

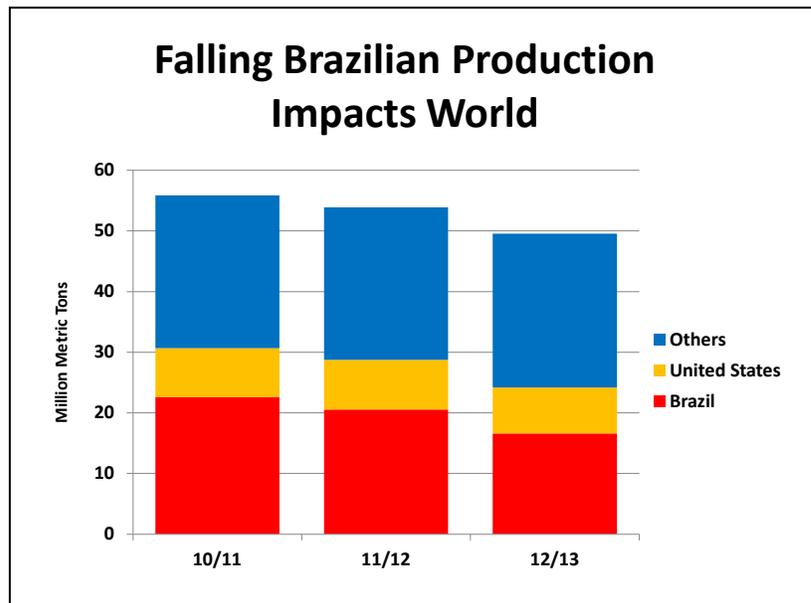


Citrus: World Markets and Trade

Oranges

Global orange production in 2012/13, now estimated at 49.6 million (metric) tons now, is down 4.3 million tons from the previous year based on a smaller Brazilian crop. This will especially affect fruit for processing, although it is expected to have little effect on trade.

Brazil's production is estimated to drop nearly 20 percent to 16.6 million tons, based on less land dedicated to oranges and expected poor yields as trees are stressed from good crops the previous two years. Many growers have turned to other crops such as sugarcane and soybeans as a result of lower orange prices and disease related problems over the past several seasons. Although Brazil is the world's largest producer, most of the crop is processed domestically for juice with very little fruit for export.



United States production is estimated at 7.6 million tons, down 7 percent largely because Florida's warm, dry, winter weather and disease pressure caused severe fruit drop. This will not affect trade since most fresh oranges for export come from California, where another good harvest will keep exports at nearly 700,000 tons.

The EU's production is estimated to decline 3 percent to 6.0 million tons due to adverse weather in Italy. Fall rains delayed the crop harvest but improved the fruit quality and size with growing exports estimated to reach a record 350,000 tons on stronger demand from Switzerland and Russia.

South African production is estimated at 1.5 million tons, up over 3 percent due to good weather in the eastern part of the country. Exports are estimated to reach 1.1 million tons with about half shipped to the EU and Russia.

Morocco's production is estimated at 785,000 tons, down 65,000 tons as the crop was damaged by severe heat waves early in the growing season and extremely cold weather in December. Since most of the crop is consumed domestically, exportable supplies are estimated to drop 50 percent to 70,000 tons.

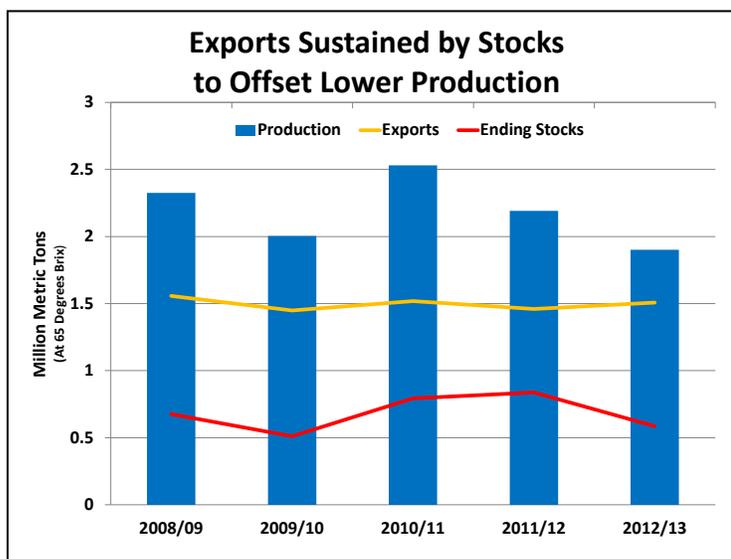
Orange Juice

Global production is estimated at 1.9 million tons, down 290,000 tons as production declined in both the United States and Brazil. However, Brazil continues to dominate global production and trade.

Brazil's production is estimated 20 percent lower to 1.0 million tons as less fruit is available for processing. Exports are virtually unchanged as stocks will be drawn down to offset lower production.

United States production is down 10 percent at 619,000 tons on less fruit available for processing. Consumption is up nearly 10 percent and imports are up 80 percent as foreign producers, notably Brazil, have come into compliance with US law regarding the use of the fungicide

carbendazim. Exports are estimated up 12 percent on stronger demand from Canada and South Korea.



With production relatively flat at 89,000 tons, the **EU** is by far the world's largest importer at 685,000 tons with Brazil and the United States as the dominant suppliers.

Global Tangerine/Mandarin Production Up, Trade Declines

Global production (24.0 million tons) and consumption (22.5 million tons) are estimated up slightly as increases in China are somewhat offset by declines in the EU and Morocco. Exports are estimated to fall 10 percent as more fruit is consumed directly in China.

Global Lemon/Lime Production Down, While Trade Remains Strong

Global production is estimated down 2 percent to 6.6 million tons on weather-related issues in the EU and Turkey. Global exports are estimated lower on reduced available supplies from Turkey.

Global Grapefruit Production and Trade Down Slightly

Global production is down 4 percent and estimated at 5.3 million tons as China's production is down almost 10 percent. Global trade is estimated down on reduced imports by the EU and Japan.

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

(1,000 Metric Tons)

	2008/09	2009/10	2010/11	2011/12	Jan 2012/13	Jul 2012/13
Production						
Brazil	17,014	15,830	22,603	20,563	18,564	16,600
United States	8,281	7,478	8,078	8,166	8,014	7,602
China	6,000	6,500	5,900	6,900	7,000	7,000
European Union	6,530	6,244	6,198	6,225	5,600	6,030
Mexico	4,193	4,051	4,080	3,360	3,900	3,900
Egypt	2,372	2,401	2,430	2,350	2,450	2,450
Turkey	1,430	1,690	1,710	1,650	1,385	1,600
South Africa	1,445	1,459	1,428	1,450	1,500	1,500
Morocco	790	823	904	850	784	785
Vietnam	679	694	729	730	730	730
Costa Rica	310	370	325	370	350	350
Argentina	900	770	850	565	340	340
Australia	430	380	300	390	340	340
Guatemala	132	132	150	150	150	150
Israel	155	148	100	116	130	130
Other	64	60	62	60	60	60
Total	50,725	49,030	55,847	53,895	51,297	49,567
Fresh Dom. Consumption						
China	5,729	6,220	5,727	6,349	6,390	6,425
Brazil	5,277	4,827	5,488	7,214	5,662	5,984
European Union	5,869	5,717	5,324	5,540	5,009	5,330
Mexico	3,188	3,167	3,156	2,726	3,015	3,010
United States	1,264	1,360	1,411	1,526	1,474	1,482
Egypt	1,553	1,503	1,350	1,365	1,365	1,365
Turkey	1,115	1,409	1,315	1,224	1,025	1,295
Vietnam	737	750	764	784	785	767
Morocco	453	627	689	652	593	655
Russia	430	476	572	494	499	499
Saudi Arabia	270	300	310	315	315	325
Argentina	570	530	560	376	230	230
Guatemala	175	172	190	204	205	202
Canada	177	204	211	190	200	200
United Arab Emirates	132	194	181	190	190	190
Other	1,307	1,400	1,366	1,424	1,457	1,464
Total	28,246	28,856	28,614	30,573	28,414	29,423
For Processing						
Brazil	11,711	10,975	17,095	13,342	12,892	10,608
United States	6,614	5,554	6,019	6,064	5,950	5,556
European Union	1,271	1,214	1,356	1,196	1,141	1,150
Mexico	1,000	880	930	650	900	898
China	182	202	180	520	600	600
South Africa	443	280	348	245	260	260
Costa Rica	196	235	210	275	220	220
Australia	135	105	100	128	110	110
Turkey	100	100	100	100	95	95
Egypt	45	48	80	85	85	85
Other	280	165	231	202	168	178
Total	21,977	19,758	26,649	22,807	22,421	19,760

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.

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

(1,000 Metric Tons)

	2008/09	2009/10	2010/11	2011/12	Jan 2012/13	Jul 2012/13
Imports						
European Union	846	959	800	816	850	800
Russia	436	478	573	495	500	500
Saudi Arabia	270	300	310	315	315	325
Hong Kong	176	193	200	188	195	220
Canada	177	204	211	190	200	200
United Arab Emirates	132	194	181	190	190	190
Korea, South	71	108	142	173	180	155
Ukraine	118	121	140	122	125	135
United States	90	106	102	119	110	125
Japan	96	104	120	127	127	120
China	66	80	99	98	110	110
Malaysia	90	83	88	96	95	100
Switzerland	61	64	64	62	65	68
Costa Rica	77	56	58	91	60	60
Guatemala	43	40	40	54	55	52
Other	254	264	255	271	284	273
Total	3,003	3,354	3,383	3,407	3,461	3,433
Exports						
South Africa	869	1,045	942	1,065	1,100	1,100
Egypt	774	850	1,000	900	1,000	1,000
United States	493	670	750	695	700	689
European Union	236	272	318	305	300	350
Turkey	256	209	339	357	300	250
Australia	134	89	85	120	90	90
China	155	158	92	129	120	85
Hong Kong	53	62	70	67	65	70
Morocco	305	161	175	138	141	70
Argentina	137	157	125	85	40	40
Other	93	97	71	61	67	73
Total	3,505	3,770	3,967	3,922	3,923	3,817

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)

	2008/09	2009/10	2010/11	2011/12	Jan 2012/13	Jul 2012/13
Production						
Brazil	1,273	1,145	1,600	1,250	1,255	1,000
United States	761	603	660	685	663	619
Mexico	105	88	91	64	90	90
European Union	99	94	105	93	88	89
China	14	16	14	40	45	45
Other	74	59	61	60	59	59
Total	2,326	2,004	2,531	2,192	2,200	1,902
Imports						
European Union	963	796	686	682	690	685
United States	228	236	191	160	200	287
Canada	111	106	103	101	100	100
Japan	75	64	87	82	75	75
China	43	60	77	60	55	55
Other	129	137	152	143	142	142
Total	1,549	1,399	1,295	1,228	1,262	1,344
Exports						
Brazil	1,283	1,173	1,185	1,190	1,215	1,200
United States	90	106	151	109	105	122
Mexico	99	82	85	60	82	82
European Union	40	45	47	52	55	51
South Africa	17	18	18	18	18	18
Other	29	26	31	30	30	30
Total	1,558	1,449	1,518	1,459	1,506	1,503
Domestic Consumption						
United States	865	832	810	703	760	769
European Union	1,022	845	744	723	723	723
China	60	61	75	102	116	116
Canada	108	105	99	96	95	96
Japan	73	74	75	76	76	76
Other	193	205	223	215	216	212
Total	2,321	2,121	2,026	1,916	1,986	1,992
Ending Stocks						
United States	498	400	290	322	320	337
Brazil	128	65	440	456	428	212
Japan	12	2	14	20	19	19
European Union	15	15	15	15	15	15
South Africa	13	7	2	2	2	2
Other	10	21	32	23	5	5
Total	676	510	793	838	789	591

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)

	2008/09	2009/10	2010/11	2011/12	Jan 2012/13	Jul 2012/13
Production						
China	12,650	14,200	14,000	16,000	17,000	17,000
European Union	3,172	3,054	3,245	3,100	2,911	2,710
Japan	1,007	1,116	857	1,001	981	980
Turkey	756	846	858	875	870	880
United States	449	578	643	635	645	664
Morocco	532	635	716	730	662	660
Korea, South	593	740	565	588	580	580
Other	717	676	734	631	555	555
Total	19,876	21,845	21,618	23,560	24,204	24,029
Imports						
Russia	520	593	717	704	710	760
European Union	377	417	334	346	347	320
Indonesia	168	160	187	205	210	210
Ukraine	113	144	185	179	180	180
Vietnam	256	202	156	202	205	140
Canada	121	124	123	129	130	130
United States	131	128	151	146	140	125
Other	146	140	145	185	185	172
Total	1,832	1,908	1,998	2,096	2,107	2,037
Exports						
China	740	712	607	840	900	710
Turkey	382	330	450	474	450	410
European Union	258	267	364	375	375	380
Morocco	332	323	349	344	297	305
South Africa	102	113	104	115	115	120
Israel	54	68	56	83	90	90
Argentina	113	119	115	100	45	45
Other	35	42	57	43	46	48
Total	2,016	1,974	2,102	2,374	2,318	2,108
Fresh Dom. Consumption						
China	11,371	12,977	12,926	14,568	15,450	15,642
European Union	2,930	2,812	2,720	2,702	2,523	2,330
Japan	904	994	791	903	899	895
Russia	518	592	716	704	709	760
United States	440	530	583	595	595	589
Korea, South	503	612	482	482	492	491
Turkey	377	520	415	410	424	477
Other	1,261	1,292	1,387	1,473	1,437	1,347
Total	18,304	20,329	20,020	21,837	22,529	22,531
For Processing						
China	550	520	480	600	660	660
European Union	361	392	495	369	360	320
United States	111	142	159	149	150	158
Japan	109	130	85	115	100	100
Korea, South	89	124	81	103	85	85
Israel	28	27	23	38	38	38
Argentina	97	91	145	40	35	35
Other	43	24	26	31	36	31
Total	1,388	1,450	1,494	1,445	1,464	1,427

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)

	2008/09	2009/10	2010/11	2011/12	Jan 2012/13	Jul 2012/13
Production						
Mexico	1,966	1,891	2,133	2,100	2,150	2,150
European Union	1,263	1,160	1,380	1,432	1,154	1,320
Argentina	1,350	1,000	1,550	1,300	1,450	1,300
United States	827	800	835	771	809	791
Turkey	672	783	787	750	635	680
South Africa	214	216	257	260	270	260
Israel	29	48	30	53	56	56
Other	51	53	60	73	62	62
Total	6,372	5,951	7,032	6,739	6,586	6,619
Imports						
United States	398	401	402	475	440	480
European Union	405	471	421	432	440	420
Russia	203	211	222	200	200	215
Canada	58	65	78	88	90	100
Saudi Arabia	100	108	116	85	90	95
United Arab Emirates	44	54	55	63	70	65
Ukraine	58	62	64	62	65	60
Other	95	83	87	84	86	84
Total	1,361	1,455	1,445	1,489	1,481	1,519
Exports						
Mexico	445	456	432	496	520	521
Turkey	351	434	457	429	320	350
Argentina	250	264	255	267	265	265
South Africa	130	145	162	160	175	160
United States	93	93	102	95	100	110
European Union	87	67	68	99	95	100
Morocco	0	6	5	7	5	10
Other	15	9	8	9	11	10
Total	1,371	1,474	1,489	1,562	1,491	1,526
Fresh Dom. Consumption						
European Union	1,364	1,395	1,386	1,412	1,250	1,313
Mexico	1,208	1,141	1,361	1,275	1,291	1,290
United States	787	739	835	964	899	891
Turkey	296	290	271	259	265	278
Russia	198	210	222	200	199	215
Canada	58	65	78	88	90	100
Saudi Arabia	100	108	116	85	90	95
Other	319	329	372	390	402	372
Total	4,330	4,277	4,641	4,673	4,486	4,554
For Processing						
Argentina	1,050	698	1,211	963	1,105	970
Mexico	314	295	342	330	340	340
European Union	217	169	347	353	249	327
United States	345	369	300	187	250	270
South Africa	73	60	82	89	84	89
Turkey	30	60	60	65	55	55
Japan	2	2	3	3	4	4
Other	1	2	2	3	3	3
Total	2,032	1,655	2,347	1,993	2,090	2,058

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.

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

(1,000 Metric Tons)

	2008/09	2009/10	2010/11	2011/12	Jan 2012/13	Jul 2012/13
Production						
China	2,520	2,900	2,800	3,200	2,900	2,900
United States	1,183	1,123	1,138	1,047	1,031	1,080
South Africa	370	343	406	390	410	410
Mexico	432	401	397	300	350	350
Israel	233	235	190	245	235	235
Turkey	168	191	213	230	150	200
European Union	85	95	83	86	90	93
Other	237	140	160	100	80	80
Total	5,228	5,428	5,387	5,598	5,246	5,348
Imports						
European Union	399	389	348	353	330	310
Russia	86	112	117	113	115	135
Japan	180	168	167	149	160	130
Canada	48	46	45	44	45	43
Ukraine	16	21	23	27	30	30
Hong Kong	16	18	18	24	25	15
China	6	7	12	13	15	10
Other	38	37	24	21	30	18
Total	789	798	754	744	750	691
Exports						
South Africa	210	187	217	180	220	225
United States	247	242	227	210	210	188
Turkey	128	154	153	177	110	132
China	102	119	84	118	140	130
Israel	85	84	83	78	76	76
European Union	21	22	20	19	20	20
Mexico	11	18	17	18	18	18
Other	21	15	17	9	10	8
Total	825	841	818	809	804	797
Fresh Dom. Consumption						
China	2,424	2,788	2,728	3,095	2,775	2,780
European Union	435	442	380	389	370	353
United States	388	387	383	351	325	335
Mexico	332	293	292	220	260	254
Russia	86	112	117	113	115	135
Japan	180	168	167	149	160	130
Turkey	45	42	66	57	45	72
Other	184	198	176	171	168	153
Total	4,074	4,430	4,309	4,545	4,218	4,212
For Processing						
United States	560	506	535	487	506	562
South Africa	156	151	184	205	185	180
Israel	142	107	88	153	145	145
Mexico	100	100	90	70	80	80
Argentina	132	71	86	42	28	33
European Union	28	20	31	31	30	30
Canada	0	0	0	0	0	0
Other	0	0	0	0	0	0
Total	1,118	955	1,014	988	974	1,030

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.