

Required Report: Required - Public Distribution

Date: December 15,2020

Report Number: AR2020-0042

Report Name: Citrus Annual

Country: Argentina

Post: Buenos Aires

Report Category: Citrus

Prepared By: Maria Julia Balbi

Approved By: Melinda Meador

Report Highlights:

For MY 2020/21, Post forecasts fresh lemon production at 1.03 MMT, down 30 percent from MY 2019/20, due to cold damage and dry growing conditions. For fresh sweet citrus, Post estimates production at 700,000 MT for oranges and 360,000 MT for tangerines, up 7.5 percent and 16 percent, respectively, from MY 2019/20. Lemon exports are estimated to decline to 190,000 MT while orange exports increase slightly to 80,000 MT, and tangerines remain flat at 35,000 MT. Private sources estimate that Argentine lemon exports to the U.S. in MY 2019/20 could reach 40,000 MT in MY 2020/21. The COVID-19 pandemic has not had a major impact on the activity of the Argentine citrus fruit industry.

Executive Summary

A drought is constraining production of all citrus fruit in Argentina by reducing fruit size. Fresh lemon production for MY 2020/21 is projected at 1.03 MMT, down 30 percent from MY 2019/20. Lemons were particularly affected by low temperatures early in the growing season. The drought will limit orange and tangerine production increases to 700,000 MT and 360,000 MT, respectively, up 50,000 MT for both fruits, compared to MY 2019/20

MY 2020/21 lemon exports are estimated at 190,000 MT, down 65,000 MT from the previous marketing year, as a result of a decrease in production, larger fruit supply in the northern hemisphere, strong competition from South Africa, and some uncertainty on the EU measures regarding Citrus Black Spot (CBS) restrictions. Post forecasts sweet citrus exports at 80,000 MT for oranges and 35,000 MT for tangerines. Despite an increased demand for citrus fruit (primarily oranges) during the COVID-19 pandemic as a result of consumers' association of vitamin C with stronger immune system performance, Argentine sweet citrus exports will remain significantly lower than historical levels. This is due to challenging domestic economic conditions, which have reduced Argentina's ability to compete in export markets against other Southern Hemisphere exporters, mainly South Africa.

Historically, domestic demand for fresh lemons was typically inelastic in Argentina. But due to production problems, MY 2020/21 consumption is forecast at 110,000 MT, down 26.5 percent from MY 2019/20 official estimates, and down 35 percent from MY 2018/19 estimates. Orange and tangerine consumption is estimated to increase to 390,000 MT and 220,000 MT, respectively, compared to MY 2019/20, due to the production increase and sustained demand as a consequence of the pandemic.

Production

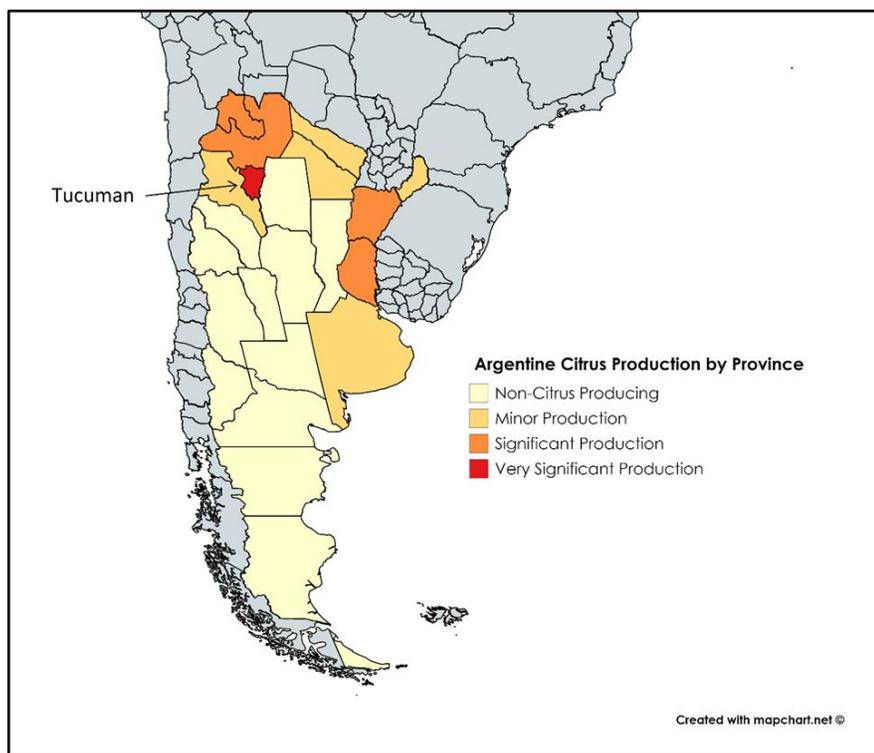
Lemons

Lemons are grown principally in northwest Argentinean provinces of Tucuman, Salta, and Jujuy, with some minor production in northeast Argentina. Genova and Eureka are the main lemon varieties grown in Argentina. Over the past decade, the lemon sector has been unique among Argentine fruit and specialty crop sectors in its ability to weather the economic and financial crises which have affected the country. This was due, in part, to investments in the activity bringing new producers and new orchards into production that increased profitability in the sector.

For MY 2020/21, Post forecasts a fresh lemon production of 1.03 MMT, down 30 percent compared to the previous marketing year. Since 2013, periodic incidences of low temperatures occurring in early spring have affected lemon production, but without serious damage. This year, the low spring temperatures seem to have significantly affected production and coupled with the ongoing drought resulted in reduced fruit size.

For MY 2019/20, Post’s estimate of fresh lemon production is revised downward to 1.47 MMT but still 70,000 tons over USDA official. Production is estimated to have fallen by 17.5 percent from the previous calendar year due to a combination of high temperatures in October-November 2019 as well as the summer and autumn of 2020, which negatively impacted the volume and size of fruit produced.

Additionally, due to the naturally alternating seasonal lifecycle of trees in lemon orchards, this marketing year was expected to be a “lighter” season for lemons as trees recovered from a heavy blossom season in MY 2018/19. For MY 2018/19, lemon production remains unchanged from the official estimate of 1.78 MMT



Oranges and Tangerines

Sweet citrus is grown in both the northwest (oranges) and northeast (oranges and tangerines) of Argentina. The main orange varieties grown in northwest Argentina are Hamlin, Pineapple, Robertson and Navel whereas in the northeast they are Navel, Salustiana and improved Valencia (Midnight, Delta Seedless). The main tangerine varieties are Clementina, Clemenvilla, Ellendale, Malvasio, Montenegrina, Murcott, and Ortanique. Expansion of sweet citrus includes seedless varieties, such as Tango for oranges, and Clementines and Clemenules for tangerines. Growers in the northeast tend to produce on smaller plot sizes than those in the northwest. For MY 2020/21, fresh orange and tangerine production is projected to increase to 700,000 MT and 360,000 MT, respectively, compared to the previous marketing year. However, it will be lower than MY 2018/2019, as a result of the severe drought affecting the main citrus growing area throughout 2020, which is expected to continue during the summer of 2021. Sweet citrus was less affected by the cool temperatures which affected lemon production.

For MY 2019/20, sweet citrus production is estimated to remain unchanged at 650,000 MT for oranges and 310,000 MT for tangerines, the same as USDA. However, production for both fruits decreased from MY 2018/19 due to a drought, which affected both volume and fruit size. In addition, low temperatures affected fruit blossom. For MY 2018/19, orange and tangerine production were unchanged from USDA estimates at 800,000 MT and 430,000 MT, respectively.

Planted Area

Lemons

Over the past few years, growers (both existing producers and new entrants) in northwest Argentina have expanded planted area. Tree removal and resetting have been increasing the plant per hectare ratio and improving productive efficiency and yields. However, for MY 2020/21, the area planted to lemons is estimated to remain stable at 50,000 hectares (HA), the same as MY 2019/20. Private sources indicate there has been no significant investment in area expansion in the past year as lemon producers have been investing in plant resetting but not in new plantations. In addition, some independent producers have decreased investment and expansion because they remain in poor financial condition after having to discard fruit in MY 2018/19. For 2018/19, the area planted to lemons remained unchanged at 50,000 HA, following official estimates.

Oranges and Tangerines

Projected planted area for MY 2020/21 remains unchanged for oranges and tangerines, respectively, at 39,000 HA and 28,000 HA, in line with USDA figures. There were no adjustments to estimates for MY 2019/20 and MY 2018/19. There has been no significant investment in area expansion in recent years, and industry consolidation is continuing. Smaller producers are struggling to compete and, when they exit the business, tend to sell their orchards to larger farmers. Better capitalized operators are focused on improving land management practices to increase productivity.



Commercial Scale Citrus Production in Province of Tucuman - Source: ACNOA

Processing

Lemons

For MY 2020/21, fresh lemons for processing are forecast to decrease significantly to 731 MT, down 31.5 percent, compared to MY 2019/20, as a result of the decrease in production.

For MY 2019/20, lemons for processing are projected to decrease to 1.06 MMT, down 34,000 MT from previous official estimates, due to larger exports and lower revised estimates for domestic production. The decrease is not expected to have a major impact as processors have large stocks of processed lemon products because of the oversupply of fruit in the previous season, which reduced prices for both fruit and processed lemon products.

Fresh lemons for processing in MY 2018/19 remained unchanged at 1.377 MMT, in line with USDA estimates.

Oranges and Tangerines

For MY 2020/21, Post forecasts fresh sweet citrus for processing at 230,000 MT for oranges and 105,000 MT for tangerines, up 19.5 percent and 36.5 percent from MY 2019/20, as a result of larger production.

Post's estimate for oranges for processing in MY 2019/20 is revised down to 194,000 MT and up to 77,000 MT for tangerines for processing, a decrease of 3 percent and an increase of 2.5 percent, respectively, from official estimates, due to larger exports and domestic consumption (for oranges) and smaller exports (for tangerines).

The 2019/20 harvest is being carried out smoothly, without major concerns related to the COVID-19 pandemic. The national government enacted a mandatory quarantine, but the citrus harvest was declared an excepted activity, allowing the packing and processing industry to continue working under a stringent protocol, coordinated by ACNOA (Citrus Association of the Northwest Argentina, in Spanish), SENASA (national plant health officials), provincial governments, and labor unions, to guarantee the safety of workers in the citrus sector, and prevent transmission of the virus.. In addition, under Decree No. 297/2020, a Regional Crisis Committee was created to coordinate activities to address the negative effects of the pandemic on the citrus industry of northwest Argentina. The committee developed a “Protocol for the Citrus Activity: COVID-19/Preventive Measures and Mitigation of Transmission Risk throughout the Supply Chain.” Unlike in past years, Post crop travel to the production regions was not permitted due to COVID-19 restrictions.

Investment

Larger lemon producers continue to invest in the replacement of unproductive trees and in genetic materials to improve yields. This year, there is no significant new capital investment in land in the northwestern provinces of Salta and Jujuy, where the lemon area expansion has been focused in the past few years. New investments by the private sector are primarily concentrating in improving efficiency in processing and packing facilities, irrigation, and research and development projects. Some factory retrofitting is taking place as exporters look to expand cold-chain capacity to meet Chinese import requirements.

Consumption

Lemons

Although fresh lemon domestic consumption tends to be inelastic, for MY 2020/21, it is forecast at 110,000 MT, down 40,000 MT from the previous marketing year, as a result of smaller production and a weakened domestic economy and restaurant sector.

For MY 2019/20, lemon consumption is projected at 150,000 MT, down 20,000 MT from MY2018/19. This projection diverges from USDA’s official estimates of 80,000 MT by 70,000 MT or 87 percent. This divergence is explained by Post’s estimate of a larger lemon production of 70,000 MT, which allows for the larger consumption figure.



Argentine lemons being sorted - Source: ACNOA

For MY 2018/19, domestic consumption is unchanged at 170,000 MT, following USDA estimates.

Oranges and Tangerines

For MY 2020/21, Post projects domestic consumption of fresh oranges to increase slightly to 390,000 MT, and consumption of fresh tangerines to reach 220,000 MT, up 10 percent from MY 2019/20 estimates. The increase is due to greater available supply and a projected sustained citrus fruit demand due to the pandemic.

For MY 2019/20, Post's estimate of domestic consumption of sweet citrus remained unchanged at 383,000 MT for oranges and 200,000 MT for tangerines, in line with USDA official estimates. While consumption for both types of fruits declined from 2018/19 levels due to decreased supply, demand and prices remained at relatively high levels as a result of significant interest in consumers in strengthening their immune systems to face the COVID-19 pandemic through the consumption of vitamin C. For MY 2018/19, domestic consumption of fresh oranges and tangerines remained unchanged at 410,000 MT and 280,000 MT, respectively, from USDA estimates.

Internal Fruit Tracking

In addition, the implementation of "Plant Transit Certificates" (DTVs, in Spanish) by Argentina's Animal and Plant Health authorities (SENASA) to control the transportation of plants and plant material, has resulted in more accurate information for domestic movement of such products, including fruits. As a result, more complete data on fruit consumption is available (*Resolución SENASA 31/2015* <http://www.senasa.gob.ar/tags/dtv>).

Trade

Exports

Lemons

Post forecasts MY 2020/21 fresh lemon exports at 190,000 MT, a fall of 25.5 percent from the previous marketing year official estimates. The projected decline is due to the decrease in production, available fruit supply in Northern Hemisphere fruit producing countries, and strong competition by South Africa. Exporters are concerned about the continued threat of fruit rejections by the EU due to presence of Citrus Black Spot (CBS) as occurred in MY 2019/20.

Post's estimate for fresh lemon exports in MY 2019/20 is increased 35,000 MT to 255,000 MT, up 16 percent from USDA estimates, as a result of larger production and less fruit devoted for processing. At the beginning of the season, local contacts were optimistic about Argentina's export prospects due to decreased fruit supply in the northern hemisphere, increased demand for products containing vitamin C (due to the COVID-19 pandemic), and the opening of new significant markets to Argentine lemons during 2019, such as India, Vietnam, and China. However, beginning in May 2020, EU member states reported the presence of CBS on imported Argentine lemons and oranges, causing the EU to reject several shipments and temporarily halt imports. Due to the EU measures, which SENASA and the local citrus industry considered to be overly restrictive and unjustified, Argentina chose to voluntarily withdraw from the EU market in mid July 2020. While Argentina had already shipped the bulk of its annual exports to the EU, local contacts estimate that that about 20,000 MT of lemons had to be reoriented to processing and non-traditional markets like the United States.

For MY 2018/19 lemon exports were unchanged at 234,000 MT, in line with USDA estimates.

Compared to other Argentine fruit and specialty crop sectors, including sweet citrus which has seen its competitiveness fall, the fresh lemon export business remains profitable despite high costs. However, with production costs, such as labor, inputs, energy, inland and ocean freight increasing, and high inflation rates (53.8 percent in CY 2019 and estimated at 37 percent for CY 2020), the competitiveness of the lemon sector has also been affected. Furthermore, although the continuous depreciation of the Argentine peso makes exports more price competitive in foreign markets, a reinstatement of export taxes, a decrease in export rebates and high interest rates, have partially offset that advantage.

Oranges and Tangerines

For MY 2020/21, fresh sweet citrus exports are forecast to increase slightly to 80,000 MT for oranges and 35,000 MT for tangerines, due to larger production. Despite this projected increase, exports still remain significantly lower than historical levels of around 150,000 MT of oranges and 100,000 MT of tangerines due to challenging domestic economic conditions and strong competition from other Southern Hemisphere exporters (primarily South Africa) but also other non-traditional competitors (such as Peru) which continues to discourage major investment in the sector.



Argentine oranges for export – Source: ACNOA

For MY 2019/20, orange exports are revised upwards slightly to 74,000 MT, and tangerine exports are revised downwards slightly to 33,000 MT, on latest available trade data. Despite a production decrease for both fruits, the demand for Argentina's sweet citrus, primarily Valencia oranges, was strong due to lower supply in the Northern Hemisphere countries and increased demand for products containing vitamin C (due to the COVID-19 pandemic). However, Argentina's dispute with EU over CBS caused an estimated 20,000 MT of oranges to be reoriented to other non-traditional markets such as Canada, Ukraine, and several Asian countries. This reduced profitability, because the prices in these markets were lower than those in the EU. Tangerine exports were not affected by this ban because South Africa has already taken most of Argentina's market share in the EU. Orange and tangerine exports in MY 2018/19 remain unchanged at 85,000 MT and 37,000 MT, in line with USDA estimates.

Export Destinations

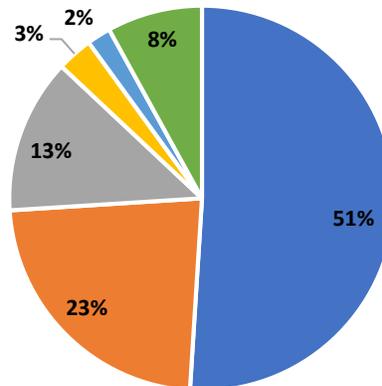
For MY 2020/21, the Argentine citrus sector will continue to look toward Asian markets for expansion. The Chinese market has remained open to fresh sweet citrus varieties since 2004. Argentina has had access to Korea since 2017, and also to Indonesia and the Philippines, for sweet citrus.

In 2018, Argentina exported its first shipment of fresh lemons to Japan under a stringent cold treatment plan, thus creating optimism about access to the Chinese market which was finally opened to fresh Argentine lemons in December 2019. Lemon exports were interrupted in 2005 when China established cold treatment for all citrus fruit. In 2019, India and Vietnam opened their markets to Argentine lemons. For lemon exporters, India is a highly attractive market as the world's second most populated country. According to private sources, the industry intends to promote Argentine lemon varieties among younger age cohorts with more Western eating habits.

However, despite gaining market access, Argentina and India are currently negotiating the reduction of a 30 percent import tariff applied to imports from countries without special trade agreements.

Argentine Fresh Lemon Exports January-October 2020

■ EU ■ Russia ■ U.S. ■ Ukraine ■ Canada ■ Other



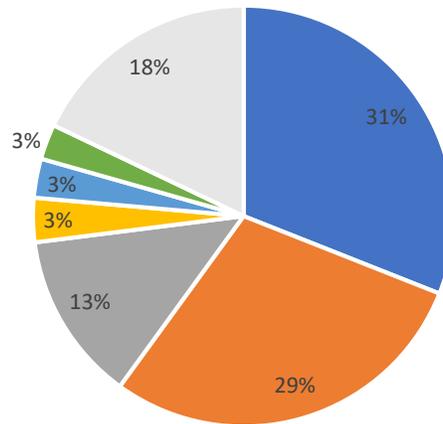
Source: FAS Buenos Aires, based on Trade Data Monitor, LLC

After regaining market access to the U.S. in 2017, Argentine lemon exports during MY 2017/18 totaled 10,640 MT. During MY 2018/19, lemon exports to the U.S. reached 23,179 MT, and private sources estimate that in MY 2019/20 exports will increase to 34,000 MT as a result of decreased production in California. For MY 2020/21, lemon exports to the U.S. are estimated to reach about 40,000 MT. However, this is an uncertain estimate due to the impact of the COVID-19 pandemic on consumption patterns. Moreover, restrictions over people’s movement are also affecting consumption levels. An additional factor that makes citrus fruit from the Southern Hemisphere more competitive in the U.S. market is that, in October 2019, the U.S. established a 25 percent import tariff on EU fresh oranges, lemons and tangerines, thus decreasing citrus exports from Spain to the U.S.

The U.S. and Argentina are currently negotiating the opening of the U.S. market to Argentine fresh sweet citrus fruit from the NEA region. Tangerines are likely to have better opportunities than oranges, as Argentina exports Valencia oranges while the U.S. demands the Navel orange variety. Private sources estimate that, in the second or third marketing season after the opening of the U.S. market, Argentine sweet citrus exports could reach between 8,000-10,000 MT.

Argentine Fresh Orange Exports January-October 2020

■ EU ■ Paraguay ■ Russia ■ Canada ■ UAE ■ Brazil ■ Other



Source: FAS Buenos Aires, based on Trade Data Monitor, LLC

The Brazilian market was opened to all Argentine citrus fruits in May 2017 and although Argentine expectations remain positive, especially for sweet citrus, it continues to face competitive challenges in this market.

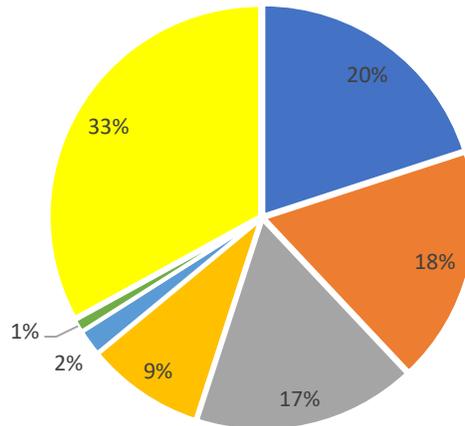
During January-October 2020, the EU remained the largest export market for Argentine fresh lemons accepting 51 percent of Argentina's exports, followed by Russia, with 23 percent, and the U.S., with 13 percent.

Orange exports to the EU accounted for 31 of total exports, compared to 53 percent during the same period of 2019, followed by Paraguay with 29 percent, Russia with 13 percent, and Canada with 3 percent. The decrease of orange exports was primarily due to Citrus Black Spot rejections at Spanish ports of entry.

For tangerines, Philippines became the largest export market with 20 percent market share, shifting Russia to the second largest position accepting 18 percent of Argentina's exports, followed by Paraguay with 17 percent share, Canada with 9 percent, and Saudi Arabia with 2 percent. Tangerine exports to traditional markets, such as the EU, have fallen over the past few years and virtually vanished in 2018 due to the lack of competitiveness by local exporters and strong competition from South Africa. (Source: Trade Data Monitor, LLC)

Argentine Fresh Tangerine Exports January-October 2020

■ Philippines
 ■ Russia
 ■ Paraguay
 ■ Canada
 ■ Saudi Arabia
 ■ Indonesia
 ■ Other



Source: FAS Buenos Aires, based on Trade Data Monitor, LLC

Imports

Citrus imports are expected to remain negligible in MY 2020/21 and MY 2019/20 as Argentina is a net citrus fruit exporting country and ongoing economic difficulties and currency devaluation will further reduce the competitiveness of citrus imports. Fruit import volumes will remain limited as local fruit production is sufficient to supply the domestic market. During January-October 2020, Argentina imported 587 MT of fresh lemons from Brazil and Chile, 540 MT of fresh oranges from Spain, and 126 MT of fresh tangerines from Uruguay and Chile.

Policy

Import and Export Regulations

In 2018, the government imposed a variable export tax of 4 Argentine pesos for every 1 U.S. dollar, by value or FOB export price, until December 31, 2020, which covered all citrus fruits, and reduced export rebates on all fruits to generate government revenue in response to the country's economic and financial crisis. However, in July 2019, the government published Decree No. 464/2019, which reduced the export tax from 4 to 3 Argentine pesos for every 1 U.S. dollar, by value or FOB export price. This measure benefited two-hundred and seven different Harmonized Tariff Schedule Codes, including citrus fruit. Please note, the Fernandez Administration currently has the power to adjust export taxes rates thanks to emergency economic laws passed by the Argentine Congress.

Below is a table including current tariffs, taxes, and rebates for all types of citrus fruit:

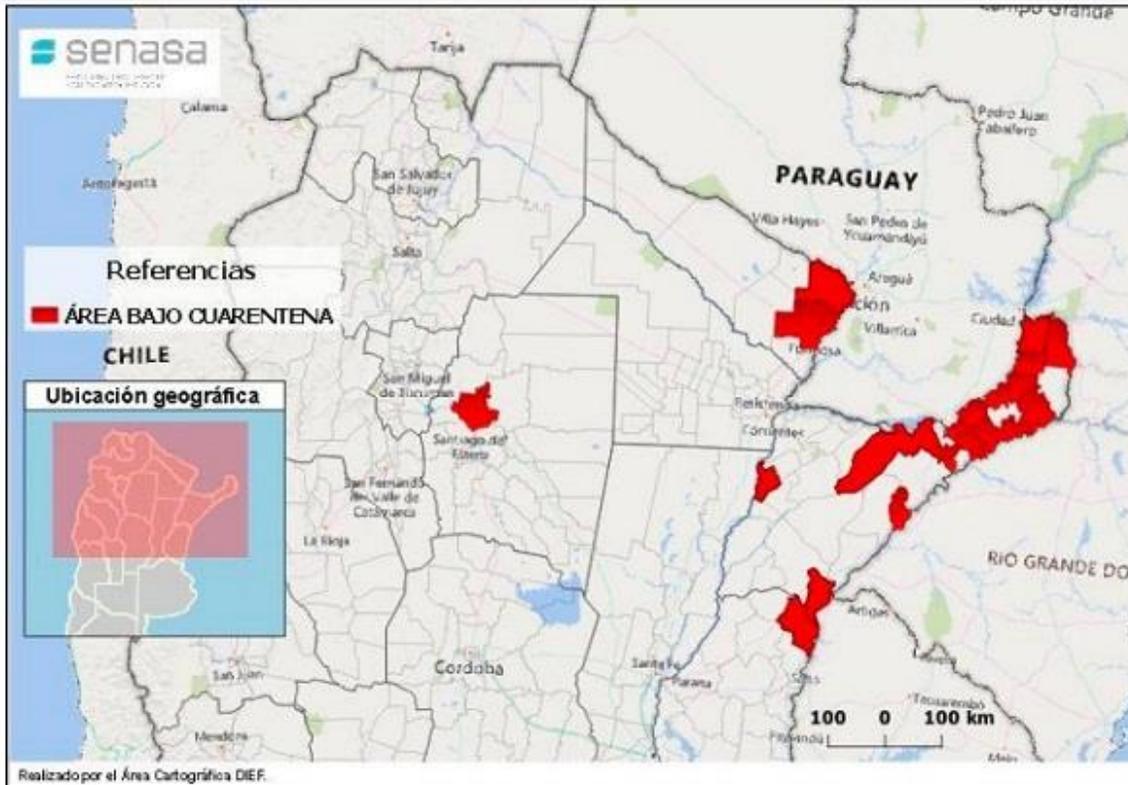
Tariffs, Taxes, & Rebates for All Citrus Fruit	
(HTS codes: 080510, 080520, 080521, 080522, 080529, 080550)	%
Import Tariff (outside Mercosur)	10.00
Import Tariff (within Mercosur)	0.00
Statistical Tax	3.00
Value-added Tax	10.5
Export Tax	12.00
Export Rebate (bulk) (*)	1.00

Source: FAS Buenos Aires based on data from Tarifar
 (*) The export rebate applies equally within and outside Mercosur

Phytosanitary Issues: Citrus Greening

In July 2014, a non-commercial case of Huanglongbing (HLB) was found in Mocoreta, Province of Corrientes (Northeastern region of Argentina – close to the border with Uruguay). The Argentine government immediately implemented its monitoring system in the area, as per the National HLB Prevention Program (created by Secretariat of Agriculture Resolution No. 517/2009, and ratified by National Law No. 26.888/2013, and SENASA Resolution 336/14), and subsequently found no other signs of the disease.

On July 4, 2012, APHIS was officially informed that a case of HLB had been reported in one infected tangerine tree in Puerto Deseado, Province of Misiones (Northeastern region of Argentina – close to the border with Brazil). The infected tree was destroyed as a precautionary action. In addition, SENASA intensified the surveillance for citrus species in the area with sampling in 150 premises with negative results for both: the symptoms and vector (*Diaphorina citri*) of the disease. SENASA stated that, since the location is not a citrus commercial area, and it is surrounded by national parks, it is likely that this was an illegal introduction from outside the country. Despite this, *Diaphorina citri* was reported in other areas of Argentina. A few additional cases were detected in Misiones and Corrientes Provinces and, in 2016, for the first time, in citrus commercial areas (i.e. vector presence, no disease).



Map of Northern Argentina, red signifies area under HLB related quarantine - Source: SENASA

In November 2017, the Ministry of Agroindustry and the Argentine Citrus Federation (FEDERCITRUS, in Spanish) signed an agreement to work jointly on the prevention of HLB into Argentina and, in March 2019, under the framework of the National Program for HLP Prevention, SENASA, the Secretariat of Agroindustry's National Trust Fund (FONDAGRO, in Spanish), and the Phytosanitary Association of the Northwest of Argentina (AFINOA, in Spanish) signed an agreement for resource contribution and management. SENASA recently made some changes to the National Program for HLB Prevention in an effort to protect citrus production. Since the presence of the pest was detected in new areas, these recently affected areas were declared under quarantine in Resolution #875/2020.

In November 2018, the Government of Entre Rios Province, through Decree #3757, declared a Phytosanitary Emergency in the province after finding the HLB vector in commercial farms and in urban areas.

In order to protect the sanitary status, SENASA defined the following areas based on HLB presence or absence, as follows:

- Area free of HLB and/or *Diaphorina citri*: Buenos Aires, Catamarca, and Tucuman.
- Area free of HLB with presence of *Diaphorina citri*: Jujuy, Salta, Santa Fe, Chaco, Misiones, Entre Ríos (some departments), Corrientes, Formosa, and Santiago del Estero.

- Areas under quarantine: Corrientes (some departments); Misiones (some departments), Entre Ríos (Federación), Formosa (some departments) and Santiago del Estero (Banda).
- Area protected from HLB: NOA region

For additional information on HLB in Argentina: <http://www.senasa.gob.ar/cadena-vegetal/frutales/produccion-primaria/programas-fitosanitarios/hlb>

Marketing

International (FOB) Prices for Fresh Citrus Fruit

In 2019, FOB prices for fresh lemons were lower than FOB prices in 2018 due to larger fruit supplies in the Northern Hemisphere. Orange FOB prices increased slightly while tangerine prices decreased, compared to the previous marketing year. Overall, FOB prices remained relatively low and were not sufficient to cover costs, thus resulting in increased financial difficulties for the local fruit sector and damaged the competitiveness of Argentine citrus in export markets. During January-October 2020, FOB prices of all citrus fruit continued to fall due to competition by other Southern Hemisphere citrus suppliers, primarily South Africa.

The highest FOB prices for lemons during January-October 2020 was \$748/MT (March); for oranges, \$533/MT (September); and for tangerines, \$645/MT (August).

Export prices tables can be found on the following three pages.

Lemon	FOB Prices (US\$/MT)		
	2018	2019	Jan-Oct 2020
January	--	--	--
February	--	--	--
March	811	849	748
April	916	806	744
May	956	806	739
June	973	784	725
July	972	763	666
August	978	750	560
September	840	688	--
October	--	--	--
November	--	--	n/a
December	--	--	n/a
Average	921	778	n/a

Source: FAS Buenos Aires based on Trade Data Monitor, LLC

Exchange rate: Argentine pesos 87.50/US\$1

Date of quote: 12/10/2020

Orange	FOB Prices (US\$/MT)		
	2018	2019	Jan-Oct 2020
January	--	--	--
February	--	--	--
March	--	--	--
April	--	--	--
May	--	--	148
June	123	422	272
July	564	492	501
August	539	465	512
September	524	488	533
October	--	363	346
November	--	--	n/a
December	--	--	n/a
Average	438	446	n/a

Source: FAS Buenos Aires based on Trade Data Monitor, LLC

Exchange rate: Argentine pesos 87.50/US\$1

Date of quote: 12/10/2020

Tangerine	FOB Prices (US\$/MT)		
	2018	2019	Jan-Oct 2020
January	--	--	425
February	--	--	519
March	1,000	895	451
April	949	836	579
May	903	822	633
June	925	792	575
July	907	755	627
August	884	705	645
September	840	572	639
October	--	180	593
November	--	--	n/a
December	--	--	n/a
Average	915	695	n/a

Source: FAS Buenos Aires based on Trade Data Monitor, LLC

Exchange rate: Argentine pesos 87.50/US\$1

Date of quote: 12/10/2020

Domestic Retail Prices for Fresh Citrus Fruit

Citrus Fruit	US\$/kg
Lemon (Premium)	1.93
Lemon (Standard)	1.70
Orange (Navel)	1.93
Orange (Valencia - Premium)	1.48
Orange (Valencia – Standard)	1.03
Tangerine (Okitsu)	1.47
Tangerine (Murcott)	1.48

The link below to the Buenos Aires Central Market provides updated wholesale citrus prices:

<http://www.mercadocentral.gob.ar/paginas/precios-mayoristas>

Promotion

“ALL LEMON Tested & Certified for Export” is a seal that guarantees the quality of Argentine fresh lemons for export. It includes an audit program of the sixteen leading lemon producers, packers, and exporters in Argentina, which certifies quality standards for export of about 85 percent of the country’s total lemon production. Lemons identified under ALL LEMON parameters must comply with:

- o Food safety standards
- o Traceability
- o Freshness
- o Firmness
- o Durability
- o High juice content
- o Aesthetic care
- o Balanced color
- o Uniform format.

For additional information on All Lemon: <http://www.latinlemon.com.ar/all-lemon-english.html>

Lemons/Limes, Fresh Market Year Begins	2018/2019		2019/2020		2020/2021	
	Jan 2019		Jan 2020		Jan 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Argentina						
Area Planted (HECTARES)	50000	50000	50000	50000	0	50000
Area Harvested (HECTARES)	44000	44000	46900	46900	0	46900
Bearing Trees (1000 TREES)	11500	11500	11500	11500	0	11500
Non-Bearing Trees (1000 TREES)	840	840	840	840	0	840
Total No. Of Trees (1000 TREES)	12340	12340	12340	12340	0	12340
Production (1000 MT)	1780	1780	1400	1471	0	1030
Imports (1000 MT)	1	1	0	0	0	1
Total Supply (1000 MT)	1781	1781	1400	1471	0	1031
Exports (1000 MT)	234	234	220	255	0	190
Fresh Dom. Consumption (1000 MT)	170	170	80	150	0	110
For Processing (1000 MT)	1377	1377	1100	1066	0	731
Total Distribution (1000 MT)	1781	1781	1400	1471	0	1031

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

Oranges, Fresh Market Year Begins	2018/2019		2019/2020		2020/2021	
	Jan 2019		Jan 2020		Jan 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Argentina						
Area Planted (HECTARES)	39000	39000	39000	39000	0	39000
Area Harvested (HECTARES)	37200	37200	37200	37200	0	37200
Bearing Trees (1000 TREES)	18300	18300	18300	18300	0	18300
Non-Bearing Trees (1000 TREES)	1500	1500	1500	1500	0	1500
Total No. Of Trees (1000 TREES)	19800	19800	19800	19800	0	19800
Production (1000 MT)	800	800	650	650	0	700
Imports (1000 MT)	2	2	0	1	0	0
Total Supply (1000 MT)	802	802	650	651	0	700
Exports (1000 MT)	85	85	70	74	0	80
Fresh Dom. Consumption (1000 MT)	410	410	380	383	0	390
For Processing (1000 MT)	307	307	200	194	0	230
Total Distribution (1000 MT)	802	802	650	651	0	700

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

Tangerines/Mandarins, Fresh Market Year Begins	2018/2019		2019/2020		2020/2021	
	Jan 2019		Jan 2020		Jan 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Argentina						
Area Planted (HECTARES)	28000	28000	28000	28000	0	28000
Area Harvested (HECTARES)	23000	23000	23000	23000	0	23000
Bearing Trees (1000 TREES)	12600	12600	12600	12600	0	12600
Non-Bearing Trees (1000 TREES)	1400	1400	1400	1400	0	1400
Total No. Of Trees (1000 TREES)	14000	14000	14000	14000	0	14000
Production (1000 MT)	430	430	310	310	0	360
Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	430	430	310	310	0	360
Exports (1000 MT)	37	37	35	33	0	35
Fresh Dom. Consumption (1000 MT)	280	280	200	200	0	220
For Processing (1000 MT)	113	113	75	77	0	105
Total Distribution (1000 MT)	430	430	310	310	0	360

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

Attachments:

No Attachments