

United States Department of Agriculture

Foreign Agricultural Service

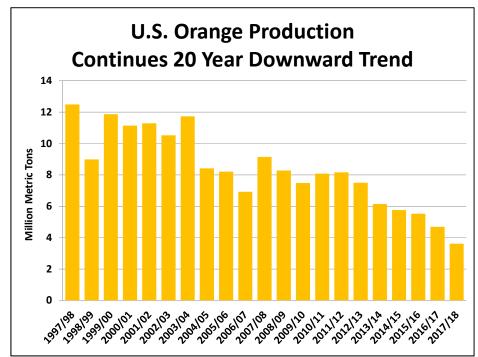
January 2018

Citrus: World Markets and Trade

Oranges

Global orange production for 2017/18 is forecast to tumble 4.0 million metric tons from the previous year to 49.3 million as unfavorable weather leads to smaller crops in Brazil, the EU, and the United States, more than offsetting a slightly larger crop in China. Similarly, fruit for processing is expected to fall 3.7 million tons with orange juice production forecast down 16 percent to 1.7 million metric tons (65 degrees brix) on the production slide in Brazil and the United States. Exports, however, are flat as the lower supplies mainly affect processing oranges.

U.S. production is projected to plunge 23 percent to 3.6 million tons, less than a third of the record high set in 1997/98. The forecast decline is large for several reasons including Hurricane Irma's winds in Florida blowing immature fruit off trees in September 2017, citrus greening disease continuing to cause fruit to drop in Florida before it is ripe. and unfavorable hot weather reducing the crop in California. Most orange



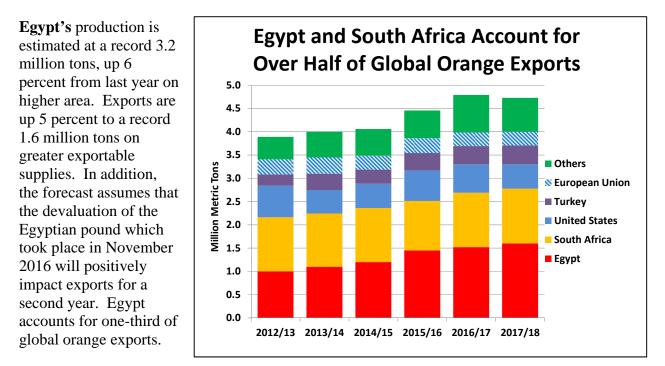
production in Florida is used for juice whereas California produces mainly for the fresh market. Exports, consumption, and fruit for processing are all lower with the smaller crop.

Brazil's production is forecast down a whopping 15 percent to 17.3 million tons based on an offyear cycle and expected lower yields. Unfavorable weather has resulted in poor bloom and fruit set. Even though the drop in production is large, the crop is still bigger than two years ago. Oranges for processing are down 2.9 million tons to 12.3 million with orange juice production forecast to fall to 1.2 million tons (65 degrees brix); fresh orange consumption is down only slightly as most of the reduced supplies affected the drop in orange juice production.

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China's production is projected up 300,000 tons to 7.3 million as a result of favorable weather and yields. Consumption is up on higher domestic supplies and robust import demand for high-quality and counter-seasonal fruit.

Production in the **European Union** is forecast down 8 percent to 6.3 million tons on lower area and drought conditions. Exports and imports are relatively flat while oranges for processing and fresh consumption are both down on lower supplies.



South Africa's production is expected to rise 2 percent to 1.4 million tons. Exports are forecast at a record 1.2 million tons and account for 25 percent of global trade. The European Union and Russia remain top markets for South African oranges.

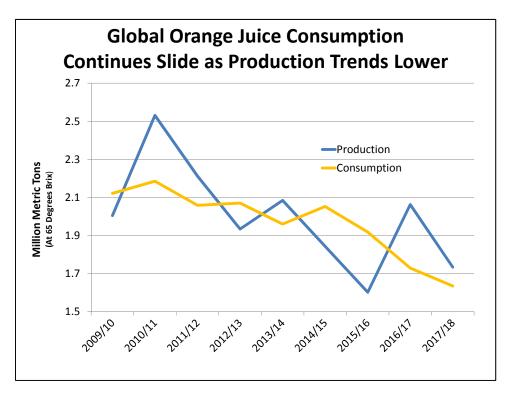
Production in **Turkey** is forecast up 3 percent to a record 1.9 million tons. Consumption and exports are also record highs on greater available supplies.

Mexico's production is projected down slightly. Consumption and fruit used for processing are also slightly down with the lower production. Exports are up nearly 7 percent as more oranges are expected to go to the United States.

Morocco's production is forecast down 10 percent to 935,000 tons due to unfavorable weather. Exports are forecast down over one-third with the reduced available supplies while consumption is down only slightly.

Orange Juice

Global orange juice production for 2017/18 is forecast down 16 percent to 1.7 million metric tons (65 degrees brix) as Brazil falls from last year's rebound. Consumption is forecast down, led by the United States and the EU. Exports and stocks are expected to fall 8 percent and 9 percent, respectively, on reduced Brazilian and U.S. production.



U.S. production is expected to decrease 97,000 tons to 215,000 as a result of fewer oranges for processing. Although imports are forecast up 10 percent to 330,000 tons, consumption continues its long-term downward trend.

Brazil's production is slated to plunge 16 percent to 1.2 million tons on fewer oranges for processing as orange juice production contracts. Exports are down similarly on smaller supplies. As the largest producer, Brazil accounts for three-quarters of global orange juice exports.

Mexico's production is unchanged and exports little changed.

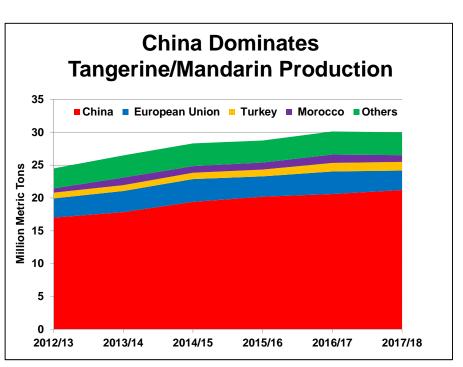
Production in the **European Union** is projected down 12 percent on reduced oranges for processing due to lower area, high temperatures, and lack of rain resulting in drought conditions. With imports relatively flat, consumption is lower.

Tangerines/Mandarins

Global production for 2017/18 is forecast at 29.9 million metric tons, down slightly from last year with a larger crop in China nearly offsetting the decline in the European Union and Morocco. Fresh consumption is flat while exports are forecast down 6 percent.

China's production is projected up 600,000 tons to a record 21.2 million due to favorable weather, and consumption is up on the gain in available supplies. China represents over 70 percent of global production and consumption and nearly one-fourth of global exports.

Production in the **European Union** is expected to fall 13 percent to 3.0 million



due to unfavorable weather in Spain. Consumption and fruit for processing are both down with the reduced available supplies while imports are flat.

Turkey's production is forecast slightly higher than last year's record at 1.3 million tons. Consumption is expected to grow 4 percent, limiting any growth in exports.

Production in **Morocco** is projected to drop 20 percent to 1.0 million tons as a result of high temperatures in July and August, bringing exports down proportionately.

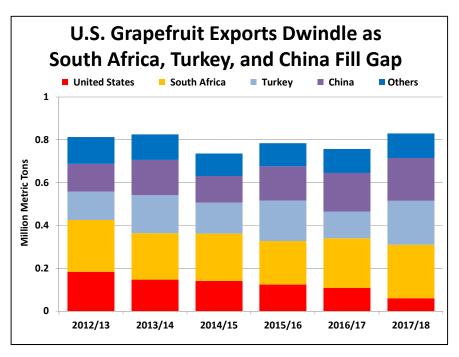
Japan's production is forecast to fall 7 percent to 990,000 tons as a result of unfavorable weather. Consumption is forecast down similarly.

U.S. production is slated to drop 14 percent to 779,000 tons on a lower crop in California due to unfavorable weather. Consumption and exports are both lower.

Grapefruit

Global production in 2017/18 is forecast up 1 percent to 6.6 million metric tons as favorable weather boosts China's crop. This more than offsets the drop in the U.S. crop resulting from citrus greening and hurricane damage. Exports and consumption are forecast up with higher supplies. Without the increase in production in China, consumption would be down but exports would still be higher due to increased exports from Turkey.

U.S. production is projected to drop more than 20 percent to 481,000 tons, reflecting losses mostly in Florida as Hurricane Irma's winds blew immature fruit off of trees in September 2017, and as greening continues to adversely affect production. Exports, consumption, and fruit for processing are lowered due to the smaller available supplies.



China's production is

forecast up 4 percent to a record 4.8 million tons as favorable weather resulted in a larger crop. Consumption and exports are also record highs.

Mexico's production and consumption are expected to decrease marginally to 440,000 tons and 335,000 tons, respectively. Exports are forecast little changed.

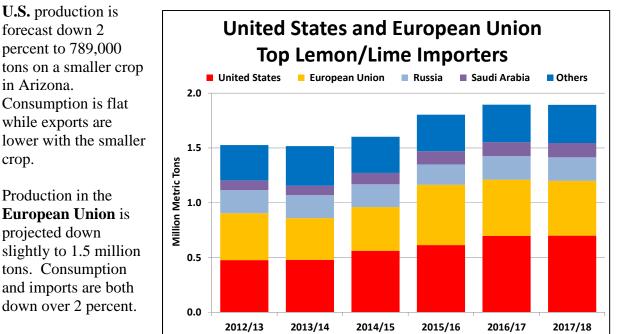
South Africa's production is expected to rise 9 percent to 400,000 tons, based on a boost in area. Exports are forecast at a new record with the higher supplies.

Turkey's production is forecast up 5 percent to a record 265,000 tons. Nearly 80 percent of production is estimated to be exported because of weak consumer preferences for grapefruit.

Production in the **European Union** is projected to fall 16 percent to 88,000 tons as a result of irregular flowering in Spain. Consumption is up on the expectation of higher imports from China.

Lemons/Limes

Global production in 2017/18 is forecast up slightly to a record 7.5 million metric tons. Higher production in Argentina and Mexico more than offsets declines in Turkey. Global exports are forecast up slightly to a new record with higher trade from Mexico. Fruit used for processing is up 3 percent.



Mexico's production

is expected up 80,000 tons to a record 2.6 million with a rise in area. Greater supplies will lead to both record consumption and exports.

Turkey's production is forecast to drop 10 percent to 675,000 tons as a result of high temperatures and lack of rain that affected flowering and fruit set. Consumption and exports are forecast down due to smaller supplies.

Argentina's production is slated to rise 100,000 to 1.4 million tons in a recovery from last year's frost damage. Fruit for processing and exports are expected to rise with the larger crop.

For further information, please contact Reed Blauer at (202) 720-0898 or *Reed.Blauer@fas.usda.gov*

FAS Reports from Overseas Offices

The *Citrus: World Markets and Trade* circular is based on post reports submitted since December 2017 and on available secondary information. Individual country reports can be obtained on FAS Online at: <u>http://gain.fas.usda.gov/Pages/Default.aspx</u>.

PSD Online

The entire USDA PSD database is available online at <u>https://apps.fas.usda.gov/psdonline/app/index.html#/app/home</u>.

Additional Resources

Please refer to the USDA-FAS Citrus website at: <u>http://www.fas.usda.gov/commodities/fruits-and-vegetables/citrus-fruit</u> for additional data and analysis.

Situation and outlook information on U.S. citrus can be obtained from the USDA-Economic Research Service at: <u>http://www.ers.usda.gov/topics/crops/fruit-tree-nuts.aspx</u>.

Future Releases and Contact Information

Please visit <u>http://www.fas.usda.gov/data/citrus-world-markets-and-trade</u> to view archived and future releases. The next release of this circular is scheduled for July 2018.

To receive the circular via email, go to: <u>https://public.govdelivery.com/accounts/USDAFAS/subscriber/new.</u>

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

(1,000 Metric Tons)

						Jan
	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Production						
Brazil	16,361	17,870	16,714	14,414	20,400	17,340
China	7,000	7,600	6,600	6,900	7,000	7,300
European Union	5,890	6,550	5,954	6,038	6,779	6,258
Mexico	4,400	4,533	4,515	4,603	4,640	4,600
United States	7,501	6,140	5,763	5,523	4,685	3,618
Egypt	2,450	2,570	2,635	2,930	3,000	3,180
Turkey	1,600	1,700	1,650	1,800	1,850	1,905
South Africa	1,659	1,723	1,645	1,275	1,400	1,430
Могоссо	784	1,001	868	925	1,037	935
Argentina	550	800	800	800	620	850
Vietnam	521	590	566	637	635	635
Australia	435	430	430	455	480	480
Costa Rica	326	315	220	335	322	325
Guatemala	152	154	161	177	175	175
Israel	73	69	86	86	81	90
Other	160	191	145	159	161	161
 Total	49,862	52,236	48,752	47,057	53,265	49,282
Fresh Dom. Consumption	,		,	,	,	,
China	6,405	6,865	6,043	6,446	6,717	7,070
European Union	5,382	5,549	5,333	5,406	5,988	5,631
Brazil	5,421	6,035	5,196	4,940	5,124	5,010
Mexico	2,887	3,312	2,947	2,929	2,887	2,852
Egypt	1,365	1,385	1,350	1,380	1,380	1,480
Turkey	1,290	1,284	1,310	1,366	1,397	1,450
United States	1,492	1,357	1,263	1,346	1,259	1,008
Morocco	642	820	688	811	824	800
Vietnam	559	661	602	695	680	680
Argentina	360	524	450	469	330	490
Russia	511	467	438	405	426	436
Saudi Arabia	274	274	448	435	350	350
Iraq	261	305	247	262	260	260
Australia	218	206	175	235	210	200
Guatemala	203	185	185	233	210	210
Other	1,663	1,532	1,475	1,543	1,422	1,432
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Total For Processing	28,933	30,761	28,150	28,944	29,464	29,369
Brazil	10,935	11,832	11,506	9,466	15,259	12,322
United States	5,470	4,420		3,684		
Mexico			4,133		2,999	2,290
	1,510	1,200	1,550	1,650	1,710	1,700
European Union	1,069	1,474	1,251	1,286	1,491	1,322
China	600	715	650	600	580	570
Argentina	113	200	278	270	212	280
Costa Rica	240	220	136	220	225	240
South Africa	369	471	403	142	161	185
Egypt	85	85	85	100	100	100
Turkey	95	100	80	100	100	98
Other	196	200	200	129	141	135
Total	20,682	20,917	20,272	17,647	22,978	19,242

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.

Oranges, Fresh: Production, Supply and Distribution in Selected Countries (Continued)

(1,000 Metric Tons)

			Jan			
	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Exports					_	
Egypt	1,000	1,100	1,200	1,450	1,520	1,600
South Africa	1,162	1,144	1,160	1,064	1,170	1,180
United States	678	506	522	657	609	520
Turkey	244	349	305	371	393	405
European Union	322	346	297	319	293	295
Australia	127	126	156	161	230	230
Hong Kong	45	49	74	107	172	160
Morocco	82	111	130	89	163	100
Argentina	77	76	72	65	80	80
Mexico	31	47	44	56	75	80
China	83	108	53	74	60	60
Brazil	20	20	28	24	33	24
Singapore	20	9	8	8	6	6
Israel	7	6	6	6	5	5
	3	3	2	2	4	4
Malaysia Other		2	2	2	4	4
	1					
Total	3,889	4,002	4,059	4,456	4,817	4,753
Imports European Union	883	819	927	973	993	990
Russia	512	469	440	473	430	990 440
China	88	469 88		220	357	440
			146			
Saudi Arabia	274	274	448	435	350	350
Hong Kong	217	230	256	286	305	300
United Arab Emirates	201	220	230	222	200	210
United States	139	143	155	164	182	200
Canada	199	183	190	204	188	190
Iraq	169	189	180	189	185	185
Korea, South	152	100	111	154	143	130
Malaysia	104	100	102	101	100	100
Japan	113	87	83	100	92	89
Ukraine	133	106	69	76	74	75
Switzerland	68	63	67	71	68	70
Costa Rica	91	77	56	35	52	65
Turkey	29	33	45	37	40	48
Vietnam	38	71	36	58	45	45
Singapore	45	48	46	44	42	42
Guatemala	51	31	24	34	35	35
Norway	38	34	36	38	35	35
Mexico	28	26	26	32	32	32
Australia	20	16	16	18	20	20
Brazil	15	17	16	16	16	16
South Africa	0	13	13	1	3	10
Mozambique	35	7	11	5	5	5
Other	0	0	0	4	2	0
Total	3,642	3,444	3,729	3,990	3,994	4,082

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

Orange Juice: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons at 65 Degrees Brix)

	2012/13	2013/14	2014/15	2015/16	2016/17	Jan 2017/18
Production						
Brazil	980	1,230	1,006	859	1,372	1,152
United States	607	476	438	390	312	215
Mexico	151	126	159	166	171	171
European Union	83	114	97	100	116	102
China	45	55	50	46	45	44
South Africa	39	48	55	19	22	26
Turkey	8	9	8	9	9	9
Other	21	25	31	13	16	15
Total	1,934	2,084	1,843	1,601	2,062	1,733
Domestic Consumption						
European Union	844	799	937	826	735	717
United States	733	700	674	670	578	510
China	115	111	99	83	97	96
Canada	99	94	87	93	86	82
Japan	70	68	80	78	72	70
Brazil	45	35	35	38	38	40
Australia	41	40	40	40	38	38
Other	123	112	100	90	85	81
Total	2,070	1,960	2,051	1,918	1,728	1,634
Ending Stocks						
United States	384	347	360	294	270	260
Brazil	334	329	147	6	85	60
European Union	15	15	15	15	15	15
Japan	15	11	18	13	12	10
Korea, South	2	1	3	5	5	6
Other	20	30	32	11	7	5
Total	771	733	574	343	394	357
Exports						
Brazil	1,110	1,200	1,153	962	1,255	1,137
Mexico	143	121	153	158	163	164
European Union	54	57	50	52	63	65
United States	114	113	81	66	57	45
South Africa	22	31	45	35	24	26
Other	29	30	32	32	32	32
Total	1,472	1,552	1,514	1,305	1,594	1,468
Imports						
European Union	815	742	890	778	682	680
United States	302	300	330	280	299	330
Canada	103	98	91	97	90	85
Japan	65	63	86	73	71	68
China	59	57	49	40	55	55
Russia	47	45	38	37	35	35
Australia	34	32	32	32	32	32
Other	61	53	47	54	47	48
Total	1,486	1,391	1,563	1,391	1,311	1,332

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

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

(1,000 Metric Tons)

						_
	2012/13	2013/14	2014/15	2015/16	2016/17	Jan 2017/18
Production						
China	17,000	17,850	19,400	20,200	20,600	21,200
European Union	2,927	3,213	3,474	3,081	3,432	2,975
Turkey	876	880	960	1,040	1,300	1,310
Morocco	662	1,160	1,003	1,065	1,278	1,020
Japan	846	1,124	1,040	933	1,070	990
United States	660	700	810	861	937	799
Korea, South	667	672	697	635	600	560
Argentina	300	370	350	350	250	400
Israel	178	139	205	190	243	265
South Africa	171	195	203	226	252	230
Other	202	171	152	154	153	153
 Total	24,489	26,474	28,294	28,735	30,115	29,902
Fresh Dom. Consumption						
China	15,650	16,524	18,053	18,910	19,413	20,060
European Union	2,493	2,848	3,206	2,983	3,274	2,905
Japan	780	1,041	959	860	989	918
Russia	789	852	782	724	841	790
United States	642	720	759	769	867	779
Turkey	479	364	368	487	609	634
Morocco	355	659	657	600	763	600
Other	1,869	1,839	1,743	1,714	1,654	1,654
 Total	23,057	24,847	26,527	27,047	28,410	28,340
For Processing						
China	660	600	630	660	650	640
European Union	347	385	348	271	372	270
United States	130	131	221	288	308	270
Argentina	63	82	97	110	75	155
Japan	81	90	90	87	98	91
Israel	30	24	45	40	55	55
Korea, South	56	93	159	85	56	50
Other	17	20	24	12	15	24
Total	1,384	1,425	1,614	1,553	1,629	1,555
Exports						
Turkey	406	532	610	575	710	700
China	702	744	736	658	587	550
Morocco	307	501	346	465	515	420
European Union	404	349	287	250	236	250
South Africa	133	153	157	190	211	180
Israel	78	78	93	87	120	140
Argentina	87	88	53	50	45	45
Other	48	38	48	42	40	34
Total	2,165	2,483	2,330	2,317	2,464	2,319
Imports						
Russia	789	852	782	724	841	790
European Union	317	369	367	423	450	450
United States	154	182	212	232	274	280
Canada	143	117	141	146	155	145
Ukraine	185	202	125	126	140	140
Vietnam	144	149	158	116	118	110
Thailand	135	139	130	149	116	105
Philippines	57	51	54	68	70	70
Indonesia	77	109	87	60	70	65
Malaysia	76	65	70	69	64	60
Other	40	46	51	69	90	97
Total	2,117	2,281	2,177	2,182	2,388	2,312

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.

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

(1,000 Metric Tons)

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	2012/13	2013/14	2014/15	2015/16	2016/17	Jan 2017/18
Production						
China	3,370	3,717	4,050	4,350	4,600	4,800
United States	1,092	950	826	728	619	481
Mexico	425	424	424	438	444	440
South Africa	437	413	387	315	366	400
Turkey	200	235	238	250	253	265
Israel	208	236	186	163	149	150
European Union	110	92	109	106	105	88
Other	0	0	26	25	25	24
Total –	5,842	6,067	6,246	6,375	6,561	6,648
Fresh Dom. Consumption	5,642	0,007	0,240	0,375	0,501	0,040
China	3,257	3,578	3,957	4,224	4,460	4,640
European Union	408	417	415	438	395	409
Mexico	324	328	323	331	339	335
United States	376	346	325	287	274	251
Russia	141	133	101	117	107	105
Japan	134	109	125	105	106	92
Turkey	72	63	96	62	130	62
Canada	43	42	40	39	38	38
Ukraine	30	27	15	18	16	16
Israel	12	27	8	10	8	8
Other	21	24	17	10	8 17	19
_						
Total	4,818	5,087	5,422	5,648	5,890	5,975
For Processing	F 4 F	470	270	222	262	105
United States	545	470	370	333	262	195
South Africa	189	203	168	111	129	147
Mexico	85	84	84	87	88	87
Israel	117	134	117	92	80	79
European Union	18	16	18	20	19	14
Other _	0	0	1	1	1	1
Total	954	907	758	644	579	523
Exports						
South Africa	242	217	221	203	232	250
Turkey	132	177	145	190	125	205
China	130	165	124	159	180	200
Israel	79	78	61	61	61	63
United States	184	147	141	124	108	60
Mexico	18	14	19	22	19	20
European Union	21	19	15	13	15	15
Other	7	8	10	12	17	17
 Total	813	825	736	784	757	830
Imports						
European Union	337	360	339	365	324	350
Russia	141	133	101	117	107	105
Japan	134	109	100	82	84	71
China	17	26	31	33	40	40
Canada	43	42	40	39	38	38
United States	13	13	10	16	25	25
Hong Kong	15	16	15	16	19	20
Ukraine	30	27	15	18	16	16
Switzerland	7	7	7	7	7	7
South Africa	0	12	7	4	, 1	4
Other	6	7	5	4	4	4
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Total	743	752	670	/01	665	680

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.

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

(1,000 Metric Tons)

		(1,000 110				Jan
	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Production						
Mexico	2,120	2,187	2,326	2,416	2,500	2,580
European Union	1,179	1,308	1,597	1,331	1,537	1,515
Argentina	1,350	780	1,450	1,350	1,300	1,400
United States	827	748	820	822	804	789
Turkey	680	760	725	670	750	675
South Africa	245	312	339	308	397	420
Israel	51	64	65	60	67	70
Other	58	55	83	89	95	77
 Total	6,510	6,214	7,405	7,046	7,450	7,526
Fresh Dom. Consumption						
European Union	1,336	1,275	1,538	1,568	1,687	1,650
Mexico	1,268	1,332	1,358	1,383	1,377	1,414
United States	926	926	1,004	1,137	1,231	1,229
Russia	212	209	206	184	212	222
Turkey	258	277	238	200	218	199
Saudi Arabia	88	85	103	121	128	135
Canada	100	99	87	102	97	100
United Arab Emirates	80	87	96	93	90	92
Argentina	75	60	70	70	70	70
Japan	57	58	75	70	75	69
Other	180	189	172	158	177	185
	4,580	4,597	4,947	5,090	5,362	5,365
For Processing	.,	.,	.,	-,	-,	-,
Argentina	996	570	1,195	1,003	992	1,080
Mexico	330	339	360	374	386	399
European Union	192	312	353	243	284	285
United States	269	176	265	190	159	155
South Africa	58	80	79	56	81	93
	3	3	27	29	31	25
Japan						23
Israel	1	3	2	2	4	
Other	55	60	57	40	40	0
Total	1,904	1,543	2,338	1,937	1,977	2,039
Exports						
Mexico	523	519	610	662	740	770
Turkey	369	426	433	434	495	480
South Africa	175	220	246	237	300	310
Argentina	280	150	185	280	240	250
United States	110	127	114	110	112	105
European Union	77	101	105	69	79	80
Hong Kong	7	33	18	17	20	20
Other	11	15	11	14	19	15
 Total	1,552	1,591	1,722	1,823	2,005	2,030
Imports						
United States	478	481	563	615	698	700
European Union	426	380	399	549	513	500
Russia	212	209	207	186	215	225
Saudi Arabia	88	85	103	121	128	135
Canada	100	99	87	102	97	100
United Arab Emirates	78	85	94	91	88	90
Japan	51	51	51	51	53	55
Ukraine	63	54	44	41	48	50
Hong Kong	26	66	48	37	45	45
Turkey	2	3	3	4	3	4
Other	2	4	3	7	6	4
Total	1,526	1,517	1,602	1,804	1,894	1,908

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 January - Decmeber of the second year shown.