

## Orange Juice Situation

**Orange juice production in the Northern Hemisphere in 2001/02 is estimated at 1.1 million tons, 65 degrees Brix, up nearly 3 percent from 2000/01. U.S. production of orange juice during 2001/02 is forecast at 1.0 million tons, up from 970,211 tons the previous year. U.S. exports during 2001/02 are forecast at 97,450 tons, up nearly 12 percent year to year.**

### Northern Hemisphere

#### United States

U.S. production of orange juice in 2001/02 is forecast at 1.0 million tons, up over 3 percent from the 2000/01 level. According to the January 11, 2002, NASS Crop Production report, Florida frozen concentrated orange juice (FCOJ) yield projection is 1.58 gallons per box of 42.0 degrees Brix. This is an increase from the December 2001 projection of 1.55 gallons per box. The early and midseason yield is projected at 1.52 gallons per box. The Valencia FCOJ yield is forecast at 1.68 gallons per box.

U.S. exports of orange juice are forecast at 97,450 tons, up nearly 12 percent from the level exported in 2000/01. U.S. exports during 2000/01 were 87,209 tons down 16 percent from the previous year. U.S. imports of orange juice are estimated at 192,050 tons, an increase of nearly 5 percent from the previous year. U.S. consumption of orange juice during 2001/02 is forecast at 1.12 million tons, up 6 percent from the previous year's level. However, consumption at this level is still depressed from the 1999/2000 level. Ending stocks of orange juice are forecast at 441,000 tons, down 5 percent from the previous year.

#### Italy

In 2001/02 Italy's orange juice output is forecast to increase by 13 percent due to a large fruit supply. Citrus fruits delivered to processors consist mainly of fruit that is in excess, or not of high enough quality for the fresh market. However, non-concentrated orange juice production is expanding in Italy, due to growing consumer demand, especially for non-concentrated fresh orange juice, which is considered to be a healthier, and higher quality product. The demand for this type of juice, which is produced almost exclusively with domestically-produced oranges, may lead to more fruit produced specifically for the juice sector.

Italy's exports of orange juice are forecast at 28,000 tons in 2001/02, down 2,000 tons from the previous year. As a result of the reform of the EU citrus regime, the Italian citrus processing sector has become more competitive. Deficiencies in domestic supply when local citrus production is poor are compensated for by large stocks and orange juice imports from Brazil entering the EU through Northern European ports.

## **Spain**

Deliveries of fresh oranges to processors during 2001/02 are forecast at 670,000 tons, producing a forecast 43,000 tons of orange juice. In Spain, oranges are not grown specifically for juice production; rather they are primarily those that have been rejected for fresh consumption. Most orange juice plants are located in the orange-producing areas in the Valencia region and in Andalucia. Faced with strong competition from other beverages, orange juice remains the favorite juice and consumption is expected to grow in 2001/02. Orange juice represents about 35 percent of the local fruit juice market. Total annual per capita consumption of orange juice is estimated at about 6 liters.

Orange juice exports during 2001/02 are forecast to be lower than during the previous season. Orange juice imports during the same time frame are forecast at 35,000 tons. About 50 percent of the total imported is concentrated orange juice, and the remaining is single strength, while a large percentage of orange juice exported, mainly to other EU countries, is single strength.

## **Japan**

Japan's imports of orange juice in 2001/02 are forecast at 110,000 tons, down 5 percent from the previous year. Brazil is, by far, the largest supplier of orange juice to Japan, accounting for 82 percent of the 116,245 tons imported during October-September 2000/01. The duties on imported orange juice range from 21.3 to 25.5 percent.

## **Mexico**

FCOJ production for 2001/02 is forecast at 37,000 tons, 12 percent higher than 2000/01 production due to the expected higher international prices. Juice production depends heavily on the international price of FCOJ. The Mexican industry is expecting prices to rise to at least \$0.90 per pound for calendar year (CY) 2002. The general uncertainty of the FCOJ industry has not changed from previous years. Unless FCOJ export prices are good, enabling processors to increase the price paid to fruit producers, it is unlikely that juice concentrate production will increase dramatically. Due to financial problems of the processing industry, there has been a concentration of ownership.

In general, the industry does not expect domestic consumption to increase dramatically because of the availability of fresh oranges in the domestic market. The majority of Mexico's consumers demand fresh-squeezed juice instead of processed orange juice. Consumption for 2001/02 is expected to remain constant, due to a decrease in consumption from the hotel and restaurant industry being offset by a steady availability of fresh, domestic oranges. Most of the orange juice produced in Mexico goes to the export market.

Exports of FCOJ for 2001/02 are forecast to increase to approximately 33,500 tons. Exports are

expected to rise because of higher demand and international prices. The main market for Mexico's orange juice is the United States, with Japan and European countries also becoming important markets. Any export growth is forecast to be limited to the needs of Florida's industry to mix their juice with a higher sugar-ratio and more colored Mexican juice.

*(This article was prepared or estimated on the basis of official statistics of foreign governments, other foreign source material, and, in particular, reports of Agricultural Attachés and Foreign Service Officers, results of office research, and related information. The FAS Attaché Report search engine contains reports on the Orange Juice industries for approximately 10 countries, including Mexico and Brazil. For information on production and trade, contact Debra A. Pumphrey at 202-720-8899.)*



**ORANGE JUICE: SUPPLY & UTILIZATION, MAJOR PRODUCING  
COUNTRIES IN NORTHERN HEMISPHERE**

<b>Country/Year 1/</b>	<b>Begin. Stocks</b>	<b>Production</b>	<b>Imports</b>	<b>Exports</b>	<b>Consumption</b>	<b>Ending Stocks</b>
<b>Metric tons, 65 Degrees Brix 2/</b>						
<b>Greece 3/</b>						
1998/99	2,044	10,000	10,000	4,500	17,500	44
1999/00	44	16,500	11,000	6,000	18,500	3,044
2000/01	3,044	15,350	8,500	7,560	19,000	334
2001/02 <b>F</b>	334	7,400	12,000	3,400	16,000	334
<b>Italy 4/</b>						
1998/99	30,000	25,000	14,000	28,000	28,000	13,000
1999/00	13,000	40,000	30,000	38,000	30,000	15,000
2000/01	15,000	38,000	30,000	41,000	31,000	11,000
2001/02 <b>F</b>	11,000	43,000	28,000	42,000	32,000	8,000
<b>Mexico 4/</b>						
1998/99	5,900	45,300	1	45,001	3,200	3,000
1999/00	3,000	41,000	1	37,801	3,200	3,000
2000/01	3,000	33,000	1	30,501	3,000	2,500
2001/02 <b>F</b>	2,500	37,000	1	33,501	3,000	3,000
<b>Morocco 5/</b>						
1998/99	4,788	9,500	943	9,913	1,934	3,384
1999/00	3,384	13,800	283	12,612	2,000	2,855
2000/01	2,855	4,000	400	4,800	2,300	155
2001/02 <b>F</b>	155	5,200	500	3,400	2,300	155
<b>Spain 6/</b>						
1998/99	5,100	45,300	25,500	56,600	18,000	1,300
1999/00	1,300	52,000	32,200	73,700	10,800	1,000
2000/01	1,000	46,000	35,000	70,000	11,000	1,000
2001/02 <b>F</b>	1,000	43,000	35,000	65,000	13,000	1,000
<b>Turkey 5/</b>						
1998/99	1,356	9,700	934	102	10,600	1,288
1999/00	1,288	11,000	1,195	167	11,500	1,816
2000/01	1,816	10,700	1,481	112	12,000	1,885
2001/02 <b>F</b>	1,885	10,700	1,500	100	12,200	1,785

**ORANGE JUICE: SUPPLY & UTILIZATION, MAJOR PRODUCING  
COUNTRIES IN NORTHERN HEMISPHERE**

Country/Year 1/	Begin. Stocks	Production	Imports	Exports	Consumption	Ending Stocks
<b>Metric tons, 65 Degrees Brix 2/</b>						
<b>United States 5/</b>						
1998/99	379,122	879,165	245,802	106,842	1,017,414	379,833
1999/00	379,833	1,071,926	241,412	103,515	1,130,869	458,787
2000/01	458,787	970,211	183,439	87,209	1,059,328	465,900
2001/02 <b>F</b>	465,900	1,003,642	192,050	97,450	1,123,142	441,000
<b>Northern Hemisphere Total</b>						
1998/99	428,310	1,023,965	297,180	250,958	1,096,648	401,849
1999/00	401,849	1,246,226	316,091	271,795	1,206,869	485,502
2000/01	485,502	1,117,261	258,821	241,182	1,137,628	482,774
2001/02 <b>F</b>	482,774	1,149,942	269,051	244,851	1,201,642	455,274

1/ Year refers to marketing period which usually begins in the fall for the Northern Hemisphere and corresponds to the harvesting and marketing period for fresh citrus.

2/ Includes all processed orange juice whether or not concentrated. One metric ton of 65 degrees brix equals 344.8 gallons at 42 degrees brix and 1,405.88 gallons at single strength equivalent.

3/ Marketing season begins September 1 of first year shown.

4/ Marketing season begins January 1 of second year shown.

5/ Marketing season begins October 1 of first year shown.

6/ Marketing season begins November 1 of first year shown.

7/ Marketing season begins December 1 of first year shown

F Forecast

Sources: National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of Census. Florida Department of Citrus. Reports from U.S. Agricultural Counselors and Attaches and/or FAS/USDA estimates.

**ORANGE JUICE: SUPPLY & UTILIZATION, MAJOR PRODUCING  
COUNTRIES IN SOUTHERN HEMISPHERE**

<b>Country/Year 1/</b>	<b>Begin. Stocks</b>	<b>Production</b>	<b>Imports</b>	<b>Exports</b>	<b>Consumption</b>	<b>Ending Stocks</b>
<b>Metric tons, 65 Degrees Brix 2/</b>						
<b>Australia 3/</b>						
1998/99	27,035	17,214	21,990	2,557	43,965	19,717
1999/00	19,717	22,471	21,887	2,346	44,942	16,787
2000/01	16,787	12,701	27,356	1,954	44,942	9,948
2001/02 <b>F</b>	N/A	N/A	N/A	N/A	N/A	N/A
<b>Brazil 3/ 4/</b>						
1998/99	263,000	1,360,000	0	1,295,000	16,000	312,000
1999/00	312,000	1,180,000	0	1,265,000	16,000	211,000
2000/01	211,000	960,000	0	1,055,000	16,000	100,000
2001/02 <b>F</b>	N/A	N/A	N/A	N/A	N/A	N/A
<b>South Africa 5/</b>						
1998/99	3,338	15,750	0	6,338	10,250	2,500
1999/00	2,500	20,000	100	9,500	11,500	1,600
2000/01	1,600	20,500	110	11,000	10,000	1,210
2001/02 <b>F</b>	N/A	N/A	N/A	N/A	N/A	N/A
<b>Southern Hemisphere Total</b>						
1998/99	293,373	1,392,964	21,990	1,303,895	70,215	334,217
1999/00	334,217	1,222,471	21,987	1,276,846	72,442	229,387
2000/01	229,387	993,201	27,466	1,067,954	70,942	111,158
2001/02 <b>F</b>	N/A	N/A	N/A	N/A	N/A	N/A
<b>World Total</b>						
1998/99	721,683	2,416,929	319,170	1,554,853	1,166,863	736,066
1999/00	736,066	2,468,697	338,078	1,548,641	1,279,311	714,889
2000/01	714,889	2,110,462	286,287	1,309,136	1,208,570	593,932
2001/02 <b>F</b>	N/A	N/A	N/A	N/A	N/A	N/A

1/ Marketing year indicated is for aggregation purposes with countries from the Northern Hemisphere corresponding to the harvesting and marketing period for fresh citrus. For the Southern Hemisphere, orange harvest occurs entirely during the second year shown.

2/ Includes all processed orange juice whether or not concentrated. One metric ton of 65 degrees brix equals 344.8 gallons at 42 degrees brix and 1,405.88 gallons at single strength equivalent.

3/ Marketing season begins July 1 of second year shown.

4/ Includes small quantities of tangerine juice.

5/ Marketing season begins February 1 of second year shown.

F Forecast

Source: National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of Census. Florida Department of Citrus. Reports from U.S. Agricultural Counselors and Attaches and/or USDA/FAS estimates.

**BRAZIL: SUPPLY AND DISTRIBUTION OF ORANGES AND FCOJ 1/**

	1997	1998	1999	2000	2001 F
	<b>Million Boxes 2/</b>				
<b>Oranges, Sao Paulo</b>					
Production 3/	420	342	395	355	286
Fresh Consumption	98	60	92	79	57
Fresh Exports	2	2	3	2	3
Processed	320	280	301	274	226
	<b>1,000 Metric Tons, 65 Degrees Brix 4/</b>				
<b>FCOJ, Brazil</b>					
Beginning Stocks 5/	126	236	263	312	211
Production					
Sao Paulo	1,353	1,156	1,310	1,140	935
Other States	37	28	50	40	25
Total	1,390	1,184	1,360	1,180	960
Exports 6/					
Sao Paulo	1,228	1,110	1,245	1,225	1,030
Other States	37	28	50	40	25
Total	1,265	1,138	1,295	1,265	1,055
Consumption	16	19	16	16	16
Ending Stocks	236	263	312	211	100

- 1/ Harvesting and processing usually begin in late April or early May. Marketing season for FCOJ begins on July 1 of year indicated.
- 2/ 40.8 kilograms or 90 pounds.
- 3/ Includes oranges produced in Sao Paulo's commercial citrus zone, plus tangerines used for processing.
- 4/ One metric ton at 65 degrees Brix equals 344.8 gallons at 42 degrees Brix, or 1,405.88 gallons at single strength equivalent.
- 5/ Sao Paulo stocks.
- 6/ Includes tangerine juice.
- F Forecast



U.S. EXPORTS OF ORANGE JUICE  
MARKETING YEARS

Destination	1998/1999	1999/2000	2000/2001	2000/2001 October	2001/2002 October
Metric tons, 65 Degrees Brix 1/					
Canada	34,622	33,143	35,426	2,703	2,577
Belgium-Luxembourg	10,384	23,526	18,966	895	1,003
Japan	28,738	18,771	13,224	1,978	0
Korea; Republic of	12,395	9,835	8,338	524	859
United Arab Emirates	4,119	5,255	3,449	236	155
Mexico	1,024	1,129	1,360	90	139
Hong Kong	1,577	2,534	1,061	114	24
Thailand	404	505	395	35	34
Taiwan	137	293	390	11	2
United Kingdom	613	350	320	15	1
Singapore	1,266	676	296	32	8
Norway	223	204	278	8	25
Bahamas; The	901	908	275	31	3
Saudi Arabia	147	240	253	8	26
Trinidad and Tobago	154	238	239	51	33
Greece	240	144	215	46	38
Netherlands Antilles	155	181	214	22	17
Costa Rica	331	227	212	7	13
Germany	74	132	181	12	15
Leeward-Windward Islands	234	306	166	0	1
Italy	107	120	142	4	8
Philippines	126	43	128	15	3
Nicaragua	40	204	123	13	11
Sweden	318	226	111	18	8
Lebanon	4	55	107	27	10
Brazil	23	4	105	0	0
New Zealand	20	16	91	0	0
Iceland	531	493	86	7	7
Honduras	82	79	83	3	5
Israel	100	17	76	6	9
Switzerland	1,584	1,758	70	3	0
Other	3,608	1,903	831	78	43
Grand Total	104,279	103,515	87,209	6,990	5,078

Marketing Years--October-September.

1/ Data includes both frozen concentrate and single strength orange juice.

U.S. IMPORTS OF ORANGE JUICE  
MARKETING YEARS

Origin	1998/1999	1999/2000	2000/2001	2000/2001 October	2001/2002 October
Metric tons, 65 Degrees Brix 1/					
Brazil	185,342	168,322	119,651	14,121	11,118
Mexico	35,357	30,494	24,200	1,807	1,568
Costa Rica	17,423	24,275	22,604	1,745	1,143
Belize	7,927	11,802	9,341	2,101	0
Honduras	657	3,488	4,358	381	424
Canada	1,133	1,130	1,731	111	130
Dominican Republic	23	292	1,147	7	41
Argentina	287	508	84	21	0
Jamaica	2	306	71	0	0
Italy	169	88	58	0	1
Total Other Countries	885	707	192	0	65
Grand Total	249,206	241,412	183,439	20,294	14,491

Marketing Years--October-September.

1/ Data includes both frozen concentrate and single strength orange juice.

