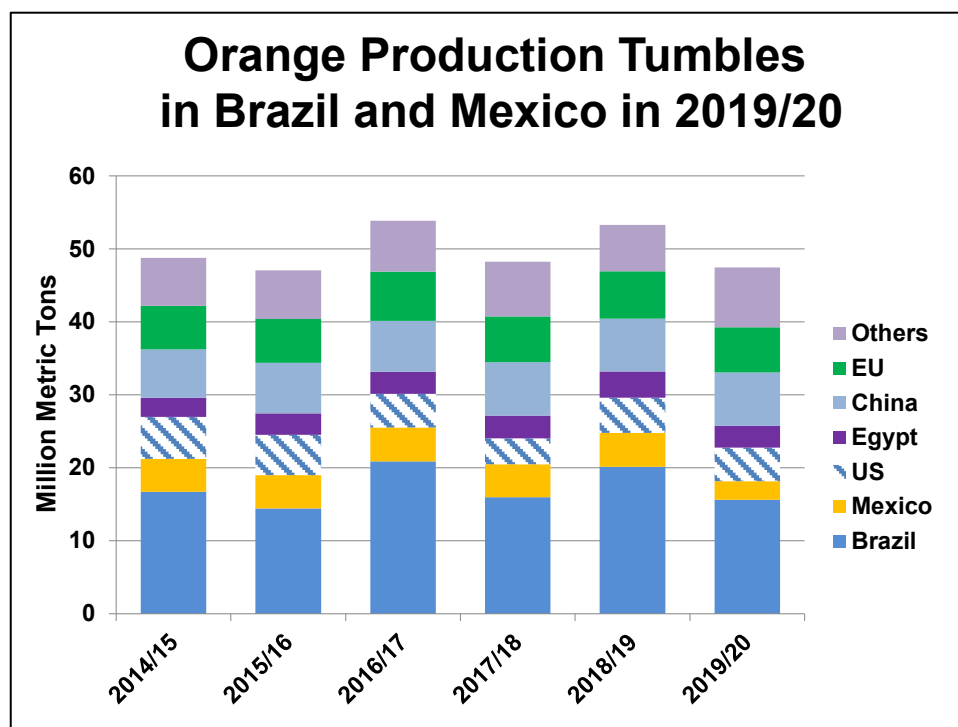


Citrus: World Markets and Trade

Oranges

Global orange production for 2019/20 is estimated to fall 7.8 million metric tons (tons) from the previous year to 46.1 million as unfavorable weather leads to smaller crops in Brazil (down 19 percent) and Mexico (down 45 percent). Consequently, consumption, fruit for processing, and fresh exports are also estimated lower.

Brazil's production is estimated to fall 19 percent to 15.6 million tons due to the alternate bearing phenomenon off-year in the Sao Paulo citrus belt and some weather-related problems (warm temperatures and below-average rainfall after the first two blooms and fruit set). Fresh orange consumption is lowered to 4.9 million tons while oranges for processing are down 3.5 million tons to 10.7 million.



Mexico's drought and high temperatures are estimated to cut the orange crop almost in half this year as production drops to 2.5 million tons, which would be the lowest harvest since the early 1990s. The ongoing drought and high temperatures have affected orange production more drastically than other citrus fruits because many orange trees are older and require more water to produce fruit. In Veracruz, the largest producing state, high temperatures were most problematic in October and November 2019. The intense temperatures and lack of rain throughout the growing season resulted in widespread fruit quality deterioration, with diminished size in most producing states. Consumption is anticipated to drop by one-third and fruit used for processing is estimated to tumble nearly 60 percent with the drop in supplies. Orange exports are anticipated to remain flat with over 95 percent of the exports expected to continue to go to the United States.

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China's production is projected up slightly to 7.3 million on favorable weather. Imports are up 3 percent on rising consumer demand for premium, high-quality oranges, and consumption is higher on overall increased supplies. Egypt and South Africa are expected to remain the top suppliers, accounting for over 70 percent of imports.

U.S. production is estimated down 5 percent to 4.7 million tons. Orange production in Florida has been trending down for years due to citrus greening with production less than one-third what it was 20 years ago. Consumption and exports are both up while fruit for processing is expected to be lower with the decline in production.

Production in the **European Union** is expected to drop 9 percent to 6.2 million tons due to unfavorable weather that affected flowering and fruit set. Fresh consumption, oranges for processing, and exports are all down on lower supplies.

Egypt's production is estimated to decrease 17 percent to 3.0 million tons as strong winds and high temperatures affected flowering and fruit set. Exports are projected 200,000 tons lower to 1.5 million on reduced supplies but are still anticipated to account for one-third of global trade. Top export markets are expected to continue to include the European Union, Russia, Saudi Arabia, and China.

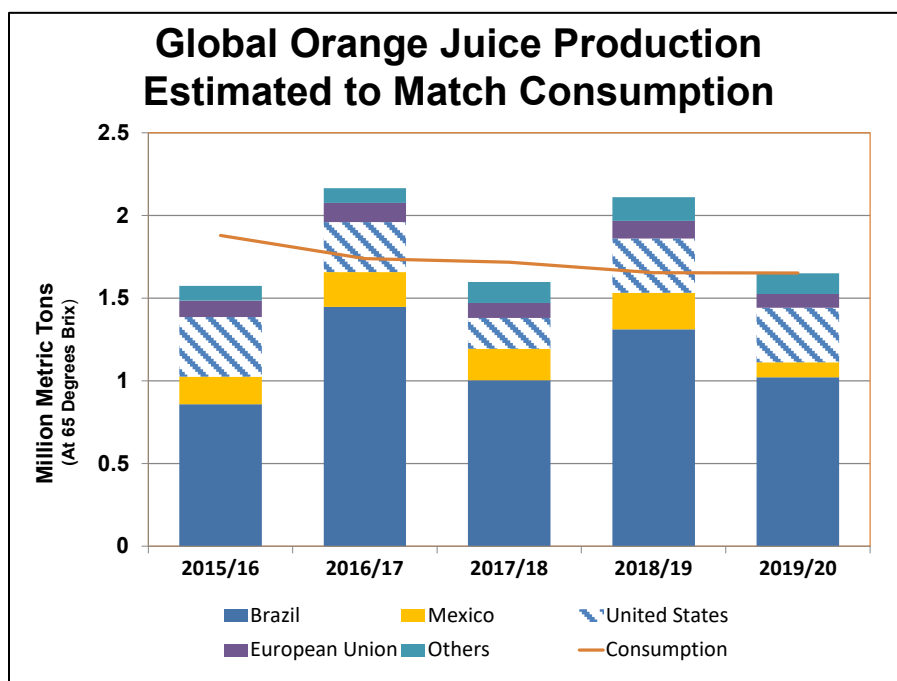
South Africa's production is expected to be flat at 1.6 million tons with normal weather conditions. Exports are estimated at a record 1.3 million tons with the European Union and China expected to remain the top markets.

Morocco's production is estimated to decline nearly one-third to 806,000 tons due to water shortages and unfavorable weather. Consumption, exports, and fruit for processing are also estimated down as a result of the drop in production.

Turkey's production is estimated to drop 11 percent to 1.7 million tons due to hot weather conditions in May 2019 which negatively affected the bloom. Consumption and exports are down as a result of fewer supplies.

Orange Juice

Global orange juice production for 2019/20 is estimated to slip 23 percent to 1.6 million tons (65 degrees brix) as production in Brazil and Mexico tumbles as a result of fewer oranges expected to be available for processing. Consumption is projected to be flat (though not down) and global trade is estimated lower with the expected drop in exports from Brazil and Mexico.



Brazil's production is forecast to drop 22 percent to 1.0 million tons with fewer oranges for processing. Consumption and stocks are both estimated slightly higher while exports are forecast 15 percent lower with the drop in production. Even with lower supplies Brazil remains the largest producer and is projected to account for over three-fourths of global orange juice exports.

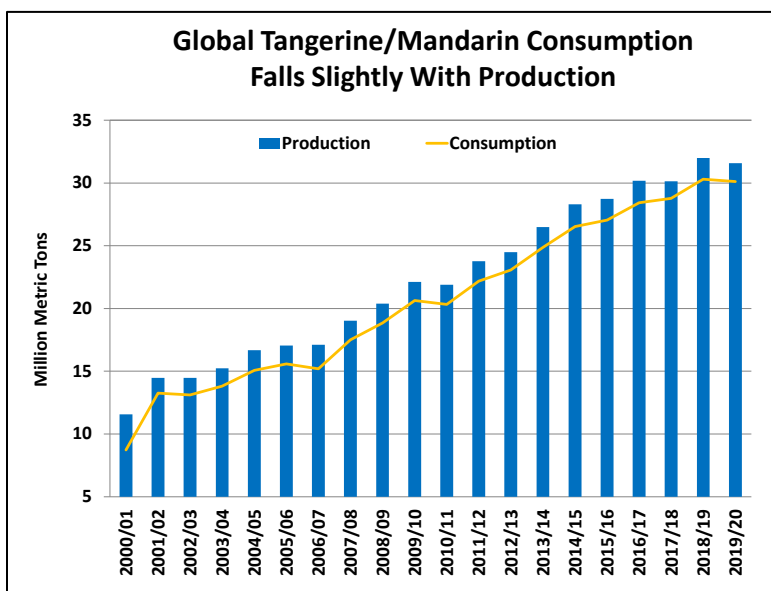
U.S. production is estimated down 10 percent to 297,000 tons with the drop in oranges available for processing. Although consumption has trended lower for over 20 years, this forecast is flat. Slightly higher exports and lower imports are anticipated to bring down stocks.

Mexico's production is projected to tumble by more than half to 90,000 tons due to significant reductions in the orange supplies available for processing. Consumption and exports both drop, drawing down stocks.

Production in the **European Union** is estimated to be 21 percent lower to 84,000 tons on fewer oranges available for processing. Consumption is down as the decline in production is expected to more than offset a slight increase in imports. Brazil is expected to remain the top orange juice supplier to the EU.

Tangerines/Mandarins

Global production is estimated down 400,000 tons for 2019/20 to 31.6 million with declines in the European Union, Morocco, Turkey, and the United States more than offsetting a larger crop in China. Consumption and exports are both down on lower available supplies. Historically, production and consumption have been trending higher, nearly 20 years now on growth from China, the European Union, Turkey, and the United States.



China's production is estimated to rise 1.0 million tons to a record 23.0 million due to favorable weather and rapid expansion in crop area devoted to newer easy-to-peel varieties. China is expected to continue to account for around 70 percent of global production and consumption and over one-quarter of global exports. The increase in production is expected to be consumed in the domestic market, while exports are estimated at last year's level.

Production in the **European Union** is expected to drop 450,000 tons to 2.8 million as a result of unfavorable spring and fall weather conditions including heavy rains in Spain and Italy. With smaller supplies, consumption is down, imports are up, and exports are expected to remain steady. Morocco and South Africa are anticipated to remain the leading suppliers to the EU market.

Turkey's production is estimated down 15 percent to 1.4 million tons due to a freeze during the bloom. Consumption is expected to decline with the reduced supplies while exports have expanded with Russia expected to remain as the top market.

Production in **Morocco** is projected to fall 33 percent to 926,000 tons due to unfavorably high temperatures during the bloom and fruit set. Consumption and exports are also estimated to plunge with the drop in supplies.

U.S. production is estimated down 20 percent to 806,000 tons due to unfavorable weather that lowered yields. Consumption is down due to lower available supplies while exports are flat with Canada and Japan expected to remain the top two markets.

Grapefruit

Global production in 2019/20 is estimated down slightly to 6.7 million tons due to unfavorable weather in Mexico and the United States. Consumption is expected to be down slightly while exports are estimated higher with an increase in exports from Turkey.

Lemons/Limes

Global production in 2019/20 is estimated down 975,000 tons to 7.6 million as a result of lower production in Argentina, the European Union, Mexico, Turkey, and the United States. With the decline in available supplies, consumption, fruit for processing, and exports are all expected to be down. The decline in exports from Turkey more than offsets the record exports from South Africa.

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

FAS Reports from Overseas Offices

The *Citrus: World Markets and Trade* circular is based on reports from FAS Overseas Posts since June 2020 and on available secondary information. Individual country reports can be obtained on FAS Online at: <http://gain.fas.usda.gov/Pages/Default.aspx>.

PSD Online

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

Additional Resources

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

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

Future Releases and Contact Information

Please visit <http://www.fas.usda.gov/data/citrus-world-markets-and-trade> to view archived and future releases. The next release of this circular is scheduled for January 2021.

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

(1,000 Metric Tons)

	2015/16	2016/17	2017/18	2018/19	Jan 2019/20	Jul 2019/20
Production						
Brazil	14,414	20,890	15,953	19,258	15,100	15,617
China	6,900	7,000	7,300	7,200	7,300	7,300
European Union	6,038	6,739	6,270	6,799	5,840	6,194
United States	5,523	4,616	3,560	4,894	4,898	4,664
Egypt	2,930	3,000	3,120	3,600	3,000	3,000
Mexico	4,603	4,630	4,737	4,639	4,417	2,530
Turkey	1,800	1,850	1,905	1,900	1,800	1,700
South Africa	1,275	1,363	1,586	1,590	1,560	1,600
Morocco	925	1,037	1,021	1,183	815	806
Vietnam	637	768	770	770	770	770
Argentina	800	700	750	800	720	650
Australia	455	480	525	510	500	500
Costa Rica	335	322	315	295	310	310
Guatemala	177	177	180	177	180	180
Israel	86	81	76	68	76	76
Other	162	160	165	161	183	165
Total	47,060	53,813	48,233	53,844	47,469	46,062
Fresh Dom. Consumption						
China	6,446	6,718	7,058	6,989	7,088	7,088
European Union	5,407	5,950	5,834	6,080	5,545	5,804
Brazil	4,940	4,761	4,982	5,035	4,735	4,943
Mexico	2,929	2,473	2,785	2,408	2,427	1,601
Turkey	1,366	1,402	1,386	1,539	1,472	1,358
United States	1,346	1,184	1,261	1,230	1,251	1,289
Egypt	1,380	1,380	1,480	1,540	1,200	1,200
Vietnam	695	811	832	821	820	820
Morocco	811	822	826	975	670	666
Russia	470	425	458	457	455	445
Saudi Arabia	411	395	380	428	410	415
Argentina	469	350	320	410	303	380
Iraq	265	257	337	263	255	270
Bangladesh	158	158	242	175	221	243
Guatemala	211	213	199	211	210	210
Other	1,782	1,676	1,673	1,689	1,595	1,592
Total	29,086	28,975	30,053	30,250	28,657	28,324
For Processing						
Brazil	9,466	16,116	10,975	14,239	10,365	10,690
United States	3,684	3,001	2,010	3,378	3,357	3,040
European Union	1,286	1,491	1,154	1,379	1,045	1,080
Mexico	1,650	2,100	1,900	2,200	1,955	900
China	600	580	570	590	600	600
Egypt	100	100	100	360	300	300
South Africa	142	123	239	333	238	247
Costa Rica	230	238	232	216	230	230
Argentina	270	273	375	307	350	200
Australia	77	60	108	90	190	190
Other	152	181	179	189	174	174
Total	17,657	24,263	17,842	23,281	18,804	17,651

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 different marketing years such as those listed above.

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

(1,000 Metric Tons)

	2015/16	2016/17	2017/18	2018/19	Jan 2019/20	Jul 2019/20
Exports						
Egypt	1,450	1,520	1,540	1,700	1,500	1,500
South Africa	1,064	1,171	1,279	1,186	1,250	1,280
United States	657	613	511	479	485	525
European Union	319	293	324	357	300	310
Turkey	371	397	454	298	253	274
Australia	161	191	186	195	190	190
Hong Kong	107	176	189	167	170	170
Morocco	89	165	145	148	110	105
Argentina	65	80	60	85	70	70
China	74	59	65	55	60	60
Mexico	56	76	72	60	62	60
Singapore	8	6	5	6	6	6
Russia	3	5	5	5	5	5
Brazil	26	33	20	4	20	4
Israel	6	5	4	3	4	4
Other	2	4	3	4	4	4
Total	4,458	4,794	4,862	4,752	4,489	4,567
Imports						
European Union	974	995	1,042	1,017	1,050	1,000
Russia	473	430	463	462	460	450
China	220	357	393	434	448	448
Saudi Arabia	411	395	380	428	410	415
Hong Kong	286	315	347	332	330	330
Bangladesh	154	155	239	172	200	240
Canada	204	183	190	186	185	200
Iraq	192	184	262	192	180	195
United States	164	182	222	193	195	190
United Arab Emirates	220	204	181	189	185	185
Korea, South	154	143	141	126	135	120
Malaysia	101	98	92	106	105	105
Ukraine	76	73	88	95	95	90
Japan	100	92	83	85	88	88
Switzerland	71	68	70	70	70	75
Costa Rica	52	70	69	66	70	70
Vietnam	58	43	62	51	50	50
Singapore	44	42	43	44	45	42
Turkey	37	49	33	42	35	42
Norway	38	35	32	33	33	33
Mexico	32	19	20	29	27	31
Guatemala	34	36	19	34	30	30
Australia	18	21	14	20	20	20
Brazil	18	20	24	20	20	20
Mozambique	5	5	6	7	7	7
Other	5	5	9	6	8	4
Total	4,141	4,219	4,524	4,439	4,481	4,480

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 different marketing years such as those listed above.

Orange Juice: Production, Supply and Distribution in Selected Countries
(1,000 Metric Tons at 65 Degrees Brix)

	2015/16	2016/17	2017/18	2018/19	Jan 2019/20	Jul 2019/20
Production						
Brazil	859	1,447	1,004	1,312	992	1,022
United States	361	303	187	329	330	297
Mexico	166	210	190	220	196	90
European Union	100	116	89	107	81	84
South Africa	21	19	49	63	45	47
China	46	45	44	45	46	46
Australia	8	7	18	17	16	16
Other	14	18	17	18	17	16
Total	1,574	2,164	1,598	2,111	1,722	1,618
Domestic Consumption						
European Union	826	741	736	705	693	696
United States	631	581	572	530	530	532
China	83	97	110	112	112	112
Canada	93	86	85	83	87	83
Japan	78	72	73	70	71	71
Brazil	38	38	40	40	42	42
Australia	40	38	36	34	34	34
Other	90	86	79	80	82	79
Total	1,879	1,739	1,730	1,654	1,650	1,649
Ending Stocks						
United States	302	268	261	376	426	318
Brazil	6	185	160	290	182	305
South Africa	11	0	6	36	20	29
Japan	13	12	23	26	23	23
European Union	15	15	15	15	15	15
Other	7	4	7	25	6	6
Total	353	485	472	768	672	697
Exports						
Brazil	962	1,230	989	1,142	935	965
Mexico	158	204	182	195	191	105
European Union	52	63	58	60	58	58
South Africa	35	28	39	30	50	50
United States	66	57	35	30	30	33
Other	32	32	32	31	28	27
Total	1,305	1,613	1,336	1,487	1,292	1,238
Imports						
European Union	778	688	704	658	670	670
United States	280	301	413	346	280	210
Canada	97	90	86	83	87	83
China	40	55	68	69	68	68
Japan	73	71	84	75	68	68
Russia	37	35	31	33	32	33
Israel	29	21	25	23	23	23
Other	57	57	45	41	41	42
Total	1,391	1,320	1,455	1,326	1,269	1,197

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 different marketing years such as those listed above.

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

(1,000 Metric Tons)

	2015/16	2016/17	2017/18	2018/19	Jan 2019/20	Jul 2019/20
Production						
China	20,200	20,600	21,200	22,000	23,000	23,000
European Union	3,086	3,421	2,913	3,211	2,643	2,761
Turkey	1,040	1,300	1,550	1,650	1,500	1,400
Japan	933	1,070	968	994	952	952
Morocco	1,065	1,278	1,185	1,375	910	926
United States	861	933	729	1,004	844	806
Korea, South	635	600	577	608	645	645
South Africa	226	261	356	375	420	421
Argentina	350	320	350	430	390	310
Israel	190	243	162	198	200	200
Other	152	157	148	151	148	147
Total	28,738	30,183	30,138	31,996	31,652	31,568
Fresh Dom. Consumption						
China	18,910	19,413	20,058	20,735	21,734	21,734
European Union	2,988	3,265	2,953	3,093	2,694	2,820
Japan	860	989	906	933	897	897
United States	769	862	876	1,030	909	875
Russia	724	841	836	902	840	840
Turkey	487	614	836	969	819	601
Korea, South	547	542	503	543	558	558
Other	1,766	1,903	1,800	2,095	1,756	1,792
Total	27,051	28,429	28,768	30,300	30,207	30,117
For Processing						
China	660	650	640	620	620	620
European Union	271	372	226	355	204	226
United States	288	309	171	243	205	195
Korea, South	85	56	72	63	85	85
Argentina	110	110	116	113	135	75
Japan	87	98	79	79	73	73
South Africa	11	24	75	59	68	56
Other	41	56	33	43	36	36
Total	1,553	1,675	1,412	1,575	1,426	1,366
Exports						
Turkey	575	710	739	712	710	828
China	658	587	556	706	710	710
Morocco	469	517	539	599	360	385
South Africa	190	210	261	296	330	344
European Union	250	236	217	246	245	245
Israel	87	120	88	102	110	110
United States	36	36	35	45	45	46
Other	56	45	38	40	38	38
Total	2,321	2,461	2,473	2,746	2,548	2,706
Imports						
Russia	724	841	836	902	840	840
European Union	423	452	483	483	500	530
United States	232	274	353	314	315	310
Ukraine	139	124	157	164	165	190
Vietnam	116	118	143	160	150	165
Canada	146	154	154	157	150	160
Philippines	68	68	87	102	95	105
Thailand	141	123	75	87	70	75
Indonesia	60	69	60	73	65	65
Malaysia	69	64	67	69	65	65
Other	69	95	100	114	114	116
Total	2,187	2,382	2,515	2,625	2,529	2,621

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 different marketing years such as those listed above.

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

(1,000 Metric Tons)

	2015/16	2016/17	2017/18	2018/19	Jan 2019/20	Jul 2019/20
Production						
China	4,350	4,600	4,800	4,900	4,930	4,930
United States	728	633	462	544	582	485
South Africa	315	354	403	372	420	387
Mexico	438	442	418	456	468	350
Turkey	250	253	260	250	300	270
Israel	163	149	144	139	155	155
European Union	107	106	107	108	89	96
Other	25	25	26	26	26	26
Total	6,376	6,562	6,620	6,795	6,970	6,699
Fresh Dom. Consumption						
China	4,224	4,460	4,670	4,713	4,743	4,743
European Union	438	398	447	395	434	434
Mexico	331	335	311	344	352	254
United States	287	282	231	240	254	230
Russia	117	106	134	156	160	135
Turkey	62	131	71	112	131	86
Japan	105	108	96	89	84	84
Canada	39	37	35	35	35	37
Ukraine	18	15	27	29	32	35
Hong Kong	5	5	5	6	10	10
Other	22	21	22	23	24	24
Total	5,648	5,898	6,049	6,142	6,259	6,072
For Processing						
United States	333	268	191	262	285	213
South Africa	111	118	111	107	124	110
Mexico	87	88	90	94	95	79
Israel	92	80	68	77	72	72
European Union	20	19	17	21	15	15
Other	1	1	2	2	3	3
Total	644	574	479	563	594	492
Exports						
South Africa	203	231	288	258	290	270
China	159	180	208	248	255	255
Turkey	190	125	189	138	170	185
Israel	61	61	68	54	75	75
United States	124	108	58	57	62	57
Hong Kong	11	15	32	21	20	25
Mexico	22	20	18	20	23	18
Other	15	15	17	16	15	17
Total	785	755	878	812	910	902
Imports						
European Union	365	326	374	324	375	370
Russia	117	106	134	156	160	135
China	33	40	78	61	68	68
Japan	82	84	71	64	60	60
Canada	39	37	35	35	35	37
Hong Kong	16	20	37	27	30	35
Ukraine	18	15	27	29	32	35
United States	16	25	18	15	19	15
Switzerland	7	7	7	7	7	7
South Africa	4	1	3	1	3	2
Other	4	4	2	3	4	3
Total	701	665	786	722	793	767

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 different marketing years such as those listed above.

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

(1,000 Metric Tons)

	2015/16	2016/17	2017/18	2018/19	Jan 2019/20	Jul 2019/20
Production						
Mexico	2,416	2,513	2,311	2,401	2,422	2,199
European Union	1,333	1,535	1,472	1,683	1,470	1,417
Argentina	1,350	1,450	1,770	1,780	1,600	1,400
Turkey	670	850	1,000	1,100	1,000	950
United States	820	800	806	909	740	831
South Africa	308	430	446	492	530	579
Israel	60	67	65	68	75	75
Other	93	99	91	92	96	99
Total	7,050	7,744	7,961	8,525	7,933	7,550
Fresh Dom. Consumption						
European Union	1,582	1,692	1,786	1,871	1,766	1,716
United States	1,135	1,222	1,222	1,359	1,265	1,356
Mexico	1,383	1,397	1,190	1,257	1,276	1,140
Turkey	200	319	417	476	406	532
Russia	184	210	216	217	222	207
Saudi Arabia	121	126	143	145	145	145
Canada	102	96	97	126	125	120
United Arab Emirates	97	93	84	85	85	85
Argentina	70	90	151	170	150	80
Japan	74	75	72	69	79	77
Other	158	178	182	193	202	206
Total	5,106	5,498	5,560	5,968	5,721	5,664
For Processing						
Argentina	1,004	1,122	1,348	1,377	1,150	1,100
Mexico	374	388	396	397	395	307
European Union	243	284	232	278	224	221
United States	190	164	189	242	185	200
South Africa	56	115	113	122	139	140
Turkey	40	40	50	50	50	50
Japan	29	31	31	32	34	34
Other	2	4	4	6	4	4
Total	1,938	2,148	2,363	2,504	2,181	2,056
Exports						
Mexico	662	731	729	751	755	755
South Africa	237	299	315	350	370	416
Turkey	434	495	536	576	546	370
Argentina	279	241	272	234	300	220
United States	110	112	97	96	90	90
European Union	69	79	65	82	80	80
Morocco	9	13	9	15	11	14
Other	22	26	17	14	16	11
Total	1,822	1,996	2,040	2,118	2,168	1,956
Imports						
United States	615	698	702	788	800	815
European Union	561	520	611	548	600	600
Russia	186	213	219	220	225	210
Saudi Arabia	121	126	143	145	145	145
Canada	102	96	97	126	125	120
United Arab Emirates	91	87	79	80	80	80
Japan	51	53	53	59	62	60
Ukraine	41	47	50	55	55	55
Hong Kong	37	47	39	36	38	35
Mexico	3	3	4	4	4	3
Other	8	8	5	4	3	3
Total	1,816	1,898	2,002	2,065	2,137	2,126

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 - December of the second year shown.

Import and export totals may not equal due in part to different marketing years such as those listed above.