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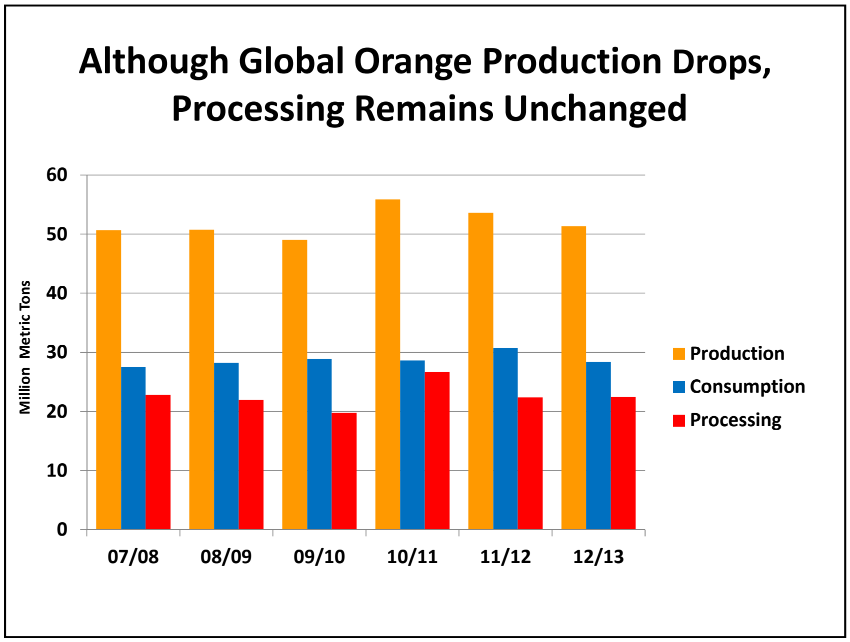
Citrus: World Markets and Trade

Oranges

Global orange production for 2012/13 is forecast to drop over 4 percent from the previous year to 51.3 million metric tons as declines in Brazil and the EU drive global fresh consumption down, fruit available for processing remains constant, and trade is virtually unchanged.

U.S. production is forecast down slightly to 8.0 million tons as projected droppage in Florida is the highest since the 1969/70 season (around 95 percent of the oranges are used for processing orange juice). Production in California is up slightly, where most of the oranges are used for fresh consumption. U.S. exports are forecast to remain flat. Due to the uncertainty regarding the outcome of the mid-January cold weather event in California, this forecast assumes no impact on production or trade.



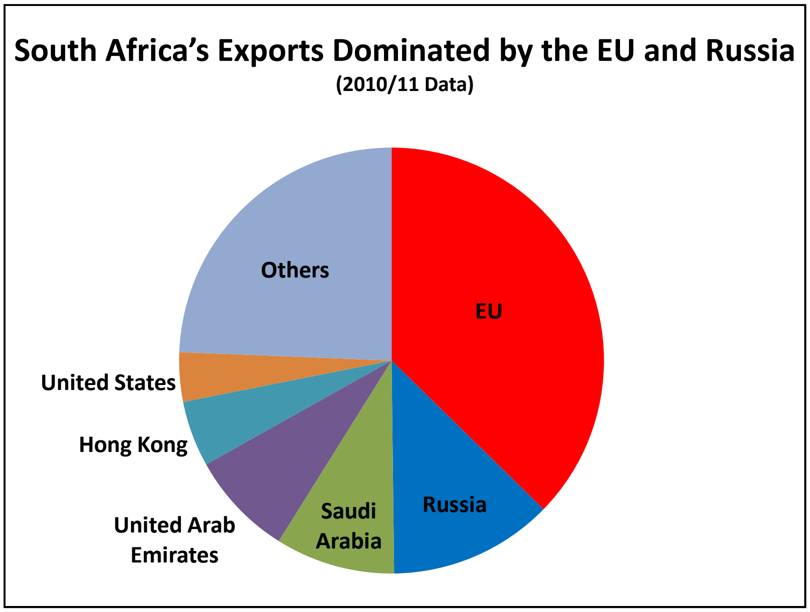
Brazil's production is forecast to drop nearly 10 percent to 18.6 million tons based on average blooms following good crops the past two years. As a result, fresh consumption is reduced, while oranges for processing are forecast unchanged. Although by far the world's largest producer, less than one percent is exported.

China's production is forecast up slightly at 7.0 million tons, with rising consumption of both fresh and processed fruit constraining exportable supplies. China is forecast to remain the largest fresh consumer accounting for over 20 percent of global consumption. In June 2012, the State Council released guidelines that commit to providing subsidies for orange seeds/seedlings as orange production is listed as one of the key sectors in agriculture development. Aiming to extend the supply, new varieties are being planted to harvest both earlier and later in the season.

EU production and fresh consumption are both forecast down 5 percent to 5.6 million tons and 5.0 million tons, respectively due to early spring bad weather conditions in Italy. Imports are forecast up slightly with South Africa, Egypt, and Morocco as the largest suppliers.

Mexico's production is forecast to reach 3.9 million tons, up over 500,000 tons on improved weather conditions after last year's drought. The gain is expected to augment both fresh consumption and processing, returning both to nearly pre-drought levels

Egypt's production is forecast at a record 2.5 million tons, up 4 percent on favorable weather and an upswing in area harvested as new, young trees start to bear fruit. Exports are forecast up 11 percent to 1.0 million tons as additional fruit is available to meet growing demand from the EU, Saudi Arabia, and the Ukraine.



South African production is forecast up slightly at 1.5 million tons. As the largest exporter, South Africa accounts for over 25 percent of world trade and is forecast at a record 1.1 million tons. The EU and Russia represent half its export market.

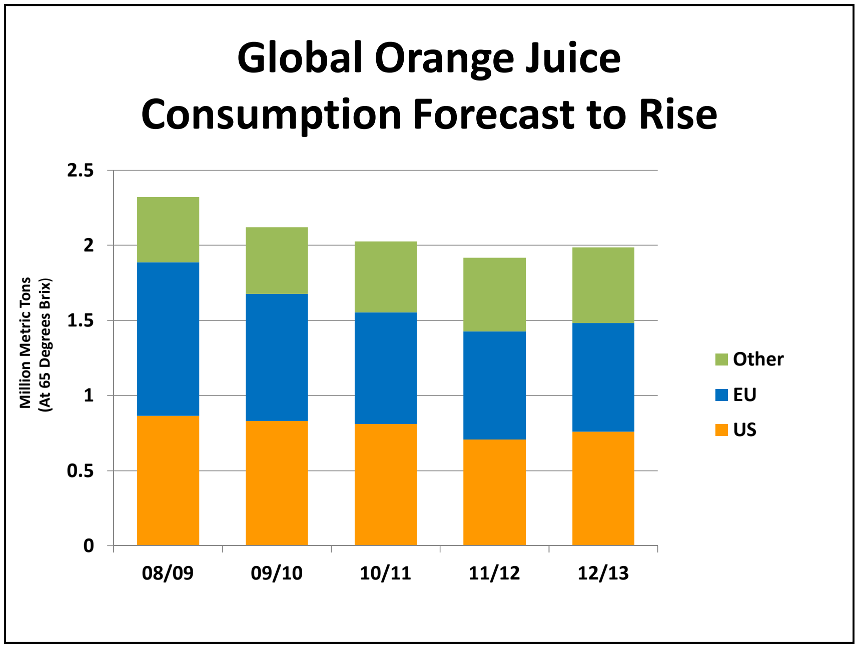
Morocco had a smaller, drought-impacted crop, although subsequent rainfall reportedly improved the size and quality of the fruit. Production is forecast at less than 800,000 tons with exports forecast to remain near last year's level.

South Korea's imports are forecast at a record 180,000 tons due to rising demand. The implementation of the U.S.-Korea Free Trade Agreement reduced the import tariff making fresh fruit more available to the consumers.

Orange Juice

For 2012/13 **global** orange juice production (65 Brix equivalent) is forecast at 2.2 million metric tons, up 2 percent from the previous year. Exports are forecast to increase with Global consumption, driven mostly by the EU and United States, forecast to rise nearly 4 percent, breaking a four year downward trend.

U.S. production is forecast down nearly 4 percent to 663,000 tons as projected droppage in Florida is the highest since the 1969/70 season. However, consumption is forecast to increase with greater imports from Brazil and Mexico. Exports are virtually unchanged, while ending stocks remain tight.



Brazil is by far the world's largest producer and exporter. Production is forecast up 4 percent to 1.3 million tons on higher crushing yields. Although exports are higher, ending stocks remain near record levels.

Mexico's production is forecast to rebound 40 percent to 90,000 tons, as significantly more fruit is available for processing on improved weather conditions after last year's drought. Consequently, exports are forecast to jump more than 35 percent with the United States as the main market, followed by Japan and the EU. Endings stocks are forecast to return to normal levels after stocks fell to zero last year as the industry reportedly sold everything.

EU production is forecast to ease 4 percent to 88,000 tons on a smaller crop. Imports remain flat with Brazil and the United States the primary suppliers.

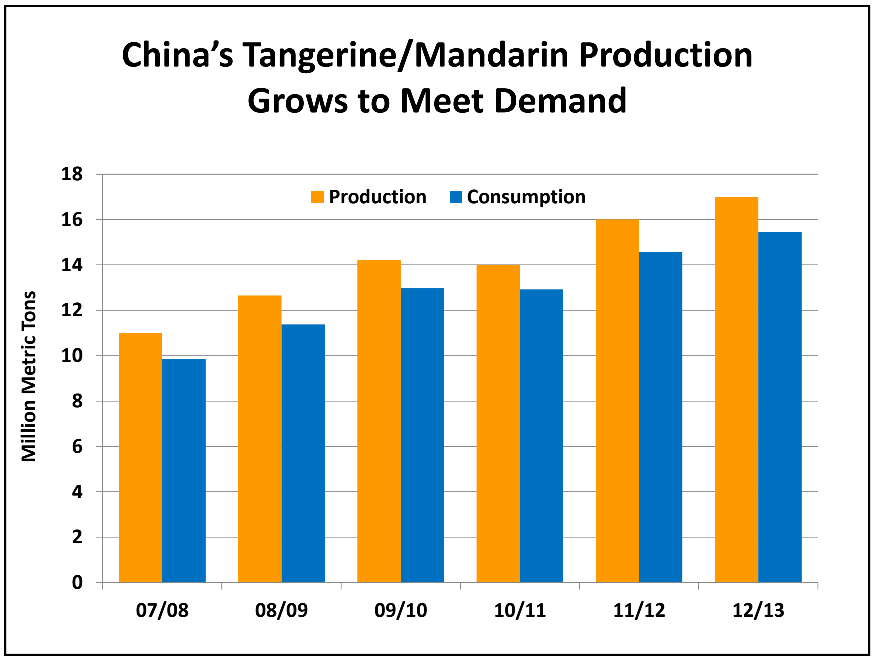
China's production is forecast to increase over 10 percent to a record 45,000 tons, with more fruit being used for processing. Higher production will primarily serve the domestic markets as orange juice grows in popularity.

Tangerine/Mandarin

Global production for 2012/13 is forecast at a record 24.2 million metric tons, up over 2 percent from last year with increases in China more than offsetting decreases in the EU and Morocco. Exports are forecast down while fresh consumption continues to grow with high demand and increased availability in China.

U.S. production is forecast to increase slightly to a record 645,000 tons with imports forecast down 4 percent and fresh consumption unchanged. Due to the uncertainty regarding the outcome of the mid-January cold weather event in California, this forecast assumes no impact on production or trade.

China's production is forecast up 1.0 million tons, to a record 17.0 million tons due to favorable weather. China represents 70 percent of global production and almost 40 percent of global exports. Rising fresh consumption is forecast to almost keep pace with production, while more fruit is available for export and processing.



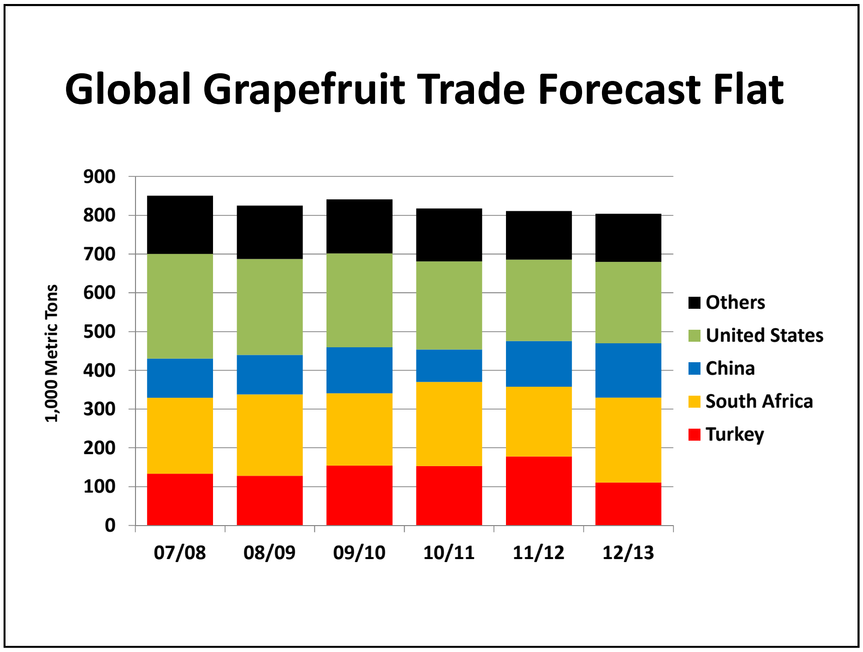
Production in the **EU** is forecast to decline 8 percent due to poor weather conditions in Spain, while trade remains virtually unchanged. Fresh consumption is forecast down on less available domestic fruit.

Japan's production is forecast down slightly at 981,000 tons as this is considered an "off-year" in the natural production cycle. Fresh consumption is forecast level at 900,000 tons with imports forecast to remain at 20,000 tons.

Turkey's production is forecast at 870,000 tons, down only slightly as tangerines were the least affected from the bad weather conditions that struck citrus production. Exports are forecast to decrease 5 percent to 450,000 tons, as more are forecast to be consumed fresh due to the high demand from reduced availability of other citrus.

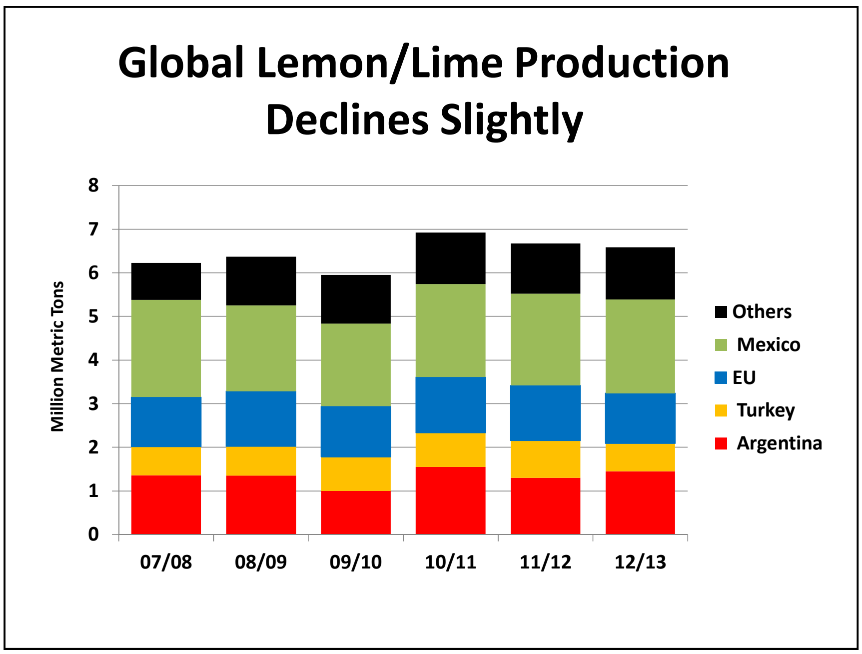
Grapefruit

Global production and fresh consumption for 2012/13 are forecast down 7 percent to 5.2 million tons and 4.2 million tons, respectively. Poor weather has reduced supplies in China and Turkey. Global exports are forecast flat as increases in South Africa and China offset declines from Turkey.



Lemon/Lime

For 2012/13, global production is forecast at 6.6 million tons, down slightly from the prior year. Reduced production, caused mostly by hot summer weather in the EU and heavy rain during the bloom in Turkey was partially offset by significant improvement in Argentina's crop due to favorable weather and improved yields. Global trade is forecast down as more available fruit is forecast to be used for processing.



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For additional production, supply, and demand information, you may visit our website at http://www.fas.usda.gov/psdonline/psdHome.aspx.

Oranges, Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2007/08	2008/09	2009/10	2010/11	2011/12	Jan 2012/13
Production						
Brazil	16,850	17,014	15,830	22,603	20,482	18,564
United States	9,141	8,281	7,478	8,078	8,180	8,014
China	5,450	6,000	6,500	5,900	6,900	7,000
EU-27	6,492	6,530	6,244	6,204	5,935	5,600
Mexico	4,297	4,193	4,051	4,080	3,360	3,900
Egypt	2,138	2,372	2,401	2,430	2,350	2,450
South Africa	1,526	1,445	1,459	1,428	1,450	1,500
Other	4,753	4,890	5,067	5,130	4,961	4,269
Total	50,647	50,725	49,030	55,853	53,618	51,297
Imports						
EU-27	1,040	846	959	799	812	850
Russia	517	436	478	573	495	500
Saudi Arabia	280	270	300	310	315	315
Canada	214	177	204	211	190	200
Hong Kong	177	176	193	200	188	195
United Arab Emirates	106	132	194	181	190	190
Korea, South	112	71	108	142	173	180
Other	886	895	918	966	1,038	1,031
Total	3,332	3,003	3,354	3,382	3,401	3,461
Exports						
South Africa	971	869	1,045	942	1,065	1,100
Egypt	850	774	850	1,000	900	1,000
United States	613	493	670	750	695	700
EU-27	242	236	272	317	304	300
Turkey	155	256	209	339	352	300
Morocco	296	305	161	175	138	141
China	124	155	158	92	129	120
Other	415	417	405	351	327	262
Total	3,666	3,505	3,770	3,966	3,910	3,923
Fresh Dom. Consumption						
China	5,143	5,729	6,220	5,727	6,349	6,390
Brazil	5,026	5,277	4,827	5,488	7,543	5,662
EU-27	5,772	5,869	5,717	5,322	5,257	5,009
Mexico	3,299	3,188	3,167	3,156	2,726	3,015
United States	1,406	1,264	1,360	1,440	1,526	1,474
Egypt	1,243	1,553	1,503	1,350	1,365	1,365
Turkey	1,202	1,115	1,409	1,315	1,308	1,025
Other	4,415	4,251	4,653	4,843	4,631	4,474
Total	27,506	28,246	28,856	28,641	30,705	28,414
For Processing						
Brazil	11,791	11,711	10,975	17,095	12,934	12,892
United States	7,199	6,614	5,554	5,990	6,078	5,950
EU-27	1,518	1,271	1,214	1,364	1,186	1,141
Mexico	1,000	1,000	880	930	650	900
China	245	182	202	180	520	600
South Africa	308	443	280	348	245	260
Costa Rica	165	196	235	210	275	220
Other	581	560	418	511	516	458
Total	22,807	21,977	19,758	26,628	22,404	22,421

Split years refer to the harvest and marketing period, which corresponds roughly to November-October in the Northern Hemisphere.

For the Southern Hemisphere, harvest occurs almost entirely during the second year shown and the harvest and marketing period begins in the second year shown:

Argentina - January through December
South Africa - February through January
Australia - April through March
Brazil - July through June

Import and export totals may not equal due in part to reporting anomalies such as those listed above.

Orange Juice: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons at 65 Degrees Brix)

	2007/08	2008/09	2009/10	2010/11	2011/12	Jan 2012/13
Production						
Brazil	1,315	1,273	1,145	1,600	1,210	1,255
United States	830	761	603	660	689	663
Mexico	102	105	88	91	64	90
EU-27	165	99	94	106	92	88
China	18	14	16	14	40	45
Other	56	74	59	61	60	59
Total	2,486	2,326	2,004	2,532	2,155	2,200
Imports						
EU-27	855	963	796	688	684	690
United States	292	228	236	191	160	200
Canada	138	111	106	103	101	100
Japan	69	75	64	87	82	75
China	51	43	60	77	60	55
Other	156	129	137	152	143	142
Total	1,560	1,549	1,399	1,297	1,230	1,262
Exports						
Brazil	1,275	1,283	1,173	1,185	1,170	1,215
United States	98	90	106	151	109	105
Mexico	96	99	82	85	60	82
EU-27	44	40	45	49	55	55
South Africa	12	17	18	18	18	18
Other	28	29	26	31	30	30
Total	1,553	1,558	1,449	1,520	1,442	1,506
Domestic Consumption						
United States	829	865	832	810	707	760
EU-27	970	1,022	845	744	721	723
China	63	60	61	75	102	116
Canada	134	108	105	99	96	95
Japan	76	73	74	75	76	76
Other	221	193	205	223	215	216
Total	2,294	2,321	2,121	2,026	1,917	1,986
Ending Stocks						
Brazil	172	128	65	440	436	428
United States	465	498	400	290	322	320
Japan	10	12	2	14	20	19
EU-27	15	15	15	15	15	15
South Africa	1	13	7	2	2	2
Other	19	10	21	32	23	5
Total	681	676	510	793	818	789

For 2007/08 and after, one metric ton of 65 degrees brix equals 344.8 gallons at 42 degrees brix and 1,392.6 gallons at single strength equivalent. One metric ton of 65 degrees brix equals 344.8 gallons at 42 degrees brix and 1,405.88 gallons at single strength equivalent for 2006/2007 and earlier.

Split years refer to the harvest and marketing period, which corresponds roughly to October-September in the Northern Hemisphere.

For the Southern Hemisphere, harvest occurs almost entirely during the second year shown and the harvest and marketing period begins in the second year shown:

South Africa - February through January
Australia - April through March
Brazil - July through June

Import and export totals may not equal due in part to reporting anomalies such as those listed above.

Tangerines/Mandarins, Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2007/08	2008/09	2009/10	2010/11	2011/12	Jan 2012/13
Production						
China	11,000	12,650	14,200	14,000	16,000	17,000
EU-27	2,975	3,172	3,054	3,187	3,161	2,911
Japan	1,193	1,007	1,116	857	1,001	981
Turkey	740	756	846	858	875	870
Morocco	471	532	635	716	730	662
United States	540	449	578	643	635	645
Korea, South	746	593	740	565	588	580
Other	716	717	676	734	631	555
Total	18,381	19,876	21,845	21,560	23,621	24,204
Imports						
Russia	486	520	593	717	704	710
EU-27	355	377	417	344	348	347
Indonesia	104	168	160	187	205	210
Vietnam	134	256	202	156	202	205
Ukraine	146	113	144	185	179	180
United States	97	131	128	151	146	140
Canada	117	121	124	123	129	130
Other	158	146	140	143	176	185
Total	1,597	1,832	1,908	2,006	2,089	2,107
Exports						
China	486	740	712	607	840	900
Turkey	224	382	330	450	474	450
EU-27	269	258	267	365	371	375
Morocco	272	332	323	349	344	297
South Africa	112	102	113	104	115	115
Israel	50	54	68	56	83	90
Argentina	95	113	119	115	100	45
Other	44	35	42	57	44	46
Total	1,552	2,016	1,974	2,103	2,371	2,318
Fresh Dom. Consumption						
China	9,850	11,371	12,977	12,926	14,568	15,450
EU-27	2,753	2,930	2,812	2,674	2,770	2,523
Japan	1,065	904	994	791	903	899
Russia	484	518	592	716	703	709
United States	426	440	530	583	595	595
Korea, South	603	503	612	482	482	492
Turkey	517	377	520	413	405	424
Other	1,154	1,261	1,292	1,387	1,469	1,437
Total	16,852	18,304	20,329	19,972	21,895	22,529
For Processing						
China	680	550	520	480	600	660
EU-27	308	361	392	492	368	360
United States	179	111	142	159	149	150
Japan	133	109	130	85	115	100
Korea, South	139	89	124	81	103	85
Israel	30	28	27	23	38	38
Argentina	105	97	91	145	40	35
Other	0	43	24	26	31	36
Total	1,574	1,388	1,450	1,491	1,444	1,464

Split years refer to the harvest and marketing period, which corresponds roughly to October-September in the Northern Hemisphere and April-March in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

Import and export totals may not equal due in part to reporting anomalies such as those listed above.

Grapefruit, Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2007/08	2008/09	2009/10	2010/11	2011/12	Jan 2012/13
Production						
China	2,230	2,520	2,900	2,800	3,200	2,900
United States	1,404	1,183	1,123	1,138	1,061	1,031
South Africa	340	370	343	406	390	410
Mexico	425	432	401	397	300	350
Israel	242	233	235	190	245	235
Turkey	167	168	191	213	240	150
EU-27	91	85	95	88	88	90
Other	240	237	140	160	100	80
Total	5,139	5,228	5,428	5,392	5,624	5,246
Imports						
EU-27	430	399	389	348	354	330
Japan	188	180	168	167	149	160
Russia	95	86	112	117	113	115
Canada	51	48	46	45	43	45
Ukraine	19	16	21	23	27	30
Hong Kong	12	16	18	18	24	25
China	3	6	7	12	13	15
Other	42	38	37	23	22	30
Total	840	789	798	753	745	750
Exports						
South Africa	196	210	187	217	180	220
United States	270	247	242	227	210	210
China	101	102	119	84	118	140
Turkey	133	128	154	153	178	110
Israel	81	85	84	83	78	76
EU-27	21	21	22	20	19	20
Mexico	14	11	18	17	18	18
Other	35	21	15	17	10	10
Total	851	825	841	818	811	804
Fresh Dom. Consumption						
China	2,132	2,424	2,788	2,728	3,095	2,775
EU-27	495	435	442	385	392	370
United States	434	388	387	383	351	325
Mexico	321	332	293	292	220	260
Japan	188	180	168	167	149	160
Russia	95	86	112	117	113	115
Argentina	90	90	60	66	56	49
Other	147	139	180	175	180	164
Total	3,902	4,074	4,430	4,313	4,556	4,218
For Processing						
United States	714	560	506	535	501	506
South Africa	144	156	151	184	205	185
Israel	144	142	107	88	153	145
Mexico	100	100	100	90	70	80
EU-27	5	28	20	31	31	30
Argentina	119	132	71	86	42	28
Canada	0	0	0	0	0	0
Other	0	0	0	0	0	0
Total	1,226	1,118	955	1,014	1,002	974

Split years refer to the harvest and marketing period, which corresponds roughly to October-September in the Northern Hemisphere and April-March in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

Import and export totals may not equal due in part to reporting anomalies such as those listed above.

Lemons and Limes, Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2007/08	2008/09	2009/10	2010/11	2011/12	Jan 2012/13
Production						
Mexico	2,229	1,966	1,891	2,133	2,100	2,150
Argentina	1,360	1,350	1,000	1,550	1,300	1,450
EU-27	1,139	1,263	1,160	1,272	1,270	1,154
United States	562	827	800	835	771	809
Turkey	652	672	783	787	850	635
South Africa	230	214	216	257	260	270
Israel	35	29	48	30	53	56
Other	20	51	53	60	73	62
Total	6,227	6,372	5,951	6,924	6,677	6,586
Imports						
EU-27	515	405	471	421	430	440
United States	424	398	401	394	475	440
Russia	191	203	211	222	200	200
Canada	58	58	65	78	88	90
Saudi Arabia	60	145	109	129	86	90
United Arab Emirates	51	54	63	67	68	70
Ukraine	55	58	62	64	62	65
Other	96	95	83	87	84	86
Total	1,450	1,416	1,465	1,462	1,493	1,481
Exports						
Mexico	508	445	456	432	496	520
Turkey	220	351	434	457	429	320
Argentina	400	250	264	255	267	265
South Africa	166	130	145	162	160	175
United States	157	93	93	102	95	100
EU-27	59	87	67	68	100	95
Hong Kong	4	8	6	7	8	8
Other	12	7	9	7	9	8
Total	1,526	1,371	1,474	1,490	1,564	1,491
Fresh Dom. Consumption						
Mexico	1,322	1,208	1,141	1,361	1,275	1,291
EU-27	1,404	1,364	1,395	1,296	1,286	1,250
United States	625	787	739	829	964	899
Turkey	424	296	290	271	359	265
Russia	186	198	210	221	199	199
Canada	55	58	65	78	88	90
Saudi Arabia	60	145	109	129	86	90
Other	298	329	338	384	395	402
Total	4,374	4,385	4,287	4,569	4,652	4,486
For Processing						
Argentina	905	1,050	698	1,211	963	1,105
Mexico	400	314	295	342	330	340
United States	204	345	369	298	187	250
EU-27	191	217	169	329	314	249
South Africa	62	73	60	82	89	84
Turkey	12	30	60	60	65	55
Japan	0	2	2	3	3	4
Other	3	1	2	2	3	3
Total	1,777	2,032	1,655	2,327	1,954	2,090

Split years refer to the harvest and marketing period, which corresponds roughly to October-September in the Northern Hemisphere and April-March in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown. The harvest of lemons often extends throughout the year.

Import and export totals may not equal due in part to reporting anomalies such as those listed above.