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Morocco

Citrus Annual

2011

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Report Highlights:

Morocco's citrus production in MY 2011/12 is estimated at 1.87 million MT, a 6.3 percent increase over the production level in 2010/2011. Orange production is estimated at about 949,000 MT, while small citrus production is estimated at 764,000 MT and other citrus at 154,000 MT. Fresh citrus exports in MY 2010/2011 totaled 529,367MT, an increase of 8.2 percent compared to the previous year. Citrus exports for MY 2011/12 are projected to reach 571,000 MT, about 8 percent higher than exports in MY 2010/11. The Russian and the EU markets remained as the main destinations for Moroccan citrus exports in 2010/11, but Morocco has not been able to fill its duty-free import quota granted by the EU for clementines and oranges. Morocco's imports of orange juice concentrate soared to 4141 MT in 2010, due to increased consumer demand inability of local processors to satisfy that demand.

Executive Summary:

Morocco's citrus production in MY 2010/2011 is estimated at 1.75 million MT, about 14 percent higher than the production level in the previous year. For MY 2011/12, total citrus production is projected to rise 6.3 percent to 1.87 million MT, of which orange production is estimated at about 949,000 MT, small citrus at 764,000 MT and other citrus at 154,000 MT. The production increase in MY 2011/12 is mostly due to favorable weather conditions during the blossoming and the fruit setting periods.

The average yield for the 2010/10 citrus harvest was estimated at 22.9 MT/HA for small citrus and 21.3 MT/HA for oranges. For MY 2011/2012, yields are projected to increase to 23.7 MT/HA for small citrus and 23 MT/HA for oranges. It is reported that oranges harvested area is 2.8 percent lower than the previous year, although total production rose 4.9 percent. The harvest is reported to be of good quality, especially in terms of fruit sizes due to sufficient rainfall in the previous season which had a beneficial impact on fruit quality. At the present time, Moroccan citrus production can hardly keep up with growing demand from both export and local markets.

Citrus exports in 2010/2011 totaled 529,367MT, an increase of 8.2 percent compared to the previous year, but about 12 percent short of the 600,000 MT target set by the Moroccan government at the beginning of the export season. Orange exports in 2010/2011 totaled 175,144MT, about 8.7 percent higher than exports in 2009/10. Exports of small citrus in 2010/2011 totaled 349,141MT, an increase of 8.4 percent over exports in the previous year, mostly due to an increase in Clementine exports. The Russian and the E.U. markets remained the main destinations for Moroccan citrus exports in MY 2010/11, though Morocco has not been able to fill its duty-free import quota granted by the EU. Morocco's citrus exports for MY 2011/12 are projected at 571,000 MT, about 8 percent higher than exports in MY 2010/11. With the inability of the local citrus processors to keep up with rising consumer demand, Morocco's imports of orange juice increased drastically last year. Imports of orange juice concentrate soared from 1295 MT in CY 2009 to 4041 MT in CY 2010, with imports coming mostly from Egypt, Argentina, France and Brazil.

The Moroccan government continues to provide subsidies for new citrus plantations that could reach up to 10 percent of the construction and the equipment cost for the citrus conditioning stations with a maximum of 4.75 million DH and 100 percent of the cost of installing new drip irrigation system, including digging wells and purchasing of irrigation equipment. Producer subsidy payments for new citrus plantations were increased to 12,000 DH per hectare (\$1,500), up from 7,800 DH (\$975) per hectare previously.

Production:

The Moroccan Ministry of Agriculture published the final estimate for citrus production in 2010/2011 at 1.75 million metric ton (MT), about 14 percent higher than the production level in the previous year. Morocco's citrus production for MY 2011/12 is projected at 1.86 MT, a 6.3 percent increase compared to production in MY 2010/2011. The projected citrus production increase in Morocco for MY 2011/12 is mostly due to favorable weather conditions during the blossoming and fruit setting periods. The adequate rainfall and moderate temperature in the spring and summer helped improve fruit quality and increased yields.

According to Ministry of Agriculture's data, total area planted with citrus in Morocco for MY 2011/12 is estimated at 96,100 hectare (HA), of which there are 45,500 HA of oranges, 42,100 HA of small citrus fruits and 8,500 HA other citrus (lemons, limes and grape fruits). The total citrus productive area is estimated at 81,400 HA, an increase of about 1.5 percent over the previous year, with 41,200 HA of oranges, 32,200 HA small citrus and 7,800 HA other citrus. The Souss region (Agadir and Taroudent) accounts for nearly half of Morocco's citrus production, and about 70 percent of its total citrus exports. This region continues to face critical water shortages which impede plans for future expansion of the citrus areas. In contrast, the Gharb region in the northern part of Morocco (Kenitra and Sidi Kacem) appears to have high potential for production growth. The expansion of citrus production in the Gharb area, however, has been constrained by aging orchards, limited number of citrus varieties, and lack of new investment. Water scarcity in the Souss region, and the appeal of the export markets encouraged many leading citrus producers to consider the Gharb area as an alternative region to expand citrus production.

The average yield for the 2010/11 citrus harvest was estimated at 22.9 MT/HA for small citrus and 21.3 MT/HA for oranges. For MY 2011/2012, yields are projected to increase to 23.7 MT/HA for small citrus and 23 MT/HA for oranges. It is reported that oranges harvested area is 2.8 percent lower than the previous year, although total production is 4.9 percent.

Small citrus production is dominated by Clementine-type varieties, such as Nules, Deverdis and Late Clementine. Production of small citrus varieties, Nova and Nour, is projected to decline by 14 and 13 percent, respectively, due to the natural alternate bearing cycle. It should be noted that there are more than 47 citrus varieties that currently exist in Morocco, several of which are new hybrid varieties, such as Nadorcott (Afourer), Ortanique and Nova, that are gaining popularity compared to local varieties. These varieties have the advantages of being a higher quality and late harvest that extends the season through February and thus increases their availability to the export markets.

Orange varieties are mainly dominated by Valencia Late (Maroc Late) and W. Navel, with market shares of 40 and 50 percent, respectively. Due to weak export market demand, more than 75 percent of Morocco's oranges production is absorbed by the local market. The growth in the orange planted area has been noticeably slower than the growth in small citrus area.

The table below shows Morocco's citrus production estimate for 2010/11 season and production projection for the 2011/12 season.

Table 1: Citrus Production for MY 2010/11 and 2011/12

Marketing Year	Production (1,000 Metric Tons)		
	2010/2011	2011/2012	% Change.
Total Small Citrus Fruit	716	763.9	7%
Clementine	538	598.2	11%
Nour	110	95	-14%
Ortanique	14.4	15.7	9%
Nova	13.4	11.7	-13%
Others(Nadorcott)	40.2	43.2	7%
Total Oranges	904	948.5	5%
Navel	343	375.2	9%
Sanguine	59.6	66.6	12%
Maroc-Late	465	469.2	1%
Others (Salustiana)	36.4	37.5	3%
Others Citrus	135.5	154	14%
Total Fresh Citrus	1,755	1,866	6.3%

Source: Ministry of Agriculture, DSS, and Export Quality Control Office (EACCE).

*: includes lemon and grapefruits. Breakdown by variety not available.

Note: Estimates for production are issued by Citrus Producers Association, DSS and the EACCE and are to be interpreted with caution because of their relative objectivity.

The government of Morocco has set an ambitious goal for citrus production under the agricultural strategy the "Green Plan." The Moroccan Citrus Producers Association (ASPAM) is in charge of implementing the citrus strategy. The citrus plan project to help create employment in the sector, provide consistent supplies and a longer harvest season. ASPAM is aiming at expanding the citrus production period through increased planting of late-maturing varieties such as Nadorcott and Nour. The total citrus production is projected to grow from its current level of 1.7 million MT to 2.9 million MT by 2018 through expanding citrus areas by 20,000 HA and renewing 30,000 HA of old plantation.

One of the major problems facing citrus production in Morocco is the presence of the virus disease Tristeza, which causes the death of the infected trees. This disease affects mostly citrus cultivars grafted on the highly susceptible sour orange rootstock (Bigaradier) that represents 95 percent of Morocco's citrus rootstock. In order to avoid the spread of the disease, the GOM has taken some preventive measures that include providing subsidies to citrus growers in the affected region to uproot, burn and replace infected trees. According to a decree by Ministry of Agriculture published in August 2010, the Moroccan government will provide citrus farmers with 28,000 MDH per hectare for the uprooting of infected trees and replanting of new citrus orchards in the affected area.

The fresh citrus marketing season in Morocco starts in early October with the harvest of early Clementine varieties which runs through March, along with main varieties Maroc Late and Salustiana. Orange harvest starts

in November and continues through late June, with Navel and late hybrid varieties that extend the marketing season. Lemons are harvested throughout the entire season, from October until July. This year's harvest is reported to be of good quality, especially in terms of fruit sizes. Favorable rain that Morocco experienced in the previous season had a beneficial impact on the evolution of the fruit size this year, which will result in greater percentage of exportable portion of the harvest. Export markets prefer particularly the large and medium sizes fruits.

Processed Citrus Production

The citrus processing sector in Morocco is facing stiff competition in sourcing raw materials in the fresh citrus market. This is mainly due to the low prices offered by orange juice processors compared to prices offered in the fresh market. There are five citrus processing plants currently operating in Morocco, of which three are producers of single strength orange juice that can hardly meet demand from local market buyers. Morocco's orange processing capacity is about 300,000 MT, and it's by far underutilized. Fresh oranges delivered to juice processors are currently estimated at about 40,000 to 50,000 MT annually, producing equivalent to 4,000-5,000 MT of orange juice concentrate. The orange variety Maroc Late accounts for about two third of the total processed citrus.

ASPAM's long-term goals include allocating 200,000 MT of fresh citrus production annually for juice processing by 2018. This quantity would be the equivalent of about 60 million liters of juice. Morocco's orange juice market is currently estimated at about 50 million liters, of which 20 million comes from processing fresh citrus and the rest is imported juice or from concentrate.

Trade:

Morocco's citrus exports are mostly dominated by small citrus and oranges. About 80 percent of exports consist of Clementine, Maroc Late, Nour and orange varieties. The citrus export season in Morocco starts about mid-October for Clementine-like varieties. Mid-season varieties (bloody oranges, Salustiana, Navel, etc.) provide a bridge through March/April where the Maroc-Late variety takes over until July.

Citrus exports in 2010/2011 totaled 529,367MT, an increase of 8.2 percent compared to the previous year, but about 12 percent short of the 600,000 MT target set by the Moroccan government at the beginning of the export season. Orange exports in 2010/2011 totaled 175,144MT, about 8.7 percent higher than exports in 2009/10. Exports of small citrus in 2010/2011 totaled 349,141MT, an increase of 8.4 percent over exports in the previous year, mostly due to an increase in Clementine exports.

Morocco's citrus exports for MY 2011/12 are projected to reach 571,000 MT, about 8 percent higher than exports in MY 2010/11. This increase is mostly due to higher exports of oranges and other citrus, while total exports of small citrus are expected to remain almost unchanged. Expected increase in Clementine exports would offset a decline in exports of Ortanique and Nour varieties. Lemon exports, which account for about 80 percent of other citrus exports, are expected to rise significantly in MY 2011/12.

Although the harvest and the export season had a good start, especially exports of small citrus to Russia, the EU and Canada, heavy rains and flooding in the Gharb region during last week of November, have delayed harvest and may affect citrus exports from that region.

The table below shows exports estimates for 2010/11 and projection for the upcoming 2011/12 export season:

Table 2: Morocco's Citrus Exports in 2010/11 and projection for 2011/12

Marketing Year	Exports (1000 Metric Tons)		
	2010/2011	2011/2012	% Change.
Total Small Citrus Fruit	349.141	349.000	0%
Clementine	214.233	222.000	4%
Nour	78.789	73.000	-7%
Ortanique	9.279	6.700	-28%
Nova	6.514	7.000	7%
Other (Nadorcott)	40.326	40.300	0%
Total Oranges	175.144	215.000	23%
Navel	23.725	32.000	35%
Sanguine(Bloody)	25.429	26.300	3%
Maroc-Late	100.488	128.500	28%
Salustianas	25.502	28.200	11%
Other Citrus*	5.082	7.000	38%
Total Fresh Citrus	529.367	571.000	8%

Source : EACCE

The table below shows Morocco's citrus exports by market share for major varieties in 2009/2010.

Table 3: Market Share by Varieties Exported in 2010/2011

Citrus Varieties / Species	Share of
CLEMENTINES DEVERDIS	32%
MAROC LATE	21%
NOUR	17%
CLEMENTINE NATURELLE	9%
NADORCOTT	5%
SALUSTIANAS	4%
WASH. SANGUINES	4%
NOVA	1%
ORTANIQUES NATURELLE	1%
OTHERS	6%

Source: EACCE

The increase in Moroccan citrus exports this year is mostly due to good fruit quality, especially in terms of fruit sizes, as well as the beneficial impact of last year's adequate rainfall that resulted in a greater percentage of the citrus harvest being fit for exports. In addition, there has been some improvement in citrus export logistics with the opening of a new shipping line between the port of Agadir (the leading citrus export region) and the port of Saint-Petersburg in Russia, the leading export destination market.

In 2010/11, Russia overtook the lead from the European Union (EU) as the main destination market for Morocco's citrus exports. Moroccan citrus exports to Russia in 2010/11 soared to 257,735 MT, of which 183,386 MT were small citrus varieties, 72,283 MT oranges, and 2,066 MT lemons. In 2010/11, the Russian market absorbed about 50 percent of Morocco's fresh citrus exports, while the EU market accounted for 37 percent. This is compared to a reverse situation in 2009/10 when EU imported about 45 percent of Morocco's total citrus exports, while Russia imported 40 percent. Moroccan exporters have been focusing on the Russian market recently despite stiff competition from third countries.

The Russian market has been appealing to the Moroccan exporters because of the difficulties they have been facing to comply with increasingly stringent EU standards and requirements as well as the incentives that the government is providing when exporting to non EU countries (see policy section below). The rise in Morocco's exports to the Russian market could be also attributed to the recent opening of a new direct shipping line between Morocco and Russia.

The following two tables show Morocco's orange and small citrus exports by destination in the last three years, as well as export changes in MY 2010/11 vs. MY 2009/10.

Table 4: Orange Exports (MT) and % Changes in 2010/2011

Marketing Year	2008/2009	2009/2010	2010/2011	%
RUSSIA	78,404	60,699	72,283	19%
Total E.U.	96,494	97,081	99,323	2%
Netherland	45,832	49,749	51,055	3%
England	17,606	16,020	17,983	12%
France	12,961	10,545	10,640	1%
Sweden	8,586	3,908	8,579	120%
Germany	3,587	3,675	3,309	-10%
Belgium	1,522	1,682	2,941	75%
Lithuania	2,177	2,050	1,608	-22%
Poland	768	1,143	1,524	33%
Other E.U.	3,455	8,309	1,684	-80%
U.S.A	0	40	22	-45%
Canada	1,745	86	107	24%
Senegal	1,270	1,651	1,133	-31%
Algeria	2,393	43	89	107%
Others	2,132	2,274	2,187	-4%
Total Orange	182,438	161,874	175,144	8%

Source: EACCE

Table 5: Small Citrus Exports (MT) and % Change in 2010/2011

Marketing Year	2008/2009	2009/2010	2010/2011	%
Russia	133,263	129,914	183,386	41%
Total E.U.	87,312	120,674	93,361	-23%
Netherland	26,162	49,138	29,597	-40%

England	19,420	24,969	17,756	-29%
France	20,329	31,308	24,809	-21%
Sweden	4,661	5,025	7,813	55%
Germany	1,900	1,803	1,892	5%
Lithuania	6,800	5,313	7,584	43%
Poland	5,323	1,484	1,961	32%
Finland	2,482	1,078	1,701	58%
Other E.U.	235	556	248	-55%
U.S.A	16,519	15,386	20,874	36%
Canada	48,817	47,549	42,589	-10%
Saoudi.A	4,102	5,484	6,381	16%
Norway	2,659	2,299	1,285	-44%
Others	844	1,105	1,265	14%
Total Small Citrus	293,516	322,411	349,141	8%

Source: EACCE (Export Quality Control Office)

Exports to the United States

Moroccan citrus exports to the U.S. in 2010/2011 totaled 20,896 MT, almost all of which were Clementine varieties. About 55 percent of these exports were Clementine Deverdis, 31 percent Nour, and 7 percent Nova. The significant increase in Morocco citrus exports to the U.S. market in recent years could be attributed to the implementation of the U.S.-Morocco Free Trade Agreement (FTA) that started in 2006. It is worth noting that Morocco's citrus exports to the U.S. in 2006/2007 were about 7,800 MT, and grew to 15,426 MT in 2009/2010. Some issues, however, remain as constraints for expanding Moroccan citrus exports into the U.S. at a larger scale such as U.S. consumer preference for larger fruit sizes and export transport logistics.

Long-term prospects for fresh citrus exports

Currently, Moroccan citrus production can hardly keep up with growing demand from both export and local markets. In recent years, Morocco has not been able to fill its annual duty-free quota granted by the EU, with 143,700 MT allocated for clementine exports (November –February) and 306,800 MT for orange exports (December-May). Often, prices in the local markets reach levels at which many farmers consider it more beneficial to sell their products locally and avoid the risks and delays in payment of selling in the export markets.

Modest Start for Moroccan Citrus Exports to China

Last year, the Moroccan Ministry of Agriculture reached an agreement with China to approve phyto-sanitary requirements for the Chinese market. The agreement, which approved the registration of 87 hectares in 17 citrus production sites, became effective in MY 2010/11. The approved production sites were mostly for Clementine and Moroccan-Late varieties. Although Moroccan agricultural officials had hoped that the agreement would offer an excellent start for Morocco's citrus exports to enter and expand into the huge Chinese market, the actual export level has been very modest compared to expectations. In MY 2010/11, Morocco exported a total of 60 MT

of Clementine Deverdis and Nova varieties to China. Moroccan agricultural officials, however, remain hopeful that citrus exports to China would certainly increase in the coming 5 years to reach 40,000 to 50,000 MT.

Citrus Juice Trade

With frequent shortages of fresh citrus supply in the local markets, Moroccan juice processors turned to concentrated juice imports. In CY 2010, Morocco's orange juice import soared to 4,141 MT, more than double the amount imported in the previous year, with imports coming mainly from Egypt (1216 MT), Argentina (966 MT), France (693 MT) and Brazil (651 MT). The Juice import increase was mostly due to rising consumption of small juice packages as well as marketing efforts by the industry to reach younger consumer groups. Morocco's orange juice exports in CY 2010 remained almost stable at 1,915 MT, a one percent lower than the year before. The main orange juice export destinations are the Netherlands (793 MT), France (358 MT), Italy (197 MT), Tunisia (131 MT), Libya (130 MT) and Germany (49 MT).

Export Procedures

Moroccan citrus exports are all handled by the private sector and are carried out by fully integrated cooperatives of small farmers and private companies (Moroccans as well as joint ventures with Europeans). In many cases, the exporting companies are advanced technologically and have shown great ability to adapt to constantly changing production and control conditions and meet importers' requirements such as ISO standards, EUREPGAP, BRC-British Retail Consortium, HACCP, etc.

The non-EU markets, commonly known as "Contract Markets", include Russia, Lithuania, Saudi Arabia, Canada, and the U.S. In the past few years, these markets accounted for over 60 percent of Morocco's total exports, up from an average of around 40 percent in 2004. This shift is mostly due to a greater focus on the Russian market. However the decline in the value of the Russian ruble against the Moroccan dirham may affect export to this country during the current year. Annual arrangements for these markets are typically made between importers and Moroccan exporters to ship agreed-upon quantities and quality of fruits. These markets are mostly handled by the exporters' cooperatives such as the Moroccan Fruit Board (MFB) that coordinate export logistics among its members.

All exported food and agricultural products in Morocco are subject to quality control by the Ministry of Agriculture's Export Quality Control Office (known as EACCE, i.e. Etablissement Autonome de Controle et de Coordination des Exportations). The EACCE ensures that the standards and requirements of the importing country, as far as quality is concerned, are effectively met.

Policy:

The citrus production and export sector is among the most organized and well managed sectors in Morocco. Due to its impact on foreign exchange revenues (about \$350 million annually) and job creation in rural areas and the economy in general, this sector has received a great deal of support from the Moroccan government. In the past several years, new citrus plantings have been growing at an average of about 2,000 hectares per year. This growth rate was deemed insufficient by the industry to keep up with the demand. More recently, however, there

has been an increased interest in new citrus plantation and renewal of orchards reaching 3,500-4,000 hectares per year due to several factors including:

- Consistently higher demand for exports and Morocco’s inability to fill up its preferential quotas in the E.U. market (143,700 MT for Clementine and 306,800 MT for oranges). The Moroccan government has been subsidizing exports to Russia and other non-EU markets (see table).
- The leasing (in 2006,2008, and 2010) of some government-owned land to private sector investors made several thousands of hectares of Morocco’s best farms available to new agricultural investment. It is likely that a good part of this leased land would be devoted to citrus production. In 2011/12, it is projected that 20 000 HA of government-owned land will be leased to private sector investors.
- The Ministry of Agriculture’s increased investment premium for the citrus sector (see table). Most of the increase is expected to occur in the northern and northern central parts of the country (Kenitra, Larach, Berkane, Beni Mellal, etc.).

Under the Green Plan” the government of Morocco has set an ambitious strategy for citrus production in Morocco. Total citrus production is projected to grow from its current level of 1.7 million MT to 2.9 million MT by 2018, through expanding citrus planted areas by 20,000 hectares and renewing old plantation of 30,000 hectares.

To help achieve the goals of this strategy, the GOM provides subsidy of 10 percent of the construction and the equipment cost for the conditioning of citrus stations with a maximum of 4.75 million MDH and 100 percent of the costs of installing new drip irrigation systems, including digging wells and purchasing irrigation equipment. Much of the new citrus plantations will be located in the Gharb region where water scarcity is less critical than in the traditional citrus areas in the Souss region.

Subsidies and incentives

The Moroccan government currently provides a set of incentive measures to support citrus growers and encourage new investment in citrus production. The Ministry of Agriculture decree (# 2-09-601) issued in October 2009 to increase the support payments for the new citrus plantations to 12,000 MDH per hectare (\$1,500 HA), up from 7,800 MDH (\$975) per hectare. In addition, there are other incentives that are not crop specific of citrus growers have been benefiting to boost investment and establishment of new citrus orchards. The table below provides a list of major investment incentives and subsidies relevant to citrus production, marketing and exports:

Table 6: Subsidies and Incentives Provided to the Citrus Sector

Activity	Subsidy/incentive	Comment
Aggregation Project centered around conditioning station	1,500 dirhams/hectare for the aggregation project	Specific to citrus to encourage aggregation project
Conditioning Station	10% of the cost of construction and equipment, with a maximum of 4.75 million Dirhams.	Specific to citrus. Subsidy depends on global cost of the conditioning station,

Digging new wells and installing irrigation equipment	100 percent of cost with a maximum cumulated of 33,000 dh (an additional maximum of 18,000 dh/ha could be added if a water basin is built).	Not specific to citrus.
Investment Premium for new citrus plantation	12,000 dirhams/hectare when certified plants are used.	Specific to fresh citrus.
Export promotion to diversify export destinations (subsidy if exported to non EU countries)	200 dirhams for each MT exported to Russia or incremental exports to other non-EU destinations (use exports in My 2000/2001 as basis)	Specific to fresh citrus. Will probably be phased out for Russia as this market accounts today for almost 50 percent total exports.
Export promotion to diversify export destinations (subsidy provided to exports to non EU or Russian markets)	500 dirham/MT for exports outside the Russian and EU markets, and exceeding export levels for periods between September 1, 2000 and August 31, 2001.	Specific to fresh citrus.

Indicative Exchange Rate: 1USD = 8.4MDH

**Production, Supply and Demand Data Statistics:
Citrus Production, Supply and Demand Data Statistics:**

Production, Supply and Distribution in Morocco (1000 MT)

Tangerines/Mandarins, Fresh Morocco	2009/2010			2010/2011			2011/2012		
	Market Year Begin: Oct 2009			Market Year Begin: Oct 2010			Market Year Begin: Oct 2011		
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post
Area Planted (HECTARES)	37,500	37,500	37,500	39,320	33,600	41,485			42,100
Area Harvested (HECTARES)	36,500	36,500	36,500	31,323	31,500	31,321			32,200
Bearing Trees (1000TREES)	16,500	16,500	16,500	17,300	13,926	13,926			14,316
Non-Bearing Trees (1000TREES)	700	700	700	3,500	928	928			3,900
Total No. Of Trees (1000TREES)	17,200	17,200	17,200	20,800	14,854	14,854			18,216
Production (1000 MT)	635	635	635	716	716	716			764
Imports (1000 MT)	0	0	0	0	0	0			0
Total Supply(1000 MT)	635	635	635	716	716	716			764
Exports (1000 MT)	323	323	323	350	351	349			349
Fresh Dom. Consumption (1000MT)	312	312	312	366	365	367			415
For Processing	0	0	0	0	0	0			0
Total Distribution (1000MT)	635	635	635	716	716	716			764

Oranges, Fresh Morocco	2009/2010			2010/2011			2011/2012		
	Market Year Begin: Oct 2009			Market Year Begin: Oct 2010			Market Year Begin: Oct 2011		
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post
Area Planted (HECTARES)	45,700	45,700	45,700	45,283	46,000	45,283			45,500
Area Harvested (HECTARES)	41,000	41,000	41,000	42,416	42,000	42,416			41,200
Bearing Trees(1000TREES)	15,000	15,000	15,000	14,950	15,200	14,950			14,500
Non-Bearing Trees (1000TREES)	1,100	1,100	1,100	955	1,100	955			1,520
Total No. Of Trees (1000TREES)	16,100	16,100	16,100	15,905	16,300	15,905			16,020
Production (1000 MT)	823	823	823	904	904	904			949
Imports (1000 MT)	0	0	0	0	0	0			0
Total Supply (1000MT)	823	823	823	904	904	904			949
Exports (1000)	161	161	161	190	242	175			215

MT)								
Fresh Dom. Consumption (1000MT)	627	627	627	674	627	694		684
For Processing (1000MT)	35	35	35	40	35	35		50
Total Distribution (1000MT)	823	823	823	904	904	904		949

Lemons/Limes, Fresh Morocco	2009/2010			2010/2011			2011/2012		
	Market Year Begin: Oct 2009			Market Year Begin: Oct 2010			Market Year Begin: Oct 2011		
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post
Area Planted (HECTARES)	3,200	3,200	3,200	4,197	3,200	4,345			4,600
Area Harvested (HECTARES)	3,100	3,100	3,100	3,570	3,100	3,570			3,700
Bearing Trees (1000TREES)	1,013	1,013	1,013	1,420	1,013	1,419			1,428
Non-Bearing Trees (1000TREES)	33	33	33	255	33	255			347
Total No. Of Trees (1000TREES)	1,046	1,046	1,046	1,675	1,046	1,674			1,775
Production (1000 MT)	46	46	46	50	46	50			60
Imports (1000 MT)	0	0	0	0	0	0			0
Total Supply (1000 MT)	46	46	46	50	46	50			60
Exports (1000 MT)	6	6	6	7	4	5			7
Fresh Dom. Consumption (1000MT)	40	40	40	43	42	45			53
For Processing (1000MT)	0	0	0	0	0	0			0
Total Distribution (1000MT)	46	46	46	50	46	50			60

Orange Juice Morocco	2009/2010			2010/2011			2011/2012		
	Market Year Begin: Oct 2009			Market Year Begin: Oct 2010			Market Year Begin: Oct 2011		
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post
Deliv. To Processors (MT)	35,000	35,000	35,000	40,000	37,000	40,000			50,000
Beginning Stocks (MT)	0	0	0	0	0	0			0
Production (MT)	3,500	3,500	3,500	4,000	3,700	4,000			5,000
Imports (MT)	1,200	1,200	1,209	1,300	1,300	4,141			3,300
Total Supply (MT)	4,700	4,700	4,709	5,300	5,000	8,141			8,300
Exports (MT)	1,900	1,900	1,930	2,100	2,000	1,915			2,000
Domestic Consumption (MT)	2,800	2,800	2,779	3,200	3,000	6,226			6,300
Ending Stocks (MT)	0	0	0	0	0	0			0

Total Distribution (MT)	4,700	4,700	4,709	5,300	5,000	8,141			8,300
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