United States Department of Agriculture

Foreign Agricultural Service

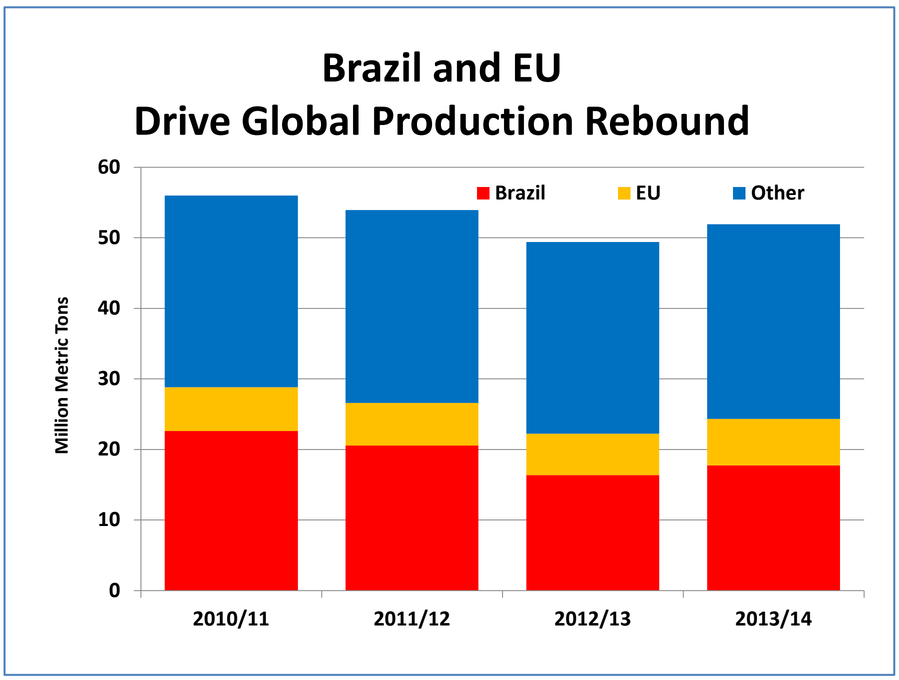
January 2014

Citrus: World Markets and Trade

Oranges

Global orange production for 2013/14 is forecast to rise 5 percent from the previous year to 51.8 million metric tons as increases in Brazil, China, and the European Union (EU) more than offset the continued drop in the United States. Trade is forecast to reach a record level on stronger demand and increases in available supplies.

United States production is forecast down 11 percent to 6.7 million tons. In Florida, where 95 percent of the oranges are used for processing orange juice, dry weather early in the year and citrus greening has caused severe fruit drop (expected highest droppage in over 50 years). In California, where most of the oranges are used for the fresh market, production is down 5 percent and as a result of the December freeze, damaged fruit will be sent to be juiced. Exports are forecast down 6 percent on reduced exportable supplies.



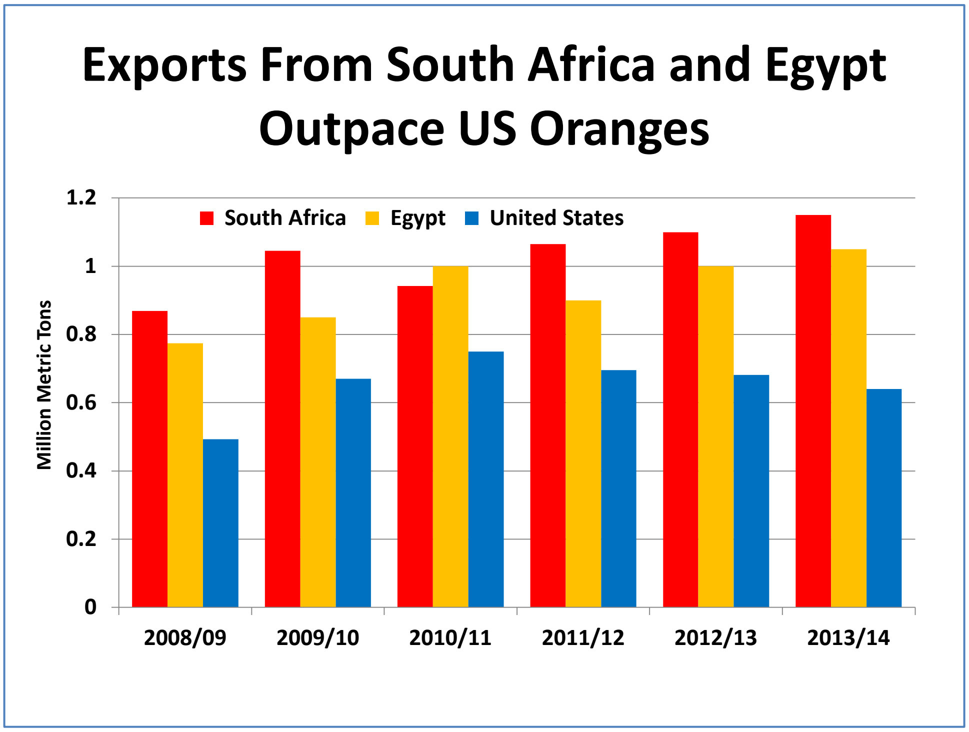
Brazil's production is forecast up 8 percent to 17.8 million tons based on higher yields and favorable weather. Nearly all of the increase is being used for processing, keeping fresh consumption flat. Although by far the world's largest producer, less than one percent is exported.

EU production is forecast up over 10 percent to 6.6 million tons due to favorable weather. Imports are forecast up slightly with South Africa and Egypt the largest suppliers. Last year imports from South Africa were banned from November 28, 2013 to the end of December due to multiple detections of citrus black spot.

China's production is forecast to grow nearly 10 percent to 7.6 million tons, keeping pace with rising fresh consumption and processing. China is forecast to remain the largest fresh consumer accounting for over 20 percent of global consumption. Aiming to continue to expand production, new varieties are being planted to harvest both earlier and later in the season.

Mexico's production is forecast at 3.9 million tons, down 100,000 tons. With an increase in fresh consumption, fruit for processing fell as prices for domestic fresh oranges are competitive. Mexico's trade for fresh oranges is negligible.

Egypt's production is forecast at a record 2.6 million tons, up 5 percent on favorable weather and an upswing in area harvested as new trees start to bear fruit. Exports are forecast to rise 5 percent as additional fruit is available to meet growing demand from the EU, Saudi Arabia, and Ukraine.

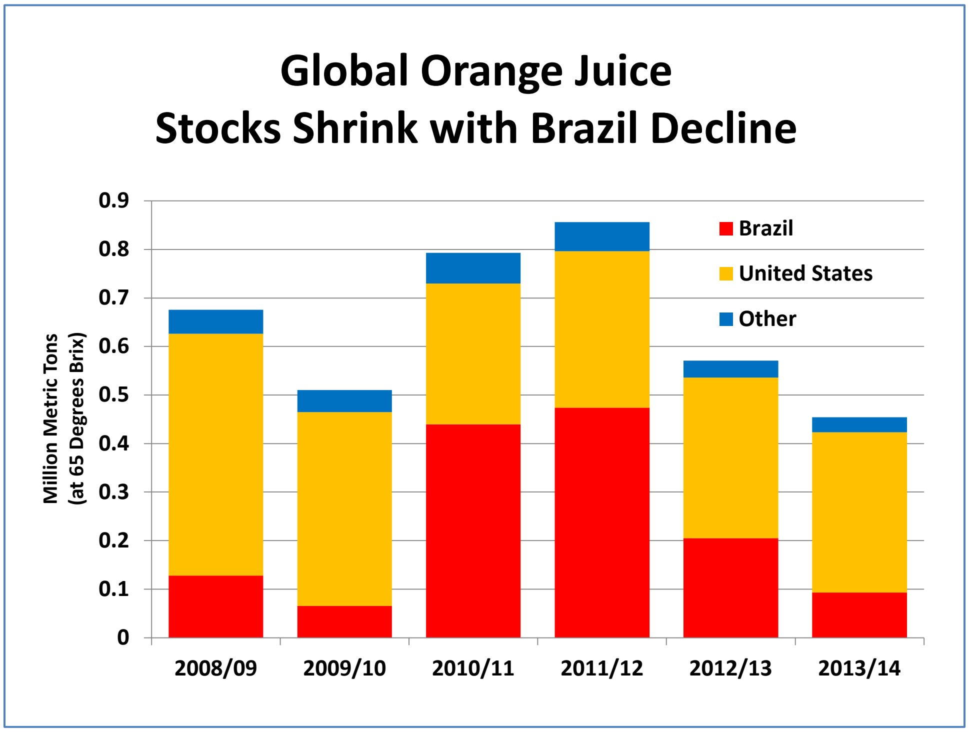


South Africa's production is forecast to increase slightly to 1.5 million tons. As the world's largest exporter, South Africa accounts for over 25 percent of world trade and is forecast at a record 1.2 million tons. The EU and Russia represent half its market.

Morocco is forecast to have a significant jump in production, following a drought-impacted crop, to a record 1.0 million tons. Along with favorable weather, area increased as a result of the government citrus policy that includes support payments for new plantations, subsidies for irrigation equipment, and crop insurance for growers. With high demand and a return of exportable supplies exports, are forecast to more than double to 160,000 tons.

Orange Juice

Global orange juice production (65 Brix equivalent) for 2013/14 is forecast at 2.0 million metric tons, up 6 percent from the previous year with growth in Brazil more than offsetting declines in the United States and Mexico. Global exports and consumption are relatively flat with stocks dropping again (lowest in 4 years).



Brazil's production is forecast up 18 percent to 1.2 million tons on higher crushing yields. However, exports from the world's largest producer are forecast to exceed production to meet demand in the EU and US. Stocks are reduced, accordingly.

United States production is forecast down nearly 12 percent to 550,000 tons as projected orange droppage in Florida (due in part to greening) is expected to be the highest in over 50 years. Consumption and exports are down as a result of the decline, while ending stocks remain around the same level as the last three years.

Mexico's production is forecast to drop over 25 percent to 100,000 tons as significantly more fresh oranges are forecast to be consumed rather than processed as prices for domestic fruit are competitive. Consequently, exports are forecast to decline more than 25 percent due to reduced available supply. Stocks are forecast to return to trend after dropping to zero 2 years earlier due to high international demand.

EU production is forecast to climb 12 percent to 100,000 tons as more fruit is available for processing. Imports remain flat with Brazil and the United States the primary suppliers.

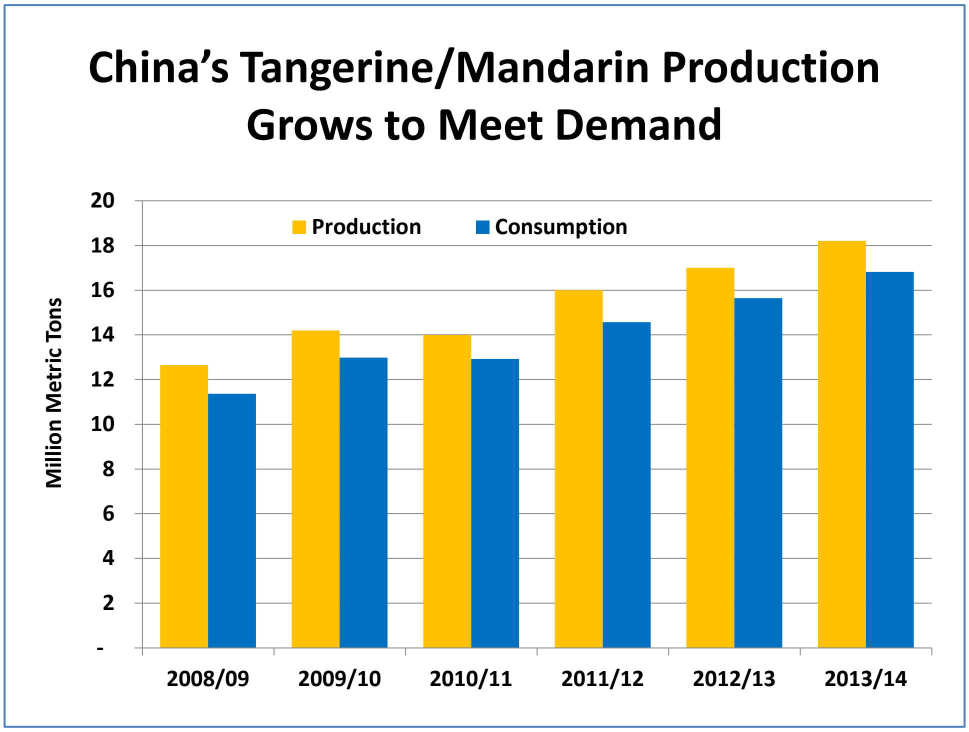
China's production is forecast to increase by one third to a record 60,000 tons, with more fruit being used for processing. Higher production will primarily serve the domestic market as orange juice grows in popularity.

Tangerine/Mandarin

Global production for 2013/14 is forecast at a record 26.0 million metric tons, up over 5 percent from last year on increases in China and Morocco. Fresh consumption continues to grow with high demand and increased supplies. Exports are forecast up on rising demand.

United States production is forecast to increase slightly to a record 674,000 tons with imports and fresh consumption flat. This forecast is based on the January USDA, National Agricultural Statistics Service Crop Production Report which indicated that the December freeze damaged fruit would be processed into juice.

China's production is forecast to jump 1.2 million tons, to a record 18.2 million on favorable weather and higher yields. China represents 70 percent of global production and 35 percent of global exports. Rising fresh consumption is forecast to almost keep pace with production. Exports are forecast to grow with the increased available supply and stronger international demand.



The **EU's** production, trade, and consumption remain virtually unchanged.

Japan's production is forecast to grow 10 percent, to 930,000 tons as the crop is considered an "on-year" in the natural production cycle. Fresh consumption is forecast up on increased available supplies, while imports remain at 20,000 tons.

Turkey's production is forecast at 880,000 tons, up only slightly. Exports are forecast to surge nearly 20 percent to 480,000 tons on stronger demand and less consumption due to increased availability of other citrus.

Production in **Morocco** is forecast to rebound to a record 850,000 tons on favorable weather and expanded area. Area increased as a result of the government citrus policy that includes support payments for new plantations, subsidies for irrigation equipment, and crop insurance for growers. Exports are reduced due to reportedly lower quality product.

Grapefruit

Global production for 2013/14 is forecast to rise over 5 percent to 6.2 million tons as growth in China more than offsets declines in the United States and South Africa. Global exports are forecast to increase slightly as consumption grows 7 percent on high demand in China.

Lemon/Lime

For 2013/14, global production is forecast down 4 percent to 6.0 million tons, as a drastic drop in Argentina caused by frost damage more than offsets increases in the EU and Turkey. However, global exports are forecast to grow nearly 5 percent as Turkey and the EU meet the rising demand.

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

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)

	2008/09	2009/10	2010/11	2011/12	2012/13	Jan 2013/14
Production						
Brazil	17,014	15,830	22,603	20,563	16,361	17,750
China	6,000	6,500	5,900	6,900	7,000	7,600
United States	8,281	7,478	8,078	8,166	7,574	6,707
European Union	6,530	6,244	6,198	6,023	5,878	6,600
Mexico	4,193	4,051	4,080	3,666	4,000	3,900
Egypt	2,372	2,401	2,430	2,350	2,450	2,570
Turkey	1,430	1,690	1,710	1,650	1,600	1,700
South Africa	1,445	1,459	1,428	1,450	1,400	1,500
Morocco	790	823	904	850	785	1,000
Vietnam	679	694	730	530	675	675
Argentina	900	770	850	565	500	550
Australia	430	380	300	390	435	465
Costa Rica	310	370	325	370	325	315
Guatemala	132	132	150	150	150	150
Israel	155	148	100	116	73	100
Other	157	181	188	186	191	191
Total	50,818	49,151	55,974	53,925	49,397	51,773
Fresh Dom. Consumption						
China	5,729	6,220	5,727	6,349	6,405	6,795
European Union	5,869	5,717	5,324	5,506	5,282	5,871
Brazil	5,277	4,827	5,488	7,079	5,447	5,501
Mexico	3,188	3,167	3,156	2,852	2,643	2,895
Egypt	1,553	1,503	1,350	1,365	1,365	1,435
Turkey	1,115	1,409	1,315	1,224	1,290	1,320
United States	1,264	1,360	1,411	1,526	1,559	1,312
Morocco	453	627	689	652	655	740
Vietnam	737	750	765	584	713	715
Russia	430	476	572	494	510	549
Argentina	570	530	560	376	340	365
Saudi Arabia	270	301	309	347	323	350
Iraq	159	172	222	287	260	315
Australia	177	202	150	165	210	224
United Arab Emirates	172	182	167	196	203	210
Other	1,482	1,593	1,645	1,687	1,705	1,769
Total	28,445	29,036	28,850	30,689	28,910	30,366
For Processing						
Brazil	11,711	10,975	17,095	13,476	10,906	12,241
United States	6,614	5,554	6,019	6,064	5,473	4,895
European Union	1,271	1,214	1,356	1,056	1,150	1,299
Mexico	1,000	880	930	830	1,350	1,000
China	182	202	180	520	600	780
Costa Rica	196	235	210	275	220	220
South Africa	443	280	348	245	160	160
Australia	135	105	100	128	110	119
Argentina	194	84	166	104	90	115
Morocco	32	35	40	60	60	100
Other	199	194	205	223	206	230
Total	21,977	19,758	26,649	22,981	20,325	21,159

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	2012/13	Jan 2013/14
Imports						
European Union	846	959	800	821	876	900
Russia	436	478	573	495	511	550
Saudi Arabia	270	301	309	347	323	350
Hong Kong	176	193	200	188	217	220
Iraq	66	70	124	196	165	220
United Arab Emirates	172	182	167	196	203	210
Canada	177	204	211	190	199	200
Korea, South	71	108	142	173	152	150
Ukraine	118	121	140	122	133	140
United States	90	106	102	119	139	140
Japan	96	104	120	127	113	130
Malaysia	90	83	88	96	100	105
Costa Rica	77	56	58	91	76	80
China	66	80	99	98	88	75
Switzerland	61	64	64	62	68	70
Other	297	304	295	318	294	293
Total	3,109	3,413	3,492	3,639	3,657	3,833
Exports						
South Africa	869	1,045	942	1,065	1,100	1,150
Egypt	774	850	1,000	900	1,000	1,050
United States	493	670	750	695	681	640
European Union	236	272	318	282	322	330
Turkey	256	209	339	357	244	310
Morocco	305	161	175	138	70	160
Australia	134	89	85	115	133	140
China	155	158	92	129	83	100
Argentina	137	157	125	85	70	70
Hong Kong	53	62	70	67	45	60
Other	93	97	71	61	71	71
Total	3,505	3,770	3,967	3,894	3,819	4,081

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	2012/13	Jan 2013/14
Production						
Brazil	1,273	1,145	1,600	1,268	981	1,160
United States	761	603	660	685	607	540
European Union	99	94	105	93	89	100
Mexico	105	88	91	83	135	100
China	14	16	14	40	45	60
Other	74	59	61	60	50	58
Total	2,326	2,004	2,531	2,229	1,907	2,018
Imports						
European Union	963	796	686	682	685	690
United States	228	236	191	160	302	275
Canada	111	106	103	101	100	100
Japan	75	64	87	82	65	75
China	43	60	77	60	59	60
Other	129	137	152	142	141	139
Total	1,549	1,399	1,295	1,227	1,352	1,339
Exports						
Brazil	1,283	1,173	1,185	1,190	1,200	1,220
United States	90	106	151	109	122	115
Mexico	99	82	85	79	128	93
European Union	40	45	47	52	51	50
South Africa	17	18	18	18	14	14
Other	29	26	31	30	29	30
Total	1,558	1,449	1,518	1,478	1,544	1,522
Domestic Consumption						
European Union	1,022	845	744	723	723	740
United States	865	832	810	703	778	701
China	60	61	75	102	115	121
Canada	108	105	99	96	96	96
Japan	73	74	75	76	75	75
Other	193	205	223	214	213	219
Total	2,321	2,121	2,026	1,914	2,001	1,952
Ending Stocks						
United States	498	400	290	322	331	330
Brazil	128	65	440	474	205	93
European Union	15	15	15	15	15	15
Japan	12	2	14	20	10	10
Korea, South	2	2	2	2	2	2
Other	21	26	31	23	8	4
Total	676	510	793	856	571	454

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	2012/13	Jan 2013/14
Production						
China	12,650	14,200	14,000	16,000	17,000	18,200
European Union	3,172	3,054	3,245	3,099	2,930	2,925
Japan	1,007	1,116	857	1,001	846	930
Turkey	756	846	858	875	876	880
Morocco	532	635	716	730	660	850
United States	449	578	643	635	661	674
Korea, South	593	740	565	586	667	645
Other	1,232	956	1,094	926	908	920
Total	20,391	22,125	21,978	23,852	24,548	26,024
Imports						
Russia	520	593	717	704	787	840
European Union	377	417	334	342	316	320
Ukraine	113	144	185	179	185	190
Vietnam	256	202	156	202	144	170
United States	131	128	151	147	154	155
Thailand	31	33	37	130	139	150
Canada	121	124	123	129	143	145
Other	314	300	332	385	246	284
Total	1,863	1,941	2,035	2,218	2,114	2,254
Exports						
China	740	712	607	840	702	800
Turkey	382	330	450	474	407	480
European Union	258	267	364	392	398	405
Morocco	332	323	349	344	305	250
South Africa	102	113	104	115	126	130
Argentina	113	119	115	100	90	90
Israel	54	68	56	83	78	82
Other	39	43	59	43	48	49
Total	2,020	1,975	2,104	2,391	2,154	2,286
Fresh Dom. Consumption						
China	11,371	12,977	12,926	14,568	15,650	16,814
European Union	2,930	2,812	2,720	2,702	2,550	2,563
Russia	518	592	716	704	787	840
Japan	904	994	791	903	780	830
United States	440	530	583	596	610	617
Korea, South	503	612	482	480	607	575
Morocco	200	312	367	386	355	555
Other	1,980	1,812	1,830	1,922	1,826	1,837
Total	18,846	20,641	20,415	22,261	23,165	24,631
For Processing						
China	550	520	480	600	660	600
European Union	361	392	495	347	298	277
United States	111	142	159	149	163	170
Japan	109	130	85	115	81	118
Korea, South	89	124	81	103	56	65
Morocco	0	0	0	0	0	45
Argentina	97	91	145	40	30	35
Other	71	51	49	64	55	51
Total	1,388	1,450	1,494	1,418	1,343	1,361

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)

	2008/09	2009/10	2010/11	2011/12	2012/13	Jan 2013/14
Production						
China	2,520	2,900	2,800	3,200	3,370	3,770
United States	1,183	1,123	1,138	1,047	1,074	976
Mexico	432	401	397	415	420	420
South Africa	370	343	406	300	410	375
Turkey	168	191	213	230	200	235
Israel	233	235	190	245	208	210
European Union	85	95	83	102	111	120
Other	237	140	160	100	70	60
Total	5,228	5,428	5,387	5,639	5,863	6,166
Imports						
European Union	399	389	348	356	335	340
Russia	86	112	117	113	141	145
Japan	180	168	167	149	134	135
Canada	48	46	45	44	43	42
Ukraine	16	21	23	27	30	35
China	6	7	12	13	17	25
Hong Kong	16	18	18	24	15	15
Other	38	37	24	21	21	21
Total	789	798	754	747	736	758
Exports						
South Africa	210	187	217	180	242	215
China	102	119	84	118	130	180
Turkey	128	154	153	177	132	165
United States	247	242	227	209	184	150
Israel	85	84	83	78	79	78
European Union	21	22	20	18	21	20
Mexico	11	18	17	19	19	20
Other	21	15	17	9	9	9
Total	825	841	818	808	816	837
Fresh Dom. Consumption						
China	2,424	2,788	2,728	3,095	3,257	3,615
European Union	435	442	380	409	406	419
United States	388	387	383	352	376	353
Mexico	332	293	292	324	318	319
Russia	86	112	117	113	141	145
Japan	180	168	167	149	134	135
Turkey	45	42	66	57	72	74
Other	184	198	176	171	150	149
Total	4,074	4,430	4,309	4,670	4,854	5,209
For Processing						
United States	560	506	535	487	521	480
South Africa	156	151	184	115	163	155
Israel	142	107	88	153	117	120
Mexico	100	100	90	80	85	83
European Union	28	20	31	31	19	21
Argentina	132	71	86	42	24	19
Canada	0	0	0	0	0	0
Other	0	0	0	0	0	0
Total	1,118	955	1,014	908	929	878

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	2012/13	Jan 2013/14
Production						
Mexico	1,966	1,891	2,133	2,055	1,950	2,000
European Union	1,263	1,160	1,380	1,264	1,165	1,345
United States	827	800	835	771	827	790
Turkey	672	783	787	750	680	760
Argentina	1,350	1,000	1,550	1,300	1,300	750
South Africa	214	216	257	260	245	265
Israel	29	48	30	53	51	55
Other	51	53	60	68	56	52
Total	6,372	5,951	7,032	6,521	6,274	6,017
Imports						
United States	398	401	402	475	478	480
European Union	405	471	421	440	422	440
Russia	203	211	222	200	212	225
Saudi Arabia	100	108	116	85	111	115
Canada	58	65	78	88	100	105
United Arab Emirates	44	54	55	63	78	90
Ukraine	58	62	64	62	63	65
Other	95	83	87	84	80	81
Total	1,361	1,455	1,445	1,497	1,544	1,601
Exports						
Mexico	445	456	432	625	525	530
Turkey	351	434	457	429	369	440
Argentina	250	264	255	267	280	250
South Africa	130	145	162	165	175	170
United States	93	93	102	95	110	120
European Union	87	67	68	92	77	100
Morocco	0	6	5	7	10	9
Other	15	9	8	9	8	9
Total	1,371	1,474	1,489	1,689	1,554	1,628
Fresh Dom. Consumption						
European Union	1,364	1,395	1,386	1,377	1,326	1,442
Mexico	1,208	1,141	1,361	1,121	1,111	1,156
United States	787	739	835	964	921	880
Turkey	296	290	271	259	258	262
Russia	198	210	222	200	212	225
Saudi Arabia	100	108	116	85	111	115
Canada	58	65	78	88	100	105
Other	319	329	372	385	379	379
Total	4,330	4,277	4,641	4,479	4,418	4,564
For Processing						
Argentina	1,050	698	1,211	963	955	450
Mexico	314	295	342	310	315	315
United States	345	369	300	187	274	270
European Union	217	169	347	235	184	243
South Africa	73	60	82	84	59	83
Turkey	30	60	60	65	55	60
Japan	2	2	3	3	3	3
Other	1	2	2	3	1	2
Total	2,032	1,655	2,347	1,850	1,846	1,426

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.