Citrus Fruits in International Trade, Economic Situation and Future Scenarios

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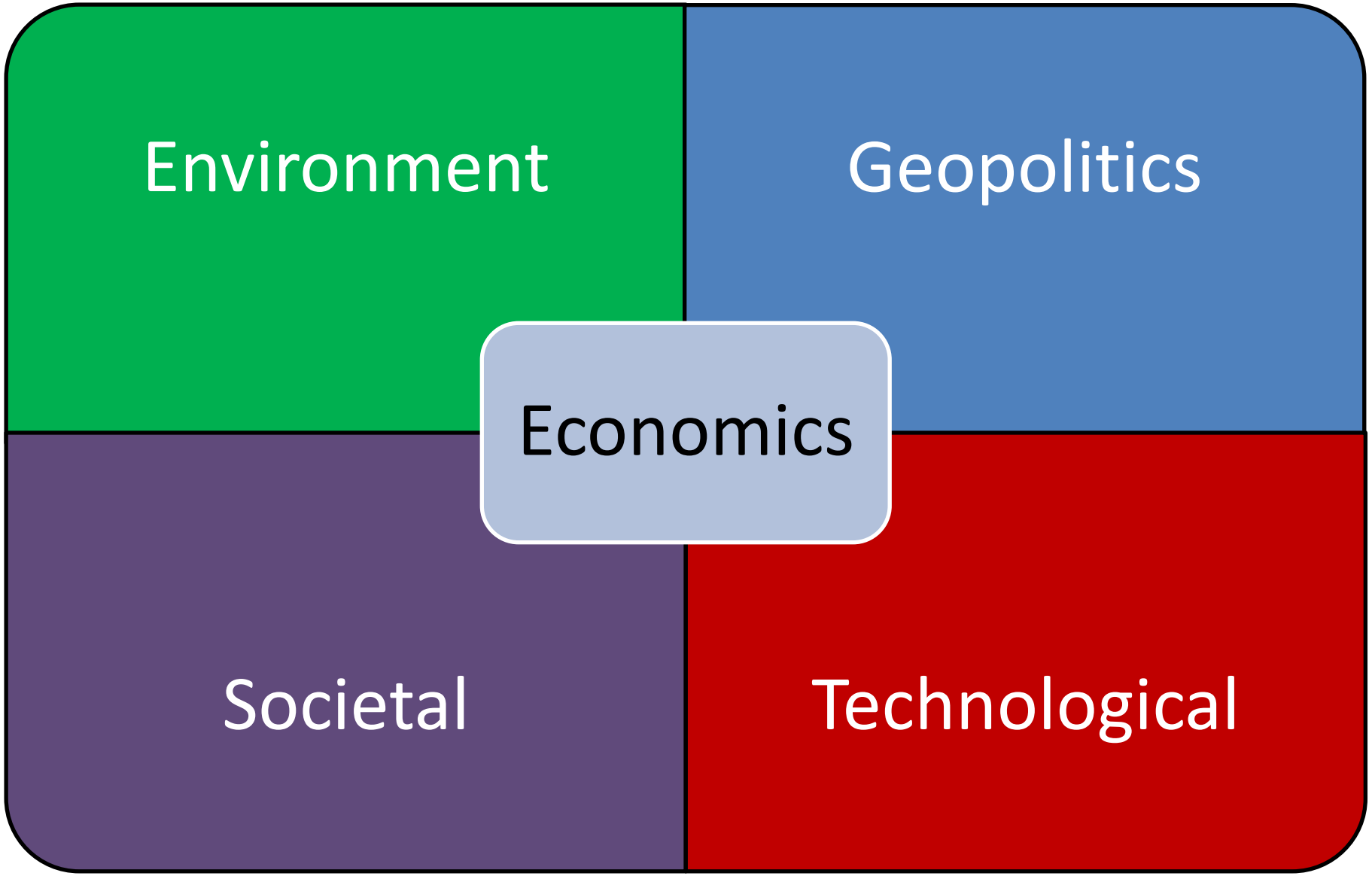
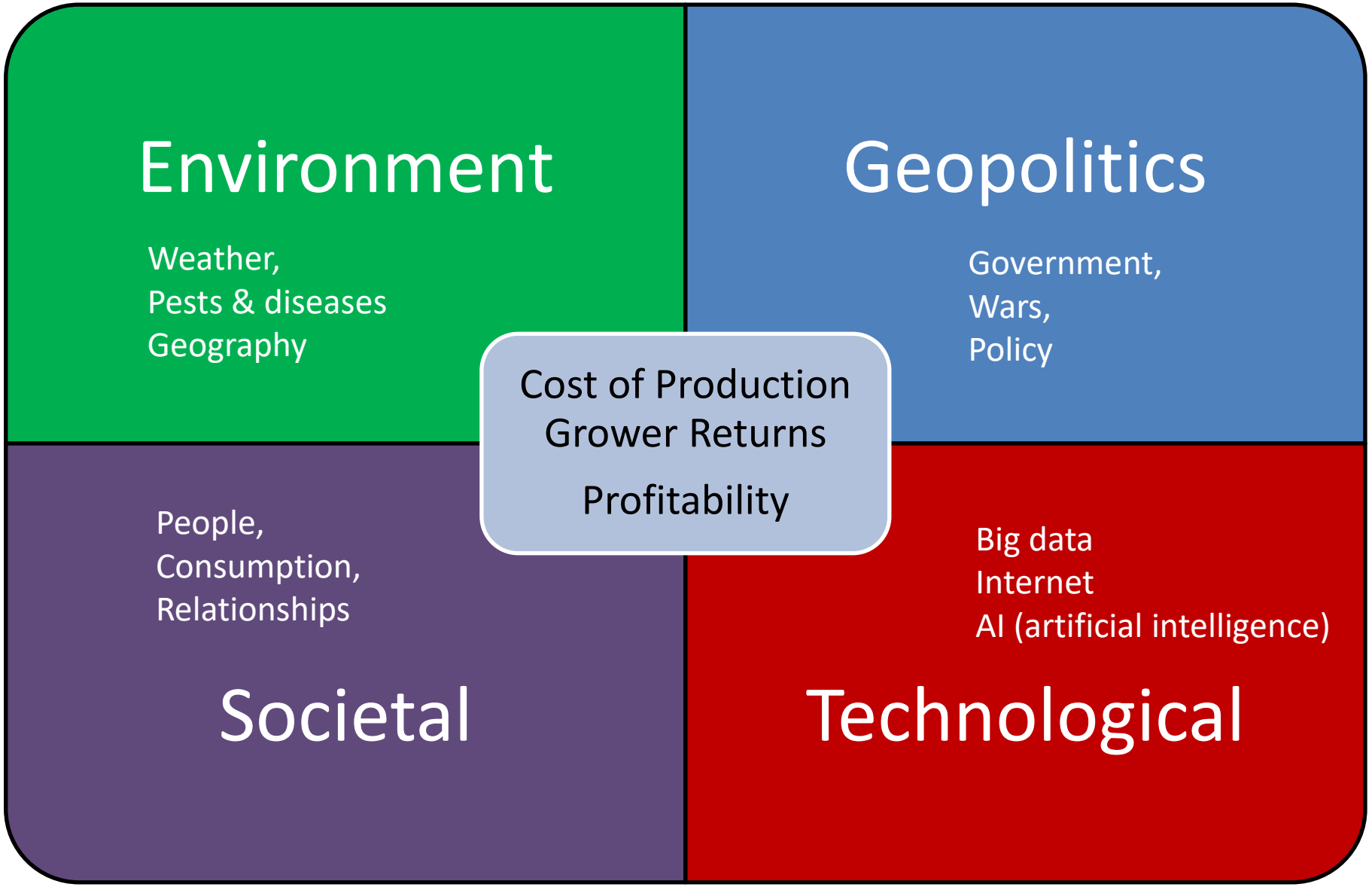


Factors that impact on the global economy

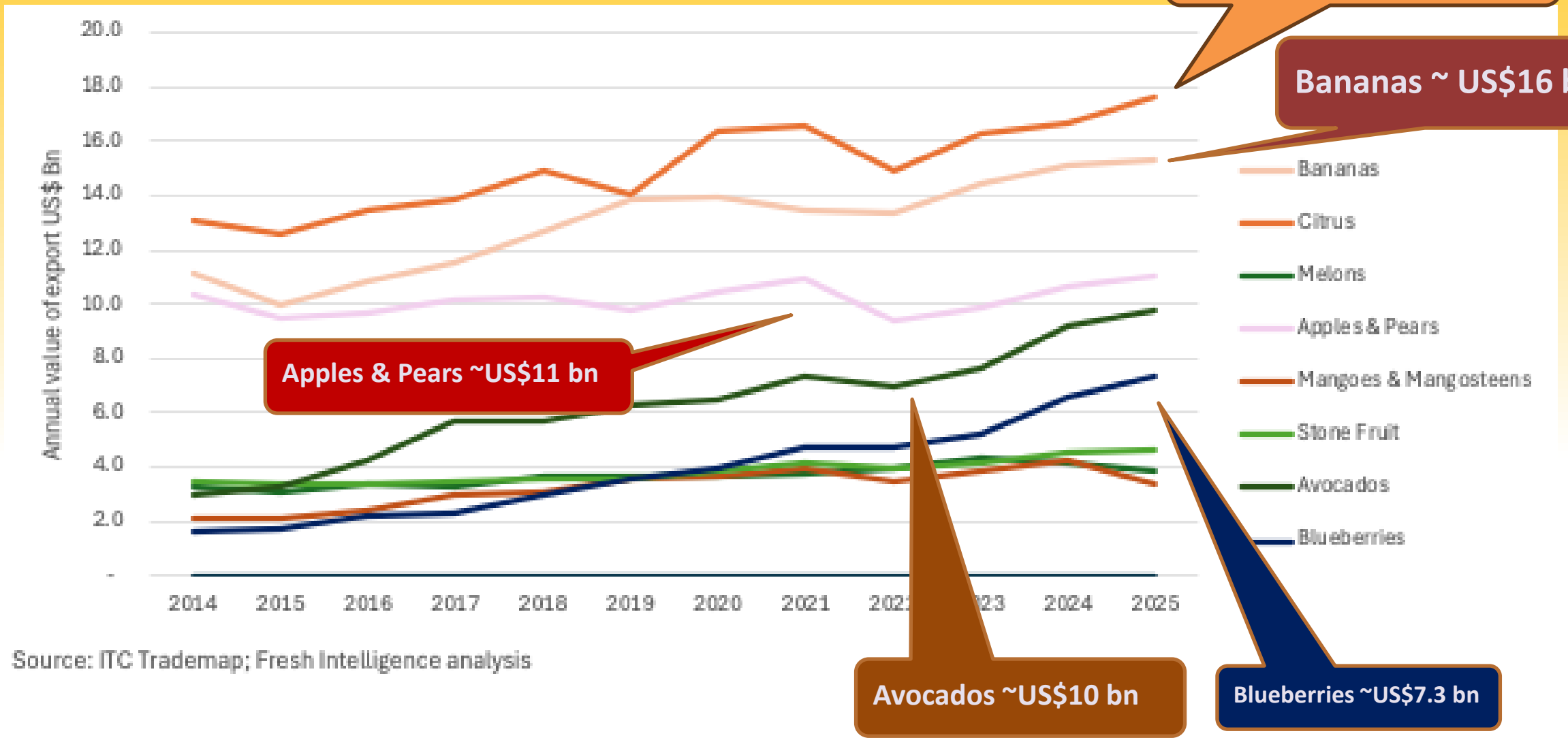
Source: World Economic Forum



Factors that impact on the global economy

Source: World Economic Forum

Global Fresh Fruit Trade ~ $118 bn USD 2014 - 2025



Source: ITC Trademap; Fresh Intelligence analysis

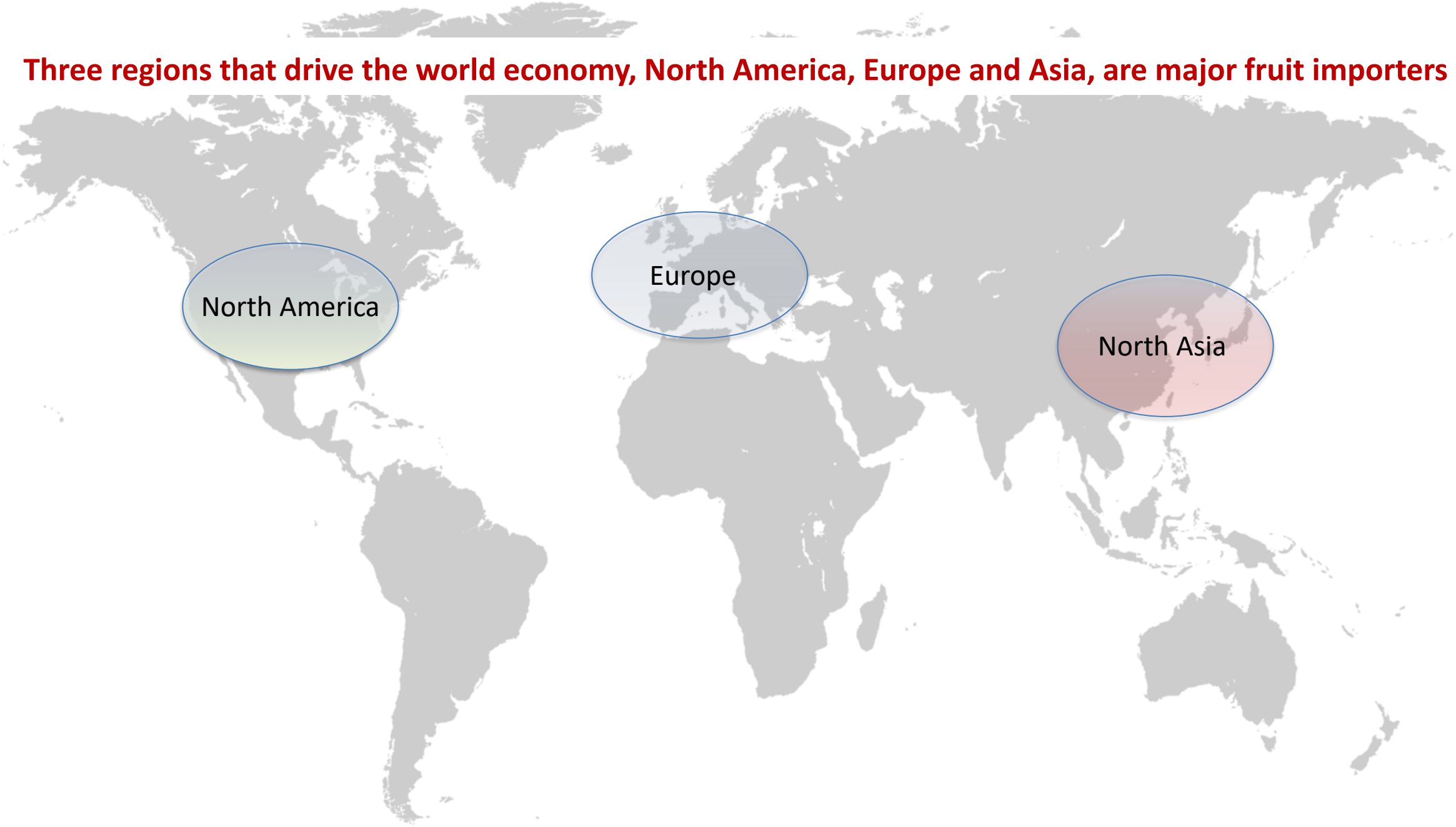
Global Fresh Fruit Production and Trade

	Production	Trade	% traded	Value
	Million Tonnes	Million Tonnes		US$ / kg
Bananas	184.0	24.7	13.4%	$0.60
Citrus	**165.6**	**18.1**	**10.9%**	$0.97
Melons	133.2	6.3	4.7%	$0.66
Apples & Pears	125.5	10.7	8.5%	$1.00
Mangoes & mangosteens	62.2	3.1	5.0%	$1.37
Stone fruit	45.2	3.2	7.0%	$1.43
Avocdos	*11.2*	*3.4*	*30.0%*	$2.73
Blueberries	*1.8*	*1.0*	*58.3%*	$6.29
Other	154.2	13.20	8.6%	$2.41
World	**882.9**	**83.5**	**9.5%**	**$1.30**

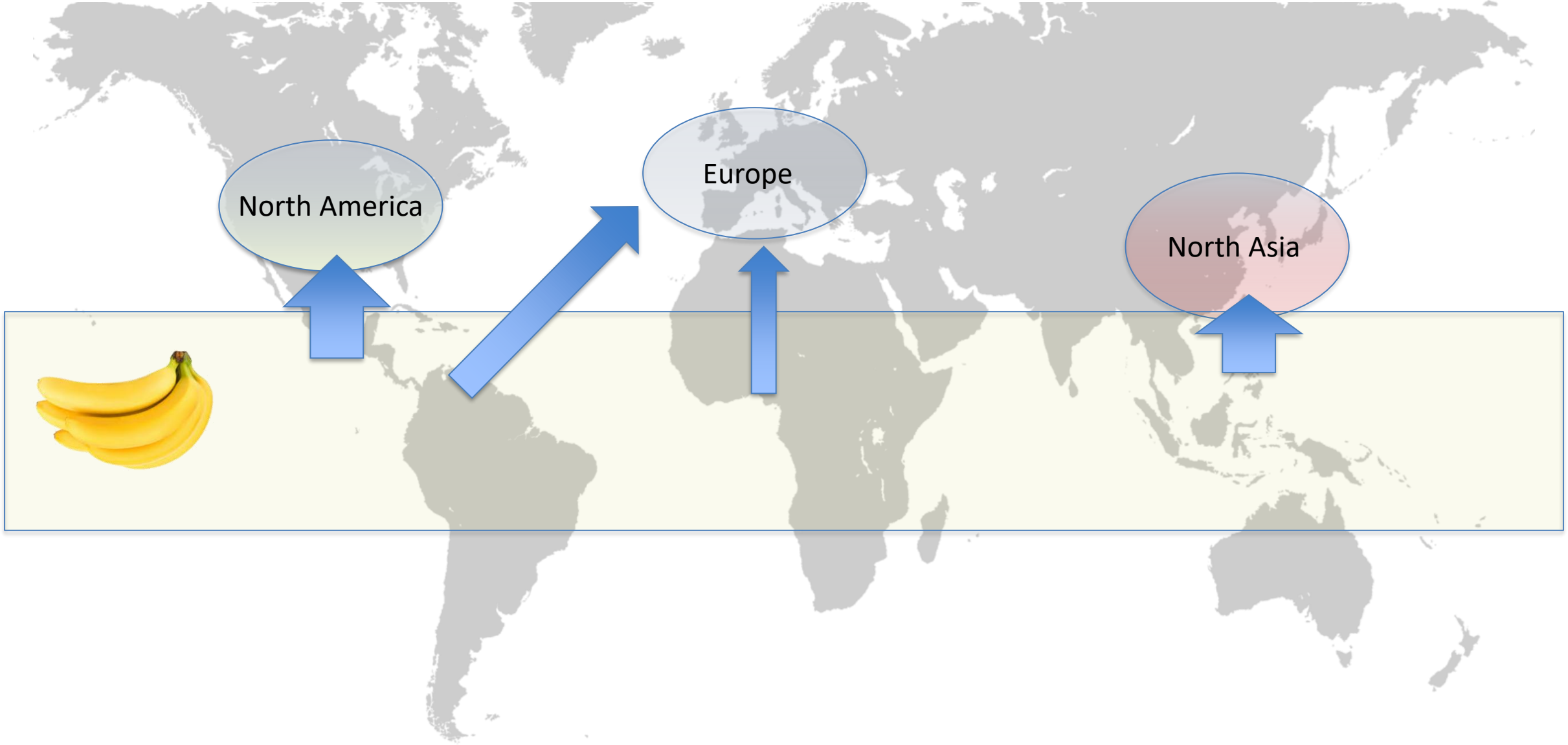
Source: ITC Trademap; Fresh Intelligence analysis

Bananas, Citrus and Apples drive fresh fruit production and trade globally

Three regions that drive the world economy, North America, Europe and Asia, are major fruit importers

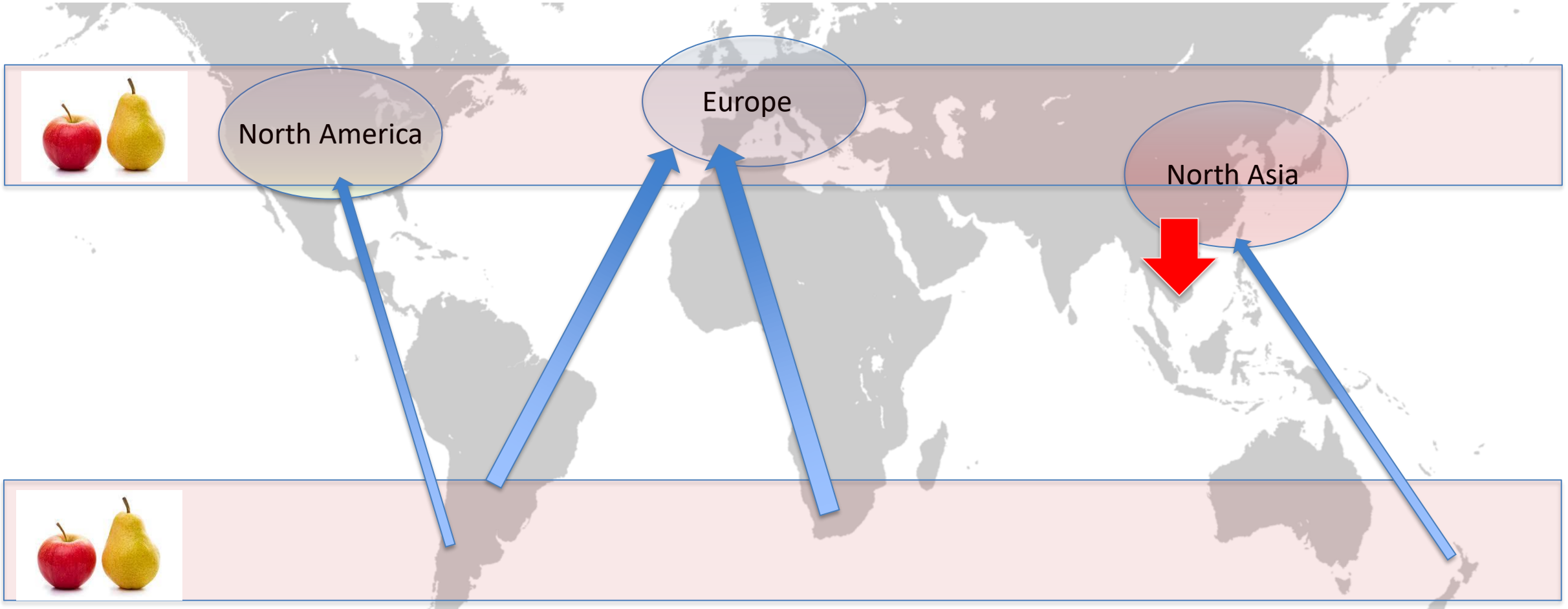


Bananas are grown in tropics and almost all consumption in North America, Europe and North Asia are imported, leading to being the largest volume of all fruits traded



Apples & pears are grown in cooler temperate areas including inside the large markets. Apples & pears can be cold stored and demand for seasonal international trade is reduced.

Most traded volume is within Europe though with small volumes of counter season trade



Citrus is grown in warmer temperate areas including inside the large markets. Unlike apples, citrus cannot be cold stored for many months, thus demand for seasonal international trade is higher.

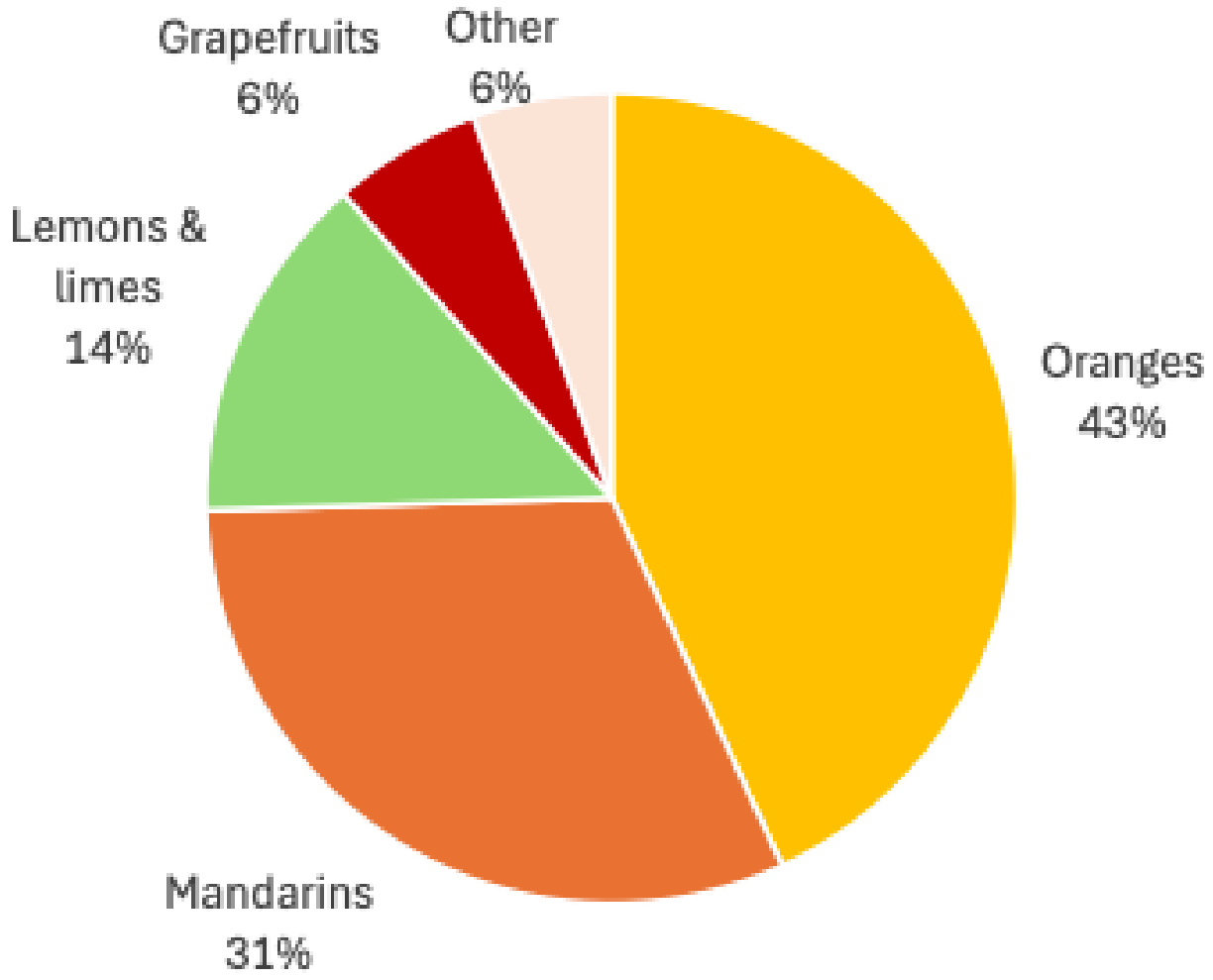
Most traded volume is within Europe, with significant counter season trade

Global Citrus Production

Orange production leads followed by mandarins

165.6 million tonnes of citrus was produced in 2024

43% Oranges
31% Mandarins
14% Lemons & Limes
6% Grapefruits
6% Other



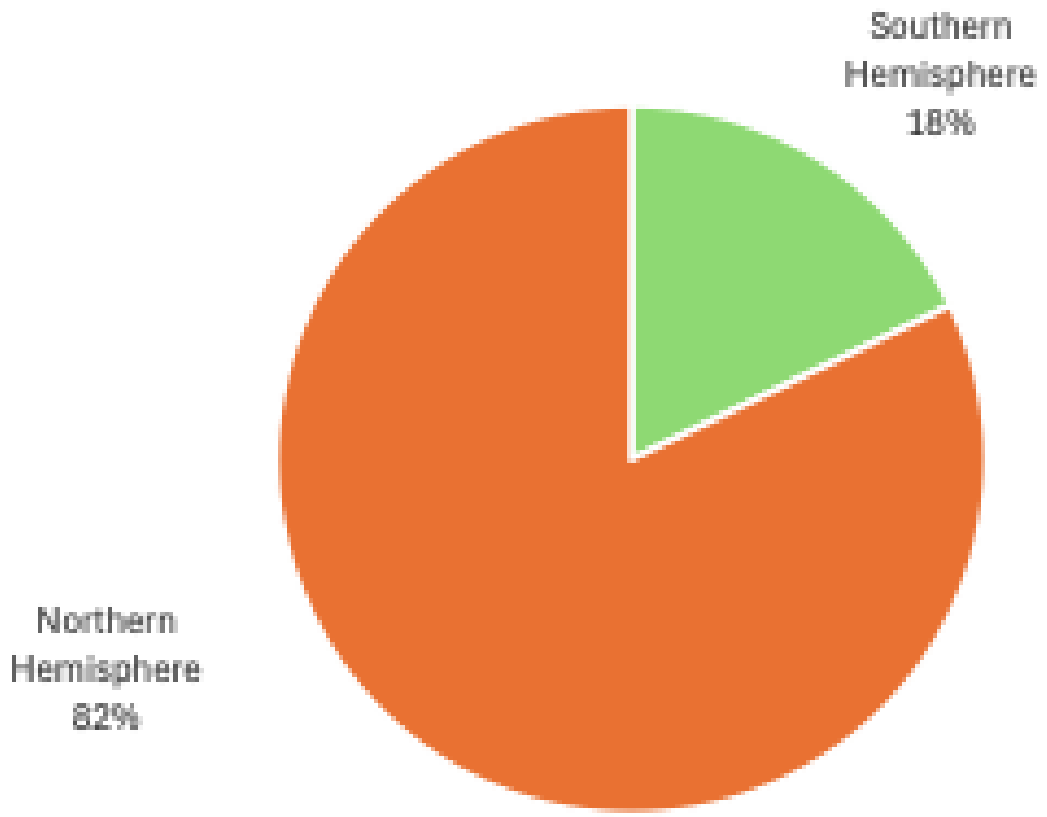
Source: FAOSTAT; Fresh Intelligence analysis

Southern Hemisphere produces 18 per cent of global citrus

165.6 million tonnes of citrus was produced in 2024

18 % Southern Hemisphere

82 % Northern Hemisphere

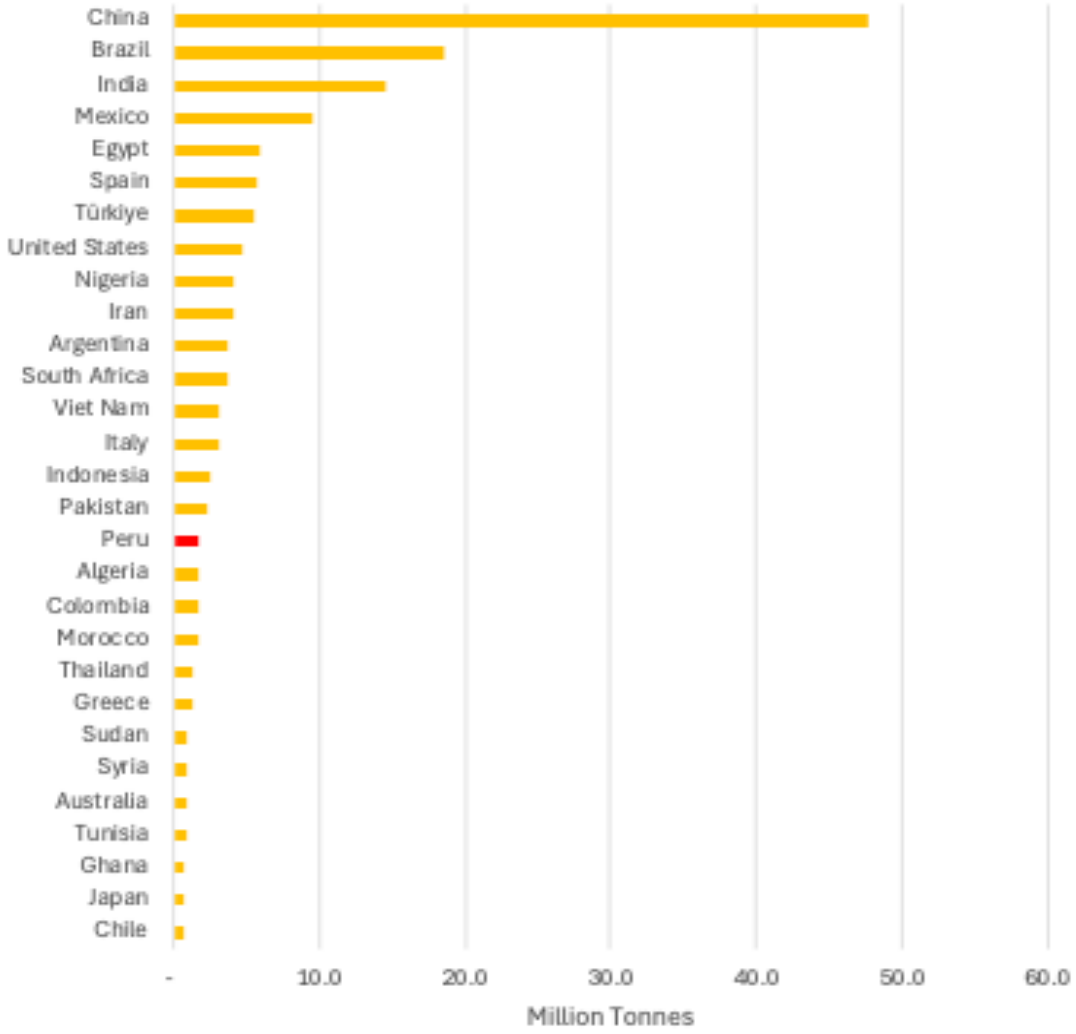


Source: FAOSTAT; Fresh Intelligence analysis

China leads with 29% share followed by Brazil 11%

165.6 million tonnes of citrus was produced in 2024

28.8 % China
11.2 % Brazil
8.8 % India
5.7 % Mexico
3.5 % Egypt



Source: FAOSTAT; Fresh Intelligence analysis

Large citrus producers are not always large traders

165 million tonnes produced in 2024

11 % is traded

Excluding Brazil, Southern Hemisphere exports **33 %** of production

	Production		Trade		% traded
	Million Tonnes	share	Million Tonnes	share	
Spain	5.7	3.5%	3.07	17.0%	*54%*
Türkiye	5.5	3.3%	1.49	8.3%	*27%*
China	47.7	28.8%	1.70	9.4%	*4%*
Egypt	5.9	3.5%	1.09	6.0%	*19%*
Mexico	9.5	5.7%	0.79	4.4%	*8%*
United States	4.8	2.9%	0.59	3.3%	*12%*
India	14.6	8.8%	0.08	0.5%	*1%*
Total Northern	135.7	81.9%	13.03	72.1%	*10%*
Peru	1.7	1.0%	0.34	1.9%	*20%*
South Africa	3.6	2.2%	3.24	17.9%	*89%*
Chile	0.7	0.4%	0.52	2.9%	*73%*
Australia	0.9	0.5%	0.36	2.0%	*41%*
Argentina	3.7	2.3%	0.32	1.8%	*9%*
Brazil	18.5	11.2%	0.20	1.1%	*1%*
Uruguay	0.3	0.2%	0.05	0.3%	*22%*
Southern	29.4	17.8%	5.04	27.9%	*17%*
World	**165.6**	100.0%	**18.1**	100.0%	***11%***

Source: FAOSTAT, ITC Trademap; Fresh Intelligence analysis

China exports 4 % of production mostly to regional Asia

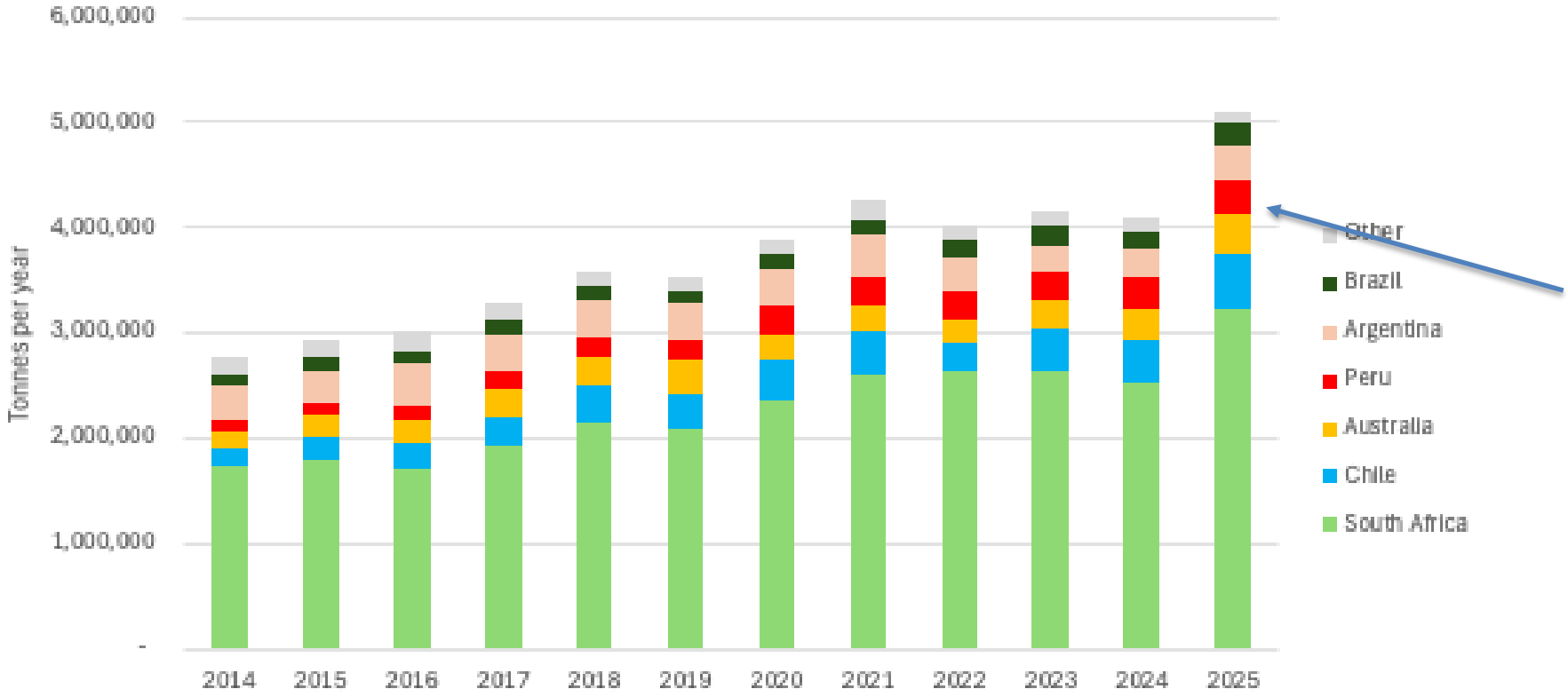
Peru exports 20 % of production – over half to US & Canada

Brazil exports 1 % of production and has a large processing sector

Source: FAOSTAT, ITC Trademap 2024, Fresh Intelligence analysis

10-year trend Southern Hemisphere Exporters of citrus to the World

5.1 million tonnes (+6% per year over 10 years)



Source: ITC Trademap; Fresh Intelligence analysis

Argentina 319 kt + 27%

Peru 344 kt +13%

Australia 359 k t +18%

Chile 520 kt +30%

South Africa 3.2 m t +27.6%

10-year trend Southern Hemisphere Exporters of citrus to the World

5.1 million tonnes (+6% per year over 10 years)

	Exports	1 yr chg	10 yr trend	share
	Tonnes	% to year ago	CAGR	
South Africa	3,237,932	28%	7%	63%
Chile	520,074	31%	8%	10%
Australia	359,017	18%	5%	7%
Peru	344,751	13%	12%	7%
Argentina	319,466	27%	-2%	6%
Brazil	204,331	15%	5%	4%
Other	129,334	11%	-4%	3%
Total	**5,114,905**	**25%**	**6%**	**100%**

Source: ITC Trademap; Fresh Intelligence analysis

25 % lift in 2025 with some recovery from adverse 2024 and 2023 and strong demand

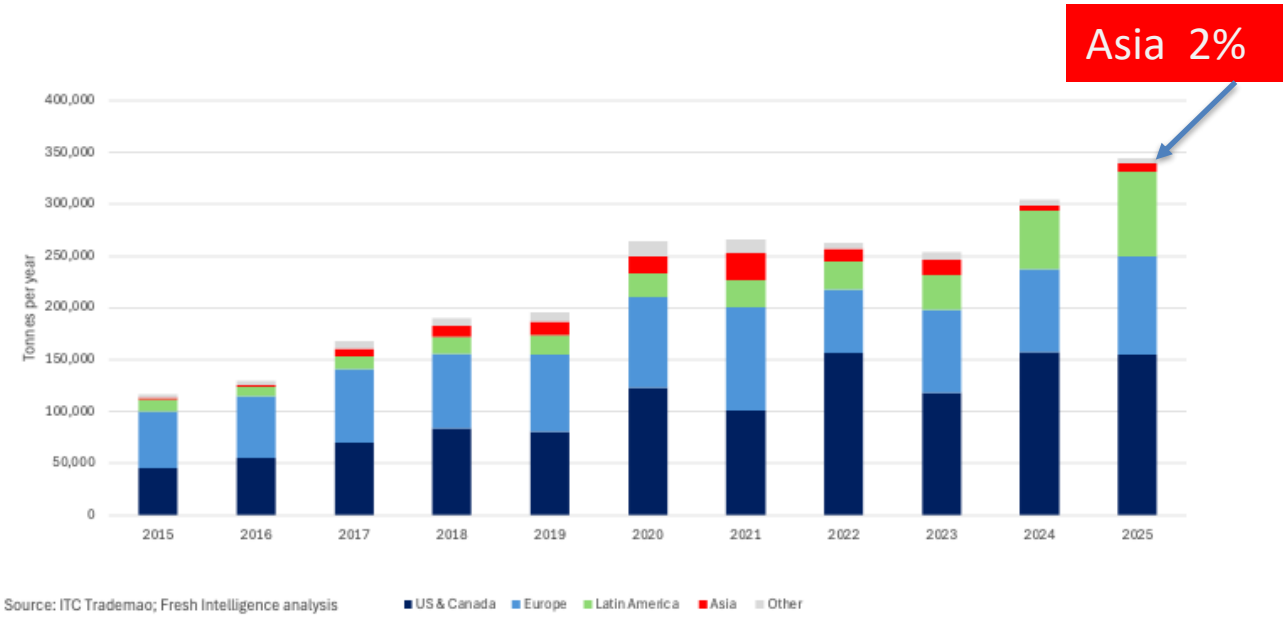
Peru exports citrus mostly to United States, Europe and Latin America

2 per cent is sent to Asia – mostly China and Japan

Peru Citrus Exports 2025 (Oct 24 – Sept 25)

	Tonnes	1 yr change	10 yr trend	share
US & Canada	155,062	-1%	12%	45%
Europe	94,797	18%	5%	27%
Latin America	81,640	46%	28%	24%
Asia	**8,397**	**66%**	**20%**	**2%**
Other	4,855	-12%	3%	1%
Total	**344,751**	**13%**	**12%**	**100%**

Source: ITC Trademap, Fresh Intelligence analysis

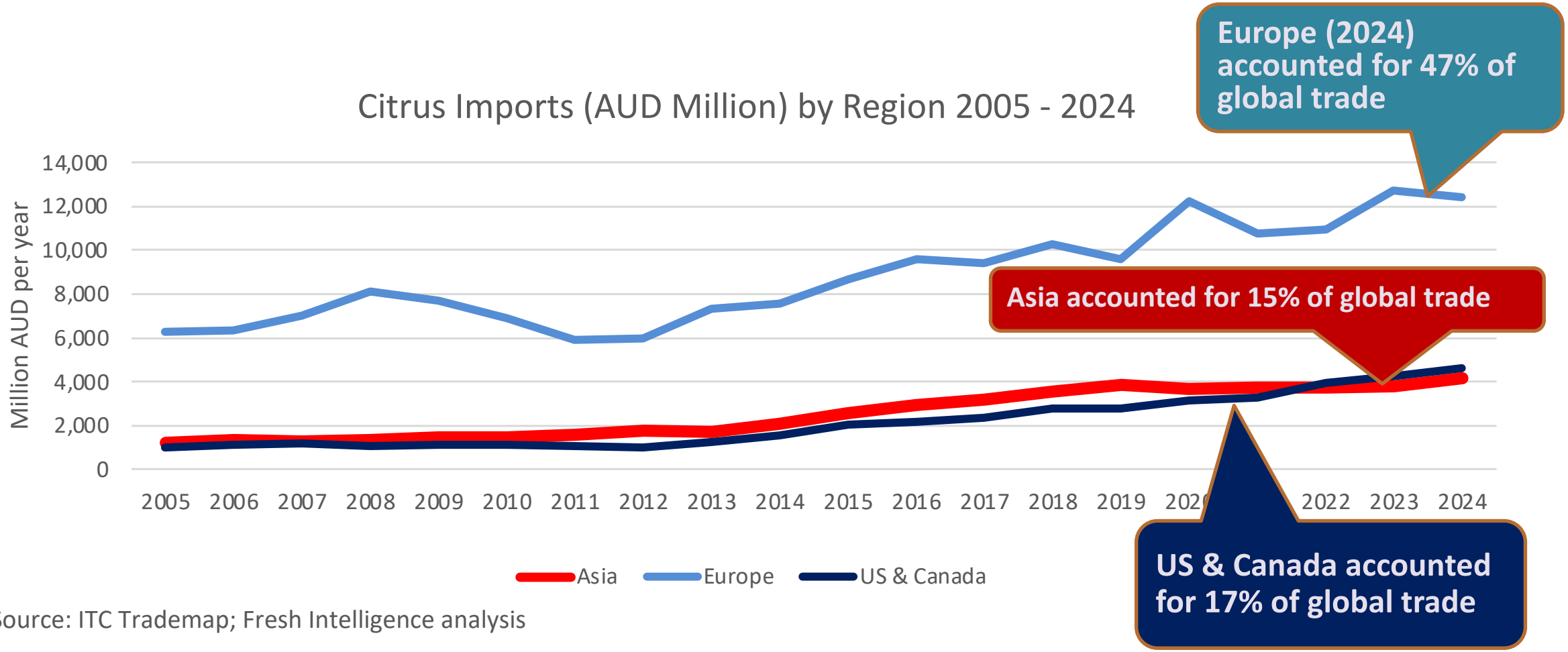


United States down 1% - Geopolitical influences, tariffs, uncertainty

46% increase to Latin America (mostly Mexico) – reducing reliance on US

66% increase to Asia off a small base – include 102% increase to Japan – more on this later !!

Global Import shares by Region (in 2024)



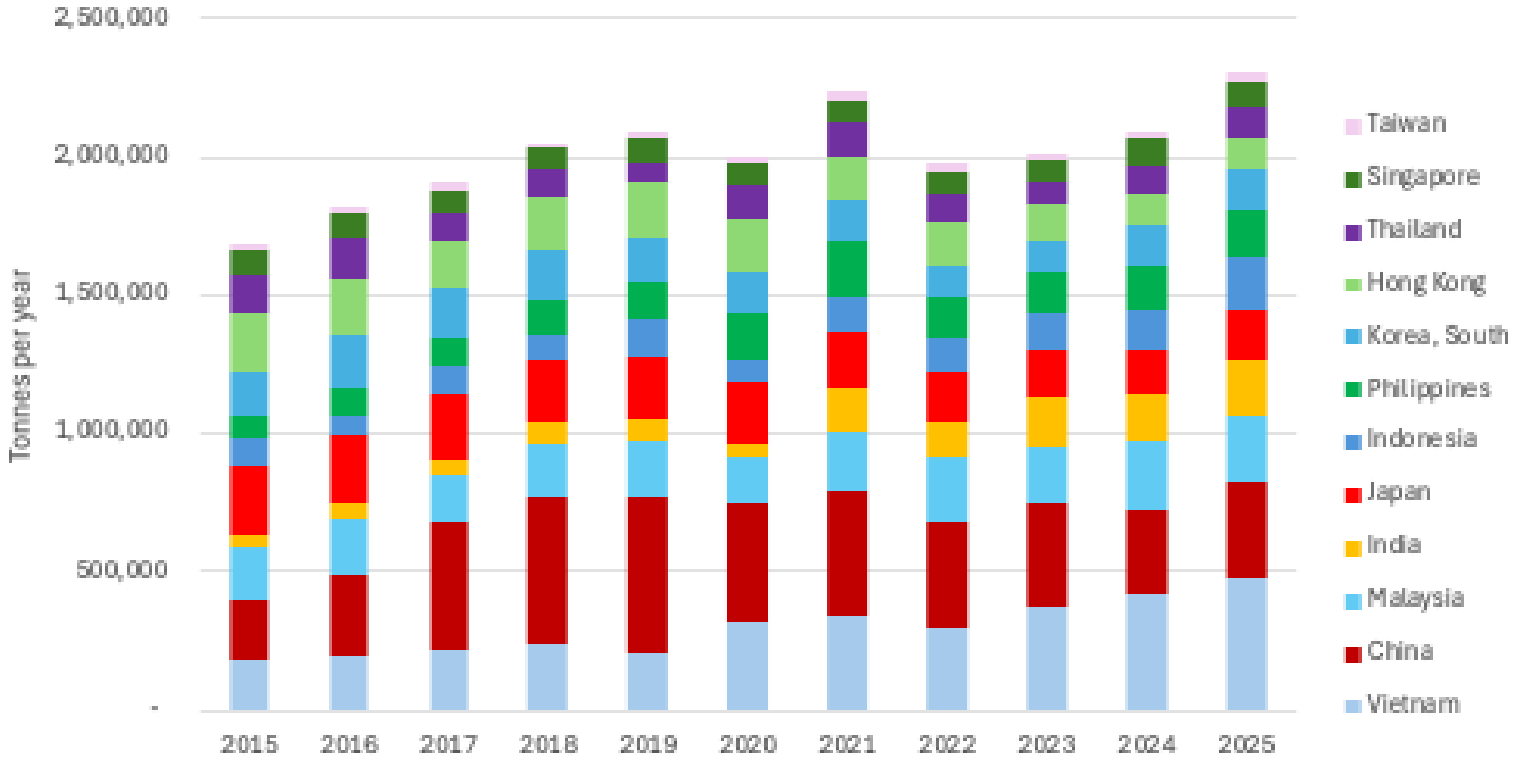
Source: ITC Trademap; Fresh Intelligence analysis

Citrus imported by Asia

Asian markets imported 2.3 million tonnes of citrus in 2025 increasing 10.4 per cent year on year and 2.6 per cent per year over 10 years

Vietnam is the largest importer – almost all from China

China imports almost all from OUTSIDE of Asia



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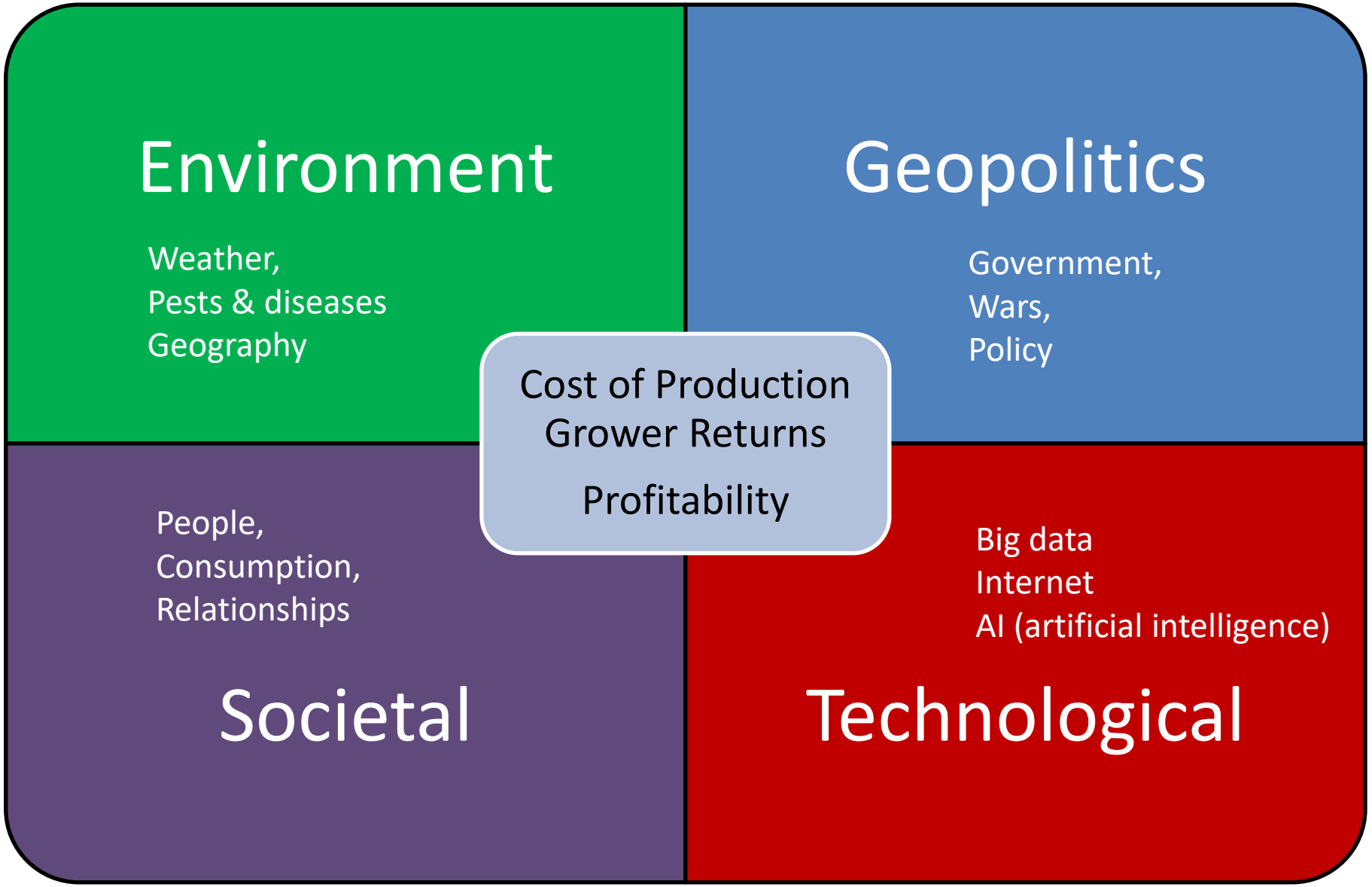

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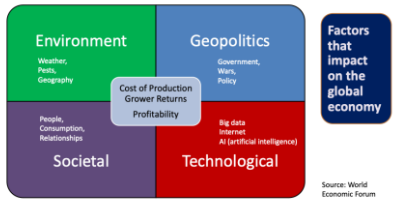
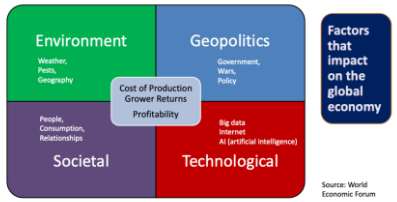


Factors influencing future scenarios

- Environment
  - Climate change / weather impacts disrupting supply – adapting to manage
  - Diseases (e.g. HLB) impacting on citrus production in other countries is a risk
  - Geography – we cannot change our location
- Geopolitics
  - Disrupters - Middle East crisis impacts on fuel costs and global economy
  - Government influence on negotiating market access and tariffs
  - Evolving New World order – are we experiencing the Asian Century?



Factors influencing future scenarios

- Societal
  - Increasing incomes in Asian countries
  - Consumers do want new experiences with food and expect premium quality for anything imported yet respect culturally sensitive foods.
  - Asian businesses and consumers value relationships
  - Brand image is critical in Asian markets
- Technological
  - Embrace better connections with internet, real time data and AI
  - Better sea and air freight, cold chains and handling by retailers
  - Despite advances, Asia is still behind Europe and US supply chains

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gracias

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REFERENCES

- International Trade Centre, TRADE MAP www.trademap.org/
- FAOSTAT www.fao.org/faostat

DISCLAIMER

- Fresh Intelligence Consulting collated the data for Pro Citrus Peru from data provided by the international trade databases as referenced.
- While every effort is made to ensure that the data is a true reflection of the trade, some errors may occur due to the reporting and Fresh Intelligence Consulting takes no responsibility for any losses that may occur as a result of decisions based on this data.
- Views expressed are personal and may not reflect the same views of Pro Citrus Peru.

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