

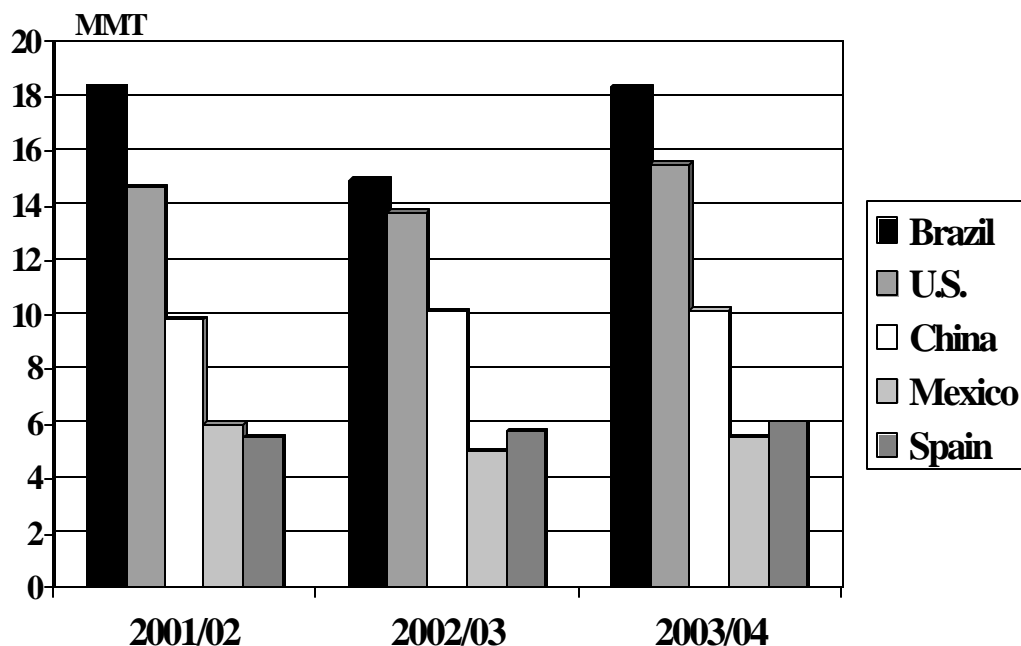
Situation and Outlook for Citrus

World citrus production in selected major-producing countries in 2003/04 is estimated at 73.3 million metric tons, an increase of nearly 12 percent from the 2002/03 level. Almost all of the increase is attributed to Brazil and the United States, the two largest producers, and Mexico. Brazil's total citrus production in 2003/04 is forecast at 18.4 million tons, up nearly 23 percent from the previous year; while Mexico's level is up by a little over 500,000 tons. U.S. production of citrus is estimated at 15.6 million tons, up 13 percent. Although California's orange crop is down 6 percent from last year, Florida's crop is estimated up 23 percent from the 2002/03 level. Total world exports of citrus for major exporters during 2003/04 are estimated at 9.7 million tons, up nearly 4 percent from the 2002/03 level.

GLOBAL PRODUCTION

World citrus production in selected major-producing countries in 2003/04 is estimated at 73.3 million metric tons, an increase of nearly 12 percent from the 2002/03 level. Almost all of the increase is attributed to Brazil and the United States, the two largest producers, and Mexico.

Total Citrus Production in the Top Producing Countries



Brazil

Brazil's orange crop for 2003/04 (marketing year July 2004-June 2005) is forecast at 18.4 million tons, up nearly 23 percent from the previous year, assuming that good weather conditions prevail for the remainder of the growing cycle to support fruit setting and size. The major factors pointing to a projected rise in production for 2003/04 (marketing year July 2004-June 2005) in the Sao Paulo and Minas Gerais commercial areas are: 1) orange trees will be rested from a smaller 2003/04 crop; 2) enhanced crop management including greater use of fertilizer, chemicals, etc., due to good orange prices received by producers in the past couple of years; 3) good blossomings that occurred in the October-December period after the beginning of the rainy period; 4) regular to good weather conditions that have prevailed since November 2003; 5) the on-year of the biennial cycle of the Hamlin and Valencia varieties; and 6) irrigated groves, which are becoming a common practice for a small, yet increasing share of orange growers.

United States

Total U.S. citrus production during 2003/04 is estimated at 15.6 million tons, up 13 percent from the 2002/03 level. Orange production is accounting for 79 percent of the total. Orange production during 2003/04 is estimated at 12.3 million tons, up nearly 17 percent from the previous year. Almost all of the increase is attributed to the sharp rise in Florida's orange crop, which is forecast up 23 percent from 2002/03, and a record. California's orange crop is estimated at 1.97 million tons, down 6 percent from last year.

China

China's production of citrus during 2003/04 is forecast to remain stable at 10.2 million tons. However, there is a growing trend for tangerine production to continue to decline while orange production increases. Government policy is aimed at increasing yields by using better varieties. Policy initiatives by the Ministry of Agriculture have focused on increasing production by promoting plantings across advantageous regions with specific varieties planted for fresh or processed utilization. Industry sources and government officials report production increases are market-driven, with the majority of the increase absorbed on the domestic market.

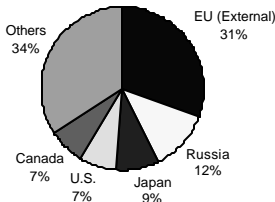
Spain

Despite the 2003 summer's heat wave, Spain's 2003/04 citrus crop is expected to reach a record. Growers are beginning to benefit from investments in upgrading orchards, replacing less profitable varieties, and improving programs to control diseases and pests. Spain's total citrus production during 2003/04 is estimated at 6.1 million tons, up nearly 6 percent from the previous year. Orange production is forecast at 3.0 million tons, up 4 percent from last year and tangerine production is forecast at 2.02 million tons, up 3 percent from the 2002/03 level. Lemon production is forecast at 1.0 million tons, up nearly 30 percent from last year.

There are several factors contributing to the continued expansion of citrus production: 1) lemon orchards that were re-grafted with the higher-quality Fino variety (replacing Verna) are coming into production; 2) orchards that were replanted with varieties resistant to *tristeza* are also beginning to produce; 3) overall orchard area is expanding, mainly in Andalucia; 4) the area planted to clementines also continues to expand. Part of this expansion reflects the replanting of orchards from satsumas to clementines. Low-cost, canned satsuma segments from China are increasingly competitive in international markets, encouraging Spanish producers to shift to clementines.

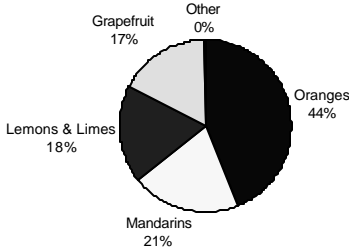
GLOBAL TRADE

World Citrus Imports by Country
Based on Quantity—CY 2002



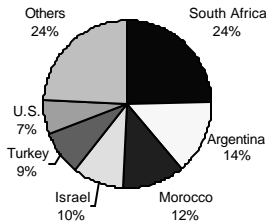
Source: Global Trade Atlas. EU External Trade.

World Citrus Imports by Type
Based on Quantity—CY 2002



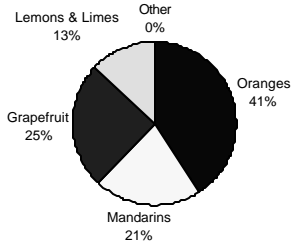
Source: Global Trade Atlas.

EU Total Citrus Imports By Country
Based on Quantity—CY 2002



Source: Global Trade Atlas. EU External Trade.

EU Citrus Imports By Type
Based on Quantity—CY 2002



Source: Global Trade Atlas. EU External Trade.

Spain

Spain's exports of total citrus during 2003/04 are estimated at 3.7 million tons, an increase of nearly 220,000 tons from last year. Oranges are estimated at 1.6 million tons, tangerines at 1.45 million tons, and lemons at 660,000 tons. Following the U.S. ban on imports of Spanish clementines imposed in December 2001 in response to the detection of live Mediterranean fruit fly (Medfly) larvae in several shipments, exports of tangerines to the United States dropped. Shipments of clementines have resumed to the United States following the removal of the import ban on October 15, 2002.

United States

U.S. exports of citrus during 2003/04 are estimated at 1.1 tons, comprising 665,000 tons of oranges, 335,000 tons of grapefruit, 100,000 tons of lemons, and 15,000 tons of tangerines. Although the orange crop in California is forecast to be down this year, December rains slowed navel picking but enhanced fruit size and overall quality is reported to be excellent. U.S. orange exports in 2003/04 are forecast to be up slightly. The volume of exports of oranges is estimated to increase this year about 3 percent as a result of good demand with the weakening dollar.

The 2003/04 grapefruit crop in the United States is up just slightly this year. As a result, U.S. exports of grapefruit during 2003/04 are forecast to decline to 335,000 tons, from 353,000 tons in 2002/03. Japan and Canada are the top two markets. The European Union (EU) is also an important market for U.S. grapefruit.

Technical Assistance for Specialty Crops (TASC) Funds

The TASC program is designed to help open, retain and expand markets for U.S. specialty crops. Resources are provided to address unique barriers, including phytosanitary or related technical barriers, that prohibit or threaten the export of U.S. specialty crops. Specialty crops include all cultivated plants and their products produced in the United States except wheat, feed grains, oilseeds, cotton, rice, peanuts, sugar and tobacco. TASC proposals will be evaluated on a quarterly basis. Proposals received by 5:00 p.m. Eastern Standard Time on Feb. 1, 2004; May 1, 2004; or Aug. 1, 2004, will be considered during that quarter's review process.

The TASC funds became available during 2002 when Congress created a new trade program specifically aimed to aid specialty crops in the 2002 Food Security Act. The TASC program is funded at \$2 million annually, beginning with fiscal year 2002.

Korea

During 2002/03, Korea's imports of oranges reached 143,773 tons, up 46 percent from 2001/02. Almost all imports—98 percent—are from the United States. The increased imports are a result of stable growth in demand for oranges among consumers and favorable exchange rates. For 2003/04,

reports indicate that fresh orange imports will amount to 140,000 to 160,000 tons. Beginning January 2004, the orange out-of-quota tariff rate dropped to 50 percent, equal to the in-quota rate for the first time, effectively eliminating the quota.

Japan

Japan's imports of citrus during 2003/04 are estimated at 495,000 tons, up only 3,000 tons from the previous year's level. Of the total, 275,000 tons are forecast to be grapefruit, 120,000 tons oranges, 90,000 tons lemons, and 10,000 tons tangerines. The United States is the major supplier. However, the U.S. share of Japan's imports is declining, while South Africa, Australia, and Chile are increasing their exports to Japan. During October-September 2002/03, the United States accounted for 72 percent of Japan's citrus imports, down from 75 percent the previous year and 76 percent during 2000/01. South Africa's share has increased to 17.5 percent in 2002/03, up from 13.6 percent the previous year. Although Japan's consumers like the taste and quality of U.S. citrus, Japan's authorities continue to take steps to protect the domestic citrus industry, which produces unshu oranges. In order to limit the imports of oranges during the distribution season for its domestic production of unshu oranges, Japan imposes seasonal duties for oranges. Imports during December-May (the key marketing season for U.S. oranges) face a duty rate of 32 percent compared to 16 percent during the rest of the year. Japan continues to be an important market for U.S. grapefruit; however, during 2002/03, nearly 25 percent of the grapefruit Japan imported was from South Africa.

CONSUMPTION AND MARKETING

Total citrus consumption in 2003/04 for the major-producing countries is estimated at 65.1 million tons, including 34.4 million tons of fresh consumption and 30.7 million tons of processed consumption. Processed consumption is for basically the processing of oranges into orange juice. Of the total citrus for processing, nearly 84 percent is oranges. The total processed represents an increase from the previous year of nearly 18 percent, mainly the result of the higher Brazilian and Florida orange crops.

United States

A large part of the citrus produced in the United States goes to processing for juice. About 74 percent of the total citrus crop is forecast to be processed in 2003/04. For oranges produced in Florida, 95-96 percent of the crop is processed for orange juice. For grapefruit produced in Florida, the amount going to processing varies, but has ranged from 60-63 percent during the last few years. If production increases, more goes to processing, since grapefruit consumption has been static. So the production and demand for juices in the United States and in major markets plays a significant role in Florida's citrus industry. See also the Orange Juice special feature article.

Florida's Orange Crop Goes Mainly for Processing



Brazil

The total for Brazil's volume of oranges processed in 2003/04 (marketing year July 2004-June 2005) is forecast at 12.7 million tons, which is about 70 percent of the production level. Since only a small amount of fresh oranges is exported, most of Brazil's production is headed to the processing sector and for export of orange juice. The amount used for fresh consumption (mostly domestic) represents 30 percent of the total.

China

China's consumption of fresh oranges closely follows its production level. About 94 percent of the total citrus produced is consumed fresh within China; about 4 percent is processed for juice or canned production. The primary citrus processing continues to be for canned mandarins. Industry sources estimate domestic production increases are directed at meeting increased domestic fresh and processed citrus consumption. Right now imports of citrus (mostly oranges) represent less than 1 percent of consumption. U.S. exports of oranges to China account for a large share of the country's imports and China represents an important-developing market for U.S. exporters. However, reports indicate that the future growth in imports of fresh citrus is likely to come from Southern Hemisphere citrus.

The Attaché Report search engine contains reports for citrus for several countries including Egypt, Israel, Japan, Korea, Morocco, Spain, Turkey, Greece, Italy, Mexico, China, Germany, Australia, Brazil, Argentina, and South Africa. For more information on production and trade, contact Debra A. Pumphrey at 202-720-8899 or at Debra.Pumphrey@usda.gov Also, please visit the citrus commodity page: <http://www.fas.usda.gov/htp/horticulture/citrus.html>

for the latest information. For more information on marketing issues, contact Sonia Jimenez at 202-720-0898.

**FRESH CITRUS: SUPPLY & DISTRIBUTION, SELECTED COUNTRIES
2001/02 - 2003/04 1/**

TOTAL CITRUS

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
		(1,000 Metric tons)				
Northern Hemisphere Mediterranean Basin						
Cyprus						
	2001/02	151	0	70	47	34
	2002/03	151	0	71	43	37
	2003/04	152	0	71	44	37
Egypt						
	2001/02	2,541	0	325	2,161	55
	2002/03	2,608	0	440	2,107	61
	2003/04	2,619	0	427	2,133	59
Gaza						
	2001/02	124	0	12	112	0
	2002/03	124	0	12	112	0
	2003/04	124	0	12	112	0
Greece						
	2001/02	1,269	11	320	655	305
	2002/03	1,385	11	399	664	333
	2003/04	1,057	13	298	479	293
Israel						
	2001/02	524	0	129	129	266
	2002/03	497	0	150	136	211
	2003/04	484	0	119	130	235
Italy						
	2001/02	2,935	240	261	1,748	1,166
	2002/03	2,814	289	213	1,608	1,282
	2003/04	2,487	307	123	1,605	1,066
Morocco						
	2001/02	1,155	0	347	790	18
	2002/03	1,308	0	482	778	48
	2003/04	1,170	0	470	660	40
Spain						
	2001/02	5,534	144	3,267	1,319	1,092
	2002/03	5,757	165	3,463	1,361	1,098
	2003/04	6,080	159	3,679	1,417	1,143
Turkey						
	2001/02	2,475	49	782	1,498	244
	2002/03	2,490	48	705	1,586	247
	2003/04	2,405	50	690	1,530	235
Subtotal Mediterranean Basin						
	2001/02	16,708	444	5,513	8,459	3,180
	2002/03	17,134	513	5,935	8,395	3,317
	2003/04	16,578	529	5,889	8,110	3,108
Other Northern Hemisphere						
China						
	2001/02	9,866	48	174	9,392	348
	2002/03	10,145	68	234	9,583	396
	2003/04	10,175	65	250	9,560	430
Cuba						
	2001/02	527	0	10	77	440
	2002/03	590	0	10	105	475
	2003/04	612	0	10	113	489
Japan						
	2001/02	1,633	475	5	1,970	133
	2002/03	1,433	492	5	1,795	125
	2003/04	1,411	495	5	1,731	170

January 2004

8

**World Horticultural Trade &
U.S. Export Opportunities**

**FRESH CITRUS: SUPPLY & DISTRIBUTION, SELECTED COUNTRIES
2001/02 - 2003/04 1/**

TOTAL CITRUS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
	(1,000 Metric tons)				
Korea, Rep. Of					
2001/02	651	0	3	601	47
2002/03	690	0	10	568	112
2003/04	576	0	446	10	120
Mexico					
2001/02	5,997	36	221	5,179	633
2002/03	5,010	44	342	4,288	424
2003/04	5,512	41	350	4,698	505
United States					
2001/02	14,691	320	1,018	3,047	10,946
2002/03	13,768	439	1,117	3,205	9,885
2003/04	15,564	440	1,118	3,302	11,584
Subtotal Other Northern Hemisphere					
2001/02	33,365	879	1,431	20,266	12,547
2002/03	31,636	1,043	1,718	19,544	11,417
2003/04	33,850	1,041	2,179	19,414	13,298
Total Northern Hemisphere					
2001/02	50,073	1,323	6,944	28,725	15,727
2002/03	48,770	1,556	7,653	27,939	14,734
2003/04	50,428	1,570	8,068	27,524	16,406
Southern Hemisphere					
Argentina					
2001/02	2,566	3	421	990	1,158
2002/03	2,340	1	499	897	945
2003/04	2,207	0	395	922	890
Australia					
2001/02	633	9	136	167	339
2002/03	410	9	110	134	175
2003/04	550	9	150	174	235
Brazil					
2001/02	18,360	0	41	4,896	13,423
2002/03	14,974	0	82	5,100	9,792
2003/04	18,360	0	102	5,528	12,730
South Africa					
2001/02	1,813	2	1,033	253	529
2002/03	1,735	2	1,017	296	424
2003/04	1,730	2	1,020	296	416
Total Southern Hemisphere					
2001/02	23,372	14	1,631	6,306	15,449
2002/03	19,459	12	1,708	6,427	11,336
2003/04	22,847	11	1,667	6,920	14,271
Total World					
2001/02	73,445	1,337	8,575	35,031	31,176
2002/03	68,229	1,568	9,361	34,366	26,070
2003/04	73,275	1,581	9,735	34,444	30,677

1/ Forecast.

2/ In Greece, Italy, and Spain, "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

FRESH CITRUS: SUPPLY & DISTRIBUTION, SELECTED COUNTRIES

2001/02 - 2003/04 1/

FRESH ORANGES

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
	(1,000 Metric tons)				
Northern Hemisphere Mediterranean Basin					
Cyprus					
2001/02	93	0	34	39	20
2002/03	92	0	34	35	23
2003/04	93	0	34	36	23
Egypt					
2001/02	1,696	0	302	1,359	35
2002/03	1,734	0	416	1,281	37
2003/04	1,742	0	400	1,305	37
Gaza 4/					
2001/02	105	0	7	98	0
2002/03	105	0	7	98	0
2003/04	105	0	7	98	0
Greece					
2001/02	1,076	1	282	503	292
2002/03	1,176	1	338	519	320
2003/04	870	1	250	341	280
Israel					
2001/02	160	0	34	62	64
2002/03	143	0	28	61	54
2003/04	133	0	25	61	47
Italy					
2001/02	1,724	77	148	970	683
2002/03	1,663	88	128	815	808
2003/04	1,437	90	65	815	647
Morocco					
2001/02	720	0	194	508	18
2002/03	800	0	274	482	44
2003/04	730	0	270	420	40
Spain					
2001/02	2,822	98	1,505	750	665
2002/03	2,867	110	1,450	887	640
2003/04	2,996	120	1,566	890	660
Turkey					
2001/02	1,250	39	185	979	125
2002/03	1,250	30	191	964	125
2003/04	1,250	30	200	955	125
Subtotal Mediterranean Basin					
2001/02	9,646	215	2,691	5,268	1,902
2002/03	9,830	229	2,866	5,142	2,051
2003/04	9,356	241	2,817	4,921	1,859
Other Northern Hemisphere					
China					
2001/02	3,598	42	5	3,612	23
2002/03	3,600	60	14	3,601	45
2003/04	3,675	55	20	3,660	50
Cuba					
2001/02	340	0	5	50	285
2002/03	375	0	5	75	295
2003/04	385	0	5	80	300
Japan					
2001/02	18	99	0	115	2
2002/03	17	121	0	136	2
2003/04	15	120	0	133	2

January 2004

10

**World Horticultural Trade &
U.S. Export Opportunities**

**FRESH CITRUS: SUPPLY & DISTRIBUTION, SELECTED COUNTRIES
2001/02 - 2003/04 1/**

FRESH ORANGES

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
	(1,000 Metric tons)				
Mexico					
2001/02	4,020	27	18	3,689	340
2002/03	3,000	32	8	2,894	130
2003/04	3,400	32	10	3,222	200
United States 5/					
2001/02	11,290	60	500	1,534	9,316
2002/03	10,527	55	646	1,625	8,311
2003/04	12,311	40	665	1,694	9,992
Subtotal Other Northern Hemisphere					
2001/02	19,266	228	528	9,000	9,966
2002/03	17,519	268	673	8,331	8,783
2003/04	19,786	247	700	8,789	10,544
Total Northern Hemisphere					
2001/02	28,912	443	3,219	14,268	11,868
2002/03	27,349	497	3,539	13,473	10,834
2003/04	29,142	488	3,517	13,710	12,403
Southern Hemisphere					
Argentina					
2001/02	780	0	80	540	160
2002/03	725	0	76	489	160
2003/04	730	0	80	490	160
Australia					
2001/02	633	9	136	167	339
2002/03	410	9	110	134	175
2003/04	550	9	150	174	235
Brazil					
2001/02	18,360	0	41	4,896	13,423
2002/03	14,974	0	82	5,100	9,792
2003/04	18,360	0	102	5,528	12,730
South Africa 6/					
2001/02	1,263	1	751	239	274
2002/03	1,266	1	757	273	237
2003/04	1,270	1	760	280	231
Total Southern Hemisphere					
2001/02	21,036	10	1,008	5,842	14,196
2002/03	17,375	10	1,025	5,996	10,364
2003/04	20,910	10	1,092	6,472	13,356
Total World					
2001/02	49,948	453	4,227	20,110	26,064
2002/03	44,724	507	4,564	19,469	21,198
2003/04	50,052	498	4,609	20,182	25,759

1/ Forecast.

2/ In Greece, Italy, and Spain, "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

4/ Tangerine production is small and is included with oranges.

5/ Includes Temples.

6/ Includes small quantities of tangerines.

FRESH CITRUS: SUPPLY & DISTRIBUTION, SELECTED COUNTRIES
2001/02 - 2003/04 1/

FRESH TANGERINES

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
		(1,000 Metric tons)				
Northern Hemisphere Mediterranean Basin						
Egypt						
	2001/02	493	0	5	485	3
	2002/03	504	0	4	495	5
	2003/04	505	0	5	498	2
Greece						
	2001/02	75	0	29	45	1
	2002/03	100	0	37	62	1
	2003/04	85	0	30	54	1
Israel						
	2001/02	83	0	25	30	28
	2002/03	71	0	23	30	18
	2003/04	78	0	24	31	23
Italy						
	2001/02	611	65	71	475	130
	2002/03	548	76	51	455	118
	2003/04	450	99	28	450	71
Morocco 4/						
	2001/02	405	0	153	252	0
	2002/03	478	0	208	266	4
	2003/04	410	0	200	210	0
Spain						
	2001/02	1,655	5	1,252	201	207
	2002/03	1,952	5	1,400	313	244
	2003/04	2,020	9	1,450	329	250
Turkey						
	2001/02	580	0	238	284	58
	2002/03	590	1	250	282	59
	2003/04	525	0	225	250	50
Subtotal Mediterranean Basin						
	2001/02	3,902	70	1,773	1,772	427
	2002/03	4,243	82	1,973	1,903	449
	2003/04	4,073	108	1,962	1,822	397
Other Northern Hemisphere						
China						
	2001/02	6,268	6	169	5,780	325
	2002/03	6,545	8	220	5,982	351
	2003/04	6,500	10	230	5,900	380
Cuba						
	2001/02	2	0	0	2	0
	2002/03	3	0	0	3	0
	2003/04	4	0	0	4	0
Japan 5/						
	2001/02	1,527	10	5	1,404	128
	2002/03	1,332	10	5	1,217	120
	2003/04	1,317	10	5	1,157	165
Korea, Rep. Of						
	2001/02	651	0	3	601	47
	2002/03	690	0	10	568	112
	2003/04	576	0	446	10	120

FRESH CITRUS: SUPPLY & DISTRIBUTION, SELECTED COUNTRIES
2001/02 - 2003/04 1/

FRESH TANGERINES

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
	(1,000 Metric tons)				
United States 6/					
2001/02	469	53	15	335	172
2002/03	433	86	17	350	152
2003/04	448	100	15	372	161
Subtotal Other Northern Hemisphere					
2001/02	8,917	69	192	8,122	672
2002/03	9,003	104	252	8,120	735
2003/04	8,845	120	696	7,443	826
Total Northern Hemisphere					
2001/02	12,819	139	1,965	9,894	1,099
2002/03	13,246	186	2,225	10,023	1,184
2003/04	12,918	228	2,658	9,265	1,223
Southern Hemisphere					
Argentina					
2001/02	416	0	46	325	45
2002/03	380	0	43	292	45
2003/04	420	0	45	330	45
Total Southern Hemisphere					
2001/02	416	0	46	325	45
2002/03	380	0	43	292	45
2003/04	420	0	45	330	45
Total World					
2001/02	13,235	139	2,011	10,219	1,144
2002/03	13,626	186	2,268	10,315	1,229
2003/04	13,338	228	2,703	9,595	1,268

1/ Forecast.

2/ In Greece, Italy, and Spain, "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

4/ Clementines only.

5/ Mainly satsumas (also called mandarin or unshu mikan, but also including mandarin hybrids).

6/ Includes tangelos which account for about half of combined tangerine and tangelo production. Export and import data include mandarins.

FRESH CITRUS: SUPPLY & DISTRIBUTION, SELECTED COUNTRIES
2001/02 - 2003/04 1/

FRESH GRAPEFRUIT

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
(1,000 Metric tons)						
Northern Hemisphere						
Mediterranean Basin						
Cyprus						
2001/02		38	0	25	3	10
2002/03		38	0	25	3	10
2003/04		38	0	25	3	10
Gaza						
2001/02		10	0	5	5	0
2002/03		10	0	5	5	0
2003/04		10	0	5	5	0
Israel						
2001/02		251	0	68	20	163
2002/03		255	0	91	27	137
2003/04		245	0	63	20	162
Italy						
2001/02		30	30	8	45	7
2002/03		30	36	5	55	6
2003/04		30	38	5	57	6
Turkey						
2001/02		135	10	100	35	10
2002/03		125	12	94	33	10
2003/04		130	10	95	35	10
Subtotal Mediterranean Basin						
2001/02		464	40	206	108	190
2002/03		458	48	220	123	163
2003/04		453	48	193	120	188
Other Northern Hemisphere						
Cuba						
2001/02		175	0	5	15	155
2002/03		200	0	5	15	180
2003/04		210	0	5	16	189
Japan						
2001/02		0	277	0	277	0
2002/03		0	272	0	272	0
2003/04		0	275	0	275	0
Mexico						
2001/02		297	8	5	265	35
2002/03		310	11	4	283	34
2003/04		312	8	5	280	35
United States						
2001/02		2,199	27	397	602	1,227
2002/03		1,871	17	353	539	996
2003/04		1,895	20	335	557	1,023
Subtotal Other Northern Hemisphere						
2001/02		2,671	312	407	1,159	1,417
2002/03		2,381	300	362	1,109	1,210
2003/04		2,417	303	345	1,128	1,247
Total Northern Hemisphere						
2001/02		3,135	352	613	1,267	1,607
2002/03		2,839	348	582	1,232	1,373
2003/04		2,870	351	538	1,248	1,435

FRESH CITRUS: SUPPLY & DISTRIBUTION, SELECTED COUNTRIES
2001/02 - 2003/04 1/

FRESH GRAPEFRUIT

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
	(1,000 Metric tons)				
Southern Hemisphere					
Argentina					
2001/02	170	3	25	75	73
2002/03	185	1	30	81	75
2003/04	157	0	20	67	70
South Africa					
2001/02	380	1	197	6	178
2002/03	280	1	170	6	105
2003/04	270	1	170	6	95
Total Southern Hemisphere					
2001/02	550	4	222	81	251
2002/03	465	2	200	87	180
2003/04	427	1	190	73	165
Total World					
2001/02	3,685	356	835	1,348	1,858
2002/03	3,304	350	782	1,319	1,553
2003/04	3,297	352	728	1,321	1,600

1/ Forecast.

2/ In Greece, Italy, and Spain, "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

FRESH CITRUS: SUPPLY & DISTRIBUTION, SELECTED COUNTRIES
2001/02 - 2003/04 1/

FRESH LEMONS

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
		(1,000 Metric tons)				
Northern Hemisphere						
Mediterranean Basin						
Cyprus						
	2001/02	20	0	11	5	4
	2002/03	21	0	12	5	4
	2003/04	21	0	12	5	4
Gaza						
	2001/02	9	0	0	9	0
	2002/03	9	0	0	9	0
	2003/04	9	0	0	9	0
Greece						
	2001/02	118	10	9	107	12
	2002/03	109	10	24	83	12
	2003/04	102	12	18	84	12
Israel						
	2001/02	19	0	0	15	4
	2002/03	20	0	3	15	2
	2003/04	20	0	2	15	3
Italy						
	2001/02	570	68	34	258	346
	2002/03	573	89	29	283	350
	2003/04	570	80	25	283	342
Morocco						
	2001/02	20	0	0	20	0
	2002/03	20	0	0	20	0
	2003/04	20	0	0	20	0
Spain						
	2001/02	1,037	41	506	368	204
	2002/03	920	50	610	161	199
	2003/04	1,048	30	660	198	220
Turkey						
	2001/02	510	0	259	200	51
	2002/03	525	5	170	307	53
	2003/04	500	10	170	290	50
Subtotal Mediterranean Basin						
	2001/02	2,303	119	819	982	621
	2002/03	2,197	154	848	883	620
	2003/04	2,290	132	887	904	631
Other Northern Hemisphere						
Japan						
	2001/02	2	89	0	91	0
	2002/03	2	89	0	91	0
	2003/04	2	90	0	92	0
United States						
	2001/02	727	38	102	433	230
	2002/03	931	30	98	438	425
	2003/04	904	30	100	427	407

FRESH CITRUS: SUPPLY & DISTRIBUTION, SELECTED COUNTRIES**2001/02 - 2003/04 1/****FRESH LEMONS**

Country/Year 3/	Production Imports ExportsConsumption 2/ Processed				
	(1,000 Metric tons)				
Subtotal Other Northern Hemisphere					
2001/02	729	127	102	524	230
2002/03	933	119	98	529	425
2003/04	906	120	100	519	407
Total Northern Hemisphere					
2001/02	3,032	246	921	1,506	851
2002/03	3,130	273	946	1,412	1045
2003/04	3,196	252	987	1,423	1038
Southern Hemisphere					
Argentina					
2001/02	1,200	0	270	50	880
2002/03	1,050	0	350	35	665
2003/04	900	0	250	35	615
South Africa					
2001/02	170	0	85	8	77
2002/03	189	0	90	17	82
2003/04	190	0	90	10	90
Total Southern Hemisphere					
2001/02	1,370	0	355	58	957
2002/03	1,239	0	440	52	747
2003/04	1,090	0	340	45	705
Total World					
2001/02	4,402	246	1,276	1,564	1,808
2002/03	4,369	273	1,386	1,464	1,792
2003/04	4,286	252	1,327	1,468	1,743

1/ Forecast.

2/ In Greece, Italy, and Spain, "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown. The harvest of lemons usually begins earlier and often extends throughout the year.

FRESH CITRUS: SUPPLY & DISTRIBUTION, SELECTED COUNTRIES

2001/02 - 2003/04 1/

OTHER CITRUS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
	(1,000 Metric tons)				
Northern Hemisphere					
Mediterranean Basin					
Egypt 4/					
2001/02	352	0	18	317	17
2002/03	370	0	20	331	19
2003/04	372	0	22	330	20
Israel					
2001/02	11	0	2	2	7
2002/03	8	0	5	3	0
2003/04	8	0	5	3	0
Morocco					
2001/02	10	0	0	10	0
2002/03	10	0	0	10	0
2003/04	10	0	0	10	0
Spain 5/					
2001/02	20	0	4	0	16
2002/03	18	0	3	0	15
2003/04	16	0	3	0	13
Subtotal Mediterranean Basin					
2001/02	393	0	24	329	40
2002/03	406	0	28	344	34
2003/04	406	0	30	343	33
Other Northern Hemisphere					
Cuba 4/					
2001/02	10	0	0	10	0
2002/03	12	0	0	12	0
2003/04	13	0	0	13	0
Japan 6/					
2001/02	86	0	0	83	3
2002/03	82	0	0	79	3
2003/04	77	0	0	74	3
Mexico 7/					
2001/02	1,680	1	198	1,225	258
2002/03	1,700	1	330	1,111	260
2003/04	1,800	1	335	1,196	270
United States 7/					
2001/02	6	142	4	143	1
2002/03	6	251	3	253	1
2003/04	6	250	3	252	1
Subtotal Other Northern Hemisphere					
2001/02	1,782	143	202	1,461	262
2002/03	1,800	252	333	1,455	264
2003/04	1,896	251	338	1,535	274
Total Northern Hemisphere					
2001/02	2,175	143	226	1,790	302
2002/03	2,206	252	361	1,799	298
2003/04	2,302	251	368	1,878	307

January 2004

18

**World Horticultural Trade &
U.S. Export Opportunities**

FRESH CITRUS: SUPPLY & DISTRIBUTION, SELECTED COUNTRIES

2001/02 - 2003/04 1/

OTHER CITRUS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
	(1,000 Metric tons)				
Total World					
2001/02	2,175	143	226	1,790	302
2002/03	2,206	252	361	1,799	298
2003/04	2,302	251	368	1,878	307

1/ Forecast.

2/ In Greece, Italy, and Spain, "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown. The harvest of limes usually begins earlier and often extends throughout the year.

4/ Mostly limes but some sour oranges and other varieties.

5/ Sour oranges.

6/ Summer oranges (Natsu mikan or natsu daidai, a hybrid of mandarin with sour orange or pomelo).

7/ Limes.