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## **Report Name:** Citrus Annual

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**Prepared By:** Carmen Valverde

**Approved By:** Jennifer Clever

### **Report Highlights:**

MY 2019/20 EU citrus production is projected to reach 10 MMT, a 12.7 percent decrease compare to the previous year. Unfavorable weather conditions are expected to significantly lower citrus production in Spain and Italy, the largest producers in the EU. The decline in EU citrus production may lead to an increase in EU imports and a decline in EU exports. Strategic export destinations for EU citrus continue to be Canada, the Middle East, and China. In MY 2018/19, EU imports of U.S. mandarins, grapefruit, and orange juice declined due to higher EU citrus production and competition from other non-EU suppliers. In addition, since the imposition of EU retaliatory in June 2018, U.S. orange juice exports dropped by 80 percent. U.S. tariffs related to the World Trade Organization case against EU aircraft subsidies may impact Spanish exports of clementines and lemons to the United States in MY2019/20.

**Disclaimer:** This report presents the outlook for citrus production, trade, consumption, and stocks for the EU-28. Unless stated otherwise, data in this report are based on the views of Foreign Agricultural Service analysts in the EU-28 and are not official data.

This report would not have been possible without the valuable contributions from the following Foreign Service analysts:

Ornella Bettini FAS/Rome covering Italy  
Dimosthenis Faniadis FAS/Rome covering Greece  
Tania De Belder FAS/USEU Brussels covering EU Policy  
Carmen Valverde FAS/Madrid covering Spain and Portugal

**Harmonized System (HS) Codes:**

Oranges 080510  
Tangerines/Tangerines 080520, 080521, 080522, 080529  
Lemons 080550  
Grapefruits 080540  
Orange Juice 200911, 200912, 200919

**MY Marketing year:**

Oranges	October/September
Tangerines	October/September
Lemons	October/September
Grapefruits	October/September
Orange Juice	October/September

**Abbreviations used in this report:**

CAP	Common Agricultural Policy
CMO	Common Market Organization
EC	European Commission
EU	European Union
FAS	Foreign Agricultural Service
FCOJ	Frozen Concentrated Orange Juice
HA	Hectares
TDM	Global Trade Atlas
MY	Marketing Year
MS	EU Member State
MT	Metric ton (1,000 kg)
MMT	Million Metric Tons
PS&D	Production, Supply and Demand
\$	U.S. Dollar

## Decline in EU Citrus Production Expected to Prompt Greater Imports

### 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 MY2019/20 (October/September), Post expects overall citrus production to decline mainly in Spain and Italy due to unfavorable weather conditions. The quality of the fruit is forecast to be excellent and EU domestic consumption of citrus may also decrease in MY 2018/19 in line with EU total citrus supply. Spanish citrus production is expected to drop 19 percent to 6.1 MMT. Similarly, Italian citrus production is anticipated to drop 20 percent to 2 MMT.

For MY 2019/20, EU orange production is forecast at 5.8 MMT, 10 percent lower than MY 2018/19. Lower production is expected in the major EU orange producers, Spain and Italy, due to unfavorable weather conditions with heavy rains in the spring and fall. In addition, orange planted area in both Spain and Italy continue on a downward trend while orange planted area in Greece and Portugal continue to rise. Correspondingly, orange juice production in the EU is forecast to go down 16 percent compared to the previous year at 81,010 MT. This is in line with the expected volume of EU oranges destined for processing in MY 2019/20. In MY 2019/20, EU-28 tangerine production is forecast to decrease 17.7 percent to 2.6 MMT. This drop is supported by expected lower production in key areas in Spain and in Italy. Over the last nine years, as citrus farms increased productivity, total EU orange planted area has shrunk almost 13 percent and total tangerine planted area 8 percent.

Similarly, for MY 2019/20 EU lemon production is forecast to decrease 12.6 percent to 1.4 MMT. EU grapefruit production is also forecast to decline 17.5 percent to 89,000 MT, due to the expected strong decline in Spain, EU's major lemon and grapefruit producer. However, in the last nine years, total EU lemon and grapefruit planted area has grown 8 percent.

Although, Spanish citrus production is primarily exported to other EU countries, the EU is a net importer of citrus. Major non-EU citrus suppliers are South Africa, North Africa and South America. Due to the rise of EU's citrus imports from third countries, in February 2019, the Spanish Young Farmers Association organized the "Orange Vests" protest at the headquarters of the European Commission in Madrid ([see GAIN Report](#)). Spanish citrus producers maintain that the growing EU citrus imports from South Africa and other North African suppliers has lowered prices in the European market to the detriment of the Spanish sector. As a result, the Spanish Ministry of Agriculture and the sector agreed on 16 basic [measures](#) (in Spanish only) to address these concerns and to also encourage the sector to get better organized. For MY 2019/20, as a result of the decline in EU citrus production, EU imports of citrus are expected to grow.

EU citrus export destinations are mainly Switzerland, Norway, and Canada, with a recent significant rise in exports to China. EU citrus exports are expected to continue their upward trend in strategic markets such as Canada, Middle East and China. In addition, in late May 2019, Portugal signed a protocol with China in order to harmonize procedures and open the Chinese market for several fruit products, including oranges from Algarve. U.S. tariffs related to the World Trade Organization (WTO) case against EU aircraft subsidies may impact EU citrus exports to the United States, mainly Spanish clementines and lemons.

Regarding EU orange juice imports, since June 2018, the European Union has imposed additional [tariffs](#) on select U.S. agricultural products, in retaliation for the U.S. implementation of its Trade Enhancement Act's Section 232 on steel and aluminum. Among the affected U.S. agricultural products, exports of U.S. orange juice have been heavily impacted, dropping 80 percent since June 2018.

In addition, on October 2019, the founding of the new World Citrus Organization (WCO) was announced in Madrid. The WCO will act as the global platform for dialogue and action between citrus producing countries worldwide. WCO is led by Ailimpo, the Spanish Lemon and Grapefruit Association, and the Citrus Growers' Association of Southern Africa (CGA).

## Commodities

### 2. ORANGES

**Table 1: Production, Supply, and Demand (MT)**

Oranges, Fresh Market Begin Year European Union	2017/2018		2018/2019		2019/2020	
	Oct 2017		Oct 2018		Oct 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	282,921	280,924	280,549	278,449		277,727
Area Harvested	264,071	259,979	260,289	259,193		257,799
Bearing Trees	0	0	0	0		0
Non-Bearing Trees	0	0	0	0		0
Total No. Of Trees	0	0	0	0		0
Production	6,269	6,270	6,525	6,505		5,842
Imports	1,084	1,042	1,050	1,012		1,050
Total Supply	7,353	7,312	7,575	7,517		6,892
Exports	318	324	325	357		300
Fresh Dom. Consumption	5,781	5,834	5,887	5,911		5,547
For Processing	1,254	1,154	1,363	1,249		1,045
Total Distribution	7,353	7,312	7,575	7,517		6,892

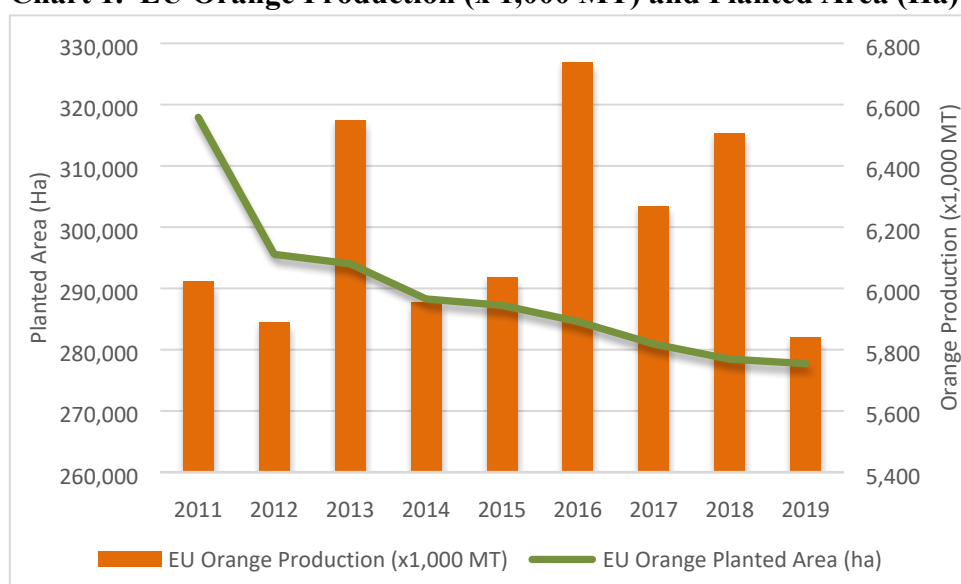
(HECTARES) ,(1000 TREES) ,(1000 MT)

Sources: FAS Madrid

## PRODUCTION

EU orange production is concentrated in the Mediterranean region. Spain and Italy represent 80 percent of the EU's total orange production. The remaining 20 percent is distributed among other Member States (MS), such as Greece and Portugal. For MY 2019/20 (October/September), EU orange production is forecast at 5.8 MMT, 10 percent lower than MY 2018/19. The expected EU orange production is 5.7 percent lower than the nine-year average orange production of 6.2 MMT. Lower production is expected mainly in Spain and Italy due to unfavorable weather conditions with heavy rains in the spring and fall. In addition, the orange planted areas in Spain and Italy continue on a downward trend (see Chart 1).

**Chart 1. EU Orange Production (x 1,000 MT) and Planted Area (Ha)**



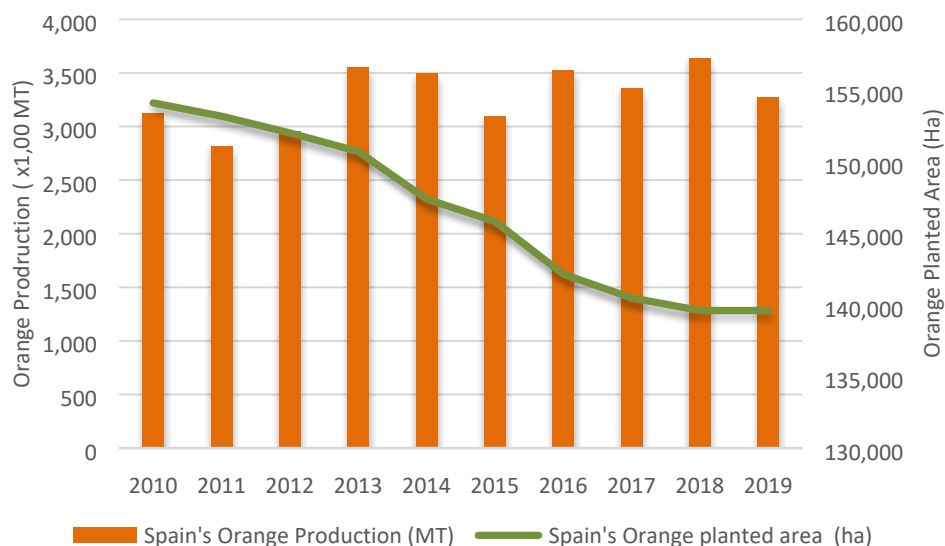
Source: FAS Madrid

Spain is the sixth global citrus producer and first global citrus exporter mainly oranges, mandarins, and lemons. Twenty percent of Spain's citrus production is destined for domestic fresh consumption, 18 percent for citrus processing and 60 percent for exports.

Spain is the primary orange producer in the EU. According to official data, Spain's MY 2019/20 orange production is forecast at 3.2 MMT, a 10 percent decline compared to the previous season. Despite its downward trend since 2011, Spanish orange planted area held steady in MY2017/18. The reduction in Spanish orange production is due to unfavorable conditions in Spain's main orange production regions of Valencia and Andalusia, affected by heavy rains during the fall in 2019 and high temperatures before summer 2019. Spanish fruit quality and size are expected to be good.

Over the last decade, Spain has reduced its orange planted area by nine percent. In 2019, Spanish planted area for oranges stood at 139,630 ha, the highest orange planted area in the EU. It is worth noting that after several consecutive years of economic slowdown, citrus farmers left orange production for more profitable products such as persimmons and avocado. Nevertheless, the productivity and performance of Spanish orange farms, and the use of efficient varieties have kept Spain as the top orange producer and exporter in the EU (see Chart 2).

**Chart 2. Spain's Orange Production (x 1,000 MT) and Orange Planted Area (Ha)**



Source: FAS Madrid with Eurostat data

Accounting for approximately 90 percent of the Spanish orange production, Valencia and Andalusia are Spain's major orange producing regions. Spanish producers try to supply the market throughout the whole marketing year by growing both *early* and *late* varieties to extend the fruit availability. *Naveline*, *Navel*, *Navelate*, *Salustiane*, *Valencia* and *Sanguinello* are the leading orange varieties grown in Spain.

Italy is the second largest European orange producer after Spain. Italy's main orange producing areas are Sicily accounting for 63 percent of total production and Calabria accounting for 19 percent. *Tarocco*, *Moro*, *Sanguinello*, *Naveline*, and *Valencia* are the leading orange varieties grown in the country. Moreover, *Ippolito* and *Meli* cultivars are gaining popularity. Italy's MY 2019/20 is forecast to drop by 19 percent from the previous season due to low temperatures and heavy rains in May affecting flowering. In addition, exceptionally high temperatures in June support the lower forecast. Quality is expected to be very good.

Greece's MY 2019/20 (October /September) orange production is expected to remain flat compared to the previous year. For *Navelina* variety the yields are lower due to adverse weather conditions during fruit setting; however, higher yields in *Commons* variety are expected to compensate the loss. Quality is expected to be very good. Peloponnese and Etoloakarnania (western Greece) are the main orange-

producing areas. *Washington Navel*, *Commons*, *Skaggs Bonanza*, *Navelina*, *New Hall*, *Lanelate*, and *Valencia* are the chief varieties grown in Greece.

Over the last decade, Portugal has increased its orange production with more efficient and irrigated citrus farms. Orange production in Portugal is mainly located in Algarve, the southern region. According to official data, in MY2019/20, Portuguese production is expected to grow 0.8 percent at 347,000 MT compared to previous period due to favorable weather conditions and the addition of new citrus trees in production. According to Portuguese official data, the expected Portuguese citrus production for MY2019/20 is the highest level reached on record since 1986, accounting 404,000 MT of total Portuguese citrus production.

In late May 2019, Portugal signed a protocol with China in order to harmonize and streamline export procedures to expand Portuguese agricultural exports. The Portuguese Ministry of Agriculture, Forestry and Rural Development is now working on several fruit products, including oranges from Algarve. According to the Ministry, negotiations are already well advanced. The Portuguese Administration has identified increasing Portuguese food products to non-EU countries as one of its priorities ([see GAIN Report](#)).

**Table 2. EU Fresh Orange Production by Country and Year (MT)**

Country	MY 2017/18	MY 2018/19	MY 2019/20
Spain	3,369,000	3,639,000	3,274,600
Italy	1,621,000	1,592,000	1,280,000
Greece	960,925	910,125	920,000
Portugal	299,000	344,000	347,000
Cyprus	20,170	20,380	20,000
<b>Total Production</b>	<b>6,270,095</b>	<b>6,505,505</b>	<b>5,841,600</b>

Source: FAS offices

## CONSUMPTION

In the EU oranges are mainly consumed fresh. Late varieties are destined for both the processing and fresh markets. Due to a decrease in production, fresh and processed consumption may decline in MY 2019/20. Spain's per capita orange consumption is estimated at approximately 20 kg. In Spain, most oranges are consumed fresh, especially *Navelina* and *Navelate* varieties. *Valencia Late* varieties are predominantly used for processing. In Italy, blood varieties (*Tarocco*, *Moro*, and *Sanguinello*) are used

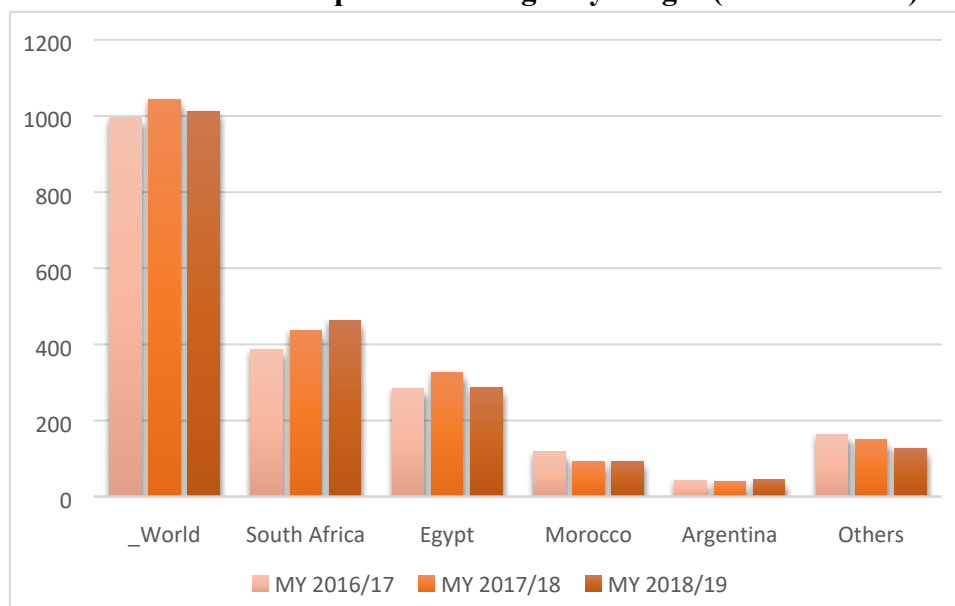
primarily for fresh consumption. Late varieties (*Ovale* and *Valencia*) are destined to both the processing and fresh markets. Greece’s orange consumption is expected to remain flat. Over the last five years, Portuguese domestic citrus consumption has increased 8 percent.

Approximately 18 percent of EU orange production goes into processing. In MY 2019/20, oranges for processing, mainly into orange juice, are expected to decline 16 percent compared to previous period because of the drop in EU orange production. Spain is the major orange processor in the EU, and around 20 percent of Spanish orange production are used for processing. In Spain, there are more than 30 citrus processors for both domestic and international markets.

## TRADE

The EU is a net importer of oranges. According to TDM, during MY 2018/19, following a significant rise in EU orange production, the EU imported 1,012,294 MT of oranges, 3 percent lower compared to previous period. This import volume was three percent lower compared to the previous season and valued at \$722 million (see Chart 3). South Africa and Egypt remain the leading orange supplier to the EU. Other important suppliers are Morocco and Argentina. EU orange imports from South Africa continue trending upward. Imports of non-EU oranges are entering through the Netherlands, the United Kingdom, and Portugal. EU orange imports in MY 2019/20 are likely to increase due to the expected decline in EU orange production.

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



Source: TDM

Spain is the major citrus supplier to the EU. Spain’s orange exports are 90 percent destined to other EU markets and 10 percent to non-EU countries. Due to the rise of EU imports of oranges from third

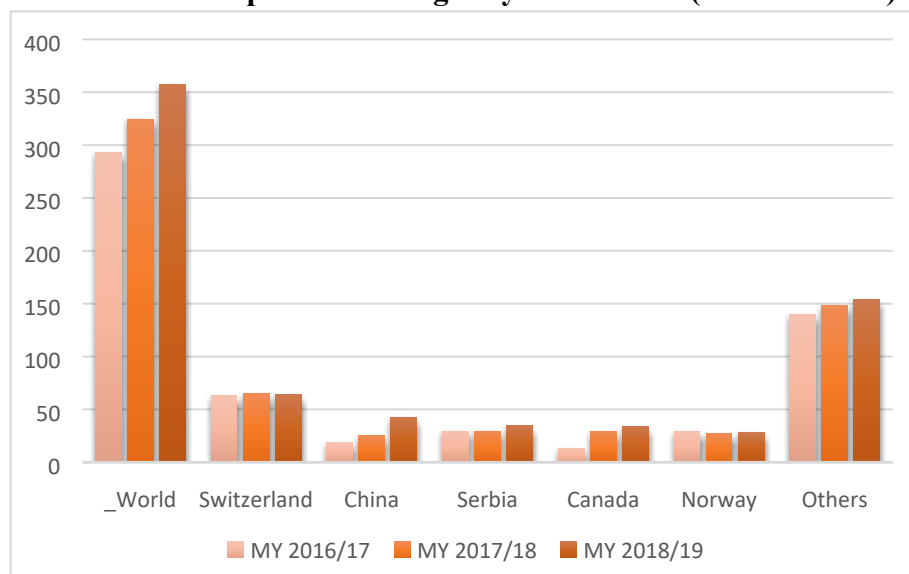


countries, on February 19, 2019, ASAJA, the Spanish Young Farmers Association, organized a protest at the headquarters of the European Commission in Madrid. The protesters demanded the EU enforce tariffs on South African citrus entering the European market. Spanish citrus producers maintain that the growing influx of citrus imports from South Africa and other African suppliers has lowered prices in the European market to the detriment of their sector. Another similar protest took place on February 25. As the Spanish citrus sector restructures, the Ministry of Agriculture and the sector agreed on 16 basic measures aimed to adjust the citrus supply, improving the sector’s structure, promoting export markets to revitalize the citrus market, and to guarantee its future. The Spanish Ministry of Agriculture has taken [steps](#) (in Spanish only) to address these concerns but has also encouraged the sector to “get better organized” in order to improve their margins ([see GAIN Report](#)).

According to TDM, during MY 2018/19, the volume of EU orange exports rose 10 percent to 356,942 MT and valued at \$287 million. Main export destinations are Switzerland, China, Serbia, Canada, and Norway (see Chart 4). In MY 2018/19, EU orange exports to China jumped 66 percent and 16 percent to Canada. The Middle East and Brazil are also growing markets for EU orange exports. EU orange exports to these new markets are mainly shipped from Spain.

On August 7, 2014, the Russian government banned a range of agricultural and food products, including fresh citrus, from the United States, the EU, Canada, Australia, and Norway (see Policy Section). This resulted in a total loss of \$34 million in EU orange exports to Russia since 2013. To compensate for the loss of the Russian market, the EU has reoriented their orange exports to new markets such as Canada, China, and Middle East. In MY 2019/20, EU orange exports are forecast to lower due to the expected shorter supplies of EU orange.

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



Source: TDM

Spain is the major European orange producer and exporter of oranges within the EU, exporting a total 1.7 MMT in MY 2018/19 valued at \$1.2 billion. The main market is the EU, with 85 percent of their total exports of oranges, mainly to Germany, France, the Netherlands, Italy, and the United Kingdom. Over the last five years, exports of Spanish oranges to China have experienced significant increases due to higher citrus demand in the Asian country. In MY 2018/19, China became the first non-EU market for Spanish oranges. Similarly, Spanish exports of oranges to Canada continue trending upward and this trend is expected to continue in MY 2019/20. Given the expected decrease in Spanish orange production during MY 2019/20, Spanish orange exports may slightly decrease in the next marketing year.

## **Orange Juice**

**Table 3: Production, Supply, and Demand (Brix 65)**

Orange Juice Market Begin Year	2017/2018		2018/2019		2019/2020	
	Oct 2017		Oct 2018		Oct 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Deliv. To Processors	1,254,000	1,154,000	1,363,000	1,249,000		1,045,000
Beginning Stocks	15,000	15,000	15,000	15,000		15,000
Production	97,213	89,460	106,120	96,825		81,010
Imports	695,499	704,474	690,000	657,637		670,000
Total Supply	807,712	808,934	811,120	769,462		766,010
Exports	55,494	58,273	60,000	59,776		58,000
Domestic Consumption	737,218	735,661	736,120	694,686		693,010
Ending Stocks	15,000	15,000	15,000	15,000		15,000
Total Distribution	807,712	808,934	811,120	769,462		766,010
(MT)						

Source: FAS Madrid

## **PRODUCTION**

For MY 2019/20, EU orange juice production is forecast at 81,010 MT, a decline of 16 percent compared to the previous year and in line with the expected volume of EU oranges destined for processing in MY 2019/20. As Spain is the leading orange juice processor in the EU, lower Spanish orange production will lead to decreased overall volume for processing. Italy also expects to utilize less oranges for processing due to its shortage of orange supplies. The total volume of oranges channeled to processing depends on the crop quality and quantity of oranges destined for the fresh markets at home and abroad.

## **CONSUMPTION**

While orange juice is the most popular juice within the EU, it competes with other non-alcoholic drinks and other fruit juices. In recent years, such competition has effectively reduced consumption of orange juice in the EU. In MY 2019/20, EU orange juice consumption is forecast to continue on this downward trend. Fourteen countries within the EU, including Spain, are developing a promotional season called “[\*Fruit Juice Matters\*](#)” to improve consumer perception and encourage fruit juice consumption.

## TRADE

The EU is a net importer of orange juice. According to TDM, during MY 2018/19, the EU imported 657,637 MT of orange juice, valued at \$1.37 billion. Brazil is the leading supplier to the EU market, representing nearly 88 percent of total imports, followed by Mexico, South Africa, and Egypt. The United States used to be the third largest orange juice supplier to the EU. However, since 2015, EU orange juice imports from the U.S. have gone down due to higher EU orange juice production but also as a direct impact of EU retaliatory tariffs on steel and aluminum. In MY 2018/19, the volume of EU imports of U.S. oranges dropped 77 percent compared to the previous period to 1,200 MT and valued at \$ 2.6 million (see Table 4).

During MY 2018/19, Post expects EU imports of orange juice to grow as a result of the expected decline in EU orange juice production.

**Table 4: EU Imports of Orange Juice by Origin in U.S. Dollars (Brix 65)**

Country of Origin	MY 2016/17	MY 2017/18	MY 2018/19
Brazil	1,230,903,849	1,290,650,895	1,201,110,552
Mexico	90,826,944	61,688,204	72,704,085
South Africa	10,578,736	9,033,135	24,127,651
Egypt	10,529,077	14,301,412	16,367,625
Israel	11,898,289	14,034,014	11,828,667
Argentina	7,202,507	5,399,288	8,361,895
Costa Rica	5,826,909	7,366,673	5,299,925
Morocco	5,389,360	3,718,217	4,860,618
Turkey	8,997,580	9,200,924	4,827,801
Belize	3,948,415	4,511,204	3,741,522
Ghana	6,136,760	6,490,608	2,756,951
United States	34,020,919	8,669,794	2,629,243
Others	13,063,394	13,485,708	10,463,734
World	1,439,322,739	1,448,550,076	1,369,080,269

Source: TDM

In MY 2018/19, the EU exported 59,776 MT of orange juice, valued at \$149 million. Main export destinations are Switzerland, Saudi Arabia, Norway, Japan, South Korea, and China (see Table 5). In addition, in MY 2018/19 EU orange juice exports to the United States reached 2,596 MT and were valued at \$6.7 million. In MY 2019/20, EU orange juice exports are expected to decrease in line with the decline in the EU orange production.

**Table 5: EU Exports of Orange Juice by Destination in U.S. Dollars (Brix 65)**

Country of Destination	MY 2016/17	MY 2017/18	MY 2018/19
Switzerland	21,453,026	17,885,669	19,420,486
Saudi Arabia	11,316,876	12,678,640	14,464,211
Norway	12,759,889	13,130,092	11,362,597
Japan	11,725,835	13,909,589	10,194,249
South Korea	9,355,175	8,667,995	9,778,919
China	6,747,623	10,248,903	8,009,097
United States	8,351,413	6,323,125	6,786,108
Others	75,836,239	67,492,656	69,168,793
World	157,546,076	150,336,669	149,184,460

Source: TDM

## Tangerines/Mandarins

**Table 6: Production, Supply, and Demand (MT)**

Tangerines/Mandarins, Fresh Market Begin Year	2017/2018		2018/2019		2019/2020	
	Oct 2017		Oct 2018		Oct 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Area Planted	155,506	155,506	154,987	155,464		155,915
Area Harvested	142,129	142,131	142,760	142,656		142,707
Bearing Trees	0	0	0	0		0
Non-Bearing Trees	0	0	0	0		0
Total No. Of Trees	0	0	0	0		0
Production	2,942	2,913	3,438	3,213		2,643
Imports	483	483	480	483		500
Total Supply	3,425	3,396	3,918	3,696		3,143
Exports	217	217	235	246		245
Fresh Dom. Consumption	2,893	2,953	3,328	3,095		2,694
For Processing	311	226	355	355		204
Total Distribution	3,425	3,396	3,918	3,696		3,143
(HECTARES) ,(1000 TREES) ,(1000 MT)						

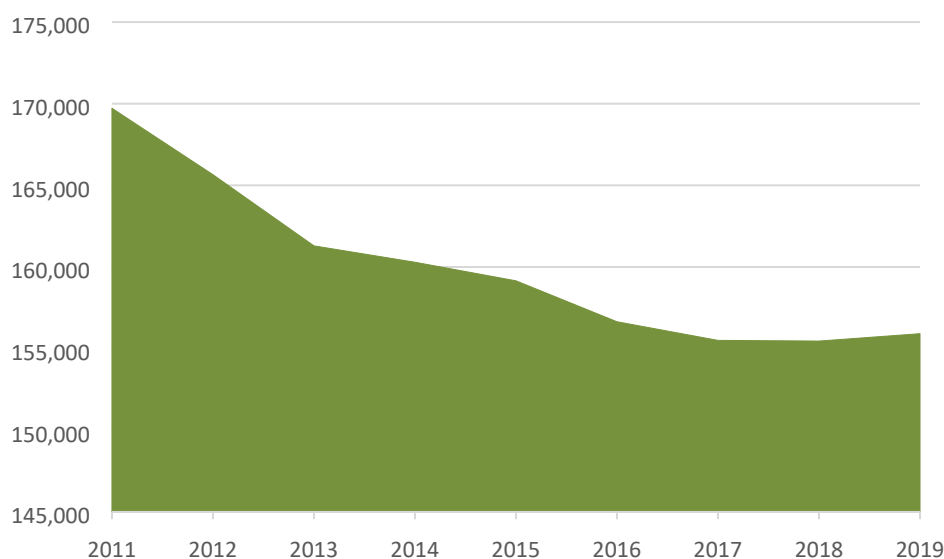
Source: FAS Offices

## PRODUCTION

MY 2019/20 EU tangerine production is forecast to lower 17.7 percent compared to the previous year, to 2.6 MMT. The expected EU tangerine production is 15 percent lower than the nine-year average tangerine production of 3.1 MMT. Unfavorable weather conditions with heavy rains in spring and fall in the EU major tangerine producers, Spain and Italy, account for the expected lower production. Fruit quality is forecast to be excellent.

In the last nine years, EU has reduced its tangerine planted area by eight percent (see Chart 5). In MY 2019/20, the EU tangerine planted area may stand at 155,915 ha. During 2011-2018 period, Spain, the major EU tangerine producer, decreased its tangerine planted area by 10.5 percent. In 2018, Spanish tangerine area stood at around 108,000 ha.

**Chart 5. MY 2011-2019 EU tangerine Planted Area (Ha)**



Source: FAS Madrid

According to the latest data from the Spanish Ministry of Agriculture, Fisheries, and Food (MAPA), Spain's MY 2019/20 tangerine production is forecast to decline sharply to approximately 2 MMT. Nevertheless, fruit quality is expected to be very good. Spain's main tangerine-producing areas are the Regions of Valencia, Andalusia, and Catalonia. Spain continues to develop new *early* and *late* varieties to extend fruit availability.

Italy's main tangerine-producing areas are Calabria accounting for 53 percent of total production, Sicily accounting for 20 percent, and Apulia with 15 percent. *Comune* or *Oroval* and *Monreal* are the leading clementine varieties grown in the country. *Avana* and *Tardivo di Ciaculli* are the chief tangerine cultivars. Italy's MY 2019/20 tangerine production is forecast to drop by 32 percent from the previous season due to low temperatures and heavy rains in May that affected flowering. In addition, exceptionally high temperatures in June support the lower forecast. Quality is expected to be very good.

Greece's MY 2019/20 tangerine production is expected to remain flat compared to the previous year. The main producing areas include Igoumenitsa, Arta, Mesologgi, and Thesprotia, located in West Greece and Laconia in Peloponnese. *Clementine* is the major tangerine variety grown in Greece; new plantings include *Nova*, *Page* and *Ortanique* varieties. Meanwhile, according to Portuguese official data, the tangerine production in Portugal for MY 2019/20 is expected to remain unchanged.

**Table 7: EU Fresh Tangerine Production by Country and Year (MT)**

Country	MY 2017/18	MY 2018/19	MY 2019/20
Spain	1,967,000	2,385,000	2,000,000
Italy	697,000	577,000	390,000
Greece	174,703	176,881	178,000
Portugal	40,000	40,000	40,000
Cyprus	35,000	35,000	35,000
<b>Total Production</b>	<b>2,913,703</b>	<b>3,213,881</b>	<b>2,643,000</b>

Source: FAS  
Madrid

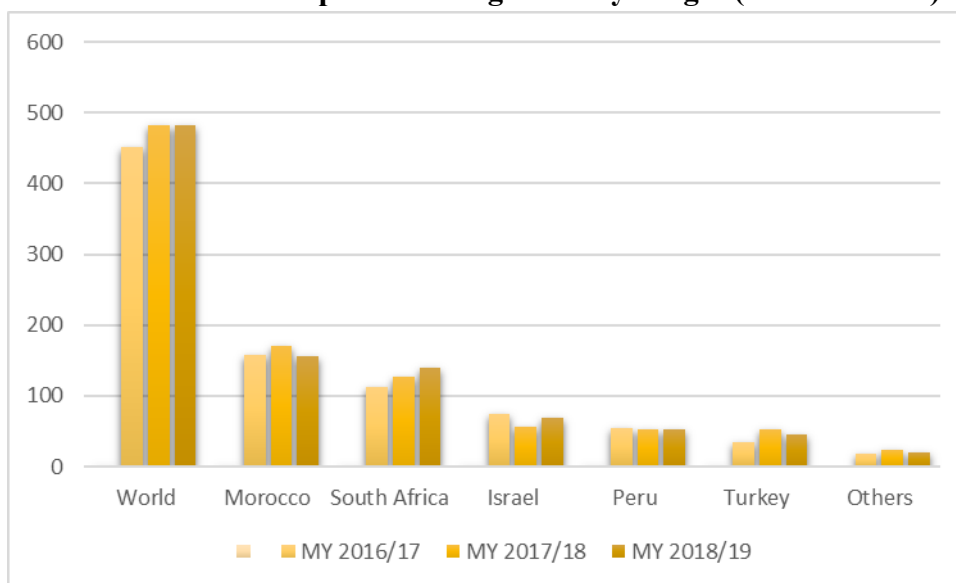
## CONSUMPTION

EU tangerine are mainly consumed fresh. In MY 2019/20, EU fresh tangerines destined for consumption and processing are forecast to decrease in line with the drop in production. Spain is the major consumer of tangerines in the EU for both fresh and processing. Italy and Portugal also consume large quantities of clementines and tangerines. Greece also consumes fresh clementines mainly along the west coast.

## TRADE

The EU is a net importer of tangerines. According to TDM, during MY 2018/19, EU imports of tangerines stabilized to 482,708 MT, valued at \$535 million. South Africa and Morocco continue to be the leading suppliers to the EU market, followed by Israel, Peru, and Turkey (See Chart 6). In MY 2018/19, imports from the United States decreased 22 percent in volume and were valued at \$6 million due to increased competition from South Africa and Israel. As a result of the estimated reduction in EU tangerine production for MY 2019/20, EU imports of tangerine are expected to grow.

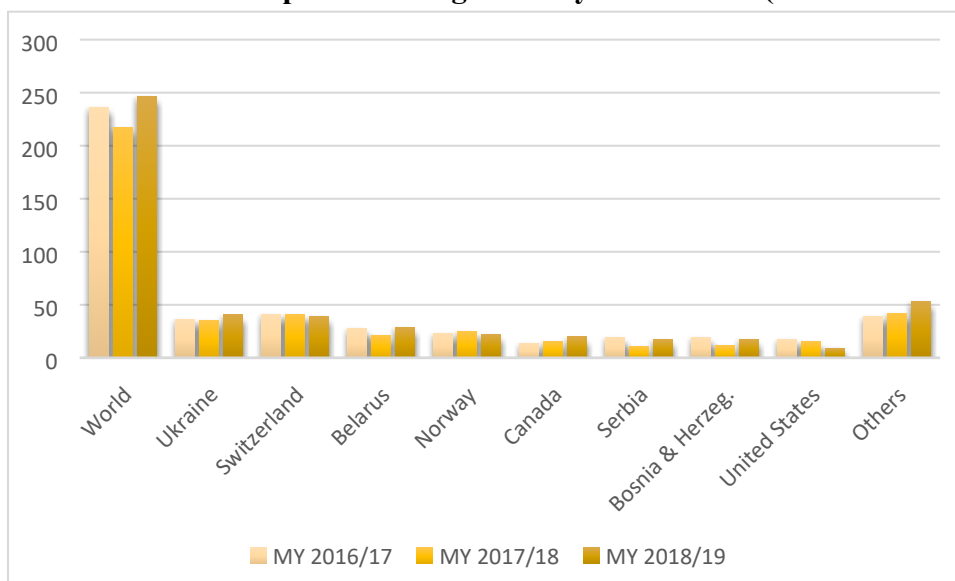
**Chart 6. MY EU Imports of Tangerines by Origin (thousand MT)**



Source: TDM

During MY 2018/19, the EU exports of tangerines rose 13.5 percent to 246,410 MT, valued at \$ 221 million. EU's main export market destinations are Ukraine, Switzerland, Belarus, Norway, and Canada (see Chart 7). In MY 2018/19, exports to the United States, mainly from Spain, continued trending downward decreasing 39 percent to 9,283 MT and valued at \$8 million. Over the last decade, Spanish clementine exports to the United States dropped 85 percent due to increasing competition from South America, Morocco and South Africa. In addition, U.S. tariffs related to the WTO case against EU aircraft subsidies, imposed on October 18, 2019, resulted in the suspension of shipments of Spanish clementines from the port of Castellon to the United States. New alternative markets in third countries such as Canada, Serbia, Middle East, Brazil, and China continue to grow. Also, due to the Russian ban, EU tangerine exports to Russia plummeted \$106 million since 2013. EU tangerines exports in MY 2019/20 are forecast to remain flat despite the expected reduction of EU tangerine production, to maintain the growing markets outside the EU mainly shipped from Spain, the EU's leading tangerine exporter.

**Chart 7. MY EU Exports of Tangerines by Destination (thousand MT)**



Source: TDM

In MY18/19, Spanish exports of tangerines increased 8 percent to 1,487,838 MT, valued at \$1.4 billion. Ninety-three percent of these exports were sent to other EU Member States. Canada, the Middle East, Brazil, and China continue to be important new strategic markets for Spanish tangerine exports. Due to the Russian ban imposed since 2013, Spain lost \$37 million of tangerine exports to Russia.



## Lemons

**Table 8: Production, Supply, and Demand (MT)**

Lemons/Limes, Fresh Market Begin Year	2017/2018		2018/2019		2019/2020	
	Oct 2017		Oct 2018		Oct 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Area Planted	75,912	75,419	75,666	77,128		77,743
Area Harvested	65,762	65,762	66,129	65,762		66,653
Bearing Trees	0	0	0	0		0
Non-Bearing Trees	0	0	0	0		0
Total No. Of Trees	0	0	0	0		0
Production	1,472	1,472	1,617	1,684		1,471
Imports	610	610	600	545		600
Total Supply	2,082	2,082	2,217	2,229		2,071
Exports	65	65	80	82		80
Fresh Dom. Consumption	1,735	1,785	1,811	1,894		1,767
For Processing	282	232	326	253		224
Total Distribution	2,082	2,082	2,217	2,229		2,071

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

Source:FAS Madrid

## PRODUCTION

MY 2018/19 EU lemon production is forecast to decrease 12.6 percent (see Chart 8). The overall decline is due to unfavorable weather conditions and lower production in Spain, the largest EU lemon producer. According to the latest data from the Spanish Ministry of Agriculture, Fisheries, and Food (MAPA), Spain's MY 2019/20 lemon production is forecast at 960 million MT, a decrease of 16.4 percent compared to the previous year. In addition, in recent years, Spain has increased its total planted area for lemons. Fruit quality is forecast to be very good. According to Spanish lemon industry *Fino* lemon is expected to decrease by 11 percent. *Verna* lemon is expected to also drop by 24 percent. Spain will continue to consolidate its leading commercial position in Europe with quality and phytosanitary guarantees. Following Argentina, Spain is the second largest lemon producer in the world but the first global exporter of lemons for fresh consumption. Spanish lemon production is concentrated in the regions of Murcia and Valencia, and the Provinces of Malaga and Almeria in Andalusia. *Fino* and *Verna* are the leading lemon varieties grown in Spain, accounting for 70 and 30 percent of the total production, respectively. The *Fino* variety is predominantly used for processing.

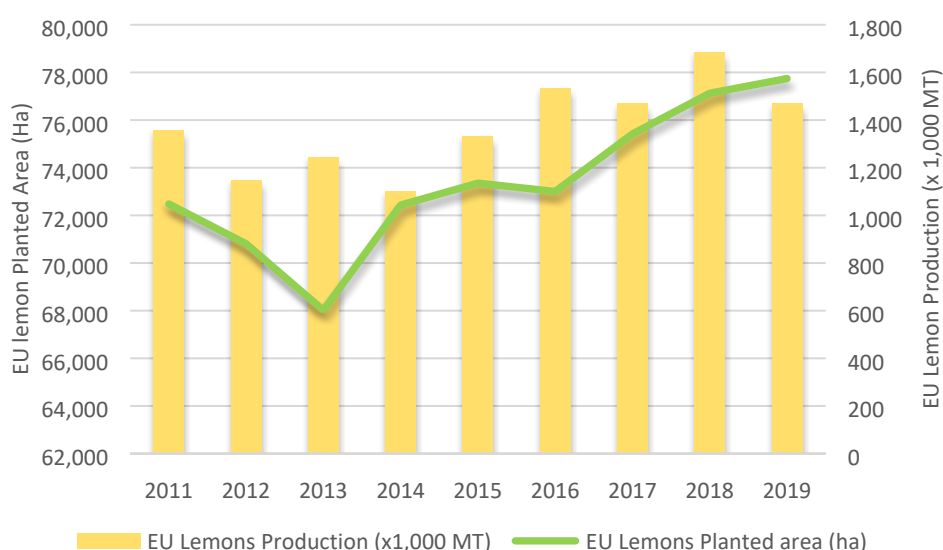
Italy is the second largest European lemon producer after Spain. Sicily is the main lemon-producing area, accounting for 88 percent of domestic production. *Femminello Siracusano*, *Lunario*, *Interdonato*, *Limone di Sorrento*, and *Limone di Procida* are the leading lemon varieties grown in the country.

Italy's MY 2019/20 lemon production is forecast to decrease 5.7 percent compared to the previous year due to heavy rains in spring that affected flowering. However, quality is forecast to be very good.

Greece's MY 2019/20 lemon production is expected to remain flat. The main lemon-producing areas include the prefectures of Achaia, Korinthos, Crete, and Laconia, located in southern Greece. The major lemon variety grown in Greece is *Maglini*, whose fruit is strongly aromatic, with quite a bitter juice. The early varieties *Interdonato* and *Eureka* are also grown in Greece.

Portuguese official data reflects that lemon production will increase slightly in MY 2019/20 with normal fruit sizes and quality.

**Chart 8. MY EU Fresh Lemons Production (MT)**



Source: FAS Madrid

**Table 9: EU Fresh Lemons Production by Country and MY (MT)**

Country	MY 2017/18	MY 2018/19	MY 2019/20
Spain	928,000	1,150,000	960,000
Italy	435,000	424,000	400,000
Greece	85,000	88,258	88,000
Portugal	16,000	16,000	17,000
Cyprus	8,000	6,000	6,000
<b>Total Production</b>	<b>1,472,000</b>	<b>1,684,258</b>	<b>1,471,000</b>

Source: FAS  
Offices

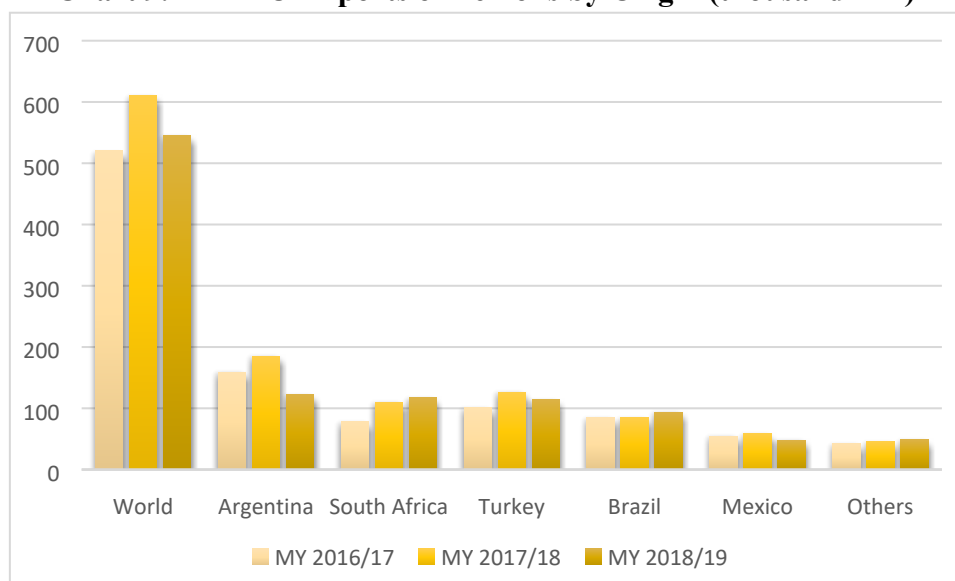
## CONSUMPTION

EU lemons are mainly consumed fresh. In MY 2019/20, EU fresh lemon consumption and lemons for processing are forecast to decrease in line with the decline in EU lemon production. EU per capita lemon consumption stands at 3 kg. According to industry sources, Spain has become the second global producer of processed lemons. Spanish lemon industry estimates that between 20 to 25 percent of Spanish lemon production is destined for processing. Greece has become increasingly reliant on imported lemon juice to meet consumer demand for soft drinks.

## TRADE

The EU is a net importer of lemons. During MY 2018/19, the EU imported 545,578 MT of lemons or 10 percent less due to the increase in EU lemon production during that season. By value, EU imports declined 29 percent to \$573 million compared to previous year. Argentina, South Africa, Turkey, and Brazil continue to be the leading suppliers to the EU market, followed by Mexico (see Chart 9). Given the expected decline in EU lemon production in MY 2019/20, EU imports of lemons are expected to rise.

**Chart 9. MY EU Imports of Lemons by Origin (thousand MT)**

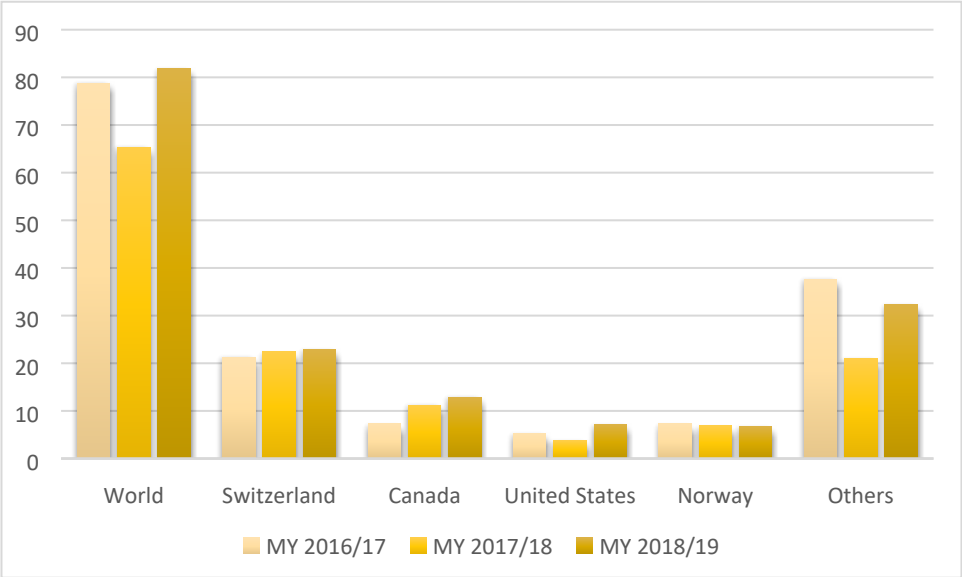


Source: TDM

During MY 2018/19, the EU exported 81,952 MT of lemons, 25 percent more due to a growth in total supply. Exports were valued at \$106 million remaining flat compared to previous period. Main export destinations are Switzerland, Canada, United States, and Norway. In MY2018/19, EU lemon exports to the United States, mainly from Spain, strongly rose 86 percent to 7,197 MT becoming the third EU's lemon export destination and valued at \$9 million (see Chart 10). In addition, U.S. aircraft-related tariffs will impact Spanish lemon exports to the United States. In MY 2018/19, Spanish lemon exports

rose 12 percent and amounted 697,937 MT valued at \$787. Spanish strategic lemon markets outside the EU continue to be Switzerland, Canada, United States, Middle East and Brazil. Spanish lemon industry expects to at least maintain lemon exports in MY 2019/20 despite the decline in lemon production.

**Chart 10. MY EU Exports of Lemons by Destination (thousand MT)**



Source: TDM

It is also important to note that on October 2019 the founding of the World Citrus Organization, WCO was announced at the Fruit Attraction Fair in Madrid. The WCO will act as the global platform for dialogue and action between the citrus producing countries worldwide. WCO is led by Ailimpo, the Spanish Lemon and Grapefruit Association, and the Citrus Growers’ Association of Southern Africa (CGA). So far, the Northern Hemisphere countries that have committed to the World Citrus Organization are Spain, Morocco, Italy, Israel, Portugal, Egypt and the United States - which will likely have a representative from California and Florida. From the Southern Hemisphere, South Africa, Argentina, Australia, Peru, and Chile have committed to the WCO. There are also discussions taking place with other countries including Mexico, Greece, Turkey and Brazil.

## Grapefruit

**Table 10: Production, Supply, and Demand (MT)**

Grapefruit, Fresh Market Begin Year European Union	2017/2018		2018/2019		2019/2020	
	Oct 2017		Oct 2018		Oct 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	3,157	3,157	3,111	3,332		3,332
Area Harvested	2,817	2,817	2,831	2,894		2,894
Bearing Trees	0	0	0	0		0
Non-Bearing Trees	0	0	0	0		0
Total No. Of Trees	0	0	0	0		0
Production	107	107	110	108		89
Imports	373	374	370	323		375
Total Supply	480	481	480	431		464
Exports	17	17	17	16		15
Fresh Dom. Consumption	443	447	444	394		434
For Processing	20	17	19	21		15
Total Distribution	480	481	480	431		464

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

Source: FAS Offices

## **PRODUCTION**

MY 2019/20 EU grapefruit production is forecast to go down 17.5 percent compared to previous season to 89,000 MT. A projected decrease in Spanish production, EU's main grapefruit producer, accounts for the drop in total EU production. According to the Spanish grapefruit industry, Spain's MY 2019/20 grapefruit production is forecast to decline 26 percent to 60,740 MT due to unfavorable weather conditions. Leading grapefruit producing areas include the Regions of Murcia, Andalusia, and Valencia. *Ruby Red* is the main grapefruit variety planted in Spain. Cyprus is the second largest grapefruit producer in the EU. *White Marsh Seedless*, mostly grown in the Limassol area, is the leading Cypriot grapefruit variety.

**Table 11: EU Fresh Grapefruit Production by Country and Year (MT)**

<b>Country</b>	<b>MY 2017/18</b>	<b>MY 2018/19</b>	<b>MY 2019/20</b>
Spain	78,000	81,000	60,740
Cyprus	21,000	19,000	20,000
Italy	4,833	5,160	5,160
Greece	2,941	3,051	3,000
Portugal	200	210	260
<b>Total Production</b>	<b>106,974</b>	<b>108,421</b>	<b>89,160</b>

Source: FAS  
Offices

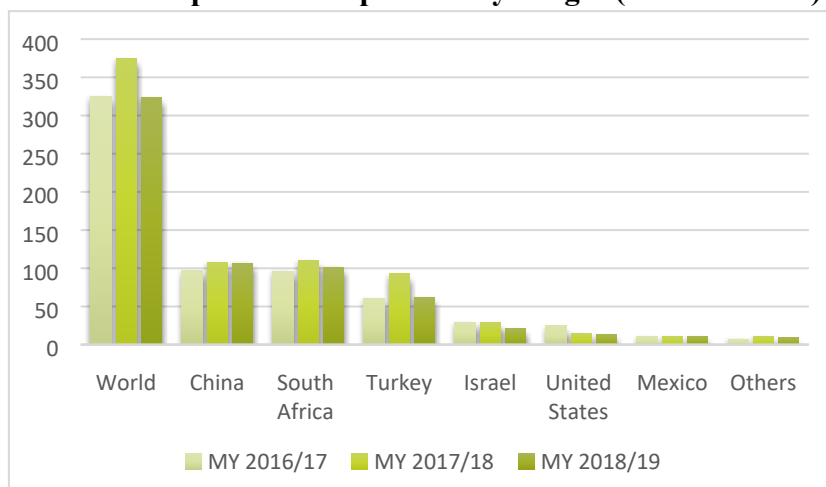
## CONSUMPTION

EU grapefruits are mainly consumed fresh with a consumption significantly surpassing grapefruit production. MY 2019/20 EU fresh grapefruit consumption and grapefruits for processing are forecast to drop in line with the decrease in total grapefruit suppl. Spain and Cyprus are the main grapefruit processors in the EU.

## TRADE

The EU is a net importer of grapefruits to satisfy the EU grapefruit domestic demand. EU grapefruit imports comprise around 75 percent of EU's total grapefruit supply. During MY 2018/19, EU imports of grapefruit decreased 13 percent to 323,485 MT compared to the previous season and valued at \$284 million. China, South Africa, Turkey and Israel are the leading suppliers to the EU market. Imports from the United States dropped 11 percent to 13,000 MT valued at \$17 million (see Chart 11) due to increased competition from China and South Africa. Mexico is also another active supplier to the EU market. Due to the expected drop of EU grapefruit production, EU grapefruit imports are expected to increase in MY2019/20.

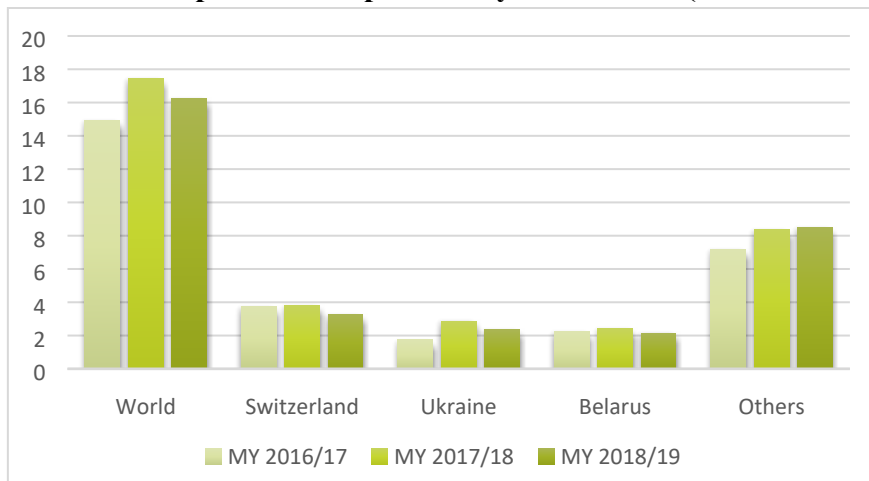
**Chart 11. MY EU Imports of Grapefruits by Origin (thousand MT)**



Source:TDM

During MY 2018/19, the EU exported 16,230 MT of grapefruits, a 7 percent decrease compared to previous year and valued at \$17 million. EU exports shipped mainly to Switzerland, Ukraine, and Belarus. EU grapefruit exports continue to consolidate their presence in the Canadian market (see Chart 12).

**Chart 12. MY EU Exports of Grapefruits by Destination (thousand MT)**



Source: TDM

## Policy Section

Citrus fruit falls under the European Union (EU) fruit and vegetables regime and is part of the Common Agriculture Policy (CAP). The following sections explain the main elements of the EU fruit and vegetables policy that refer to the citrus sector, the Russian embargo, and the upcoming Maximum Residue Levels (MRLs) reviews under Article 12 of Regulation 396/2005.

## **I. EU Policy Related to Citrus Fruit**

### **1. The Common Agriculture Policy (CAP)**

[Regulation \(EU\) No 1308/2013](#) outlines a framework for market measures under the CAP by the single Common Market Organization (CMO) and it entered into force on January 1, 2014. The CAP consists of four [basic regulations](#), supplemented by delegated acts, and amends the implementing rules for the fresh and processed fruit and vegetables sectors ([Commission implementing Regulation \(EU\) No 543/2011](#)).

On June 1, 2017, [Commission Delegated Regulation 2017/891](#) entered into force and amended regulation 543/2011. The new framework seeks to make Producer Organizations (POs) more attractive to non-members and provide greater clarity about what actions are eligible for EU funding. The framework seeks to set the maximum percentage of produce that can be marketed outside the organization to 25 percent in order to create shorter supply chains where producers can sell directly to consumers. It also simplifies and clarifies legislation with regards to payments to transnational POs and their associations. In addition, it increases the support for withdrawals for fruit and vegetable from the market POs.

These market measures under the CAP aim to:

#### **a) Create a more competitive and market-oriented sector**

The POs are still the key elements in the EU's CMO for fruit and vegetables. POs are legal entities established by producers to market commodities, including citrus fruit. These POs are eligible to receive EU subsidies instead of individual producers. In order to qualify for EU subsidies, a PO must submit an operational program financed through an operational fund and directly receives the EU's financial contribution. The basis for the calculation of the estimated amount of the operational fund is the operational program and the value of the marketed production. The approval of operational programs happens under Regulation (EU) No 1308/2013.

Fresh fruit and vegetable imports into the EU have to comply with EU-harmonized marketing standards. These standards apply at all marketing stages and include criteria such as quality, size, labeling, packaging, and presentation. Commission Implementing Regulation (EU) No 543/2011 provides for a general marketing standard for all fresh fruits and vegetables. Specific marketing standards are still in place for ten products, including citrus fruit. The specific marketing standards are set out in Part B of Annex I to this Regulation: citrus fruit can be found in Part 2 of that same section (p.111).

#### **b) Diminish crisis-related fluctuations in producers' income**

To achieve this objective, the EU offers funding under the operational programs for:

- Product withdrawal
- Green harvesting/non-harvesting;



- Promotion/communication tools;
- Training measures;
- Harvest insurance;
- Assistance to secure bank loans, and support for administrative costs associated with setting up mutual funds.

The national authorities must determine, in their national strategies, which of these instruments can receive funds in their countries. POs may take out loans on commercial terms to finance crisis prevention and management measures. The repayment of the capital and the interest on those loans may be eligible for financial assistance under the operational programs of the POs.

c) Encourage increased consumption of fruit and vegetables in the EU

The European “School Fruit Scheme” originated in 2009 as a measure to combat child obesity. It includes three elements: free distribution of fruit and vegetables in schools, informational campaigns on healthy eating habits, and monitoring and evaluation. As in previous years, the EU funds of \$264 million (€250 million) were allocated in the school year 2018/2019 to all of the [Member States](#) (MS).

[Commission Implementing Decision C\(2019\)2249](#) on the new School Scheme for Milk, Fruit and Vegetables applies since August 1, 2019.

The sector may also benefit from the European [promotion](#) budget for agricultural products and [quality schemes](#). The Commission reformed its promotion policy with an extension of the product scope and a greater focus on export markets. The promotion budget will reach \$255 million (€200 million) in 2020. There will no longer be a need for national co-funding; EU associations will be able to apply directly for a program.

d) Increase the use of environmentally friendly cultivation and production techniques

At least ten percent of operational program funding must be spent on environmental actions that go beyond mandatory environmental standards. The EU MS with recognized POs must draw up a National Framework for Environmental Action (NEF) as part of their “national strategy for sustainable operational program.” The NEF must contain a non-exhaustive list of environmental actions and the conditions applicable to them in the MS concerned.

## **CAP after 2020**

On 1 June 2018, the European Commission presented legislative proposals on the CAP beyond 2020. The aim of the new proposals is to be more responsive to current and future challenges such as climate change. The CAP will continue to support European farmers, but the overall budget is lower compared to the previous period. For information on the CAP after 2020, please see:

[https://ec.europa.eu/info/food-farming-fisheries/key-policies/common-agricultural-policy/future-cap\\_en](https://ec.europa.eu/info/food-farming-fisheries/key-policies/common-agricultural-policy/future-cap_en)

## 2. Certification of Fruit Shipments

Fruit, vegetable, and nut shipments exported to the EU require a phytosanitary certificate. A USDA/Animal Plant Health Inspection Service inspector issues these certificates in accordance with international regulations established by the [International Plant Protection Convention of the Food and Agriculture Organization of the United Nations](#). This standard-setting body coordinates cooperation between nations to control plant and plant product pests and to prevent their spread.

[Council Directive 2000/29/EC](#) contains provisions concerning compulsory plant health checks. This includes documentary, identity, and physical plant health checks to verify compliance with EU import requirements. [Directive 2019/523](#) amends Annexes I to IV of [Directive 2000/29/EC](#) and sets (new) protective measures against the introduction of harmful organisms for the import of several fruit and vegetable products from September 1, 2019. However, it is worthwhile to check the specific article in [Directive 2019/523](#) for each of the product/harmful organism combinations since these are all different. Most requirements (e.g. for citrus and mango) are applicable for all third countries, but there are also requirements for certain products (apple, pear, blueberry) which only apply to the United States (U.S.), Canada and Mexico. The new legislation has established the obligation for non-EU countries to communicate some information for importing certain commodities under specific import requirements.

On the following website you can find official information submitted by non-EU countries:

[https://ec.europa.eu/food/plant/plant\\_health\\_biosecurity/non\\_eu\\_trade/declarations\\_en](https://ec.europa.eu/food/plant/plant_health_biosecurity/non_eu_trade/declarations_en)

In addition, [Directive 2000/29/EC](#) will be repealed on December 14, 2019 and will be replaced by [Regulation 2016/2031](#) of the European Parliament and of the Council concerning protective measures against pests of plants. There is more information available on the DG Health and Food Safety (DG SANTE) website: [http://ec.europa.eu/food/plant/plant\\_health\\_biosecurity/non\\_eu\\_trade/index\\_en.htm](http://ec.europa.eu/food/plant/plant_health_biosecurity/non_eu_trade/index_en.htm)

[Commission Regulation 1756/2004](#) provides for a possibility to carry out plant health checks at reduced frequency when justified. The European Commission published the updated list of products on [January 1, 2019](#). The Commission monitors imports of fruit and vegetables on an annual basis to determine how to adjust the frequency of testing consignments.

## 3. Maximum Residue Levels for Fruit

Maximum Residue Levels (MRLs) for pesticides, including import tolerances, have been harmonized throughout the EU since September 2008. As a marketing tool, some retail chains in the EU adopt private standards that exceed EU regulations by requiring their suppliers to adhere to stricter company policies that limit the maximum residues to 30, 50, or 70 percent of the respective EU MRL. Please find the link to the [EU MRL database](#), as well as to the subscription page for the [global MRL database](#) for MRLs worldwide.

#### 4. Tariffs

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. Produce valued below the entry price are charged a tariff equivalent in addition to the ad valorem duty. The tariff equivalent is graduated for products valued between 92 and 100 percent of the entry price. The ad valorem duty and the full tariff equivalent are levied on imports valued at less than 92 percent of the entry price.

Tariff levels for 2019 are published in [Commission Implementing Regulation 2018/1602](#). The tariffs for citrus fruit remain unchanged compared to the levels of 2018 and can be found on page 96 for oranges, tangerines, lemons, grapefruit and other citrus fruit, while the tariff for orange juice can be found on page 163.

The United States tends to sell high quality products at higher prices, which typically do not face additional duties.

#### 5. EU's Decision on Citrus Canker

[Commission Implementing Directive 2017/1279](#), published on July 14, 2017, amends the requirements set forth in Council Directive 2000/29/EC for citrus fruit exported from areas where *Xanthomonas citri* (Citrus canker) is known to exist. The previous regulation required certification that “no symptoms...have been observed in the field of production and in its immediate vicinity”, which was overly burdensome and would require expensive and time-consuming inspections of entire groves. The new regulation, effective as January 1, 2018, instead requires that groves be appropriately managed and that the fruit be free of symptoms of canker.

### II. Russian ban on agricultural products

On August 7, 2014, the Russian government implemented a (then) one-year ban on a range of agricultural and food products, including fresh deciduous fruit, from the U.S., the EU, Canada, Australia, and Norway, in response to U.S. and EU sanctions over Russian actions in Ukraine. Russia has extended the ban every year since; In June 2019, President Putin signed a decree extending the ban until the end of 2020. For more information, See [GAIN report RS1907](#).

The CMO rules (see Regulation 1308/2013 in part I) provide various market management tools to stabilize markets and the Commission is empowered under the reformed CAP to take "exceptional measures" in case of market disruption. As such, the Commission introduced specific market support measures for the European fruit and vegetable sector since the start of the ban in 2014 until 2017. The last emergency measures for fruit and vegetables were phased out on June 30, 2018. The impact on the citrus sector is very limited, since exports to Russia have not been significant in terms of volumes.

Overall, the EU granted \$588 million (€500 million) of aid to EU producers of fruit and vegetables corresponding to 1.7 million tons of withdrawals from the market.

Please find more information on the Commission's response to the Russian ban here: [http://ec.europa.eu/agriculture/russian-import-ban/index\\_en.htm](http://ec.europa.eu/agriculture/russian-import-ban/index_en.htm)

### **III. Upcoming MRL reviews under Article 12 of Regulation 396/2005**

Plant protection products (PPPs) along with MRLs and import tolerances are an increasingly important issue in the EU since there is a significant reduction in the number of active substances approved for use. Regulation (EC) No 1107/2009 and Regulation (EC) No 396/2005 regulate PPPs and MRLs, respectively. There is a consistent review of active substances for which the approval is up for renewal, as well as their associated MRLs.

Existing MRLs are also being reviewed through a process known as an Article 12 review. The first list below indicates the upcoming MRL reviews for the main fresh deciduous fruit commodities under this Article 12 process. The second list includes the active substances which are, or will soon be, up for renewal. It is important to note that these lists are not all-inclusive.

Due to the complexity of the renewal process and the importance of the issue, **stakeholders are encouraged to actively engage early in these review processes by reaching out to the applicant.** Together with the applicant, they can ensure that the necessary data is available for the review or if trials for data collection are in progress or should be initiated etc., especially if the substance is not used or authorized in the EU. It is highly recommended to contact the assigned "Rapporteur Member State" (RMS) which will carry out the first evaluation of the active substance and existing EU pesticide MRLs. **Stakeholders are encouraged to engage with FAS on substances and MRLs of importance to their commodities.**

1) Article 12 review

	<b>Orange, lemon, tangerine and grapefruit</b>	<b>RMS*</b>	<b>Start of data collection</b>	<b>Expected date of RO**</b>
Fluopyram	x	DE (AT)	10/13/2017	12/2/2019
Fenazaquin	x	EL (DE)	2/14/2018	12/20/2019
Fluxapyroxad	x	UK (FR)	6/15/2018	01/06/2020
Spirotetramat	x	AT	7/15/2018	01/06/2020
Acequinocyl	x	NL (DE)	8/15/2018	01/01/2020

\*RMS: rapporteur member state

\*\*Expected date of Reasoned Opinion by the European Food Safety Authority (EFSA)

2) Active substances up for review

	<b>Expiry date</b>	<b>Last day of Application:</b>
Flumetralin	12/11/2022	12/11/2019
Glyphosate	12/15/2022	12/15/2019
Esfenvalerate	12/31/2022	12/31/2019
Fenpyrazamine	12/31/2022	12/31/2019

**Attachments:**

No Attachments