

## Tangerines from Southern Hemisphere on the rise

The global trade in tangerines is still growing, but that's not the case for Spain, the most important exporter in the world. Seen absolutely, the Spanish tangerine export declined by about 10 per cent in 10 years, while the export of all other countries combined increased by about 60 per cent in that same period. In the (net) export, the share of Spain decreased from 40 to 30 per cent.

Seen absolutely, Turkey and Morocco in particular now export a lot more tangerines than 10 years ago. Besides, it's noticeable that tangerines from the Southern Hemisphere are on the rise. Last year, the share of tangerines from the Southern Hemisphere in (net) export was still quite modest with 14 per cent. Despite Spain playing such a dominant role on the international tangerine market, the Netherlands re-exports a considerable amount of tangerines. As an import country, the Netherlands is in sixth place globally with an import of more than 240,000 tonnes in the 2017/18 season. Of this, 110,000 tonnes were re-exported.

### A third trade between EU countries

A third of the global tangerine trade takes place between EU countries. Three-quarters of this concerns Spanish export to partner countries. In the past 10 years, the import of all EU countries has been at a stable level around two million tonnes. The share of import from outside the EU has grown from 16 to 23 per cent. Seen in absolute figures: from 330,000 to 450,000 tonnes. Another important flow is that from Asian, particularly Turkish, tangerines to Russia. A third important flow is that between countries in South and East Asia. On the African continent, Morocco and South Africa are important tangerine exporters.

### Clementines dominate EU

In the international trade in tangerines, a distinction can be made between three groups: the Clementine group, the Wilkings group and the miscellaneous group, including Satsumas. Within the EU, satsumas are also registered separately.



Globally, the group of miscellaneous tangerines is the most important one with a share of nearly 45 per cent in global export. The share of Clementines is roughly 35 per cent. In the Spanish and Moroccan export, Clementines are the most important group: both countries have a share of 70 per cent. Two-thirds of the Turkish tangerine export consists of miscellaneous, while the Chinese export practically completely consists of these. In South Africa's tangerine export there isn't a properly dominant group. The import of South African product in the EU is 40 per cent Clementines and 16 per cent Satsumas.

### **Spanish export strongly focused on EU**

Spain is still the most important export country of tangerines globally. With 1.39 million tonnes, slightly more was exported in the 2017/18 season than in the previous season. In the past, Spain once exported 1.7 million tonnes of tangerines.

The export is strongly focused on other EU countries. In past seasons, the export to countries outside of the EU was less than 100,000 tonnes.

Germany is the most important buyer with a share of more than one quarter in total. France is a good second with 20 per cent, and the UK is good for 10 per cent. Combined, the top three had a share of 57 per cent in the 2017/18 season. In the past 10 years, that ratio has remained mostly the same.

The next two countries, Poland and Italy, clearly buy less than in the past. The Netherlands and Belgium are number 6 and 7 when it comes to buying Spanish tangerines. The export to the Netherlands amounted to nearly 77,000 tonnes in the past season, and to Belgium it amounted to 45,000 tonnes. For both countries this was more than in the previous season but less than in the past.

### **The Netherlands: 30% Spanish import**

In the various EU countries, the share of Spain in the total tangerine import varies. In Germany, the Spanish tangerines have a dominant position. The share of Spain is 90 per cent. The share in Italy and Belgium (both 70 per cent) is large as well, and in France it's 60 per cent. On the Polish market, the Spanish tangerines represented nearly half, and on the British market, the Spanish share is 35 per cent.

In the Netherlands, the Spanish share in the total tangerine import is only around 30 per cent. Ten years ago it was more than 40 per cent. In the past season, the Netherlands imported 77,000 tonnes of tangerines from Spain. Morocco and South Africa are two other



important suppliers, with volumes of 49,000 and 42,000 tonnes respectively in the 2017/18 season. Peru is also starting to count for something with 20,000 tonnes. These three countries are supplying more and more.

### **The Netherlands imports a lot in summer months**

Due to the increasing interest of countries in the Southern Hemisphere such as South Africa and Peru, the division over the season has also become less focused on the October-April period in the Netherlands. The countries in the Southern Hemisphere are mostly on the market in the later months. The Moroccan season starts roughly a month later than the Spanish season, and also ends in April.

South African and Peruvian tangerines enter the market in April, and the season ends in September. The tangerines from the Northern and Southern Hemispheres therefore mostly compete with each other in the months of September and April.

Chile is the third largest supplier from the Southern Hemisphere, but they barely supply tangerines to Europe. Practically the entire export, 60,000 tonnes in 2017, was sent to the US.

### **Russia most important importer by far**

Russia is by far the most important importer of tangerines. In 2107, it concerned a volume of as much as 810,000 tonnes. With 342,000 tonnes, Morocco is the most important supplier, followed by Turkey with 211,000 tonnes. Pakistan, China and Egypt are the other suppliers of meaning. Various countries are active on the Russian market that don't export much to Western Europe, except for Morocco.

For Turkey and Morocco, Russia is the most important buyer. Russia is also an important market for South Africa as third buyer, for that matter. China and Pakistan, the number 4 and 5 export countries, are, in addition to Russia, mostly active in their own region.

### **More South Africa in the coming years**

South Africa is an important tangerine exporter, but considering the mostly young plants, production will increase considerably in the coming years. South African production is mostly meant for export.

The Moroccan area is also still growing, albeit not as quickly as a few years ago. Of the total Moroccan tangerine production, about 60 per cent is meant for the domestic market. The other thing that's remarkable is that Morocco exports large amounts of tangerines to





Canada and the US. In the past season, these countries imported 68,000 and 57,000 tonnes, respectively.

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