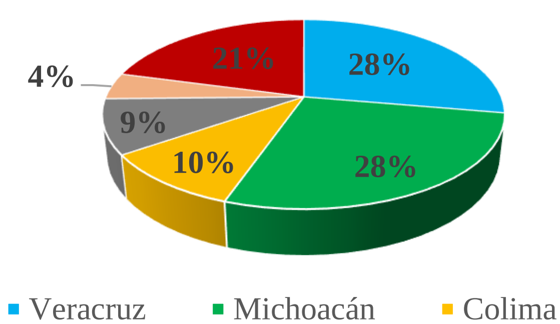
The production of limes in Mexico is composed mainly of three varieties. The Persian lime is a variety that continues to gain position in the national market, though most of this fruit is for export. In 2022, Veracruz remains as the largest producer of Persian Lime with over 52 percent of production of that variety. The Mexican or sour lime variety, known as Key lime in the U.S. market, is cultivated throughout the country and primarily commercialized domestically. This variety is an important ingredient in Mexican cuisine. In 2022, Michoacan accounted for over 60 percent of total production of this variety. The Italian lime variety (or what U.S. consumers know as yellow lemons) is of high quality and with characteristics that make this fruit highly competitive in the international market. Mexico's production is almost exclusively exported. In 2022, Tamaulipas accounted for over 77 percent of total production of this variety.

**Figure 10: Mexico's Top Lime/Lemon Producing States, 2017-2022**




Source: SIAP

**Figure 11: Top Lime/Lemon Producing States, 2022 (% of Volume)**




Source: SIAP

**Table 6: Lime Production by State, 2022**

| Limes | Planted Area (ha) | Harvested Area (ha) | Production (mt) | Yield (mt/ha) |
|---|---|---|---|---|
| **Total** | **218,836.85** | **200,877.86** | **3,101,098.58** | **15** |
| Veracruz | 53,056.31 | 52,322.50 | 859,613.08 | 16 |
| Michoacán | 64,112.95 | 54,159.50 | 856,744.34 | 16 |
| Colima | 21,796.81 | 21,713.81 | 310,074.59 | 14 |
| Oaxaca | 22,387.30 | 21,511.95 | 289,060.80 | 13 |
| Tamaulipas | 8,521.31 | 6,968.31 | 140,335.57 | 20 |
| Others | 48,962.17 | 44,201.79 | 645,270.20 | 13 |

Source: SIAP

Lime production in Veracruz and Michoacan amounts to almost 1.7 MMT, which represents 55.3 percent of total production.

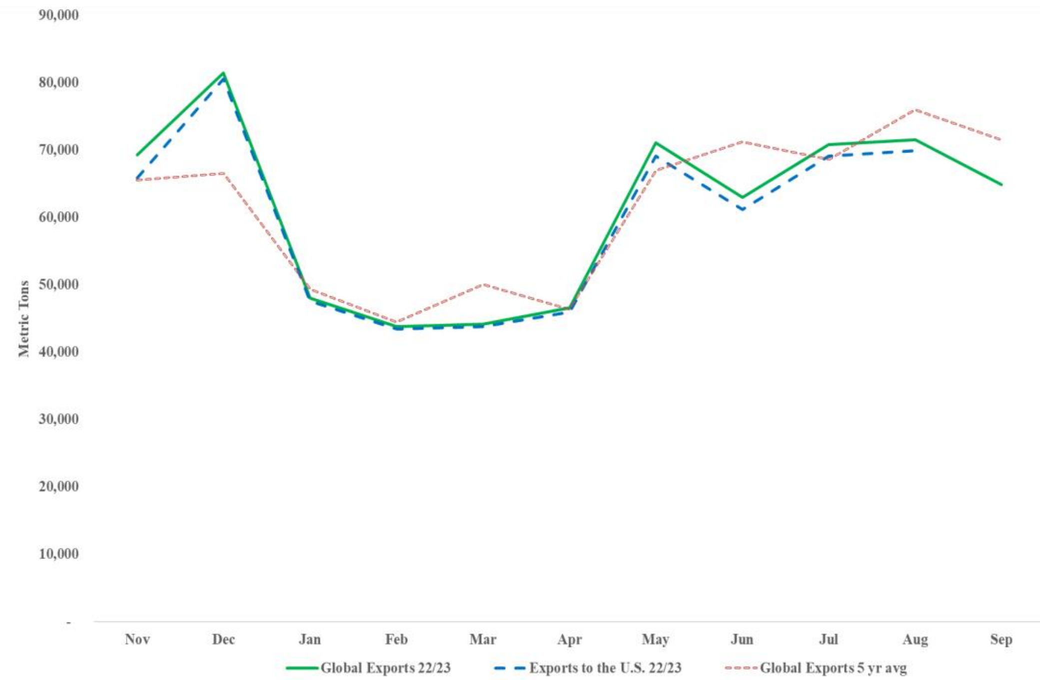
**Consumption**

Post forecasts Mexico’s lemon/lime consumption for MY 2023/24 at 1.87 MMT, 7 percent below the previous MY, taking into account anticipated lower availability of product. Affordability issues will also continue to limit consumption growth of lemons, limes, and other citrus fruits. These figures consider the effect of inflation on the average Mexican household budget and a decline of purchasing power to buy groceries. Pricing of limes is also a challenge in the foodservice sector, where use of the ingredient in both food and beverages is key, and those costs are mitigated by either reducing consumption or passing cost to the customer. Domestic price volatility has been especially acute for limes in Mexico due to the challenges in some production areas with insecurity that drives up producer costs.

**Trade**

Post forecasts Mexico MY 2023/24 exports at 690,000 MT, 7.5 percent below the previous MY. This forecast is based on steady demand driven by the U.S. market, but a forecasted reduction in overall supply. In MY 2022/23, Post estimates Mexico´s total lemon/lime exports at 746,000 MT based on available data and pace of trade. Through September, MY exports have surpassed 674,000 MT with expectations of continued steady demand through the last month of the market year. The U.S. market accounts for over 97 percent of total exports. The majority of lime exports to the United States correspond to the Persian and Italian varieties. For MY 2023/24, Post projects total lemon/lime imports to remain at 6,000 MT, unchanged from the year prior.

**Figure 12: Mexico's Lemon/Lime Exports to the World and to the U.S. – MY 2022/2023 YTD (Nov '22-Sep '23)**




Source: Census Bureau

Mexico is the largest supplier of limes to the United States market. In MY 2022/23, over 79 percent of total lime imported by the United States was of Mexican origin, followed by Argentina (9 percent), Colombia (5 percent) and Chile (4 percent).

**Table 7: Key Lime Wholesale Prices (Pesos/Kg) Mexico City**

| Month | 2022 | 2023 |
|---|---|---|
| January | 20.00 | 27.50 |
| February | 26.32 | 26.00 |
| March | 40.00 | 35.50 |
| April | 25.50 | 37.50 |
| May | 18.50 | 28.00 |
| June | 21.50 | 26.00 |
| July | 31.00 | 29.50 |
| August | 27.50 | 35.50 |
| September | 25.00 | 44.00 |
| October | 19.50 | 49.50 |
| November | 17.50 | 30.00 |
| December | 19.00 | 23.50 |

Source: SNIIM

**Table 8: Persian Lime Wholesale Prices (Pesos/Kg) Mexico City**

| Month | 2022 | 2023 |
|---|---|---|
| January | 37.00 | 33.00 |
| February | 56.00 | 59.00 |
| March | 61.00 | 65.00 |
| April | 45.00 | 55.00 |
| May | 23.00 | 25.50 |
| June | 14.00 | 23.00 |
| July | 13.00 | 23.50 |
| August | 14.00 | 33.50 |
| September | 14.30 | 39.50 |
| October | 12.00 | 38.00 |
| November | 12.50 | 31.50 |
| December | 11.50 | 29.50 |

Source: SNIIM

## Policy

The export of fresh lemon/limes from Mexico to the United States is not regulated under current USDA/APHIS and SADER/SENASICA work plans.

## Fresh Grapefruit

**Table 9: Mexico Fresh Grapefruit – Production, Supply, and Distribution**

| Grapefruit, Fresh | 2021/2022 | | 2022/2023 | | 2023/2024 | |
|---|---|---|---|---|---|---|
| Market Year Begins | Nov 2021 | | Nov 2022 | | Nov 2023 | |
| Mexico | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| **Area Planted** (HECTARES) | 21418 | 21418 | 21500 | 21600 | 0 | 21700 |
| **Area Harvested** (HECTARES) | 19955 | 19955 | 19747 | 20411 | 0 | 20800 |
| **Bearing Trees** (1000 TREES) | 5900 | 5900 | 6000 | 6000 | 0 | 6000 |
| **Non-Bearing Trees** (1000 TREES) | 740 | 740 | 760 | 760 | 0 | 760 |
| **Total No. Of Trees** (1000 TREES) | 6640 | 6640 | 6760 | 6760 | 0 | 6760 |
| **Production** (1000 MT) | 453 | 453 | 420 | 489 | 0 | 500 |
| **Imports** (1000 MT) | 2 | 2 | 2 | 4 | 0 | 2 |
| **Total Supply** (1000 MT) | 455 | 455 | 422 | 493 | 0 | 502 |
| **Exports** (1000 MT) | 15 | 17 | 10 | 7 | 0 | 9 |
| **Fresh Dom. Consumption** (1000 MT) | 440 | 438 | 412 | 486 | 0 | 493 |
| **For Processing** (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total Distribution** (1000 MT) | 455 | 455 | 422 | 493 | 0 | 502 |
| | | | | | | |
| (HECTARES) ,(1000 TREES) ,(1000 MT) | | | | | | |

## Planted Area

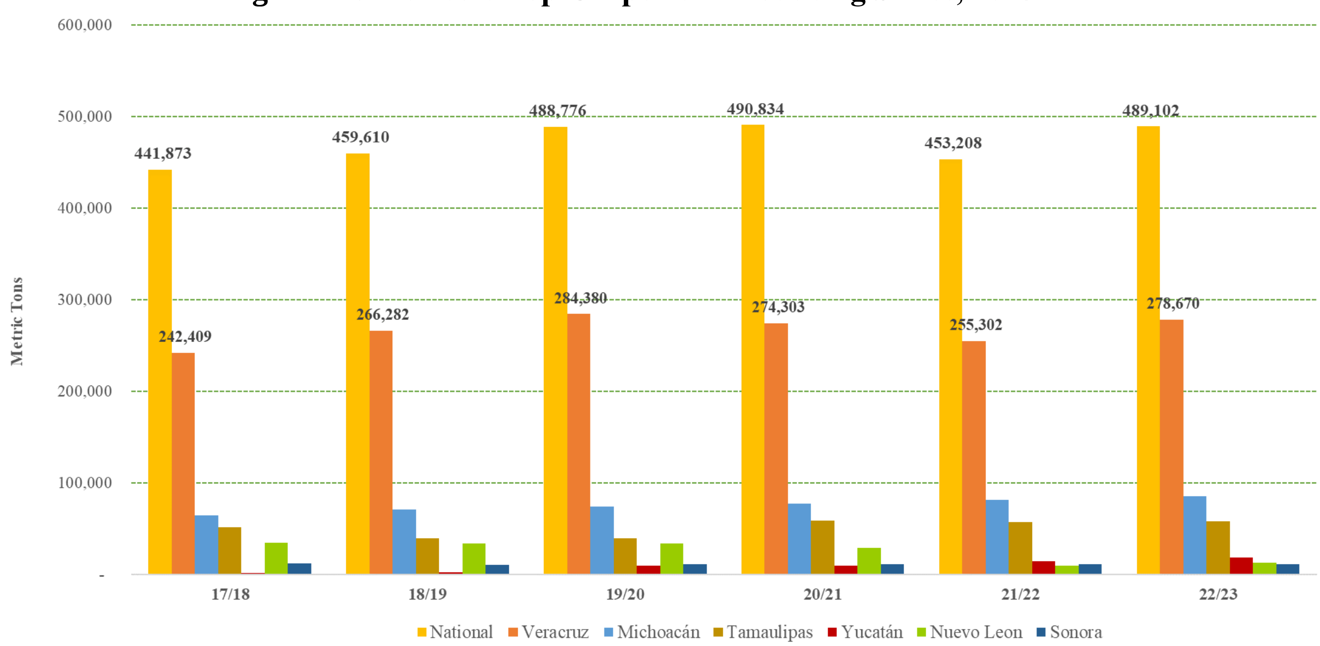
Post forecasts Mexico's grapefruit planted area for MY 2023/24 at 21,700 ha based on grower expectations of minimal growth in the export market. This represents a small increase of 0.5 percent from MY 2022/23. From 2019 to 2022, total planted area has not increased more than one percent annually. In 2022, the state of Veracruz accounted for 37 percent of planted area followed by Michoacan with 28 percent, Tamaulipas with 11 percent, and Nuevo Leon with 10 percent. These four states represent 94 percent of total planted area. Mexico's MY 2022/23 planted area is estimated to be 21,600 ha, based on available data. This represents a 0.85 percent increase from MY 2021/22.

**Production**

Post's grapefruit production forecast for MY 2023/24 is 500,000 MT. This is a moderate increase from the year prior, considering that planted area growth is less than 1 percent. Production growth is also tempered by higher costs of production and logistics. From 2020 to 2022, according to available SIAP data on a year-to-year basis, planted area at a national level increased only 1.1 percent in 2020, 1.26 precent in 2021, and 0.85 percent in 2022. Limited or no increase in hectarage for production will contribute to production remaining at around the same level as previous MY.

MY 2022/23 grapefruit production is estimated to be at 489,000 MT based on available data. This estimate reflects an increase of 16 percent versus previous MY. Yield increase is primarily attributed to production in Veracruz in 2022. Production increase can also be attributed to factors as improved pest and disease management, good agricultural practices and orchard maintenance. The largest volume of grapefruit produced in Mexico corresponds to the "Doble Roja or double red" category, which includes the Rio Red, Flame, and Ruby Red varieties. Of these the largest volume corresponds to Rio Red considered as the tastiest and juiciest of the Red´s. White grapefruit production is second in importance with the Marsh variety. Much like in fresh oranges, Veracruz is Mexico's largest grapefruit producing state, accounting for 57 percent of total grapefruit production in Mexico, followed by Michoacan with 17 percent, and Tamaulipas with 12 percent.

**Figure 13: Mexico's Top Grapefruit Producing States, 2017-2022**



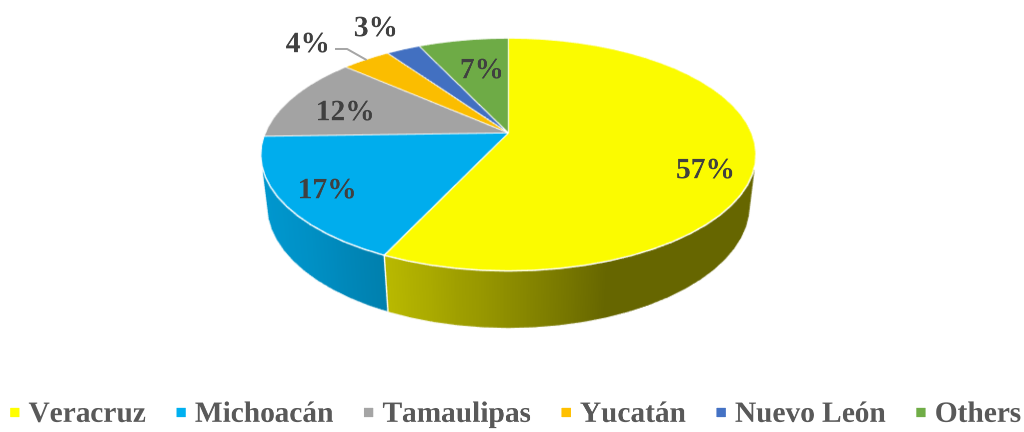

Source: SIAP

**Table 9: Production by State MY 2022/2023**

| Grapefruit | Planted Area (ha) | Harvested Area (ha) | Production (mt) | Yield (mt/ha) |
|---|---|---|---|---|
| **Total** | **21,600** | **20,411** | **489,101** | **24** |
| Veracruz | 8,047 | 7,987 | 278,669 | 34 |
| Michoacán | 6,025 | 5,585 | 85,848 | 15 |
| Tamaulipas | 2,307 | 2,196 | 58,420 | 26 |
| Yucatán | 1,080 | 971 | 18,682 | 19 |
| Nuevo Leon | 2,091 | 1,894 | 13,026 | 7 |
| Others | 1,082 | 1,040 | 11,797 | 11 |

Source: Agri-food and Fisheries Information Service (SIAP)

**Figure 14: Top Grapefruit Producing States, 2022 (% of Volume)**




Source: SIAP

**Consumption**
Post projects Mexico’s MY 2023/24 grapefruit consumption at 493,000 MT, 1.6 percent higher than the previous year based on more available supply. As mentioned previously in the orange and lemons/limes sections, affordability issues will also set back consumption growth of grapefruit. Mexico’s domestic fresh grapefruit consumption for MY 2022/23 is estimated at 486,000 MT, 10 percent above MY 2021/22 due to higher availability and lower export demand.

**Trade**
Post forecasts Mexico’s fresh grapefruit exports for MY 2023/24 at 9,000 MT. This reflects Mexico’s relatively stable year-to-year grapefruit exports. Mexico’s MY 2022/23 exports are estimated at 7,000 MT based on available data and current pace of trade. Weather issues in Mexico’s northeastern producing states affected the availability of exportable supply to the United States.

Mexico’s grapefruit imports are minimal. The Post forecast for MY 2022/23 fresh grapefruit imports is 4,000 MT. Available data shows that over the past 6 years, Mexico imported fresh grapefruits only from the United States.

**Table 10: Red Grapefruit Wholesale Prices (Pesos/Kg) Mexico City**

| Month | 2022 | 2023 |
|---|---|---|
| January | 11.00 | 16.00 |
| February | 10.20 | 17.00 |
| March | 11.15 | 16.50 |
| April | 13.80 | 17.50 |
| May | 15.80 | 18.50 |
| June | 18.50 | 22.00 |
| July | 22.50 | 25.00 |
| August | 20.00 | 23.00 |
| September | 17.50 | 21.00 |
| October | 16.30 | 17.80 |
| November | 17.50 | 15.50 |
| December | 11.50 | 14.50 |

Source: SNIIM

**Policy**

Export of fresh grapefruit from Mexico to the United States is allowed for compliant product under current USDA/APHIS and SADER/SENASICA work plans. The state of Sonora is declared as a fruit fly free zone and product from this state is not regulated by applicable citrus work plans.

**Attachments:**

No Attachments