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Required Report - public distribution

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## Israel

## Citrus Annual

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## Report Highlights:

Post forecasts Israel's MY 2015/16 (October-September) citrus production at 600 thousand metric tons (TMT), up nearly 10 percent from MY2014/15. The increase is attributable to record production of easy peelers and an increase in orange production due to new plantings in recent years. Post expects an increase of 16 percent in citrus exports in MY 2015/16, due to the increase in production.
The U.S. and Canada have relatively large shares of Israeli citrus exports and account for about 9 percent of Israeli citrus exports overall. On the other hand, due to the economic situation in Russia and Ukraine, exports of Israeli citrus to these two markets decreased significantly in MY 2014/15.

## Executive Summary:

The total planted area to citrus was 19,500 hectares (ha) in 2015, 100 HA above 2014. The Or/Orri mandarin variety accounts for 5,800 ha or 29 percent of the area, and about 55 percent of the new plantings in 2015 were Or/Orri variety. Taken as a whole, mandarin varieties account for 49 percent of the total citrus planted area.

Post forecasts that MY 2015/16 total citrus production should reach about 600 TMT, a 10 percent increase compared to MY 2014/2015. The increase is mainly due to increased production of mandarins and oranges. As a result, orange and easy peeler production is expected to reach 120 TMT and 225 TMT, respectively- a record high for easy peelers. Post forecasts Israel's exports of citrus in MY 2015/16 to reach 200 TMT, up by 22 percent compared to MY2014/15. Export growth is being driven by increased production of easy peelers in MY 2015/16.

MY 2014/15 fresh fruit exports were 163 TMT out of which mandarins accounted for 56 percent and grapefruit for 37 percent of total exports. The mandarin variety, Or, accounted for 65 TMT, or 40 percent of all Israeli citrus exports. Grapefruit exports have continued their decline and this is mainly due to the uprooting of red grapefruit over the past 4 years. On the other hand, Or variety exports increased significantly in MY 2014/15 compared to the previous years as a result of an increased local production of this variety. About two-thirds of citrus deliveries to processing plants in the past three years were grapefruits, but as a result of the decreased grapefruit planted area, in MY 2014/15, only 58 percent of the deliveries were grapefruit.

The Russian market which was a good market for Israeli citrus in recent years experienced a significant decrease in MY 2014/15, mainly due to the dramatic weakening of the Ruble, and since January 2015, no Israeli citrus exports were shipped to Russia.

Due to strong hail storms in January 2015, it is estimated that about 50,000 tons of citrus fruit were destroyed, and a further 50,000 tons of citrus were graded as a B quality product; hence, production in MY 2014/15 was hit significantly.

## Commodities:

Grapefruit, Fresh
Tangerines/Mandarins, Fresh
Citrus, Other, Fresh
Lemons, Fresh
Orange Juice
Oranges, Fresh

## Production:

## Crop Area

The bulk of the Israeli citrus industry is located in central (48 percent) and southern Israel (31 percent). However, there is also significant citrus production in northern Israel ( 21 percent). The total planted area to citrus was 19,500 ha in 2015, an increase of 150 ha from 2014. The Or /Orri mandarin is the most widespread planted variety, accounting for 5,700 ha or 29 percent of the total area. Taken as a whole, mandarin varieties account for 49 percent of the total planted area, while area with red grapefruit has decreased significantly to 1,700 ha compared to 2,800 ha seven years ago, a 40 percent decrease. Oranges have retained their planted area of 4,000 ha or 20 percent share. In 2014 there are about 3,300 ha of planted grapefruit (white, red and sweetie) which is a record low. About 55 percent of the new plantings in 2015 were Or /Orri mandarin variety.

Table 1: Citrus Orchards by Variety, 2015, Hectares and Percentage

|  | Hectares | \% |
| :--- | :---: | :---: |
| Grapefruit | 3,300 | 17 |
| Oranges | 4,000 | 20 |
| Mandarins (easy peelers) | 9,500 | 49 |
| Lemons and Limes | 2,000 | 10 |
| Others | 700 | 4 |
| Total | $\mathbf{1 9 , 5 0 0}$ | $\mathbf{1 0 0 \%}$ |

Post forecasts that MY 2015/16 total production should reach about 600 TMT, nearly a 12 percent increase compared to MY 2014/15. The increase is mainly due to increased mandarin and orange production and better weather condition compared to the previous year. As a result, easy peeler production in MY 2015/16 is expected to reach 240,000 tons, a record for easy peelers. In addition, an increasing number of mandarin trees (mainly Or) have entered the fruit-bearing stage over the last three years. The relatively low citrus production in MY2013/14 and MY2014/15 was mainly due to hot weather conditions in the spring and hail storms in the winter significantly affecting easy peeler and orange production. In addition, due to the winter storms in January 2014 and 2015 citrus experienced lower fruit quality and size. Due to strong hail storms in January 2015, it is estimated that about 50,000 MT of citrus fruit were destroyed, and a further 50,000 tons of citrus were graded as a B quality product. In sum, production in MY 2014/15 was hit significantly as it was estimated last year that MY 2014/15 production would total about 605,000 tons, while in the end it amounted to only 543,000 tons.

Table 2: Citrus Production by Varieties, thousand metric tons, MY

| MY | Oranges | Mandarins | Lemons/Limes | Grapefruit | Other | Total |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- |


|  |  | (easy <br> peelers) |  |  | Citrus $^{\mathbf{1}}$ | Production |
| :--- | :---: | :---: | :---: | :---: | :---: | :---: |
| $\mathbf{2 0 0 7 / 0 8}$ | 125 | 145 | 35 | 242 | 13 | 560 |
| $\mathbf{2 0 0 8 / 0 9}$ | 155 | 139 | 29 | 232 | 12 | 567 |
| $\mathbf{2 0 0 9 / 1 0}$ | 148 | 150 | 48 | 235 | 14 | 595 |
| $\mathbf{2 0 1 0 / 1 1}$ | 100 | 125 | 30 | 190 | 10 | 455 |
| $\mathbf{2 0 1 1 / 1 2}$ | 116 | 166 | 53 | 245 | 6 | 586 |
| $\mathbf{2 0 1 2 / 1 3}$ | 73 | 178 | 51 | 208 | 7 | 517 |
| $\mathbf{2 0 1 3 / 1 4}$ | 69 | 139 | 64 | 236 | 9 | 517 |
| $\mathbf{2 0 1 4 / 1 5}$ | 86 | 205 | 58 | 186 | 8 | 543 |
| $\mathbf{2 0 1 5 / 1 6}$ | 107 | 240 | 60 | 185 | 8 | 600 |

(1) Other Citrus includes red and white pomelos, kumquat, limquat, ethrog (citron).

Table 3: Citrus Type Share of Total Production, Percentage, MY

| MY | Oranges | Mandarins <br> (easy <br> peelers) | Lemons/Limes | Grapefruit | Other <br> Citrus | Total <br> Production |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| $\mathbf{2 0 0 7 / 0 8}$ | 22.3 | 25.9 | 6.3 | 43.2 | 2.3 | 100 |
| $\mathbf{2 0 0 8 / 0 9}$ | 27.3 | 24.5 | 5.1 | 40.9 | 2.2 | 100 |
| $\mathbf{2 0 0 9 / 1 0}$ | 24.9 | 25.2 | 8.1 | 39.0 | 2.8 | 100 |
| $\mathbf{2 0 1 0 / 1 1}$ | 22.0 | 27.5 | 6.6 | 41.7 | 2.2 | 100 |
| $\mathbf{2 0 1 1 / 1 2}$ | 19.8 | 28.3 | 9.0 | 41.8 | 1.0 | 100 |
| $\mathbf{2 0 1 2 / 1 3}$ | 14.1 | 34.5 | 9.8 | 40.3 | 1.3 | 100 |
| $\mathbf{2 0 1 3 / 1 4}$ | 13.3 | 26.9 | 12.4 | 45.6 | 1.8 | 100 |
| $\mathbf{2 0 1 4 / 1 5}$ | 15.8 | 37.8 | 10.7 | 34.3 | 1.4 | 100 |
| $\mathbf{2 0 1 5 / 1 6}$ | 17.8 | 40.0 | 10.0 | 30.8 | 1.4 | 100 |

Oranges - Post forecasts that orange production in MY 2015/16 will reach 107,000 TMT, a 24 percent expansion from the previous year. The growth is mainly due to increased orange planting in recent years. Shamuti and navel oranges remain Israel's two main orange varieties with a planted area of 4,000 ha.

Tangerines/ Mandarins (Easy Peelers) - Post forecasts total mandarin production in MY 2014/15 at 240 TMT, a record high and a 17 percent increase from the previous year. In the last three marketing seasons, the full production potential of the easy peelers was not achieved due to unfavorable weather conditions. The Or/Orri variety, the main mandarin variety, captured about 44 percent or 90 TMT of the total mandarin production in MY 2014/15. Out of the 90 TMT, 72 percent ( 65 TMT) was exported and the rest ( 25 TMT) was consumed fresh locally. Other main locally produced varieties are Suntina, Mineola, Topaz, Orra, Michal, Murcott and Hadas.

Grapefruit - Although there has been a significant decrease in the past three years in the area planted to red grapefruit varieties, the star ruby "sunrise" variety is the main citrus variety exported by Israel with a 27 percent market share of total Israeli fresh citrus exports, as well as 59 percent of citrus deliveries to the processing industry. Post forecasts that in MY 2015/2016, Israel will produce 185 TMT of grapefruit, unchanged from the previous year.

Lemons and Limes - MY 2015/16 lemon and lime production is expected to total 60 TMT, a 3 percent increase from MY 2014/15. Almost all lemons and limes are locally consumed.

Other Citrus - In the last four years, white pomelo planted area has increased by nearly 80 percent. White and red production is mostly consumed domestically. Other citrus are expected to total 8 TMT in MY 2015/16, unchanged from the previous MY, of which 3,000 tons will be exported, 4,500 tons for local consumption and 500 tons will be processed domestically.

Table 4: Citrus Utilization, Destination, metric tons, MY

| Period | Total Exports |  | Delivery to Processors |  | Local Fresh Market |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| MY | Quantity | \% | Quantity | \% | Quantity | \% | Total Percent |
| 2007/08 | 172,059 | 30.7 | 212,097 | 37.9 | 175,844 | 31.4 | 100 |
| 2008/09 | 173,576 | 30.6 | 223,310 | 39.4 | 170,277 | 30.0 | 100 |
| 2009/10 | 179,238 | 30.0 | 182,203 | 30.6 | 234,531 | 39.4 | 100 |
| 2010/11 | 154,996 | 34.1 | 139,906 | 30.7 | 160,000 | 35.2 | 100 |
| 2011/12 | 180,388 | 30.4 | 231,454 | 39.5 | 176,424 | 30.1 | 100 |
| 2012/13 | 166,723 | 31.2 | 174,493 | 39.0 | 176,000 | 29.8 | 100 |
| 2013/14 | 160,691 | 32.5 | 177,000 | 34.2 | 172,000 | 33.3 | 100 |
| 2014/15 | 163,342 | 30.1 | 200,000 | 36.8 | 180,000 | 33.1 | 100 |
| 2015/16 | 190,000 | 31.7 | 210,000 | 35.0 | 200,000 | 33.3 | 100 |

## Consumption:

Post estimates local consumption of fresh citrus fruit in MY 2015/2016 at 200 TMT, an 11 percent increase from the previous year. The increase is mainly due to the increased supply of oranges and easy peelers, which will provide attractive pricing in the local fresh market. Most lemon (90 percent) production is consumed fresh by the local market, while just 36 percent of the easy peelers' production is consumed domestically, due to higher profitability of the Or/Orri mandarin variety in the export market.

Table 5: Fresh Citrus Consumption by the Local Market, MY

|  | 2013/14 |  | 2014/15 |  |
| :--- | :---: | :--- | :---: | :---: |
|  | Quantity (tons) | \% | Quantity (tons) | \% |
| Oranges | 46,000 | 28.6 | 46,000 | 25.6 |
| Grapefruit | 24,000 | 8.1 | 8,000 | 4.4 |
| Easy Peelers (mandarins) | 37,000 | 23.0 | 68,000 | 37.8 |
| Lemons | 58,000 | 36.0 | 52,000 | 28.9 |
| Others | 7,000 | 4.3 | 6,000 | 3.3 |
| Total | $\mathbf{1 7 2 , 0 0 0}$ | $\mathbf{1 0 0}$ | $\mathbf{1 8 0 , 0 0 0}$ | $\mathbf{1 0 0}$ |

## The Processing Industry

Two groups control Israel's three citrus processing plants. The plants are "Gan Shmuel", "Pri- Nir" and "Pri- Mor". Post estimates deliveries to processing plants in MY 2015/16 will total 210 TMT, up 5 percent from the previous year. The slight increase is driven mainly by oranges and easy peelers' production. In MY 2014/15 deliveries to the processing industry were up by 13 percent compared to the previous year and totaled 200 TMT. Pricing was good for most varieties. The increase in orange deliveries is attributed to a higher demand for oranges for juice in the hotel, coffee shop and restaurant sector. About 60 percent of citrus deliveries in MY 2014/15 were grapefruit. Easy peeler deliveries to the processing industry were also up in MY 2014/15, and this is mainly due to increased local production of easy peelers.

Table 6: Delivery to the Processing Plants, MY

|  | $\mathbf{2 0 1 1 / 1 2}$ |  | $\mathbf{2 0 1 2 / 1 3}$ |  | $\mathbf{2 0 1 3 / 1 4}$ |  | $\mathbf{2 0 1 4 / 1 5}$ |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Tons | $\mathbf{\%}$ | Tons | $\%$ | Tons | $\%$ | Tons | $\%$ |
| Oranges | 38,092 | 16 | 25,550 | 15 | 16,000 | 9 | 35,500 | 18 |
| Grapefruit | 153,008 | 66 | 117,198 | 67 | 134,000 | 76 | 117,000 | 59 |
| Mandarins | 37,723 | 16 | 29,969 | 17 | 24,300 | 14 | 45,000 | 22 |
| Lemons | 2,631 | 1 | 1,776 | 1 | 2,700 | 1 | 2,500 | 1 |
| Total | $\mathbf{2 3 1 , 4 5 4}$ | $\mathbf{1 0 0}$ | $\mathbf{1 7 4 , 4 9 3}$ | $\mathbf{1 0 0}$ | $\mathbf{1 7 7 , 0 0 0}$ | $\mathbf{1 0 0}$ | $\mathbf{2 0 0 , 0 0 0}$ | $\mathbf{1 0 0}$ |

## Trade:

Post forecasts Israel's exports of citrus in MY 2015/16 to reach about 190 TMT, up 16 percent compared to the previous marketing year. Export growth is being driven mainly by increased production of both easy peelers (due to Or/Orri mandarin's very good receptivity in the European market) and oranges. Total citrus exports in MY 2014/15 were up by nearly 2 percent compared to the previous marketing year of 163 TMT, of which 56 percent were mandarins and 37 percent grapefruit. Mandarins and grapefruit account for about 93 percent of the Israeli fresh citrus exports, a trend that is expected to continue in the coming years. The Or mandarin and Star Ruby grapefruit varieties alone account for 40 and 27 percent of total citrus exports, respectively. Oranges on the other hand, continue to see their export market share significantly drop. Oranges dropped to 3 percent within the citrus export mix in MY 2014/2015; down from 15.5 percent in MY 2008/2010. The significant decrease in orange exports in MY 2012/13, MY 2013/14 and MY 2014/15 compared to the previous years is attributed mainly to the sharp decrease in production driven by unfavorable weather conditions. Nonetheless, due to favorable weather conditions in MY 2015/16, orange exports are expected to rebound reaching about 10 TMT, or a 100 percent increase compared to

MY 2014/15. Due to the strengthening of the Israeli shekel compared to the Euro in MY 2014/15 ( $10 \%$ valuation) and the dramatic Russian ruble drop, the revenues of Israeli citrus exporters were reduced in MY 2014/15 compared to the previous MY

Table 7: Fresh Citrus Exports by Varieties, metric tons, MY

|  | $\mathbf{2 0 1 1 / 1 2}$ | $\mathbf{2 0 1 2 / 1 3}$ | $\mathbf{2 0 1 3 / 1 4}$ | $\mathbf{2 0 1 4 / 1 5}$ | $\mathbf{2 0 1 4 / 1 5} \%$ Chg. vs. <br> $\mathbf{2 0 1 3 / 2 0 1 4}$ |
| :--- | :---: | :---: | :---: | :---: | :---: |
| Oranges | 13,007 | 7,369 | 6,880 | 4,930 | $-28.3 \%$ |
| Grapefruit | 79,905 | 78,632 | 76,807 | 61,078 | $-20.4 \%$ |
| Mandarins | 83,399 | 78,170 | 71,021 | 91,989 | $29.5 \%$ |
| Lemon and <br> Limes | 1,174 | 766 | 3,199 | 3,416 | $6.8 \%$ |
| Other Citrus | 2,893 | 1,786 | 2,784 | 1,929 | $-30.7 \%$ |


| Grand Total | 180,378 | 166,723 | 160,691 | 163,342 | $\% 1.6$ |
| :--- | :--- | :--- | :--- | :--- | :--- |

Chart 1: Major Citrus Export Varieties, MY 2014/15, Percentage of Total Exports


Suntina
Minneola and Or are mandarins varieties
In the last four years "Mehadrin" has been the country's largest grower and exporter of quality citrus, as well as a leading exporter of other fruits and vegetables. There are about 50 authorized private citrus exporters in Israel.

Chart 2: Export Market Destinations, Fresh Citrus, MY 2014/15, Market Share


Europe- European markets import about 75 percent of Israel's citrus exports. Specifically, Western Europe absorbs 58 percent of Israeli citrus exports (mainly UK, Scandinavian countries, Holland, France, Italy and Germany), while Russia and the Ukraine combined take in 17 percent compared to 23 percent in the previous year.

Russia - The significant weakening of the Russian rubble in conjunction with the economic situation in Ukraine has dramatically decreased Israeli citrus exports to these two markets.

Japan - Exports to Japan of sweetie (grapefruit variety) in MY 2014/15 decreased by 48 percent from the previous marketing year. Post finds that red pomelo exports decreased by 41 percent in MY 2014/15 compared to MY 2013/14, due to shipping earlier than normal and lower quality.

After a hiatus of several years, there have been some exports of white and red grapefruit to Japan. All in all, it is estimated that total Israeli citrus exports to Japan in MY 2015/16 will not be much different from MY2014/15.

Table 8: Israeli Fresh Citrus Export to Japan, number of cases, MY

|  | $\mathbf{2 0 1 2 / 1 3}$ | 2013/14 | 2014/15 | 2014/15 \% Chg. vs. 2013/2014 |
| :--- | :---: | :---: | :---: | :---: |
| White Grapefruit | 0 | 0 | 10,856 | --- |
| Sweetie | 228,816 | 192,964 | 100,856 | $-16 \%$ |
| Red Pomelo | 2,520 | 1,428 | 840 | $-43 \%$ |
| Red Grapefruit | 2,496 | 0 | 1,400 | $-100 \%$ |



Other Countries - Increased exports to long distance markets are taking place and mainly go to United States, Canada, South Korea and Japan. The United States and the Canadian markets account for 9 percent of the total Israeli citrus exports compared to 2-3 percent in recent years.

## Exports by Citrus Varieties:

Oranges - Post estimates exports of oranges to reach 10 TMT in MY 2015/16, an increase of 100 percent compared to the previous marketing year. The expected increase in exports is mainly due to higher local orange production this season. Due to bad weather conditions in MY 2013/14 and 2014/15, local orange production was significantly lower compared to the previous year leading to a significant decrease in orange exports in the recent three MY. Israeli Shamuti is, far and away, the main export variety.

Table 9: Oranges Varieties Exports, metric tons, MY

|  | $2012 / 13$ | $2013 / 14$ | $2014 / 15$ | $2014 / 15$ \% Chg. vs. 2013/2014 |
| :--- | :--- | :--- | :--- | :--- |


| Navel | 663 | 187 | 684 | $266 \%$ |
| :--- | :---: | :---: | :---: | :---: |
| Shamuti | 5,224 | 6,177 | 3,911 | $-37 \%$ |
| Valencia | 1,482 | 516 | 335 | $-35 \%$ |
| Total | $\mathbf{7 , 3 6 9}$ | $\mathbf{6 , 8 8 0}$ | $\mathbf{4 , 9 3 0}$ | $\mathbf{- 2 8 \%}$ |

Tangerines/ Mandarins (Easy Peelers) - Post forecasts total mandarin exports in MY 2015/16 to reach about 115 TMT, up 25 percent compared to MY 2014/15. The increase is due to a record easy peeler production (mainly Or variety), as well as its continued increased demand. In My 2014/15, Or variety exports totaled about 65 TMT, and captured 41 percent of all Israeli citrus exports. Or mandarins are exported mainly to France.

Table 10: Mandarins (easy-peelers) Varieties Exports, metric tons, MY

|  | $\mathbf{2 0 1 2 / 1 3}$ | $\mathbf{2 0 1 3 / 1 4}$ | $\mathbf{2 0 1 4 / 1 5}$ | $\mathbf{2 0 1 4 / 1 5} \%$ Chg. vs. 2013/2014 |
| :--- | :---: | :---: | :---: | :---: |
| Or/Orri | 48,918 | 53,274 | 65,324 | $23 \%$ |
| Mineolla | 5,947 | 6,818 | 6,249 | $-8 \%$ |
| Suntina | 13,174 | 10,500 | 12,489 | $19 \%$ |
| Topaz/Tangor | 2,856 | 957 | 327 | $-66 \%$ |
| Others | 7,275 | 6,351 | 7,600 | $20 \%$ |
| Total | $\mathbf{7 8 , 1 7 0}$ | $\mathbf{7 7 , 9 0 0}$ | $\mathbf{9 1 , 9 8 9}$ | $\mathbf{1 8 \%}$ |

Grapefruit -Due to the significant local uprooting of grapefruit in recent years, grapefruit exports in MY 2014/15 continued their decline in recent years and totaled 61,078 in MY 2014/15, representing a 20 percent decrease compared the previous MY. The main Israeli grapefruit export decrease was recorded in red grapefruit. However, post estimates that Israeli grapefruit exports will increase by about 10 percent in MY 2015/16 and this is due to expected higher prices for fresh grapefruit in Europe.

On the other hand, white grapefruit experienced a 42 percent increase to 5.5 TMT. The Star Ruby (red grapefruit) variety accounts for 27 percent of total citrus exports in MY 2014/15 compared to 36 percent share in recent years.

Table 11: Grapefruit Varieties Exports, metric tons, MY

|  | $\mathbf{2 0 1 2 / 1 3}$ | $\mathbf{2 0 1 3 / 1 4}$ | $\mathbf{2 0 1 4 / 1 5}$ | $\mathbf{2 0 1 4 / 1 5} \%$ Chg. vs. 2013/2014 |
| :--- | :---: | :---: | :---: | :---: |
| White Grapefruit | 5,588 | 3,850 | 5,475 | $42 \%$ |
| Red Grapefruit | 59,843 | 59,031 | 43,999 | $-25 \%$ |
| Sweetie | 13,192 | 13,502 | 11,604 | $-14 \%$ |
| Total | $\mathbf{7 8 , 6 3 2}$ | $\mathbf{7 6 , 3 8 3}$ | $\mathbf{6 1 , 0 7 8}$ | $\mathbf{- 2 0 \%}$ |

Other Citrus -Lemon exports in MY2014/15 totaled 3 TMT and lime exports at 1 TMT. Red and white pomelo experienced a decrease in exports in MY 2014/15 and this is mainly the result of lower local production combined with competition by Chinese pomelo producers. It is expected the lemons and other citrus varieties exports will total about 6,000 tons in MY 2015/16.

Table 12: Lemons and Other Citrus Varieties Exports, metric tons, MY

|  |  |  |  | $\mathbf{2 0 1 3 / 2 0 1 4}$ |
| :--- | :---: | :---: | :---: | :---: |
| Lemons | 583 | 2,860 | 2,553 | $-10 \%$ |
| Red Pomelo | 973 | 1,071 | 853 | $-20 \%$ |
| White Pomelo | 451 | 1,166 | 600 | $-48 \%$ |
| Limquat and <br> Kumquat | 362 | 541 | 557 | $3 \%$ |
| Lime | 183 | 421 | 782 | $86 \%$ |
| Total | $\mathbf{2 , 5 5 2}$ | $\mathbf{6 , 0 5 9}$ | $\mathbf{5 , 1 8 9}$ | $\mathbf{- 1 4 \%}$ |

## Policy:

Exports of U.S.-origin citrus to Israel are not currently permissible. A Pest Risk Assessment (PRA) has not been conducted for U.S. citrus. Indications are that even should Israel's Plant and Protection Service conduct a PRA for U.S. citrus, high shipping costs would hinder U.S. citrus exports. In addition, Israel does not import any fresh citrus, and this is not expected to change in the coming years.

Table 13: Tariff-rate Quotas, U.S. Fresh Citrus, Orange and Grapefruit Juices, U.S.-Israel Agreement on Trade in Agricultural Products

| Description | Total Quota (metric tons) | Duty |
| :--- | :---: | :--- |
| Oranges* | 1,689 | $0 \%$ |
| Lemons* | 506 | $0 \%$ |
| Grapefruit* | 1,689 | $0 \%$ |
| Other citrus <br> (non-easy peelers)* | 1,689 | $0 \%$ |
| Frozen Orange Juice <br> (packages over 100 kg ) | 4,154 | $0 \%$ |
| Frozen Grapefruit Juice <br> (packages over 100 kg ) | 1,016 | $0 \%$ |

* Requires a Pest Risk Assessment (PRA). Without a PRA the product cannot enter Israel.
** Within the quota it is duty-free. Kilograms = kg.
No fresh citrus is exported to Israel, as all Israeli citrus consumption is coming from local production.


## Production, Supply and Demand Data Statistics:

| Lemons/Limes, |
| :--- | :---: | :---: | :---: | :---: | :---: | :---: |
| Fresh |
| Market Begin Year |
| Israel |


| Imports | 0 | 0 | 0 | 0 | 0 | 0 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Total Supply | 64 | 64 | 65 | 0 | 0 | 60 |
| Exports | 3 | 3 | 3 | 0 | 0 | 3 |
| Fresh Dom. Consumption | 58 | 58 | 60 | 0 | 0 | 55 |
| For Processing | 3 | 3 | 2 | 0 | 0 | 2 |
| Total Distribution | 64 | 64 | 65 | 0 | 0 | 60 |
|  |  |  |  |  |  |  |
| (HECTARES) ,(1000 TREES) ,(1000 MT) |  |  |  |  |  |  |


| Tangerines/Mandarins, Fresh | 201 | 2014 |  |  | 14/201 | 15 |  |  | / 2016 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Market Begin Year |  | 2013 |  |  | ct 2014 |  |  |  | 2015 |
| Israel | $\begin{aligned} & \text { USD } \\ & \text { Offici } \end{aligned}$ |  | New Post |  |  | New Post |  |  | New Post |
| Area Planted |  | 00 |  | 0 | 400 | 9400 |  | 0 | 9500 |
| Area Harvested |  | 00 |  | 0 | 300 | 7300 |  | 0 | 7600 |
| Bearing Trees |  | 0 |  | 0 | 0 | 0 |  | 0 | 0 |
| Non-Bearing Trees |  | 0 |  | 0 | 0 | 0 |  | 0 | 0 |
| Total No. Of Trees |  | 0 |  | 0 | 0 | 0 |  | 0 | 0 |
| Production |  | 39 |  | 0 | 200 | 205 |  | 0 | 240 |
| Imports |  | 0 |  | 0 | 0 | 0 |  | 0 | 0 |
| Total Supply |  | 39 |  | 0 | 200 | 205 |  | 0 | 240 |
| Exports |  | 78 |  | 0 | 89 | 92 |  | 0 | 115 |
| Fresh Dom. Consumption |  | 37 |  | 0 | 80 | 68 |  | 0 | 75 |
| For Processing |  | 24 |  | 0 | 31 | 45 |  | 0 | 50 |
| Total Distribution |  | 39 |  | 0 | 200 | 205 |  | 0 | 240 |
| (HECTARES) ,(1000 TREES) ,(1000 MT) |  |  |  |  |  |  |  |  |  |
| Grapefruit, Fresh Market Begin Year Israel | 2013/2014 |  |  | 2014/2015 |  | 2015/2016 |  |  |  |
|  | Oct 2013 |  |  | Oct 2014 |  | Oct 2015 |  |  |  |
|  | USDA Official | New Post |  | USDA Official | New <br> Post | USDA Official |  | New Post |  |
| Area Planted | 3800 | 0 | 0 | 3300 | 3300 |  | 0 |  | 3300 |
| Area Harvested | 3750 | 0 | 0 | 3050 | 3050 |  | 0 |  | 3070 |
| Bearing Trees | 0 | 0 | 0 | 0 | 0 | 0 | 0 |  | 0 |
| Non-Bearing Trees | 0 | 0 | 0 | 0 | 0 | 0 | 0 |  | 0 |
| Total No. Of Trees | 0 | 0 | 0 | 0 | 0 | 0 | 0 |  | 0 |
| Production | 236 | 0 | 0 | 169 | 186 |  | 0 |  | 185 |
| Imports | 0 | 0 | 0 | 0 | 0 | 0 | 0 |  | 0 |
| Total Supply | 236 | 0 | 0 | 169 | 186 |  | 0 |  | 185 |
| Exports | 78 | 0 | 0 | 61 | 61 |  | 0 |  | 65 |
| Fresh Dom. Consumption | 24 | 0 | 0 | 10 | 8 | 8 | 0 |  | 10 |
| For Processing | 134 | 0 | 0 | 98 | 117 |  | 0 |  | 110 |
| Total Distribution | 236 | 0 | 0 | 169 | 186 |  | 0 |  | 185 |
|  |  |  |  |  |  |  |  |  |  |

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

| Oranges, Fresh Market Begin Year Israel | 2013/2014 |  | 2014/2015 |  | 2015/2016 |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | Oct 2015 |
|  | USDA Official | $\begin{aligned} & \text { New } \\ & \text { Post } \end{aligned}$ |  |  | USDA | $\begin{aligned} & \text { New } \\ & \text { Post } \end{aligned}$ | USDA Official | New Post |
| Area Planted | 4100 | 0 | 4000 | 4000 | 0 | 4000 |
| Area Harvested | 3900 | 0 | 3750 | 3750 | 0 | 3800 |
| Bearing Trees | 0 | 0 | 0 | 0 | 0 | 0 |
| Non-Bearing Trees | 0 | 0 | 0 | 0 | 0 | 0 |
| Total No. Of Trees | 0 | 0 | 0 | 0 | 0 | 0 |
| Production | 69 | 0 | 108 | 86 | 0 | 107 |
| Imports | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Supply | 69 | 0 | 108 | 86 | 0 | 107 |
| Exports | 7 | 0 | 6 | 5 | 0 | 10 |
| Fresh Dom. Consumption | 46 | 0 | 76 | 46 | 0 | 50 |
| For Processing | 16 | 0 | 26 | 35 | 0 | 47 |
| Total Distribution | 69 | 0 | 108 | 86 | 0 | 107 |
|  |  |  |  |  |  |  |
| (HECTARES) , (1000 TREES) ,(1000 MT) |  |  |  |  |  |  |


| Orange Juice Market Begin Year Israel | 2013/2014 |  | 2014/2015 |  | 2015/2016 |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Oct 2013 |  | Oct 2014 |  | Oct 2015 |  |
|  | USDA Official | $\begin{aligned} & \hline \text { New } \\ & \text { Post } \end{aligned}$ | USDA Official | New Post | USDA | New Post |
| Deliv. To Processors | 16000 | 16000 | 25500 | 35500 | 0 | 47000 |
| Beginning Stocks | 100 | 100 | 100 | 100 | 0 | 100 |
| Production | 1500 | 1500 | 2500 | 3340 | 0 | 4420 |
| Imports | 28000 | 28000 | 26500 | 25800 | 0 | 26000 |
| Total Supply | 29600 | 29600 | 29100 | 29240 | 0 | 30520 |
| Exports | 13500 | 13500 | 13000 | 12740 | 0 | 13400 |
| Domestic Consumption | 16000 | 16000 | 16000 | 16400 | 0 | 16900 |
| Ending Stocks | 100 | 100 | 100 | 100 | 0 | 220 |
| Total Distribution | 29600 | 29600 | 29100 | 29240 | 0 | 30520 |
|  |  |  |  |  |  |  |


| Citrus, Other, Fresh | 2013/ |  | 2014/ |  | 2015/ |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Market Begin Year | Jan 2 |  | Jan 2 |  | Oct 2 |  |
| Israel | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Area Planted | 0 | 500 | 0 | 600 | 0 | 700 |
| Area Harvested | 0 | 450 | 0 | 400 | 0 | 400 |
| Bearing Trees | 0 | 0 | 0 | 0 | 0 | 0 |
| Non-Bearing Trees | 0 | 0 | 0 | 0 | 0 | 0 |
| Total No. Of Trees | 0 | 0 | 0 | 0 | 0 | 0 |
| Production | 0 | 9 | 0 | 8 | 0 | 8 |
| Imports | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Supply | 0 | 9 | 0 | 8 | 0 | 8 |
| Exports, Fresh | 0 | 2 | 0 | 2 | 0 | 2 |
| Fresh Dom. Consumption | 0 | 7 | 0 | 6 | 0 | 6 |
| For Processing | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Distribution | 0 | 9 | 0 | 8 | 0 | 8 |
|  |  |  |  |  |  |  |
| (HECTARES) ,(1000 TREES) ,(1000 MT) |  |  |  |  |  |  |

