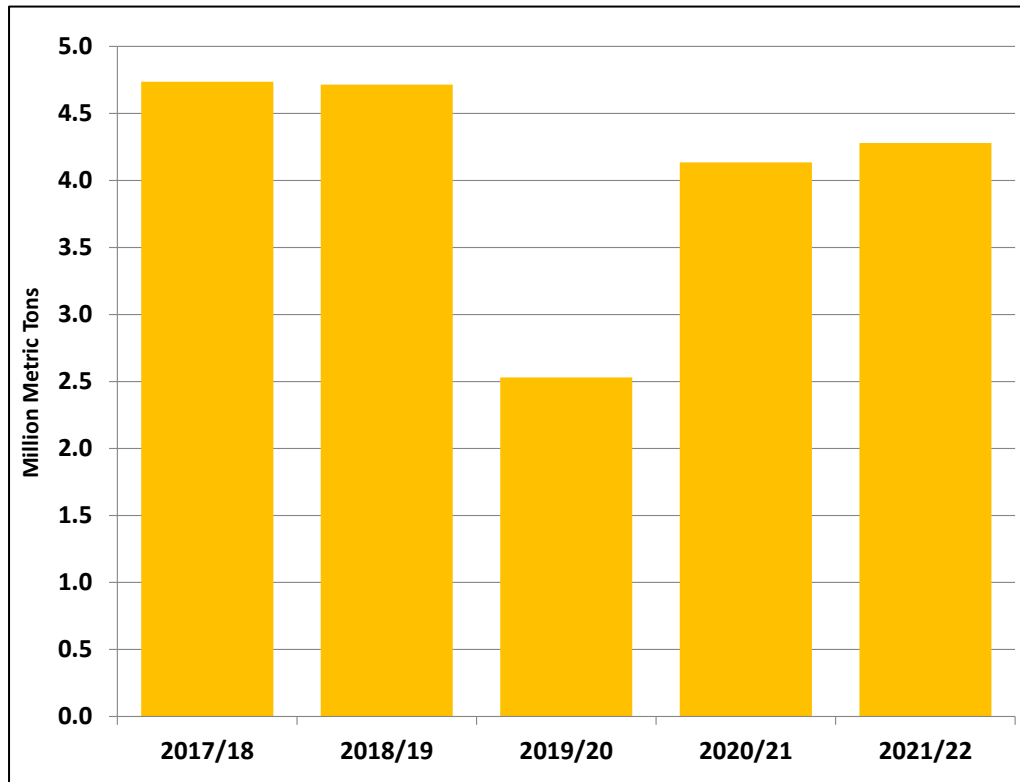


Citrus: World Markets and Trade

Mexico Orange Production Continues to Recover from 2019/20 Drought



Mexico orange production is forecast at 4.3 million tons, up 3 percent from the previous year due to a return to normal weather conditions in Veracruz. The 2019/20 drought affected orange production more than other citrus, as many orange trees are old and require more energy to produce fruit. Mexico produces three main orange varieties: Valencia, which is favorable for juice production; Lane Late, which is mainly consumed fresh; and Navelina, which is consumed fresh and is also used for juice production. Oranges are harvested mainly from November to May.

Oranges are the most prevalent citrus fruit planted in Mexico, with the state of Veracruz accounting for nearly half of the total harvested area. Its high elevation, nutrient-rich soil, and high humidity make it ideal for citrus production. Other significant producer states include Nuevo León, Puebla, Sonora, and Tamaulipas. Additionally, many small producers lack irrigation technology and have poor crop management practices, exacerbating production challenges. Producers, many of whom are small-scale (3 hectares or less), have little liquidity or government assistance to invest in tree maintenance activities such as leaf removal and fertilization, both necessary to maintain soil health for optimal production. In Veracruz, only 3 percent of orange planted area, typically owned by large juice production businesses, utilizes sophisticated irrigation technologies and regular fertilizer application. Tamaulipas, Nuevo León, and Yucatán have the most significant area planted with irrigation technology.

The COVID-19 pandemic has had little effect on citrus production throughout the country, as the agricultural sector was deemed essential by the federal government. Producers have adopted a number of precautions and safety measures in the field, such as distance restrictions between workers while harvesting and additional shifts at packing plants to enhance social distancing. Consistent supply chains have allowed for ample supplies and stable prices for consumers.

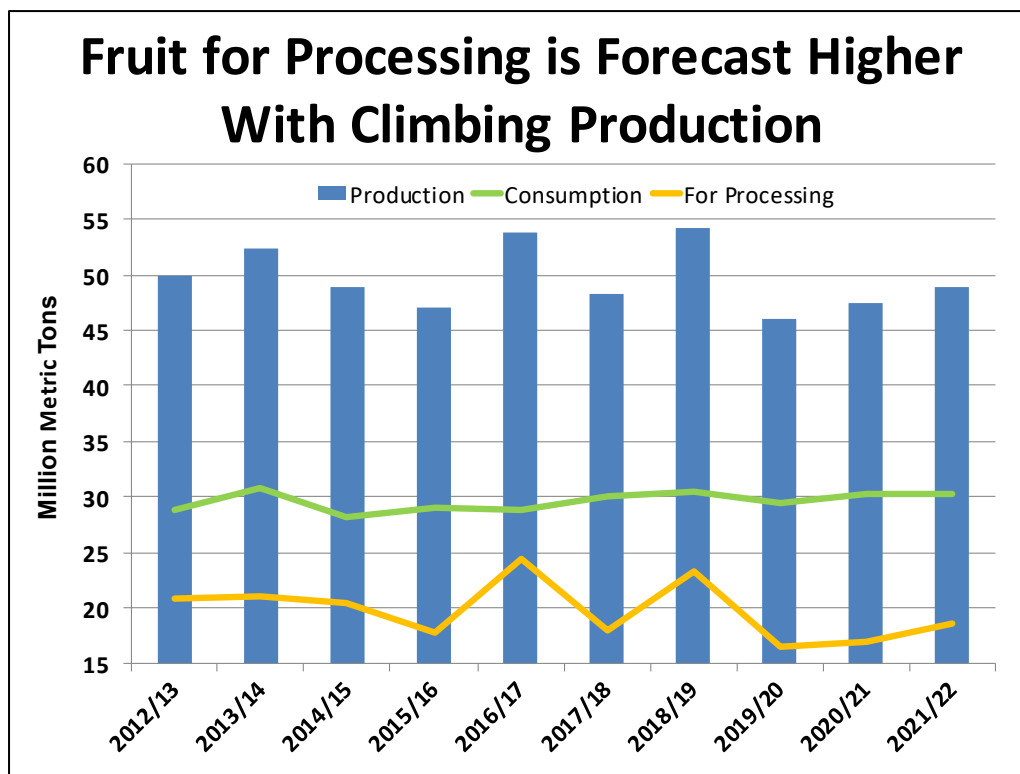
Mexico continues to face challenges with citrus greening, or Huanglongbing (HLB). Caused by bacteria introduced by psyllids, the disease makes citrus trees produce misshapen, partially green fruit. Taste can also be affected, and the fruit is not marketable for fresh consumption. Trees infected with HLB will eventually succumb to the disease and die within a few years. Mexico's first detection was in 2009, and since then, the National Service of Agricultural Food Safety and Quality (SENASICA) has implemented a monitoring program for the disease. HLB has been detected in citrus production areas including the states of Veracruz, Tamaulipas, San Luis Potosi, and Nuevo Leon. In 2019, Baja California had HLB positive detections along the California/Mexico border region. HLB is present in all Florida counties with commercial citrus groves and has also been found in California and Texas.

Oranges are the primary sweet citrus fruit consumed in Mexico and are mainly used for fresh-squeezed juice found in grocery stores and street-side juice stands. Fresh orange availability in the domestic market depends greatly on the volume of oranges sent for processing, as producers usually find higher returns selling to juice processors.

Exports are forecast at 75,000 tons, due to strong U.S. demand for fresh consumption. Most of the oranges shipped to the United States are navel oranges grown in Sonora. Imports are forecast at 34,000 tons, exclusively from the United States, and primarily for fresh consumption in the border region.

Oranges

Global orange production for 2021/22 is estimated up 1.4 million tons from the previous year to 48.8 million as favorable weather leads to larger crops in Brazil, Mexico, and Turkey. These gains more than offset lower production in Egypt, the European Union, and the United States. Most of the higher production is expected to go into fruit for processing.



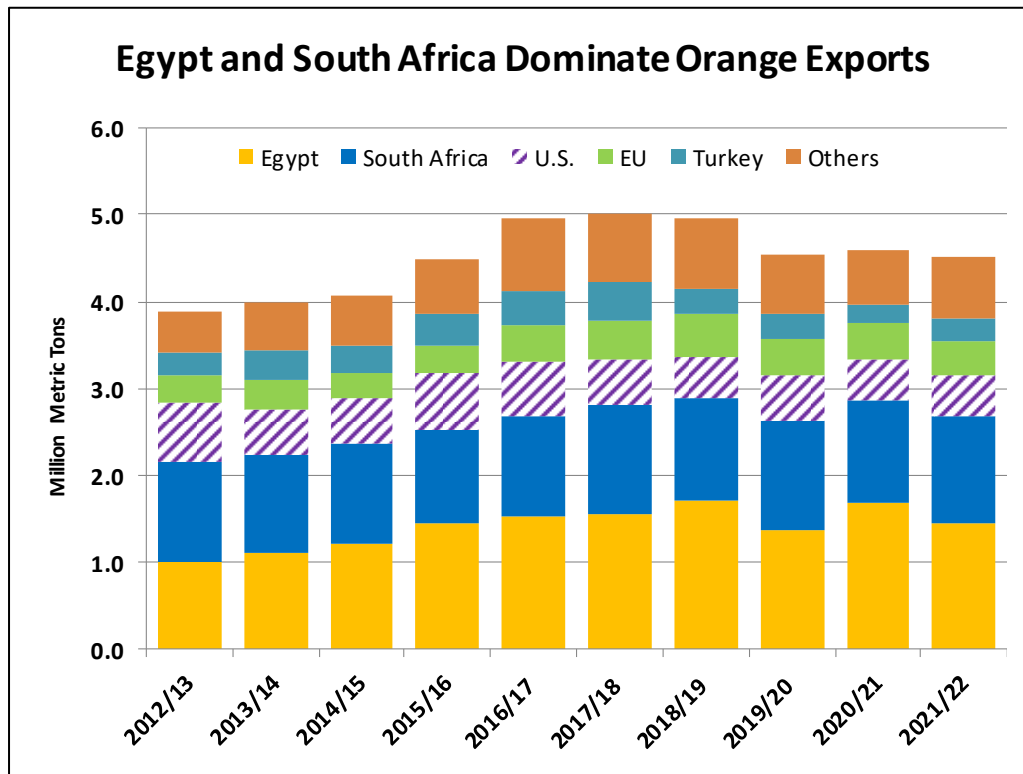
Brazil production is forecast up 1.8 million tons to 16.5 million; favorable weather during flowering improved fruit set. Consumption is up slightly while fruit for processing is forecast up 16 percent, accounting for the majority of the increase in available supplies.

China production is projected up slightly to a record 7.6 million tons. The forecast is based on higher output in new navel planting areas in Jiangxi and higher yields in Hubei and Hunan provinces, offsetting decreases in southern Jiangxi province where citrus greening disease has affected crops for several years. Consumption and exports are forecast up with the higher production while imports are down.

U.S. production is forecast to drop 11 percent to a near record low 3.6 million tons due to poor fruit set in California and the continued decline in area and yields as a result of citrus greening in Florida. Consumption, exports, and fruit for processing are all lower with the drop in production, while imports are projected to be flat due to weak consumer demand.

European Union production is expected to decline 6 percent to 6.1 million tons due to unfavorable weather and a slight drop in area harvested. Fresh consumption, fruit for processing, and exports are down with the lower supplies. Imports are projected up with the drop in production. Egypt and South Africa are expected to continue to be the leading suppliers of imports.

Egypt production is forecast to drop by almost 16 percent to 3.0 million tons due to unfavorable weather during flowering which reduced fruit set. Consumption is forecast lower due to the lower production. Exports are forecast down due to lower supplies, but a greater share of supply is expected to go towards exports (less to domestic consumption) given high global demand for the fruit. Top export markets are expected to include the European Union, Russia, Saudi Arabia, and China.



South Africa production is forecast to increase 3 percent to 1.7 million tons (the highest level in 8 years) due to favorable weather and a rise in area. Consumption and exports are up with the rise in production as well as strong demand. The EU is expected to remain the top market, accounting for over 40 percent of shipments.

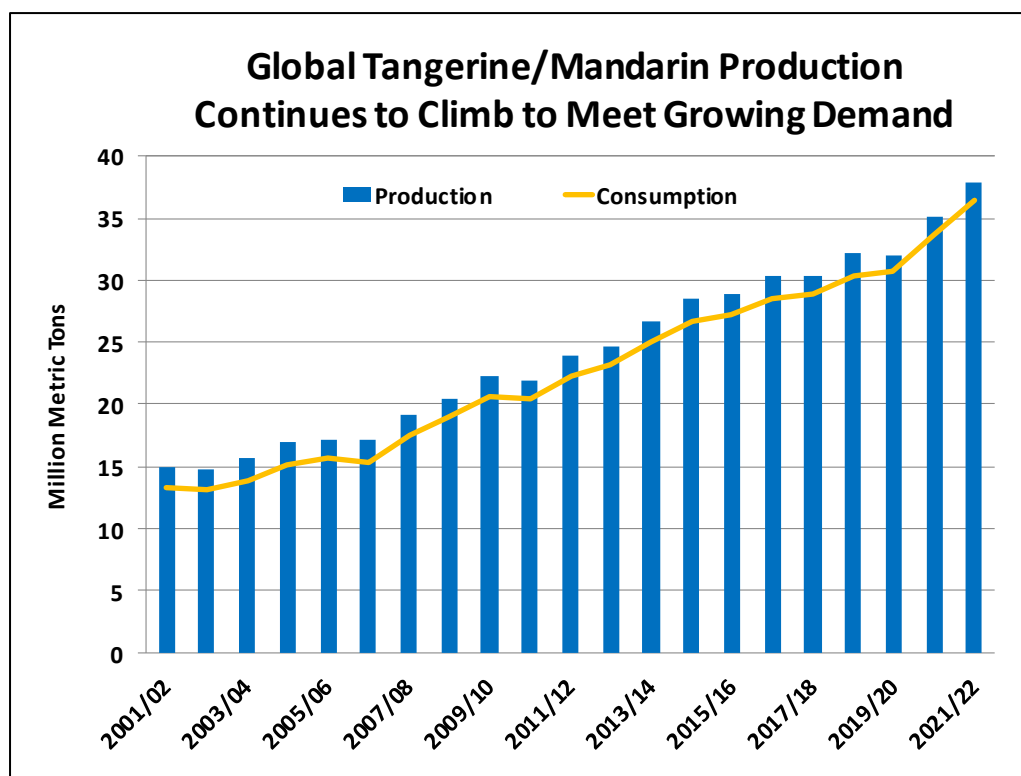
Turkey production is forecast to rise 40 percent to 1.8 million tons due to favorable weather and higher area and yields. Consumption and exports are up as a result of the increased supplies.

Morocco production is estimated to rise 11 percent to 1.2 million tons due to favorable weather and increased area as new orchards begin production. Consumption and exports are also projected up as a result of the greater supplies.

Argentina production is projected up 50,000 tons to 800,000 as a result favorable weather. Consumption is forecast higher with the greater supplies while exports are projected to be unchanged.

Tangerines/Mandarins

Global production for 2021/22 is estimated up 2.8 million tons to a record 37.9 million with growth in China expected to more than offset declines in the United States and European Union. Consumption and exports are both at record highs. Production and consumption have been trending higher for more than 20 years on growth from China, the EU, Morocco, and Turkey.



China production is forecast to rise 3.0 million tons to a record 28.0 million due to favorable weather and higher area and yields. Consumption and exports are also at record highs with the increase in supplies. The Philippines, Thailand, and Vietnam are expected to remain the top export markets.

EU production is expected to fall 8 percent to 3.0 million tons as a result of unfavorable weather in Spain. With reduced supplies, consumption is down, exports are down slightly, and imports are up. Morocco and South Africa are anticipated to remain the leading suppliers of imports to the EU.

Turkey production is forecast up 150,000 tons to a record 1.8 million due to favorable weather and higher area and yields. Consumption is up with rise in supplies and exports are at a new record. Russia is expected to remain the top market.

Morocco production is projected to jump 13 percent to 1.4 million tons due to favorable weather. Consumption is forecast at a record and exports are set to rise with the higher production. Top export markets are expected to continue to be the European Union and Russia.

U.S. production is expected to fall by a quarter to just under 800,000 tons due to unfavorable weather in California. Consumption is down as higher imports do not fully offset the decline in production.

Future Releases and Contact Information

Please visit <https://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 July 27, 2022.

FAS Reports from Overseas Offices

The *Citrus: World Markets and Trade* circular is based on reports from FAS Overseas Posts since December 2021 and on available secondary information. Individual country reports can be obtained on FAS Online at: <https://gain.fas.usda.gov/Pages/Default.aspx>.

European Union definition: includes 27 countries in the customs union (Austria, Belgium/Luxembourg, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden).

Effective January 1, 2021, the separation of the United Kingdom (UK) from the European Union (EU) was complete, including trade between both entities. Starting in January 2022 with the release of 2021/22 data, PSD's for grapefruit, fresh; lemons/limes, fresh; oranges, fresh; orange juice; and tangerines/mandarins, fresh reflect EU27 (shown in the PSD system as "European Union") and UK separately. Historical data for both EU27 and the UK is provided for 5 years (2016/17 through 2020/21).

PSD Online

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

Global Agricultural Trade System (GATS)

U.S. Exports and Imports at: <https://apps.fas.usda.gov/gats/default.aspx>

Additional Resources

Please refer to the USDA-FAS Citrus website at: <https://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: <https://www.ers.usda.gov/topics/crops/fruit-tree-nuts.aspx>
Publications are available from the National Agricultural Statistics Service at: <http://www.nass.usda.gov/Publications/>

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

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

(1,000 Metric Tons)

	2016/17	2017/18	2018/19	2019/20	2020/21	Jan 2021/22
Production						
Brazil	20,890	15,953	19,298	14,870	14,712	16,524
China	7,000	7,300	7,200	7,400	7,500	7,600
European Union	6,739	6,270	6,800	6,268	6,488	6,101
Mexico	4,630	4,737	4,716	2,530	4,136	4,280
United States	4,616	3,515	4,923	4,766	4,015	3,560
Egypt	3,000	3,120	3,600	3,200	3,570	3,000
Turkey	1,850	1,905	1,900	1,700	1,300	1,820
South Africa	1,363	1,586	1,590	1,620	1,650	1,700
Morocco	1,037	1,021	1,183	806	1,039	1,150
Vietnam	768	855	1,017	1,017	1,017	1,017
Argentina	700	750	800	700	750	800
Australia	526	528	515	485	525	535
Costa Rica	322	315	295	285	290	300
Guatemala	177	178	178	180	180	180
Iraq	73	75	73	134	134	130
Other	168	166	153	147	142	141
Total	53,859	48,274	54,241	46,108	47,448	48,838
Fresh Dom. Consumption						
China	6,718	7,058	7,059	7,236	7,295	7,370
European Union	5,690	5,582	5,878	5,963	5,930	5,793
Brazil	4,761	4,982	4,961	4,967	4,573	4,749
Mexico	2,473	2,785	2,486	1,596	2,749	2,539
Turkey	1,402	1,386	1,539	1,347	1,018	1,488
Egypt	1,380	1,480	1,540	1,490	1,550	1,250
United States	1,184	1,216	1,259	1,409	1,274	1,100
Vietnam	811	917	1,068	1,062	1,092	1,097
Morocco	822	826	968	654	893	975
Argentina	350	320	410	429	480	516
Russia	425	458	457	426	471	475
Saudi Arabia	374	380	402	369	419	424
Iraq	258	337	266	303	309	273
United Kingdom	261	239	243	226	241	240
Bangladesh	158	242	175	221	230	227
Other	1,780	1,765	1,773	1,788	1,749	1,743
Total	28,847	29,973	30,484	29,486	30,273	30,259
For Processing						
Brazil	16,116	10,975	14,362	9,915	10,159	11,791
United States	3,001	2,010	3,378	3,050	2,488	2,230
Mexico	2,100	1,900	2,200	900	1,350	1,700
European Union	1,491	1,154	1,309	848	1,006	908
South Africa	123	239	333	282	363	368
China	580	570	520	400	350	350
Egypt	100	100	360	335	350	300
Australia	214	215	210	195	250	225
Costa Rica	238	232	216	213	215	220
Argentina	273	375	307	190	186	200
Other	181	179	189	174	164	194
Total	24,417	17,949	23,384	16,502	16,881	18,486

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)

	2016/17	2017/18	2018/19	2019/20	2020/21	Jan 2021/22
Exports						
Egypt	1,520	1,540	1,700	1,375	1,670	1,450
South Africa	1,171	1,279	1,186	1,260	1,200	1,240
United States	613	511	479	507	471	450
European Union	419	443	494	417	410	400
Turkey	397	454	298	292	220	265
Australia	191	186	198	181	160	190
Morocco	165	145	155	117	96	120
China	59	65	55	52	100	110
Argentina	80	60	85	83	85	85
Hong Kong	176	189	167	117	60	80
Mexico	76	72	60	65	72	75
Saudi Arabia	15	13	15	12	11	11
Brazil	33	20	4	8	4	8
Russia	5	5	5	6	6	5
United Kingdom	30	29	32	38	5	5
Other	16	13	15	10	12	11
Total	4,966	5,024	4,948	4,540	4,582	4,505
Imports						
European Union	861	909	881	960	858	1,000
Russia	430	463	462	432	477	480
Saudi Arabia	389	393	417	381	430	435
United Kingdom	291	268	275	264	246	245
China	357	393	434	288	245	230
Bangladesh	155	239	172	218	230	227
United Arab Emirates	204	181	190	234	220	220
United States	182	222	193	200	218	220
Hong Kong	315	347	332	270	170	193
Canada	183	190	186	198	170	168
Iraq	185	262	193	169	175	143
Korea, South	143	141	126	116	110	105
Malaysia	98	92	106	87	95	103
Ukraine	73	88	95	89	88	90
Japan	92	83	85	91	86	84
Vietnam	43	62	51	45	75	80
Switzerland	68	70	70	73	74	75
Costa Rica	70	69	66	71	68	71
Guatemala	36	19	34	38	55	44
Turkey	49	33	42	49	43	43
Singapore	42	43	44	42	41	42
Mexico	19	20	30	31	35	34
Norway	35	32	33	30	32	33
Brazil	20	24	29	20	24	24
Australia	21	14	16	16	15	15
Other	10	15	13	8	8	8
Total	4,371	4,672	4,575	4,420	4,288	4,412

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.

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

(1,000 Metric Tons)

	2016/17	2017/18	2018/19	2019/20	2020/21	Jan 2021/22
Production						
China	20,600	21,200	22,000	23,000	25,000	28,000
European Union	3,421	2,913	3,209	2,889	3,206	2,965
Turkey	1,300	1,550	1,650	1,400	1,600	1,750
Morocco	1,278	1,185	1,375	926	1,205	1,360
Japan	1,070	968	994	962	976	924
United States	933	729	1,004	856	1,058	797
South Africa	261	356	375	461	567	630
Korea, South	600	577	608	631	655	610
Argentina	320	350	430	330	380	370
Australia	160	157	175	160	180	190
Other	403	340	394	357	346	337
Total	30,346	30,325	32,214	31,972	35,173	37,933
Fresh Dom. Consumption						
China	19,416	20,058	20,735	21,768	23,577	26,490
European Union	2,953	2,650	2,870	2,694	3,001	2,813
United States	862	876	956	1,004	1,034	952
Russia	841	836	903	819	930	935
Japan	991	904	949	902	930	877
Morocco	761	646	752	515	742	860
Turkey	614	836	969	614	739	784
Other	2,096	2,070	2,290	2,319	2,738	2,707
Total	28,534	28,876	30,424	30,635	33,691	36,418
For Processing						
China	650	640	620	620	630	680
European Union	372	226	271	272	277	262
United States	309	171	317	198	343	200
Japan	98	79	64	80	68	70
Korea, South	56	72	63	77	78	60
Argentina	110	116	113	76	60	55
South Africa	24	75	59	47	51	53
Other	59	36	46	44	37	34
Total	1,678	1,415	1,553	1,414	1,544	1,414
Exports						
Turkey	710	739	712	827	898	1,000
China	584	556	706	657	857	900
South Africa	210	261	296	389	490	550
Morocco	517	539	623	411	463	500
European Union	406	373	407	330	350	340
Australia	70	61	87	61	80	90
Israel	120	88	102	98	76	90
Other	83	76	87	86	114	108
Total	2,700	2,693	3,020	2,859	3,328	3,578
Imports						
Russia	841	836	903	819	930	935
European Union	310	336	339	407	422	450
Vietnam	118	143	160	254	405	420
United States	274	353	314	391	374	400
United Kingdom	313	293	292	298	301	300
Ukraine	138	154	171	184	198	200
Philippines	68	87	101	112	167	170
Canada	154	154	157	159	163	165
Thailand	116	73	85	71	135	135
Indonesia	69	60	73	69	98	100
Other	165	170	188	172	197	202
Total	2,566	2,659	2,783	2,936	3,390	3,477

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.