



Citrus: World Markets and Trade

ORANGES: 2011/12 HIGHLIGHTS

Summary

Global production dropped 7 percent from the previous year to 51.1 million metric tons (MMT), largely because of smaller crops in Brazil, Mexico and the EU making less fruit available for processing while consumption at 28.5 MMT, is estimated down 2 percent. Exports estimated at 3.9 MMT, declined 3 percent. Top importers include the EU, Russia, and Saudi Arabia.

Brazil's production is estimated to decline by 12 percent to 19.1 MMT as off-year biennial cycle affects some varieties. Nearly one third is consumed domestically and two thirds is used for processing for export. Although Brazil is the world's largest producer, a very small portion is exported as fresh oranges.

United States

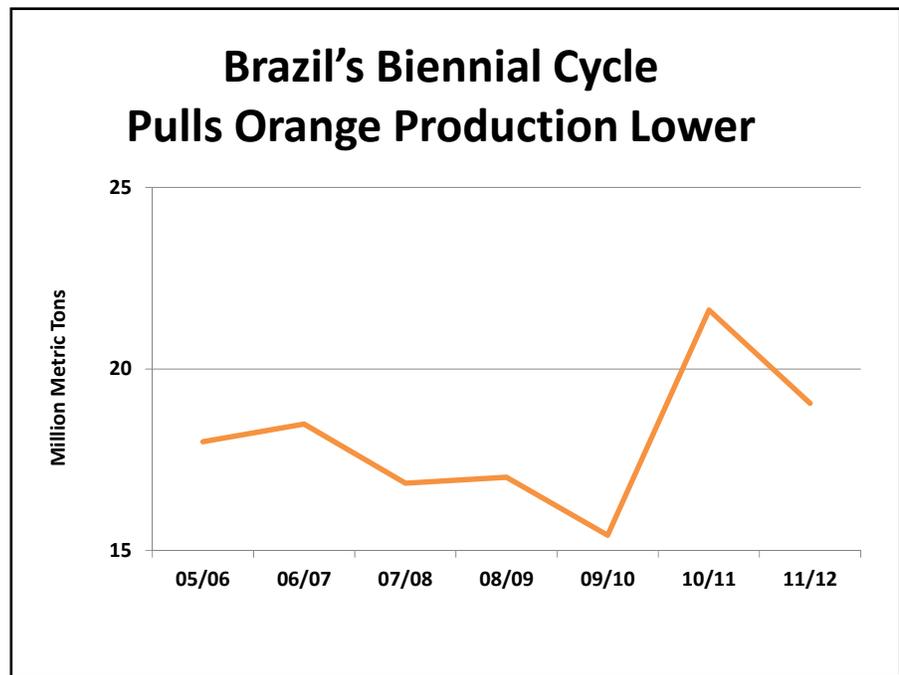
production is estimated up slightly to 8.1 MMT.

U.S. exports estimated at 719,000 tons are 6 percent lower as a result of a decline in California's production. South Korea, Canada, and Japan are top markets for U.S. exports.

EU production is down nearly 12 percent to an estimated 5.5 MMT. Reduced available supplies caused a drop in exports to 280,000 tons, while imports are estimated to reach 900,000 tons. South Africa, Egypt, and Morocco are top suppliers. Consumption is estimated down 12 percent based on lower availability in the market and the effects of the ongoing economic crisis that is particularly hitting the Southern region.

South African production is up slightly to 1.45 MMT. South Africa is the largest exporter with exports of over 1 MMT estimated up 10 percent. The EU and Russia account for around half of their exports.

Morocco is estimated to produce 850,000 tons. Exports, down over 30 percent, were negatively affected by drought and cold weather that impacted the size and quality of the oranges.



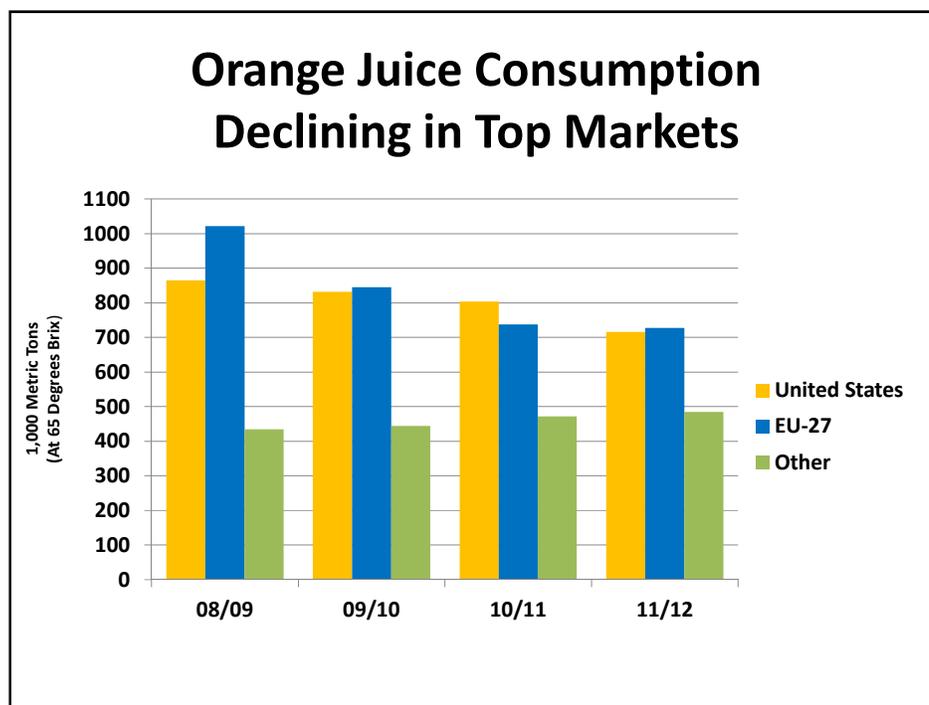
ORANGE JUICE: 2011/12 HIGHLIGHTS

Summary

Global orange juice production is estimated at 2.2 MMT, down 9 percent from the previous year. Global consumption, driven mostly by the EU and United States, continues to trend downward. Exports are down 5 percent while ending stocks are estimated to increase, particularly in the United States.

United States

production rose 4 percent to an estimated 687,000 tons. US consumption for orange juice is estimated to drop 11 percent following high prices as well as issues related to carbendazim, which was found in orange juice imported from Brazil and other countries. Imports are estimated down 3 percent. Exports are down nearly 29 percent and ending stocks are estimated to expand 16 percent. Canada and the EU account for over 80 percent of U.S. exports.



Brazil's production is estimated 15 percent lower to 1.26 MMT. Exports are forecast to remain firm with no stocks buildup. Brazil should have carbendazim free product to export to the U.S. by September 2012.

With the EU estimated to produce 98,000 tons, up about 4 percent, and falling consumption, imports are estimated at 680,000 tons, down 2 percent. Brazil is the dominant supplier of orange juice to the EU followed by the United States.

OTHER CITRUS: 2011/12 HIGHLIGHTS

Global Grapefruit Production and Trade Up Slightly

Global production is estimated slightly higher than the previous year at 5.4 MMT with growth in China and Turkey countering declines in the United States and Mexico. Global exports are forecast up slightly with growing demand from Russia.

Global Lemon/Lime Production Down, While Trade Remains Strong

Global production is estimated at 6.2 MMT, down 4 percent from the prior year, caused mostly by a freeze in Argentina and dry conditions in Mexico. Lower production in these countries was partially offset by significant improvement in the EU and Turkey due to good weather. Global trade is forecast up slightly with strong import demand from the United States.

Global Tangerine/Mandarin Production and Trade Up

Global production is forecast at 22.6 MMT, up 5 percent from last year on increases in China and Japan. Exports continue to rise as demand is estimated at a record high in markets such as Canada, Indonesia, and Russia.

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

(1,000 Metric Tons)

	2007/08	2008/09	2009/10	2010/11	Jan 2011/12	Jul 2011/12
Production						
Brazil	16,850	17,014	15,422	21,624	18,155	19,053
United States	9,141	8,281	7,479	8,035	8,150	8,140
China	5,450	6,000	6,500	5,900	6,600	6,600
EU-27	6,492	6,530	6,244	6,264	6,355	5,521
Mexico	4,297	4,193	4,051	4,100	3,200	3,200
Egypt	2,138	2,372	2,401	2,430	2,350	2,350
Turkey	1,427	1,430	1,690	1,710	1,730	1,730
Other	4,924	4,748	4,723	4,769	4,812	4,513
Total	50,719	50,568	48,510	54,832	51,352	51,107
Imports						
EU-27	1,040	846	959	788	700	900
Russia	517	436	478	573	600	500
Saudi Arabia	280	270	300	310	315	315
Hong Kong	177	176	193	202	205	205
Canada	214	177	204	211	210	190
United Arab Emirates	106	132	194	181	210	190
Korea, South	112	71	108	142	145	170
Other	885	892	913	948	947	978
Total	3,331	3,000	3,349	3,355	3,332	3,448
Exports						
South Africa	971	869	1,045	942	1,015	1,040
Egypt	850	774	850	1,000	900	900
United States	613	493	668	753	710	710
Turkey	155	256	209	339	350	350
EU-27	242	236	272	317	320	280
China	124	155	158	92	100	125
Morocco	296	305	161	175	215	120
Other	422	416	411	371	383	345
Total	3,673	3,504	3,774	3,989	3,993	3,870
Fresh Dom. Consumption						
China	5,143	5,729	6,220	5,727	6,285	6,260
Brazil	5,018	5,275	4,814	6,079	5,384	6,201
EU-27	5,772	5,869	5,717	5,520	5,451	4,873
Mexico	3,299	3,188	3,167	2,988	2,506	2,515
United States	1,406	1,264	1,347	1,489	1,450	1,465
Egypt	1,243	1,553	1,503	1,350	1,365	1,365
Turkey	1,202	1,115	1,409	1,315	1,310	1,310
Other	4,487	4,094	4,542	4,747	4,810	4,509
Total	27,570	28,087	28,719	29,215	28,561	28,498
For Processing						
Brazil	11,791	11,711	10,567	15,504	12,730	12,811
United States	7,199	6,614	5,570	5,895	6,085	6,075
EU-27	1,518	1,271	1,214	1,215	1,284	1,268
Mexico	1,000	1,000	880	1,120	700	700
China	245	182	202	180	325	325
South Africa	308	443	280	348	250	270
Costa Rica	165	196	235	210	245	245
Other	581	560	418	511	511	493
Total	22,807	21,977	19,366	24,983	22,130	22,187

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	Jan 2011/12	Jul 2011/12
Production						
Brazil	1,315	1,273	1,095	1,475	1,245	1,260
United States	830	761	603	660	677	687
EU-27	165	99	94	94	100	98
Mexico	102	105	88	116	70	70
China	18	14	16	14	25	25
Other	56	74	59	64	60	61
Total	2,486	2,326	1,954	2,423	2,176	2,202
Imports						
EU-27	855	963	796	694	700	680
United States	292	228	236	191	200	185
Canada	138	111	106	103	105	105
China	51	43	60	77	80	80
Japan	69	75	64	87	75	75
Other	156	129	137	147	148	148
Total	1,560	1,549	1,399	1,298	1,308	1,273
Exports						
Brazil	1,275	1,283	1,173	1,210	1,245	1,230
United States	98	90	106	154	125	110
Mexico	96	99	82	110	64	64
EU-27	44	40	45	49	50	50
South Africa	12	17	18	18	18	18
Other	28	29	26	30	29	32
Total	1,553	1,558	1,449	1,572	1,531	1,504
Domestic Consumption						
EU-27	970	1,022	845	738	750	728
United States	829	865	832	804	751	716
Canada	134	108	105	99	103	100
China	63	60	61	75	90	90
Japan	76	73	74	75	76	76
Other	221	193	205	222	217	219
Total	2,294	2,321	2,121	2,014	1,987	1,929
Ending Stocks						
United States	465	498	400	292	293	339
Brazil	172	128	15	240	163	228
China	12	4	15	25	34	34
EU-27	15	15	15	15	15	15
Japan	10	12	2	14	13	13
Other	7	19	13	8	6	8
Total	681	676	460	595	524	637

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.

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

(1,000 Metric Tons)

	2007/08	2008/09	2009/10	2010/11	Jan 2011/12	Jul 2011/12
Production						
China	2,230	2,520	2,900	2,800	3,000	3,000
United States	1,404	1,183	1,123	1,139	1,041	1,022
South Africa	340	370	343	406	360	390
Mexico	425	432	401	394	300	300
Turkey	167	168	191	213	240	240
Israel	242	233	235	190	205	205
Argentina	240	237	140	160	130	160
Other	91	85	95	107	114	104
Total	5,139	5,228	5,428	5,409	5,390	5,421
Imports						
EU-27	430	399	389	344	360	365
Japan	188	180	168	167	163	160
Russia	95	86	112	117	125	120
Canada	51	48	46	45	46	45
Ukraine	19	16	21	23	25	25
Hong Kong	12	16	18	18	18	18
China	3	6	7	12	15	12
Other	42	38	37	22	28	27
Total	840	789	798	748	780	772
Exports						
South Africa	196	210	187	217	230	210
United States	270	247	240	227	230	210
Turkey	133	128	154	153	180	170
China	101	102	119	84	72	120
Israel	81	85	84	83	85	85
EU-27	21	21	22	20	20	18
Mexico	14	11	18	18	15	15
Other	35	21	15	17	17	17
Total	851	825	839	819	849	845
Fresh Dom. Consumption						
China	2,132	2,424	2,788	2,728	2,943	2,892
EU-27	495	435	442	411	428	431
United States	434	388	389	375	345	329
Mexico	321	332	293	288	203	203
Japan	188	180	168	167	163	160
Russia	95	86	112	117	125	120
Turkey	38	45	42	65	65	75
Other	199	184	198	175	174	179
Total	3,902	4,074	4,432	4,326	4,446	4,389
For Processing						
United States	714	560	506	544	473	490
South Africa	144	156	151	184	126	175
Israel	144	142	107	88	99	99
Mexico	100	100	100	90	90	90
Argentina	119	132	71	86	61	85
EU-27	5	28	20	20	26	20
Canada	0	0	0	0	0	0
Other	0	0	0	0	0	0
Total	1,226	1,118	955	1,012	875	959

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	Jan 2011/12	Jul 2011/12
Production						
Mexico	2,229	1,966	1,891	1,800	1,700	1,700
EU-27	1,139	1,263	1,160	1,183	1,320	1,316
Argentina	1,360	1,350	1,000	1,500	1,300	1,200
Turkey	652	672	783	787	850	850
United States	562	827	800	853	733	753
South Africa	230	214	216	257	240	260
Israel	35	29	48	30	61	61
Other	20	51	53	57	68	68
Total	6,227	6,372	5,951	6,467	6,272	6,208
Imports						
United States	424	398	401	394	430	475
EU-27	515	405	471	418	400	410
Russia	191	203	211	222	220	190
Saudi Arabia	46	125	84	105	105	100
Canada	58	58	65	78	75	85
Ukraine	55	58	62	64	65	60
United Arab Emirates	51	60	56	54	56	55
Other	96	95	83	87	87	77
Total	1,436	1,402	1,433	1,422	1,438	1,452
Exports						
Mexico	508	445	456	432	440	496
Turkey	220	351	434	457	500	450
Argentina	400	250	264	255	260	260
South Africa	166	130	145	162	170	165
United States	157	93	93	102	85	95
EU-27	59	87	67	68	70	80
Hong Kong	4	8	6	7	7	7
Other	12	7	9	7	11	10
Total	1,526	1,371	1,474	1,490	1,543	1,563
Fresh Dom. Consumption						
EU-27	1,404	1,364	1,395	1,357	1,350	1,407
Mexico	1,322	1,208	1,141	1,080	992	936
United States	625	787	738	781	733	776
Turkey	424	296	290	271	290	340
Russia	186	198	210	221	219	189
Saudi Arabia	46	125	84	105	105	100
Canada	55	58	65	78	75	85
Other	298	335	331	364	392	379
Total	4,360	4,371	4,254	4,257	4,156	4,212
For Processing						
Argentina	905	1,050	698	1,166	972	870
United States	204	345	370	364	345	357
Mexico	400	314	295	290	270	270
EU-27	191	217	169	176	300	239
South Africa	62	73	60	82	59	84
Turkey	12	30	60	60	60	60
Israel	3	1	2	2	3	3
Other	0	2	2	2	2	2
Total	1,777	2,032	1,656	2,142	2,011	1,885

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.

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

(1,000 Metric Tons)

	2007/08	2008/09	2009/10	2010/11	Jan 2011/12	Jul 2011/12
Production						
China	11,000	12,650	14,200	14,000	13,800	15,000
EU-27	2,975	3,172	3,054	3,194	3,135	3,127
Japan	1,193	1,007	1,116	882	1,015	1,015
Turkey	740	756	846	858	875	875
Morocco	471	532	635	716	765	730
Korea, South	746	593	740	565	645	645
United States	540	449	577	618	616	635
Other	716	717	676	685	699	594
Total	18,381	19,876	21,844	21,518	21,550	22,621
Imports						
Russia	486	520	593	717	730	720
EU-27	355	377	417	337	350	330
Vietnam	134	256	202	156	160	200
Indonesia	104	168	160	187	180	190
Ukraine	146	113	144	185	190	185
Canada	117	121	124	123	125	125
United States	97	131	128	151	150	120
Other	158	146	140	144	145	179
Total	1,597	1,832	1,908	2,000	2,030	2,049
Exports						
China	486	740	712	607	580	840
Turkey	224	382	330	450	450	475
EU-27	269	258	267	365	360	380
Morocco	272	332	323	349	349	345
South Africa	112	102	113	104	125	115
Argentina	95	113	119	115	105	80
Israel	50	54	68	54	70	72
Other	44	35	42	57	61	44
Total	1,552	2,016	1,974	2,101	2,100	2,351
Fresh Dom. Consumption						
China	9,850	11,371	12,977	12,926	12,696	13,632
EU-27	2,753	2,930	2,812	2,828	2,804	2,757
Japan	1,065	904	994	813	911	913
Russia	484	518	592	716	729	719
United States	426	440	529	557	551	548
Korea, South	603	503	612	482	532	532
Turkey	517	377	520	413	430	405
Other	1,154	1,261	1,292	1,377	1,407	1,405
Total	16,852	18,304	20,328	20,112	20,060	20,911
For Processing						
China	680	550	520	480	540	540
EU-27	308	361	392	338	321	320
United States	179	111	142	160	160	170
Japan	133	109	130	88	121	121
Korea, South	139	89	124	81	110	110
Argentina	105	97	91	110	95	70
Israel	30	28	27	22	47	47
Other	0	43	24	26	26	30
Total	1,574	1,388	1,450	1,305	1,420	1,408

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.