United States Department of Agriculture
Foreign Agricultural Service

GAIN Global Agricultural Information Network

Required Report: Required - Public Distribution **Date:** July 19, 2022

Report Number: E42022-0050

Report Name: Citrus Semi-annual

Country: European Union

Post: Madrid

Report Category: Citrus

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Report Highlights:

MY 2021/22 citrus production in the EU is projected to drop by five percent as unfavorable weather conditions pushed yield down in the main EU citrus-producing Member States. The lower domestic supply is expected to reduce exported amounts of citrus. Imports are projected to expand, in response to the lower EU production available and the return to close to pre-pandemic tourism activity. Nevertheless, overall citrus consumption is revised down from the previous season when it reached record levels.

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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Abbreviations and References used in this report:

CAP	Common Agricultural Policy
CMO	Common Market Organization
EC	European Commission
EU	European Union
FAS	Foreign Agricultural Service
HA	Hectares
TDM	Trade Data Monitor
MY	Marketing Year
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
US	United States
$	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

MY Marketing year:

Oranges, Fresh	October/September
Orange Juice	October/September
Tangerines/Mandarins, Fresh	October/September
Lemons/Limes, fresh	October/September
Grapefruits, Fresh	October/September

Executive **Summary**

EU citrus production is concentrated in the Mediterranean region. Spain and Italy represent the leading EU citrus producers, followed by Greece, Portugal, and Cyprus. For Marketing Year (MY) 2021/22 (October/September), Post expects overall citrus production to decline by five percent compared to the previous season, due to unfavorable weather conditions prevailing in most EU citrus producing regions. A drop in production was registered in mandarins, lemons, and orange production while grapefruit production grew in MY 2021/22. Conversely a larger area planted to citrus is estimated for MY 2022/23, as the increases in lemon and grapefruit plantings counter the expected declines in orange and mandarin groves. Rising input costs (namely fertilizers, logistics, and energy) remain a major concern for EU citrus growers.

The EU is a net importer of citrus fruits, with imports largely exceeding exports. A large amount of citrus trade occurs within the EU from producing to non-producing regions. In MY 2021/22, EU fresh citrus exports are expected to decline due to problems with export logistics, namely shortage of container and freight costs. Additionally, the lower available domestic citrus supply limits exportable amounts, while imports are expected to increase to cover for the production gap. For EU consumption, on one hand smaller amounts of fruits are expected to be devoted for processing, while the ongoing consumer prices' hike is anticipated to result, to a certain extent, in a decline in fresh citrus demand.

The Russian invasion of Ukraine in February 2022 tested the resilience of the food supply sector and altered agricultural input markets (fertilizers, electricity, labor costs, logistics, and energy) as well as production trade-flows.

According to Commission Implementing Regulation 2022/959, orange imports from countries affected by False Codling Moth (*Thaumatotibia leucotreta*) will be required to undergo a precooling and cold treatment in transit.

Since June 2021, the five-year truce of aircraft-related retaliatory tariffs, as well as the January 2022 phase out of the EU's retaliatory tariffs against the U.S. safeguard measures on EU steel and aluminum, have affected fresh citrus and orange juice, improving the U.S. position as an EU fresh citrus and orange juice supplier.

Oranges

Table 1: Production, Supply, and Distribution

Oranges, Fresh	2019/2020		2020/2021		2021/2022	
Market Year Begins	Oct 2019		Oct 2020		Oct 2021	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	278,746	278,746	278,367	278,367	276,245	277,945
Area Harvested (HECTARES)	261,829	261,829	259,898	259,898	257,452	255,252
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	0	0	0	0	0	0
Production (1000 MT)	6,268	6,268	6,488	6,489	6,101	6,096
Imports (1000 MT)	960	960	858	858	1,000	840
Total Supply (1000 MT)	7,228	7,228	7,346	7,347	7,101	6,936
Exports (1000 MT)	417	417	410	410	400	400
Fresh Dom. Consumption (1000 MT)	5,963	5,963	5,930	5,941	5,793	5,731
For Processing (1000 MT)	848	848	1,006	996	908	803
Total Distribution (1000 MT)	7,228	7,228	7,346	7,347	7,101	6,936
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Not official USDA data. Sources: Trade for MY 2019/20 and 2020/21: Trade Data Monitor, LLC (TDM).
All other: FAS EU posts

Production: For MY 2021/22, EU orange production is expected at 6.1 million MT, below previous season levels, driven by moderate production declines registered in Spain and Italy, which combined account for nearly 80 percent of the total EU orange output. In Spain, the combination of DANA at the end of August 2021 as well as hailstorms in September and November deteriorated yield expectations. Italy's orange production was negatively impacted by the floods in Sicily, one of the country's main producing regions. Additionally, the summer 2021 heatwave and lack of rainfall resulted in a 20 percent production reduction in Greece. Conversely a larger orange crop was recorded in Portugal, driven by the long-term trend of more efficient and irrigated citrus farms entering into production (see Table 2).

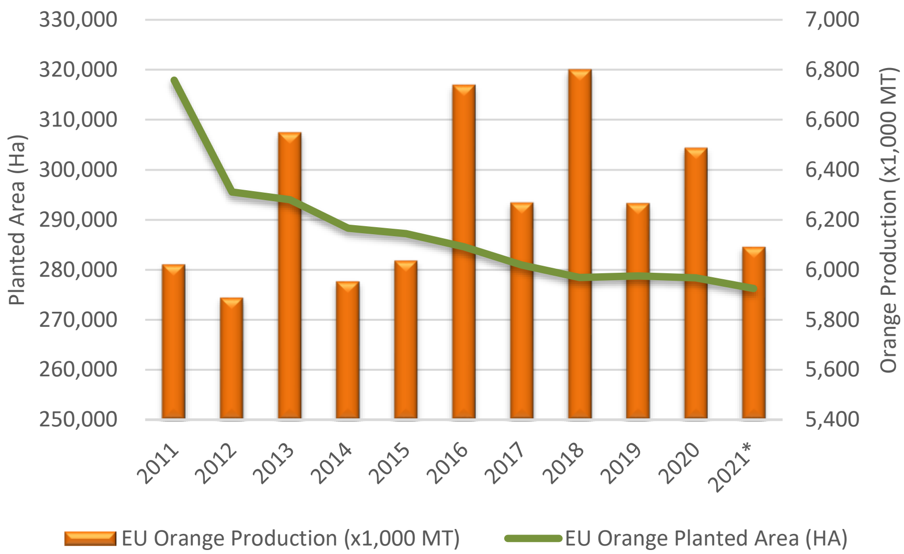
Table 2. Top EU Fresh Orange Producers (MT)

Country	MY 2019/20	MY 2020/21	MY 2021/22
Spain	3,342,540	3,496,145	3,356,000
Italy	1,650,207	1,772,769	1,680,215
Greece	910,186	886,639	720,000
Portugal	346,510	315,000	320,000

Source: FAS offices

The forecast for total EU orange planted area in MY 2021/22 is 255,252 HA, 2 percent below previous season's area, driven by the declines in planted area, mainly in Italy (see Chart 1). The long-term trend overall in orange area reduction can be explained by the fact that, after several consecutive years of poor economic performance, citrus farmers across the EU are shifting from orange production to more profitable permanent crops such as avocados or persimmons.

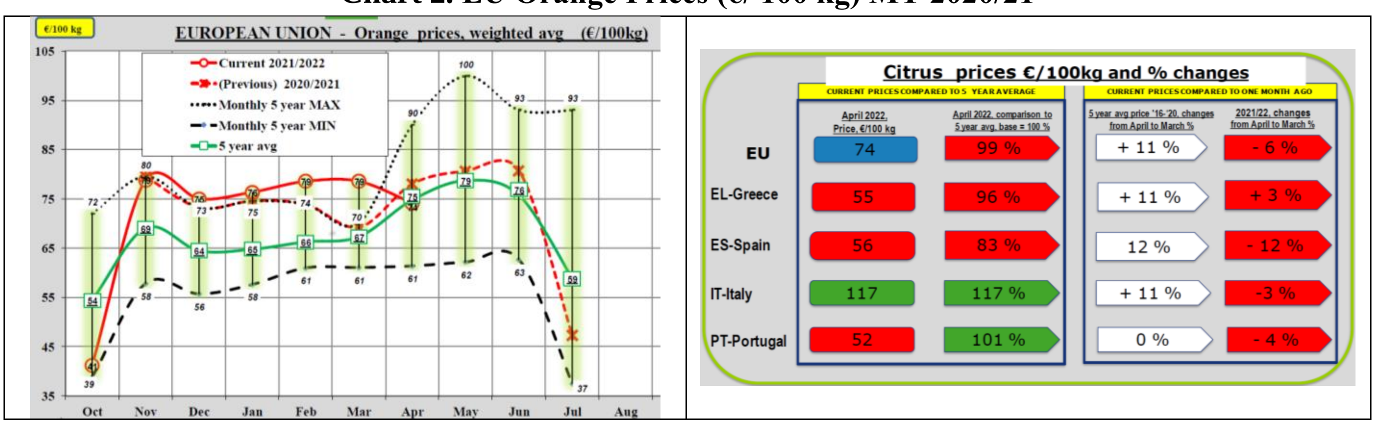
Chart 1. EU Orange Production and Orange Planted Area 2011-2021



*Forecast Source: FAS offices

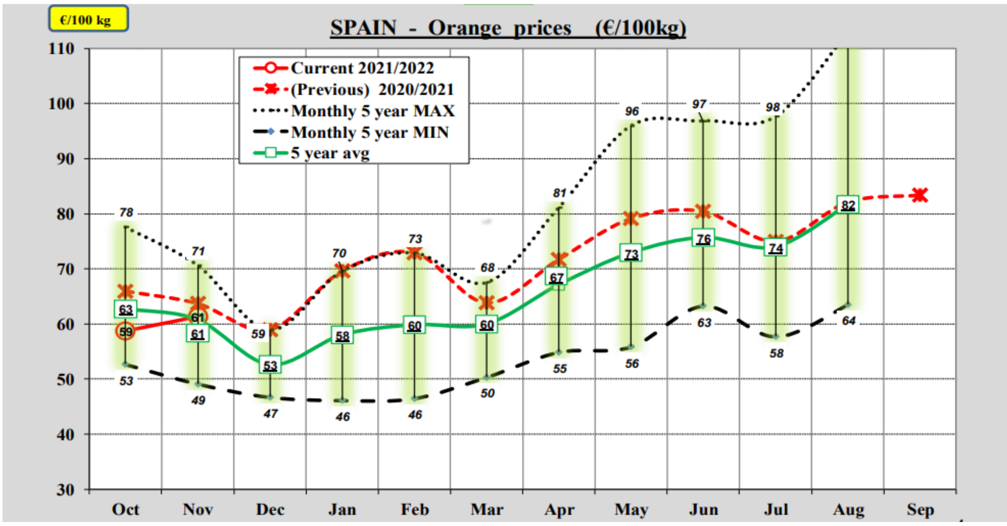
According to the [EU Citrus Dashboard,](#) during the first half of MY 2021/22, EU average orange prices were higher than the last five-year average (see Chart 1). However, since April 2022 average orange prices in the EU have fallen below the five-year average. Latest statistical information indicates that EU orange prices in May 2022 stood at 77 Euros/100 Kg. This rise in prices was mainly fueled by the somewhat lower supply, the steady EU orange demand, and increasing energy prices and inflation rates in the EU. As Spain is the major orange supplier to the EU, the rise in Spanish orange prices (Chart 3) also stimulated the overall EU price (Chart 2).

Chart 2. EU Orange Prices (€/ 100 kg) MY 2020/21



Source: DG AGRI Dashboard: Citrus Fruit

Chart 3. Spain's Orange Prices (€/100 kg) MY 2020/21

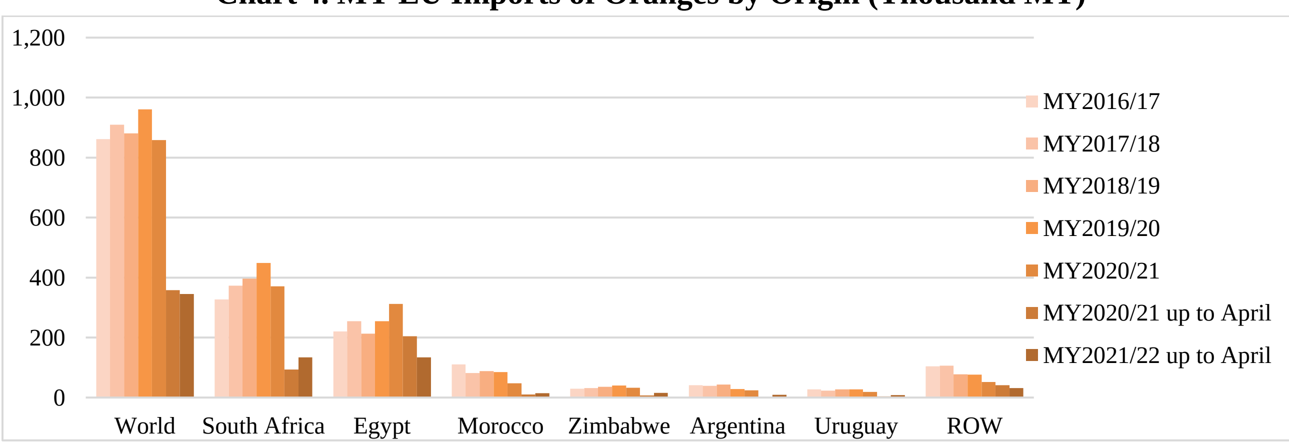


Source: DG AGRI Dashboard: Citrus Fruit

Consumption: In MY 2021/22, fresh orange consumption is expected to decline compared to the previous season, as the shorter EU crop and higher consumer prices discourage consumption. While EU consumers interest in vitamin C rich citrus fruits in the context of the pandemic fades away, the recovery in tourism activity within the EU may temper oranges demand. In the EU, oranges are mainly consumed fresh. Approximately 80 percent of EU orange supply is destined for fresh consumption and around 15 percent of EU orange supply is destined for processing. Given the shorter crop, in MY 2021/22 this share is expected to stay at approximately 13 percent.

Trade: Although oranges represent the largest citrus category produced in the EU, the bloc has a significant trade deficit. In MY 2021/22, EU imports of oranges are anticipated to decline below previous season levels, despite the significant reduction in EU orange production. South Africa, especially during the off-season, and Egypt, are the EU's leading suppliers of oranges to the EU market. Other important suppliers include Morocco, Zimbabwe, and Argentina.

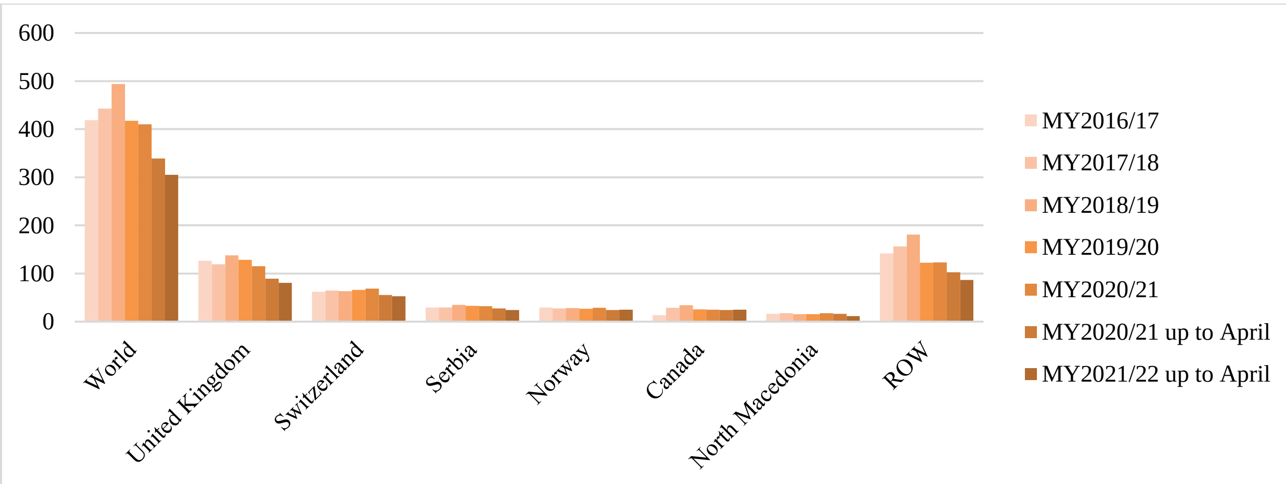
Chart 4. MY EU Imports of Oranges by Origin (Thousand MT)



Source: Trade Data Monitor, LLC

As it pertains to exports, extra EU destination from orange producing Member State lead by Spain include the UK, Canada, Switzerland, Norway, the Middle East, and Brazil.

Chart 5. MY EU Exports of Oranges by Destination (Thousand MT)



Source: TDM, LLC

Policy: For the first time, since July 14, 2022, EU orange imports from countries affected by False Codling Moth (*Thaumatotibia leucotreta*) will be required to undergo a precooling and cold treatment in transit.

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

Orange Juice

Table 3: Production, Supply, and Distribution (Brix 65)

Orange Juice	**2019/2020**		**2020/2021**		**2021/2022**	
Market Year Begins	**Oct 2019**		**Oct 2020**		**Oct 2021**	
European Union	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Deliv. To Processors (MT)	848,000	848,000	1,006,000	996,000	908,000	803,000
Beginning Stocks (MT)	15,000	15,000	15,000	15,000	15,000	15,000
Production (MT)	65,739	65,739	77,987	77,212	70,390	62,250
Imports (MT)	685,061	685,061	635,098	637,237	650,000	650,000
Total Supply (MT)	765,800	765,800	728,085	729,449	735,390	727,250
Exports (MT)	162,050	162,050	132,174	132,174	135,000	130,000
Domestic Consumption (MT)	588,750	588,750	580,911	582,275	585,390	582,250
Ending Stocks (MT)	15,000	15,000	15,000	15,000	15,000	15,000
Total Distribution (MT)	765,800	765,800	728,085	729,449	735,390	727,250
(MT)						

Not official USDA data. Sources: Trade for MY 2019/20 and 2020/21: Trade Data Monitor, LLC (TDM);
All other: FAS EU posts

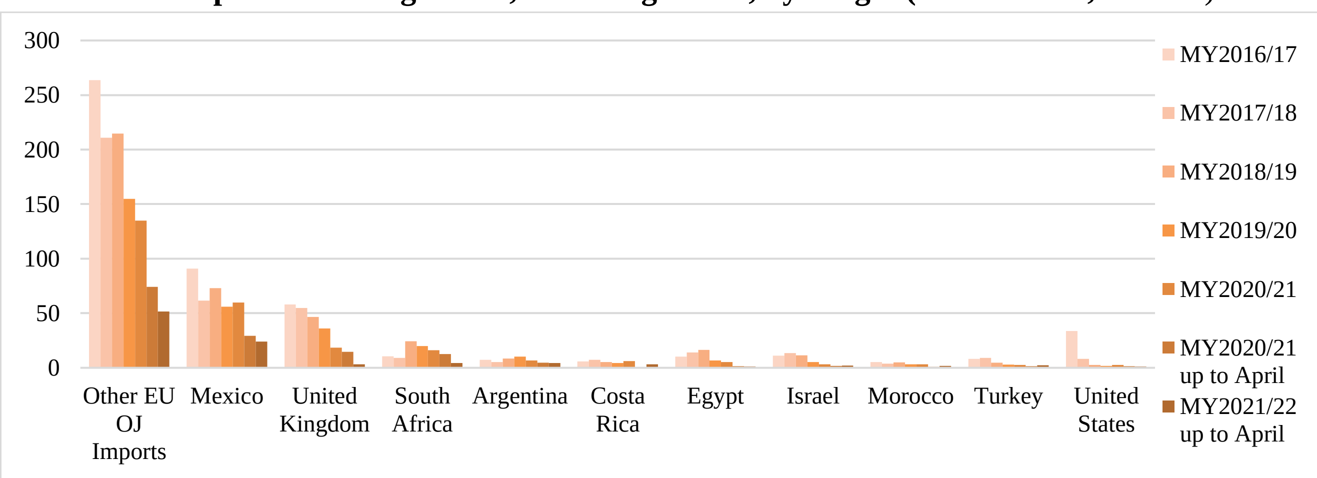
Production: EU orange juice production in MY 2021/22 is forecast at 62,250 MT, down from the 77,212 MT estimated for MY 2020/21. The total volume of oranges channeled to processing depends on the crop quality and quantity of oranges destined for the domestic fresh markets and abroad. The surge in domestic orange consumption in Italy, combined with the somewhat shorter EU orange crop, are the main drivers for lowered deliveries to process in MY 2021/22.

Consumption: In MY 2021/22, orange juice consumption is forecast to remain at similar levels to MY 2020/21, when a tight EU orange juice supply forced consumption down. According to the European Fruit Juice Association Report, while EU orange juice remains the preferred fruit juice in the EU, it faces increased competition from other drinks and fruit juices.

Trade: The EU is a net importer of orange juice. In MY 2021/22, EU imports of orange juice are anticipated to expand and partially offset the reduction in domestically produced orange juice. The EU's orange juice market is dominated by Brazil, which accounts for 90 percent of the bloc's imports. To a much smaller extent, other suppliers to the EU include Mexico, South Africa, the UK, Argentina, and Egypt. Since 2018, EU tariffs priced U.S. orange juice out of the market. The recent tariff truces in place improve U.S. orange juice exporters' position to resume their sales to the EU.

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

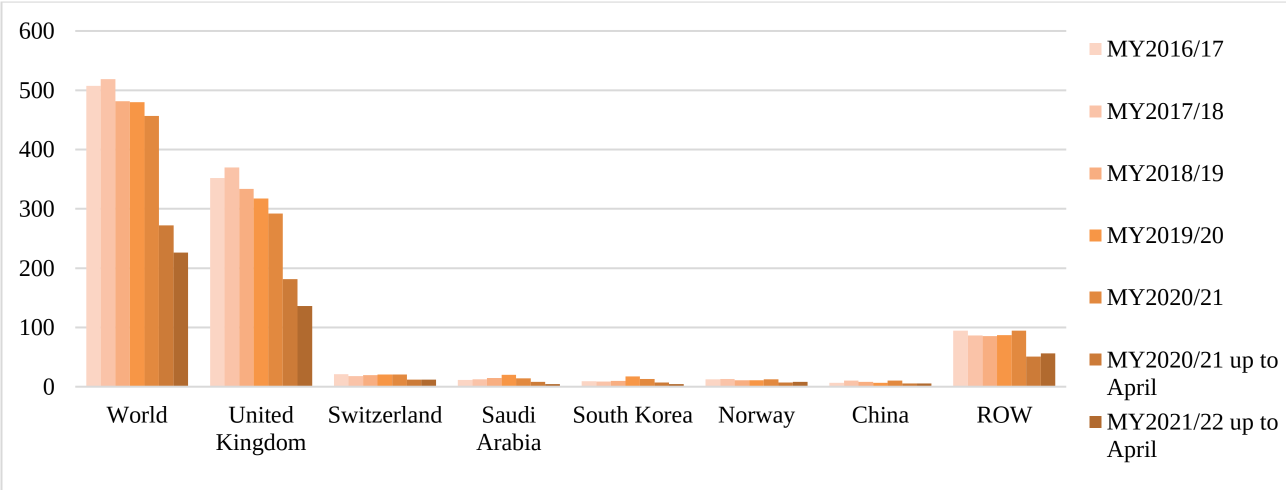
Chart 6: EU Imports of Orange Juice, excluding Brazil, by Origin (Million USD, Brix 65)



Source: TDM, LLC

MY 2021/22, EU orange juice exports, mainly directed to the UK, are expected to drop slightly in line with the lower EU orange production.

Chart 7: EU Exports of Orange Juice by Destination (Million USD, Brix 65)



Source: TDM, LLC

Tangerines/Mandarins

Table 4: Production, Supply, and Distribution

Tangerines/Mandarins, Fresh	**2019/2020**		**2020/2021**		**2021/2022**	
Market Year Begins	**Oct 2019**		**Oct 2020**		**Oct 2021**	
European Union	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Planted (HECTARES)	153,404	153,504	152,406	152,006	152,400	151,576
Area Harvested (HECTARES)	141,632	141,632	141,972	140,972	141,874	140,768
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	0	0	0	0	0	0
Production (1000 MT)	2,889	2,889	3,206	3,235	2,965	3,162
Imports (1000 MT)	407	407	422	422	450	450
Total Supply (1000 MT)	3,296	3,296	3,628	3,657	3,415	3,612
Exports (1000 MT)	330	330	350	350	340	340
Fresh Dom. Consumption (1000 MT)	2,694	2,694	3,001	3,030	2,813	2,996
For Processing (1000 MT)	272	272	277	277	262	276
Total Distribution (1000 MT)	3,296	3,296	3,628	3,657	3,415	3,612
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Not official USDA data. Sources: Trade for MY 2019/20 and 2020/21: Trade Data Monitor, LLC (TDM); All other: FAS EU posts

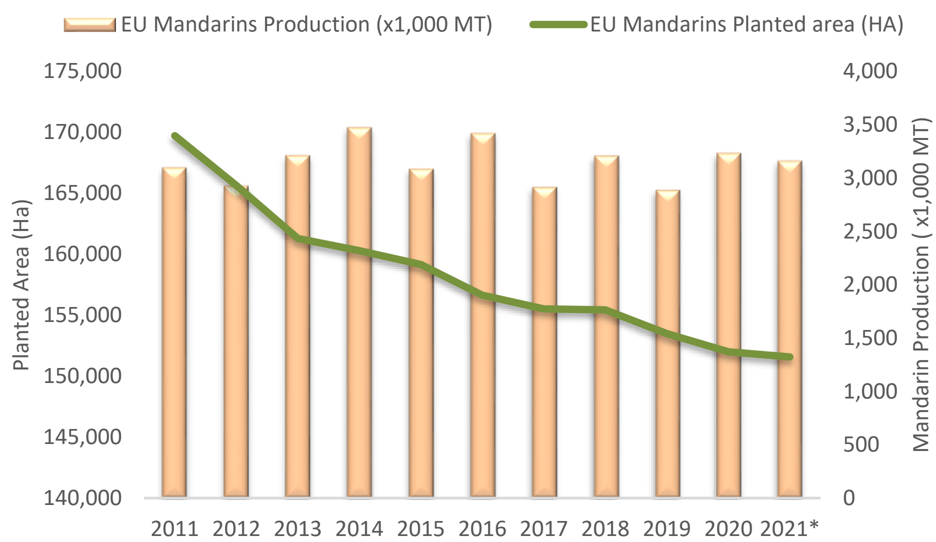
EU mandarin production in MY 2021/22 is forecast at 3.16 MMT, a 2.3 percent decrease from the previous year. Favorable weather condition in Calabria resulted in an overall mandarin production increase in Italy, despite the floods causing damages in citrus groves in Sicily. The larger production in Italy was not enough however to offset production decreases in Spain, where higher temperatures delayed the beginning of the harvest. Production also went down in Greece, where the summer 2021 heatwave and lack of rainfall negatively affected yields (see Table 5). EU mandarin planted area for MY 2021/22 has been also revised down to 151,576 HA (see Chart 8), continuing the long-term contraction, mainly driven by the planted area reduction in Spain.

Table 5: Top EU Fresh Mandarin Producers (MT)

Country	MY 2019/20	MY 2020/21	MY 2021/22
Spain	1,893,951	2,346,000	2,122,400
Italy	763,601	660,280	823,300
Greece	174,147	171,849	160,000

Source: FAS offices

Chart 8. EU Mandarins Production and Planted Area 2011-2021*

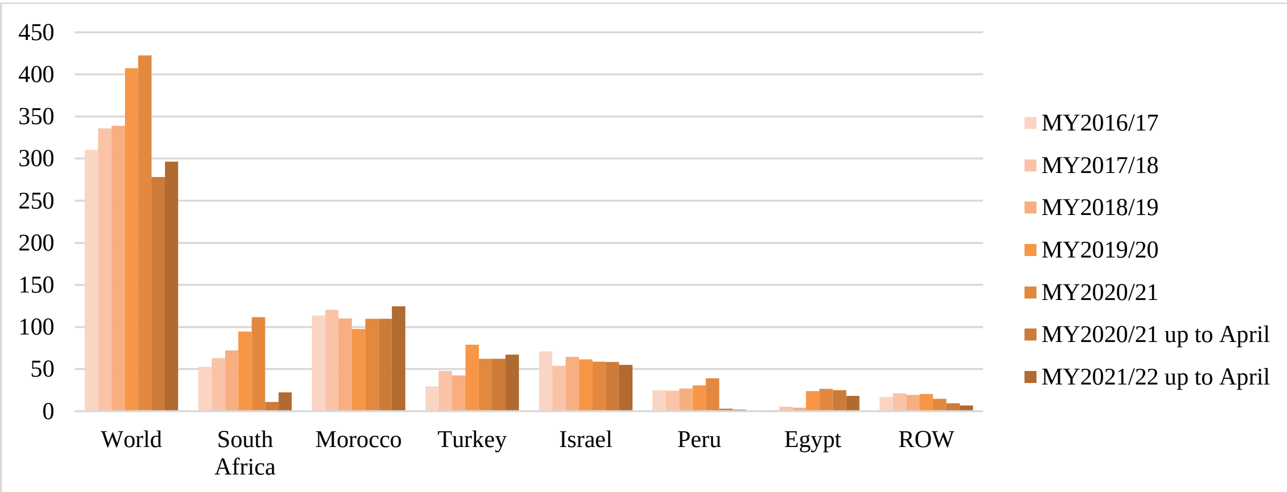


*Forecast Source: FAS offices

Consumption: After peaking in MY 2020/21, in MY 2021/22, a slight decrease in overall consumption of EU fresh mandarins for consumption and processing is forecast. Reduced consumption is expected in Spain while the larger consumption volumes are anticipated in other main producing Member States such as Italy or Greece.

Trade: The EU is a net importer of mandarins. Trade data available for MY 2021/22 show a new expansion of EU imports of mandarins to make up for the reduced domestic supply. In MY 2020/21, the larger EU production allowed for a 6 percent expansion in exports. South Africa and Morocco remain the leading suppliers to the EU market, followed by Turkey, Israel, and Peru (see Chart 9).

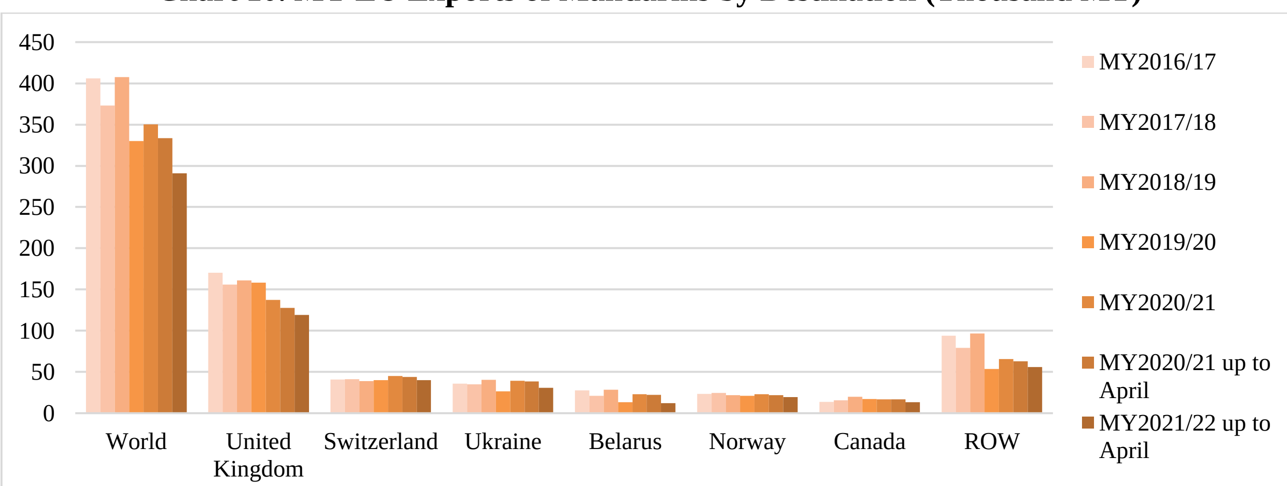
Chart 9. MY EU Imports of Mandarins by Origin (Thousand MT)



Source: TDM, LLC

The shorter EU crop limits export possibilities in MY 2021/22. The EU's main export market destinations for mandarins included the UK, Switzerland, Ukraine, Belarus, Norway, and Canada, (see Chart 10).

Chart 10. MY EU Exports of Mandarins by Destination (Thousand MT)



Source: TDM, LLC

Lemons/Limes

Table 6: Production, Supply, and Distribution

Lemons/Limes, Fresh	2019/2020		2020/2021		2021/2022	
Market Year Begins	Oct 2019		Oct 2020		Oct 2021	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	80,229	80,029	82,320	82,210	82,220	82,753
Area Harvested (HECTARES)	68,433	68,433	71,249	71,239	71,315	71,139
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	0	0	0	0	0	0
Production (1000 MT)	1,488	1,481	1,720	1,720	1,567	1,571
Imports (1000 MT)	521	521	551	551	560	560
Total Supply (1000 MT)	2,009	2,002	2,271	2,271	2,127	2,131
Exports (1000 MT)	174	174	155	155	150	150
Fresh Dom. Consumption (1000 MT)	1,521	1,514	1,724	1,724	1,694	1,694
For Processing (1000 MT)	314	314	392	392	283	287
Total Distribution (1000 MT)	2,009	2,002	2,271	2,271	2,127	2,131
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Not official USDA data. Sources: Trade for MY 2019/20 and 2020/21: Trade Data Monitor, LLC (TDM);
All other: FAS EU posts

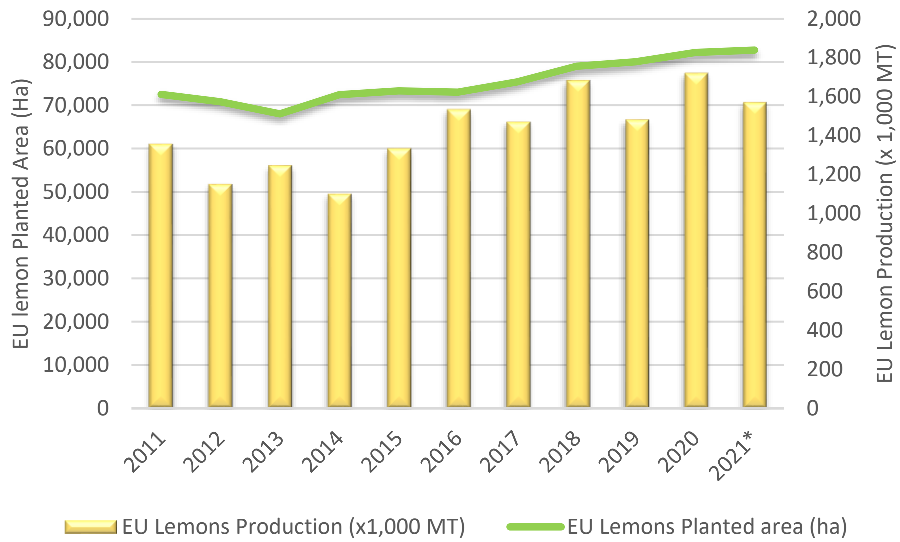
Production: In MY 2021/22, EU lemon production is forecast at 1.5 million MT, down from the 1.7 estimated for the previous season, despite the overall expansion in area registered, driven by increased plantings in Spain. Spain is the EU largest lemon producer and accounts for nearly 65 percent of the EU's production. Unfavorable weather conditions that affected flowering and fruit set in some production areas of Spain, combined with hailstorms in November drove the country's lemon production down. In Italy, the EU's second larger producer of lemons, floods hit Sicily at the end of October, causing damage to lemon groves. Greece's lemon production is expected to remain flat in MY 2021/22.

Table 7: Top EU Fresh Lemons Producers (MT)

Country	MY 2019/20	MY 2020/21	MY 2021/22
Spain	931,000	1,141,600	1,012,000
Italy	445,949	473,276	459,657
Greece	82,255	87,889	88,000

Source: FAS offices

Chart 11. EU Lemon Production and Planted Area 2011-2021

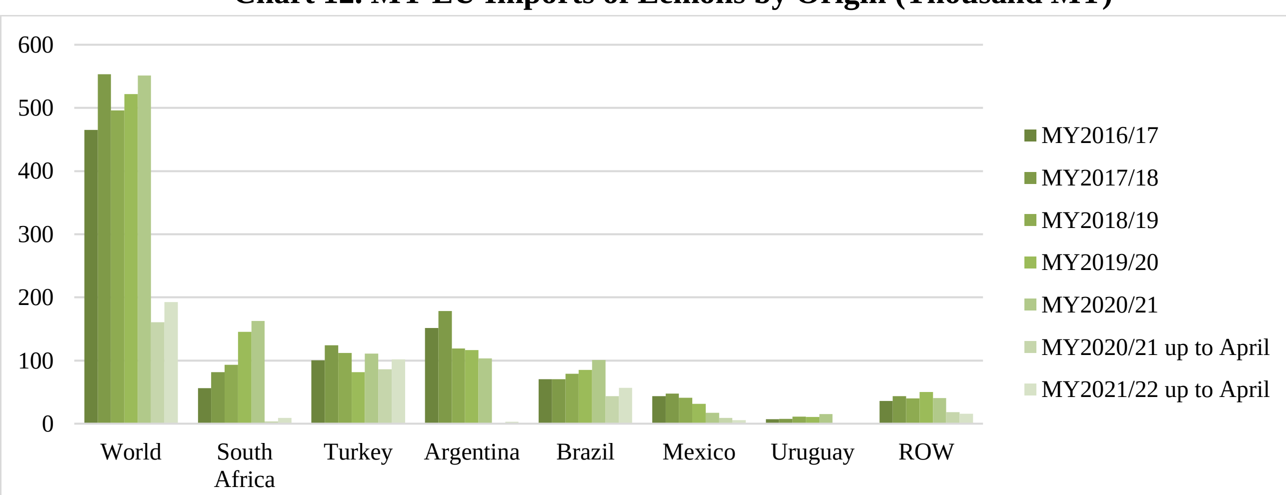


*Forecast Source: FAS offices

Consumption: In MY 2021/22, EU fresh lemon consumption and lemons for processing are forecast to decrease driven by the decline in EU lemon production and the consumer's prices hike.

Trade: MY 2021/22 EU imports of lemons are expected to rise to make up for a drop in EU lemon production. During MY 2020/21, EU imports of lemons increased by 6 percent. South Africa, Turkey, Argentina, and Brazil are the leading suppliers to the EU market, followed by Mexico (see Chart 12). In MY 2020/21, EU lemon imports from Turkey surpassed those from Argentina due to the EU ban imposed on Argentina citrus.

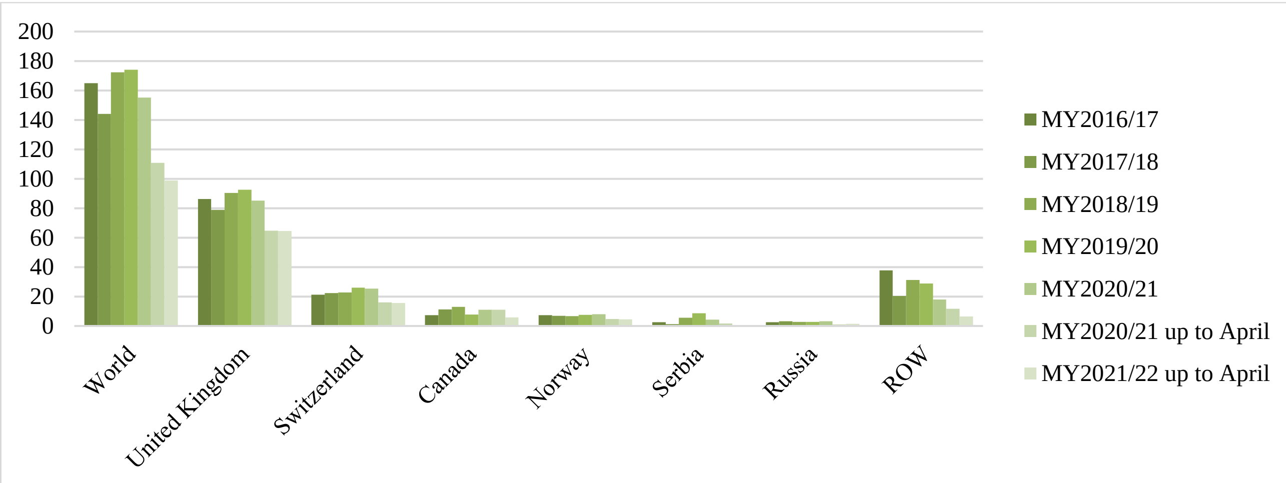
Chart 12. MY EU Imports of Lemons by Origin (Thousand MT)



Source: TDM, LLC

MY 2021/22 EU exports are projected to decline given the shorter crop and the increased competition by other producers like Turkey. In MY 2020/21, the volume of EU lemon exports declined 11 percent compared to the previous year. Shipping primarily from Spain, main export destinations for EU lemons were the UK, Switzerland, Canada, and Norway (see **Chart 13**).

Chart 13. MY EU Exports of Lemons by Destination (Thousand MT)



Source: TDM, LLC

Grapefruit

Table 8: Production, Supply, and Distribution

Grapefruit, Fresh	**2019/2020**		**2020/2021**		**2021/2022**	
Market Year Begins	**Oct 2019**		**Oct 2020**		**Oct 2021**	
European Union	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Planted (HECTARES)	3,452	3,432	3,648	3,628	3,648	3,828
Area Harvested (HECTARES)	2,868	2,868	2,846	2,846	2,844	2,844
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	0	0	0	0	0	0
Production (1000 MT)	95	95	105	105	108	107
Imports (1000 MT)	320	320	295	295	295	285
Total Supply (1000 MT)	415	415	400	400	403	392
Exports (1000 MT)	27	27	26	26	27	25
Fresh Dom. Consumption (1000 MT)	374	374	358	359	360	351
For Processing (1000 MT)	14	14	16	15	16	16
Total Distribution (1000 MT)	415	415	400	400	403	392
(HECTARES) ,(1000 TREES) ,(1000 MT)						

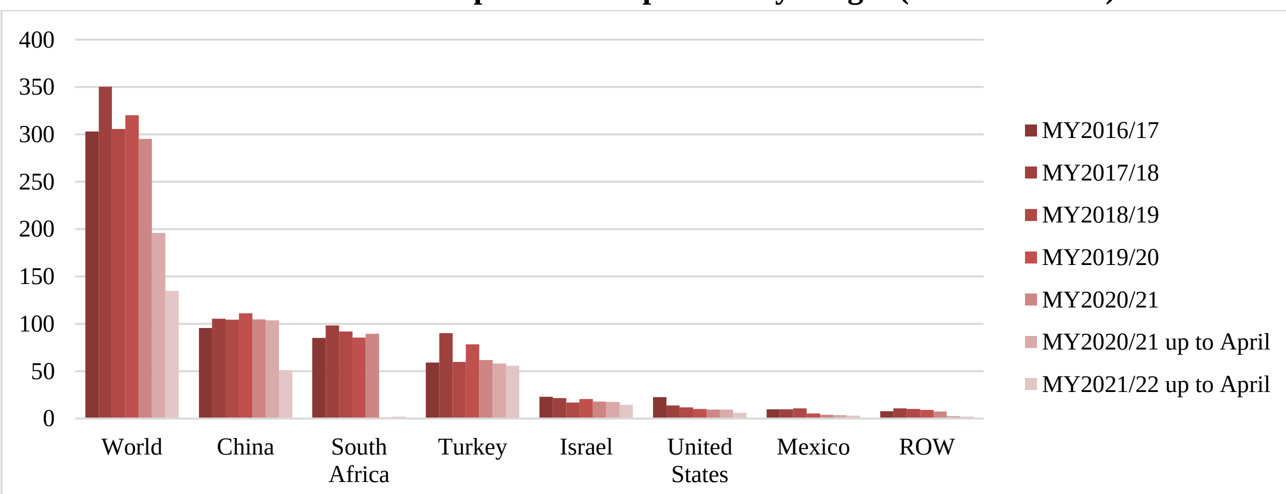
Not official USDA data. Sources: Trade for MY 2019/20 and 2020/21: Trade Data Monitor, LLC (TDM); All other: FAS EU posts

Production: MY 2021/22 EU grapefruit production is forecast to expand to 107,000 MT, largely driven by the area increase reported in Spain, the EU's larger grapefruit producer.

Consumption: In MY 2021/22, EU grapefruit consumption has been revised down, driven by the consumer price index hike affecting consumer's purchasing power. Grapefruits in the EU are mainly consumed fresh. Spain and Cyprus are the main grapefruit processors in the EU.

Trade: In MY 2021/22, EU imports of grapefruit are expected to contract. In MY 2020/21, imports of grapefruit declined by 80 percent, with China, South Africa, Turkey, Israel, and the United States consolidating its positions as leading suppliers to the EU market. Since Spring 2021, the suspension of the additional EU tariffs related to the WTO case against U.S. aircraft subsidies on U.S. grapefruit exports has opened opportunities for U.S. grapefruits exporters to resume their sales to the EU.

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



Source: TDM, LLC

EU grapefruit exports are limited and expected to decline marginally in MY 2021/22. During MY 2020/21, the larger domestic supply allowed for a 2 percent increase in EU grapefruit exports. The UK, Switzerland, Belarus, and Ukraine were the main export destinations for EU grapefruits.

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

Policy

In 2021, EU policymakers were faced with many challenges: the COVID-19 crisis, the Common Agricultural Policy (CAP) reform, the implementation of the Farm to Fork Strategy (F2F), and the first full year without the UK in the EU. Resiliency of the food system has been front and center in policy debates in Brussels for the past two years and these concerns were raised to a higher level following the Russian invasion of Ukraine in February 2022.

EU Policy Response to the War in Ukraine

In February 2022, Russia launched an invasion in Ukraine and the ensuing war is continuing to threaten global food security and creating a food supply chain crisis. On March 23, 2022, the European Commission published a Communication on 'Safeguarding food security and reinforcing the resilience of food systems,' which outlines short-term and medium-term actions that the EU will take to enhance global food security and support EU farmers given rising commodity prices and costs for energy and fertilizer inputs due to the war in Ukraine. The EU will distribute €500 million euros in national allocations to directly support EU farmers most affected by higher input costs and the closure of export markets. Member States can supplement this support up to 200 percent using national funds. Additionally, the Commission has granted an exceptional and temporary derogation from certain greening obligations. Member States may allow production of any food and feed crop on fallow lands that are part of Ecological Focus Areas (EFA) for the duration of 2022, while still providing the full level of greening payment that would be given if the land was kept fallow. This temporary flexibility aims to allow EU farmers to adjust and expand their cropping plans in response to the new market dynamics. Despite the measures, the European fresh produce sector remains concerned about market stability since the focus is on crops and fertilizer availability.

Pesticides and 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.

In particular, the Commission approved the non-renewal of the active substance phosmet, which will likely have an impact for future U.S. exports of citrus to the EU once the MRLs are reviewed. For additional information, please consult the FAS/Brussels website on EU Early Alerts.

Upcoming reviews for MRLs:

Article 12 review: https://www.efsa.europa.eu/sites/default/files/pesticides-MRL-review-progress-report.pdf

Upcoming reviews for active substances:

Active substance	Expiration date	Last day of application for renewal of the active substance
Flucapyroxad	05/31/2025	05/31/2022
Bixafen	05/31/2025	05/31/2022
Pyriofenone	01/31/2025	01/31/2025
Disodium phosphonate	01/31/2026	01/31/2023
Penflufen	05/31/2025	05/31/2022
Sedaxane	05/31/2025	05/31/2022
Benalaxyl-	04/30/2025	04/30/2022
Pyroxsulam	04/30/2025	04/30/2022
Penthiopyrad	05/31/2025	05/31/2022
1,4-Dimethylnaphthalene	06/30/2025	06/30/2022
Pyridalyl	06/30/2025	06/30/2022

Glyphosate

The active substance glyphosate is approved for use at the EU level and is set to expire on December 15, 2022. Its renewal procedure is currently ongoing, and its last reauthorization was limited to five years instead of the more typical 10 to 15 years. Although the substance is still approved at the EU level, some Member States are banning its sale or restricting its use in plant protection products at the national level. Since the EU MRLs for glyphosate remain in place in these Member States, there may be some political pressure to restrict imported products containing glyphosate because some EU farmers are not allowed to use the substance.

New EU Cold Treatments Required for Orange Imports

On June 16, 2022, the European Commission published Commission Implementing Regulation 2022/959 stating that orange imports from countries affected by False Codling Moth (*Thaumatotibia leucotreta*) must have a phytosanitary certificate indicating that the oranges were grown in authorized locations and were subjected to required cold treatments. The regulation requires a precooling step and cold treatment in transit. From 2023, exporters will be able to choose either a cold treatment of between -1°C to 0°C for 16 days or between to -1°C to 2°C for 20 days, with precooling at 0°C and 2°C, respectively. This will be the first time that the European Union has approved a measure to apply cold treatment to fruit imports from third countries.

EU Import Policies Concerning 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, which 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. Tariff levels for 2022 are published in Commission Implementing Regulation 2021/1832. The tariffs for citrus fruit can be found on page 104 for oranges, tangerines, lemons, grapefruit, and other citrus fruit, while the tariff for orange juice can be found on page 173.

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
Sweet oranges	0805 10 22 10 0805 10 24 10 0805 10 28 10	20,000,000	Feb 1 – Apr 30	All origins	10%
Minneolas	0805 29 00 21 0805 29 00 29	17,931,000	Feb 1 – Apr 30	All origins	2%
Frozen Orange Juice	2009 11 99 11 2009 11 99 19	1,500,000	Jan 1 – Dec 31	All origins	13%

Additional EU Duties Targeting U.S. Citrus

EU retaliation on U.S. Section 232 Safeguard Measures on EU Steel and Aluminum: On June 22, 2018, the EU imposed additional tariffs of 25 percent on products in retaliation to U.S. safeguard measures on EU steel and aluminum (Commission Implementing Regulation (EU) 2018/886). The targeted U.S. products included fresh orange juice. On October 30, 2021, the United States and European Union agreed to end the dispute over U.S. steel and aluminum tariffs. On November 26, 2021, under Commission Implementing Regulation (EU) 2021/2083, the EU suspended tariffs affecting U.S. agricultural products from January 1, 2022, until December 31, 2023.

U.S.-EU WTO Cases on Aircraft Subsidies: On November 9, 2020, the European Union adopted countermeasures against U.S. exports following the World Trade Organization's ruling that authorized the EU to take such countermeasures against U.S. subsidies to aircraft maker Boeing. The European Commission published Implementing Regulation (EU) 2020/1646 that lays down the list of products affected by a 25 percent additional tariff. The Regulation entered into force on November 10, 2020. Grapefruits and frozen orange juice were listed in the Regulation and hence subject to the additional tariff.

However, on June 15, 2021, the European Union and the United States agreed to suspend the application of the tariffs for a period of five years. The two sides also agreed to seek to overcome long-standing differences in order to avoid future litigation through the Understanding on a cooperative framework for Large Civil Aircraft.

For additional information regarding policies affecting citrus, please consult the latest EU Citrus Annual Report.

Trade Shows

Trade fairs 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 are:

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. More than 2,400 companies from across the entire fresh produce value chain will participate, including major global players, as well as small and medium-sized suppliers from around the world. https://www.fruitlogistica.com/en/	Next Fair: February 8-10, 2023
BIOFACH Nuremberg, Germany (Interval: yearly) Target Market: Germany/Europe The leading European trade show for organic food and non-food products. http://www.biofach.de/en	Next Fair: July 26-29, 2022 February 14-17, 2023
FRUIT ATTRACTION Madrid, Spain (Interval: yearly) Target Market: Spain/EU/International Fruit attraction is an international Trade Show for the Fruit and Vegetable Industry sector with more than 1600 exhibitor companies from around the world. https://www.ifema.es/en/fruit-attraction	Next Fair: October 4-6, 2022

Related Reports

Country	Title	Date
EU	EU Citrus Annual	12/23/2021
EU	EU Citrus Semi-Annual	06/17/2021
EU	EU Citrus Annual	12/18/2020

These and other GAIN reports can be downloaded from the USDA/FAS GAIN database: https://gain.fas.usda.gov/#/search

Acknowledgements:

Ornella Bettini	FAS/Rome covering Italy
Tania De Belder	USEU/FAS Brussels covering EU policy
Dimosthenis Faniadis	FAS/Rome covering Greece
Carmen Valverde	FAS/Madrid covering Spain and Portugal Coordinator of the EU Citrus Annual Report

Attachments:

No Attachments