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Report Highlights:

The Brazilian orange crop for Marketing Year (MY) 2022/23 is forecast at 405 million 40.8-kg boxes (MBx), equal to 16.52 million metric tons (MMT), a reduction of two percent relative to the current season. The forecast assumes normal weather conditions will prevail as of early-December 2022 to support fruit setting and development of citrus groves in the Sao Paulo and Minas Gerais commercial citrus belt. Total Brazilian FCOJ 65 Brix equivalent exports for MY 2022/23 are forecast at 1.04 MMT, similar to the revised figure for MY 2021/22. Note that NFC exports for MY 2021/22 are estimated at 310,000 MT, 65 Brix equivalent, an increase of 15 percent compared to the previous season, primarily to supply the U.S. market due to limited juice availability from Florida due to hurricane Ian. Stock levels for MY 2022/23 are 13,000 MT, one of the citrus industry's lowest levels ever reached.

FRESH ORANGES

Production

PS&D Tables

The following table provides revised data for Sao Paulo and total Brazilian fresh orange production, supply, and distribution (PS&D) for Brazilian (BR) marketing years (MY, July-June) 2021/22 and 2022/23, and the initial forecast for MY 2023/24. The MY mentioned above are equivalent to U.S. MY 2020/21, 2021/22 and 2022/23, respectively.

Table 1

Brazil: Fresh Oranges PS&D (Jul-Jun, 1,000 ha, million trees & million 40.8 kg boxes)			
Item/U.S. Marketing Year	US 20/21	US 21/22	US 22/23
Item/ Brazilian Marketing Year	2021/22	2022/23	2023/24
Area Planted	604.4	614.1	614.1
Sao Paulo	379.4	387.1	387.1
Others	225.0	227.0	227.0
Area Harvested	546.1	546.4	546.4
Sao Paulo	346.1	344.4	344.4
Others	200.0	202.0	202.0
Bearing Trees	221.6	228.0	228.0
Sao Paulo	166.6	170.0	170.0
Others	55.0	58.0	58.0
Non-Bearing Trees	28.0	34.3	34.3
Sao Paulo	23.0	29.3	29.3
Others	5.0	5.0	5.0
Total Trees	249.6	262.3	262.3
Total Production	359.7	415.0	405.0
Sao Paulo	263.0	314.0	305.0
Others	96.7	101.0	100.0
Exports	0.0	0.0	0.0
Imports (total Brazil)	0.6	0.2	0.2
Domestic Consumption	112.3	114.2	113.2
Delivered to processors	248.0	301.0	292.0
Sao Paulo (FCOJ + NFC exports)	224.0	277.0	268.0
Others	24.0	24.0	24.0

*Note: There is a one-year lag between the BR MY and the U.S. MY. For example, BR MY 2022/23 is equivalent to U.S. MY 2021/22. To ensure data continuity, the current Brazilian MY 2023/24 will be referred to as U.S. MY 2022/23 throughout this report.

General

The Agricultural Trade Office (ATO)/Sao Paulo forecasts the total Brazilian orange crop for MY 2022/23 (July/June) at 405 million 40.8-kg boxes (MBx), equivalent to 16.52 million metric tons (MMT), a reduction of 10 MBx compared to the current crop (MY 2021/22). The forecast assumes that normal weather conditions will prevail as of early-December 2022 to support fruit setting and development for the citrus groves in the Sao Paulo and Minas Gerais commercial citrus.

The commercial area in the state of Sao Paulo and the western part of Minas Gerais should account for 305 MBx (12.44 MMT), a drop of three percent vis-à-vis the revised figure for MY 2021/22 (314 MBx or 12.81 MMT). Good weather conditions triggered a good first blossoming in August with excellent fruit setting in irrigated citrus groves and non-irrigated citrus groves, mainly in the southern part of the citrus belt in Sao Paulo. A broader and excellent second blossoming occurred in October in most of the citrus belt. However, weather conditions (warm temperatures) were not adequate to sustain a robust fruit setting, damaging the production potential from the second blossoming.

A third blossoming might still occur in December if favorable weather conditions prevail. Note that the increased infection from greening has also been negatively affected by citrus trees (*see Disease sub-section for further information*).

Production from other states is projected at 100 MBx (4.08 MMT), similar to MY 2021/22 (101MBx or 4.12 MMT). Overall, it is still too early to project total orange production for MY 2022/23. More accurate numbers should be available during the first quarter of 2023.

The ATO/Sao Paulo revised the estimate for the Brazilian orange crop for MY 2021/22 to 415 MBx (16.93 MMT), virtually unchanged from the previous estimate, based on the first crop estimate update released by the Defense Fund for Citriculture (Fundecitrus) in September 2022 and the Brazilian Institute for Geography and Statistics (IBGE). Harvest in Sao Paulo and western Minas Gerais commercial citrus area started in May/June 2022. It should be extended through February/March 2023, given the orange juice processors will likely attempt to maximize crushing to the fullest.

On September 12, Fundecitrus released the first crop estimate updated for the 2022/23 citrus production for the commercial area in the state of Sao Paulo and the western part of Minas Gerais, placing production at 314.09 MBx, a drop of 2.86 MBx relative to the initial forecast released in May 2022 (316.95 MBx), due to lower rainfall volumes compared to historical averages which negatively affected the fruit size/weight for early orange varieties.

On December 12, Fundecitrus will release the second updated crop estimate for the 2022/23 citrus production for the commercial area in Sao Paulo and the western part of Minas Gerais. On September 12, Fundecitrus released the first crop estimate updated for the 2022/23 citrus production for the commercial area in the state of Sao Paulo and the western part of Minas Gerais. Production from other states is estimated at 101 MBx (4.12 MMT), an increase of 3.6 MBx from the previous estimate.

The Sao Paulo State Institute of Agricultural Economics (IEA) released its September 2022 crop survey for the 2022 crop (BR MY 2022/23). The Sao Paulo state crop, including commercial and non-commercial areas, is estimated at 311.5 MBx (12.71 MMT), an increase of five percent compared to the

previous crop year (296.1 MBx or 12.08 MMT). Note that IEA considers the entire state of Sao Paulo and all varieties of oranges. Simultaneously, the Agricultural Trade Office's (ATO) estimates follow the Fundecitrus methodology, which includes the commercial area of the state plus the western part of Minas Gerais and the major citrus varieties for juice processing.

Area, Tree Inventory, and Yields

The Brazilian agricultural yield for the MY 2022/23 crop is projected at 1.78 boxes/tree, a drop of two percent compared to the current crop (1.82 boxes/tree), assuming normal weather conditions as of early-December 2022.

Total Brazilian tree inventory for MY 22/23 is projected at 262.3 million trees, unchanged relative to the previous season, and the area planted for oranges is projected at 614,100 hectares (ha). Sao Paulo is the only state that compiles trees planted and tree inventory data. According to the September 2022 crop survey IEA released, Sao Paulo has 172.04 million orange trees (18.03 million non-bearing trees and 154.01 million bearing trees). ATO/Sao Paulo estimates stable area and tree population for other producing states based on the Brazilian Institute of Geography and Statistics (IBGE).

Disease

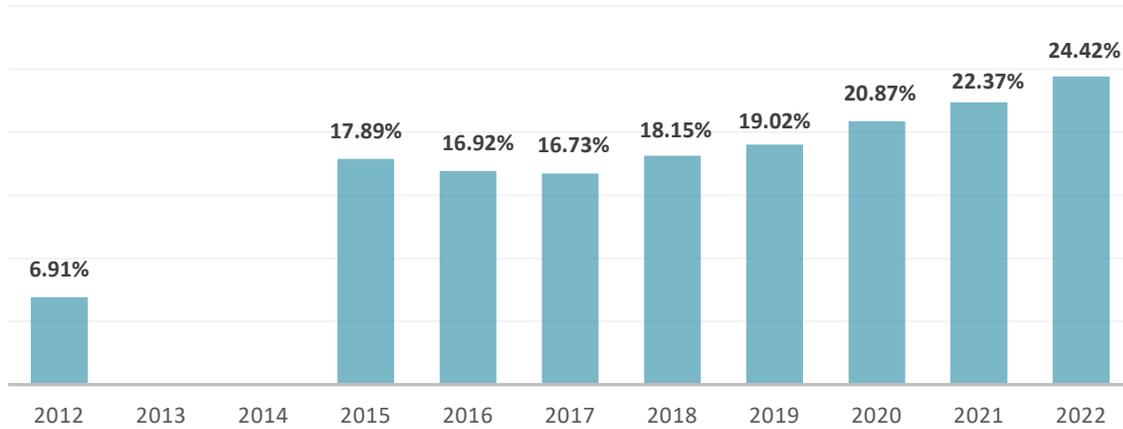
According to the 2022 greening survey conducted by Fundecitrus, 48.66 million trees, or 24.42 percent, of the trees in the commercial area of the state of Sao Paulo and the western part of Minas Gerais are affected by greening. This figure shows an increase of nine percent in the greening infection relative to the 2021 greening survey (22.37 percent). However, if the number of citrus trees eradicated in 2021 due to greening (approximately 6.4 million trees) was included in the survey, greening infection would rise to 27.50 percent.

Favorable weather and the high density of citrus trees have supported the spread of the psyllid *Diaphorina Citri*, the vector of the bacteria that causes greening, in the groves. In addition, Fundecitrus found that in most of the citrus groves, the infected trees have not been eradicated and the control of the vector has been insufficient with the use repetitive use of pesticides with the same active principle, longer than recommended intervals for pesticide spray and insufficient sprays in adult and high-density citrus groves. The link below shows the latest information on citrus greening as reported by Fundecitrus: https://www.fundecitrus.com.br/comunicacao/revista_detalhes/revista-citricultor---edicao-58/78

Citrus greening was identified in Brazil in 2004, and no definitive cure has been found. The graph below shows the incidence of greening in the Sao Paulo and western Minas Gerais commercial area since 2012. No surveys were conducted in 2013 and 2014 due to a lack of funding.

Figure 1

Incidence of Greening in Commercial Citrus

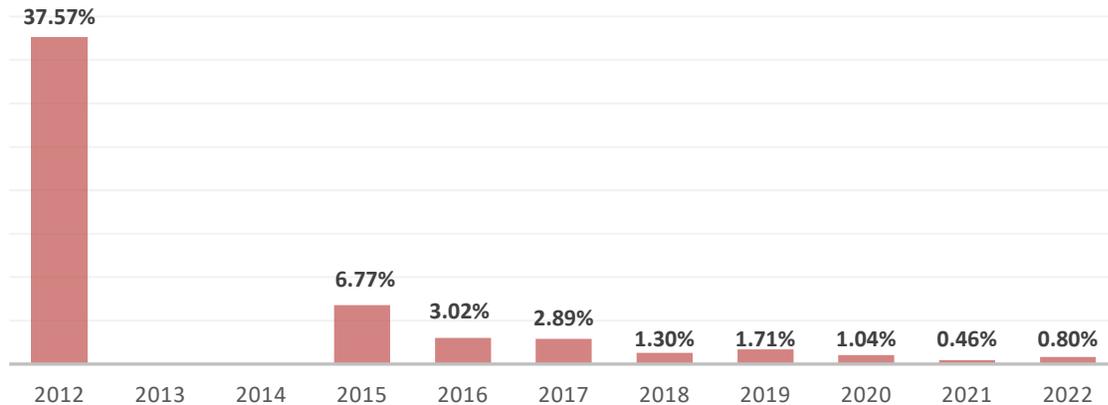


Source: Fundecitrus

The 2022 Fundecitrus citrus variegated chlorosis (CVC) disease survey reports that the level of infection reached 0.80 percent or roughly 154,640 trees. Losses associated with CVC remain very low given that the infected trees are mostly in the initial phases of the disease. The graph below shows the incidence of CVC in the Sao Paulo and western Minas Gerais commercial area since 2012. No surveys were conducted in 2013 and 2014 due to a lack of funding.

Figure 2

Incidence of CVC in Commercial Citrus

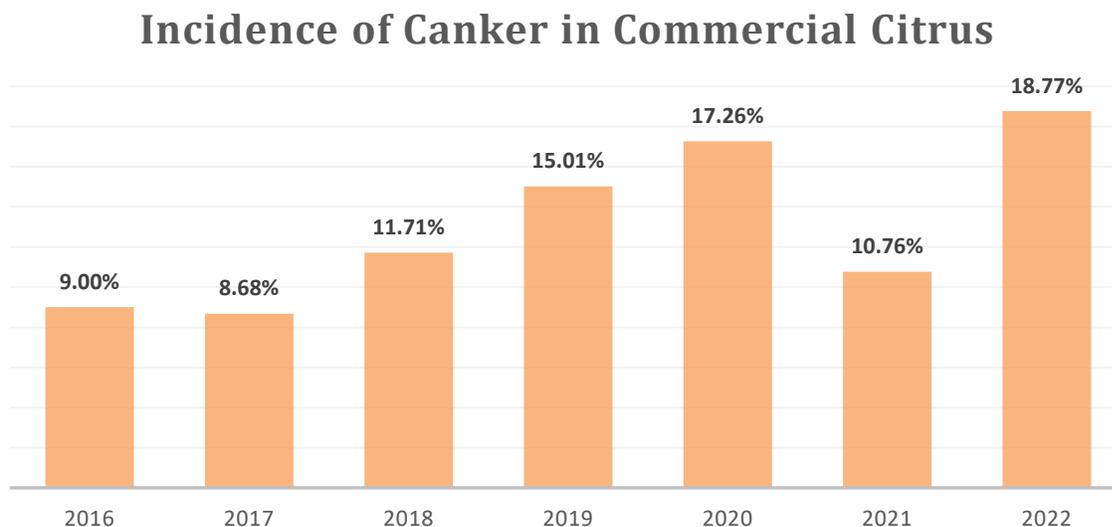


Source: Fundecitrus

Citrus canker infection in 2022 is estimated at 18.76 percent of the trees in the commercial area of Sao Paulo and Minas Gerais, or 36.26 million trees, similar to the infection level from 2020 (17.26 percent), according to the latest Fundecitrus survey. Higher infection is related to higher rainfall volumes which favor the spread of the disease. However, it does not pose a risk to the groves since risk mitigation practices have been adopted in recent years. Note that the formerly rigid control of eradicating the

affected and neighboring trees was loosened up and replaced by risk mitigation practices. The graph below shows the incidence of CVC in the Sao Paulo and western Minas Gerais commercial areas since 2016.

Figure 3



Source: Fundecitrus

Producer Prices

The Orange Index price series is published by the University of Sao Paulo's Luiz de Queiroz College of Agriculture (ESALQ) for both the domestic fresh market and products delivered to orange juice processing plants in the state of Sao Paulo. Prices for the fresh market are for fruit on the tree.

Spot prices for fruit for processing during 2022 ranged between R\$ 27.50 and 32.50/box, with an upward trend as of August. On average, contracted prices for fruit for processing were R\$32.00/box. Prices for fruit for the fresh market have escalated since August due to tight fruit availability and increased competition with fruit for orange juice processing. Post contacts report that orange juice processors have been negotiating the extension of current contracts to the next crop, given that fruit availability will likely be tight.

Table 2

Orange Prices paid by Sao Paulo Industry - Spot Market (Pera, Natal, Valencia varieties, average prices in Reais - R\$, 40.8 kg box, fruits delivered to the processing plant).						
Month	2017	2018	2019	2020	2021	2022
Jan	25.84	17.66	21.77	20.96	25.29	29.08
Feb	21.98	16.70	21.19	21.20	24.87	29.58
Mar	21.39	16.24	21.58	20.48	24.89	29.75
Apr	17.60	16.33	20.61	20.80	25.88	27.83
May	16.52	17.27	18.21	20.92	26.17	27.44
Jun	16.11	19.28	19.13	22.35	28.93	28.52
Jul	18.55	20.55	19.78	22.63	29.16	29.38
Aug	19.30	22.00	20.01	22.94	29.17	31.01
Sep	19.13	22.48	19.67	23.61	28.83	31.30
Oct	19.15	22.29	20.05	23.91	28.84	32.50
Nov	18.96	22.51	20.27	24.47	28.98	31.89
Dec	18.64	22.15	20.64	25.10	28.94	--

Source: CEPEA/ESALQ.

Table 3

Orange Prices received by Producers in the Domestic Fresh Market (Pera Variety, average prices in Reais - R\$, 40.8 kg box, fruits on the tree).						
Month	2017	2018	2019	2020	2021	2022
Jan	37.53	20.00	30.42	30.53	39.03	36.99
Feb	43.91	22.51	40.66	33.06	37.69	39.87
Mar	41.86	29.02	42.23	35.35	38.71	42.85
Apr	30.41	29.83	31.80	32.47	38.11	42.01
May	21.15	26.33	21.17	26.09	34.42	37.39
Jun	17.14	25.66	18.24	25.26	32.64	34.81
Jul	16.15	26.80	18.06	26.83	34.74	34.28
Aug	16.40	29.08	18.26	30.01	39.67	37.20
Sep	17.34	31.39	19.51	32.78	45.30	39.75
Oct	19.27	32.83	22.99	38.89	49.88	40.81
Nov	19.97	30.24	28.04	43.35	45.01	42.08
Dec	19.94	27.16	28.22	40.52	38.80	--

Source: CEPEA/ESALQ

Exchange Rate

The table below shows the official exchange rate as released by the Brazilian Central Bank from 2016 through 2022.

Table 4

Exchange Rate (R\$/US\$1.00 - official rate, last day of period)							
Month	2016	2017	2018	2019	2020	2021	2022
January	4.04	3.13	3.16	3.65	4.25	5.48	5.36
February	3.98	3.10	3.24	3.74	4.50	5.53	5.14
March	3.56	3.17	3.32	3.90	5.20	5.70	4.74
April	3.45	3.20	3.48	3.94	5.43	5.40	4.92
May	3.60	3.26	3.74	3.94	5.43	5.23	4.73
June	3.21	3.30	3.86	3.83	5.48	5.00	5.24
July	3.24	3.13	3.75	3.76	5.20	5.12	5.19
August	3.24	3.15	4.14	4.14	5.47	5.14	5.18
September	3.25	3.17	4.00	4.16	5.64	5.44	5.41
October	3.18	3.27	3.72	4.00	5.77	5.64	5.26
November 1/	3.40	3.26	3.86	4.22	5.33	5.62	5.38
December	3.47	3.31	3.87	4.03	5.20	5.58	

Source: Brazilian Central Bank (BACEN) 1/ November 2022 refers to November 28.

Consumption

ATO/Sao Paulo forecasts total Brazilian orange consumption for MY 2022/23 at 113.2 MBx (4.62 MMT), relatively similar vis-à-vis the current season (114.2 MBx or 4.66 MMT). These figures include actual domestic consumption plus losses from the natural drop, harvesting, transportation, and packing.

Note that fruit delivered to processors for “not from concentrate” (NFC) orange juice production for the domestic market will not be included as fresh oranges consumption but as “Delivered to Processors for NFC Production.”

Fresh domestic consumption estimates are calculated as the difference between production estimates and the volume of oranges delivered to processors for FCOJ and NFC produced for domestic consumption and export.

Trade

Exports

Total fresh orange exports for MY 2022/23 are projected at virtually zero, like fresh orange export estimates for MY 2021/22, according to updated information from Trade Data Monitor, LLC. Marshall

Islands, Liberia, Panama, and Honk Kong imported insignificant volumes of fresh oranges during the July-2022 – October 2022 period.

The table below shows fresh orange exports (NCM 0805.10.00) by destination, according to the Trade Data Monitor, LLC, based on data from the Secretariat of Foreign Trade (Secex) for BR MY 2019/20, 2020/21 and 2021/22 (July-June), as well as for BR 2020/21, 2021/22 and 2022/23 (July-October).

Table 5

Brazilian Fresh Orange Exports (MT and US\$ 1,000 FOB)						
Country	Jul 2019 - Jun 2020		Jul 2020 - Jun 2021		Jul 2021 - Jun 2022	
	Value	Quantity	Value	Quantity	Value	Quantity
Russia	-	-	89	186	70	145
Marshall Islands	40	49	41	52	53	60
Panama	33	42	39	47	44	52
Liberia	30	42	34	46	42	48
Hong Kong	29	39	26	37	29	33
Malta	16	21	16	22	19	22
Singapore	16	20	13	18	14	16
Greece	12	16	11	16	13	17
Canada	18	39	138	259	12	3
Bahamas	10	11	7	10	11	12
Others	1,726	3,357	3,922	8,243	70	83
Total	1,930	3,636	4,336	8,936	377	491

Source: Trade Data Monitor (LLC). NCM 0805.10.00. Numbers may not add due to rounding.

Table 6

Brazilian Fresh Orange Exports (MT and US\$ 1,000 FOB)						
Country	Jul 2020 - Oct 2020		Jul 2021 - Oct 2021		Jul 2022 - Oct 2022	
	Value	Quantity	Value	Quantity	Value	Quantity
Marshall Islands	13	19	15	19	20	21
Liberia	10	15	13	17	16	18
Panama	14	18	15	19	18	18
Hong Kong	9	14	8	11	13	13
Malta	5	8	7	9	7	8
Singapore	5	7	3	5	7	7
Cyprus	5	7	3	5	3	7
Bahamas	2	3	4	5	6	5
China	2	3	2	2	3	4
Greece	4	7	5	6	3	4
Others	3,440	5,448	84	162	29	19
Total	3,511	5,549	159	260	127	124

Source: Trade Data Monitor (LLC). NCM 0805.10.00. Numbers may not add due to rounding.

Imports

Total fresh orange imports for MY 2022/23 are projected to stable at 0.2 MBx (8,160 MT, according to updated information from Trade Data Monitor, LLC. Egypt, Uruguay, and Spain were the major countries of origin for imported oranges from July 2021 – June 2022.

The table below shows fresh orange imports (NCM 0805.10.00) by country of origin, according to the Trade Data Monitor, LLC, based on data from the Secretariat of Foreign Trade (Secex) for BR MY 2019/20, 2020/21 and 2021/22 (July-June), as well as for BR 2020/21, 2021/22 and 2022/23 (July-October).

Table 7

Brazilian Fresh Orange Imports (MT and US\$ 1,000 FOB)						
Country	Jul 2019 - Jun 2020		Jul 2020 - Jun 2021		Jul 2021 - Jun 2022	
	Value	Quantity	Value	Quantity	Value	Quantity
Egypt	60	75	2,574	3,552	7,308	11,815
Uruguay	5,940	8,888	2,878	3,870	4,571	7,632
Spain	13,246	15,535	11,951	11,914	5,654	6,798
Argentina	1,495	2,397	1,190	1,652	1,142	1,700
Chile	887	986	351	324	78	91
Total	21,628	27,881	18,944	21,312	18,753	28,036
Source: Trade Data Monitor (LLC). NCM 0805.10.00. Numbers may not add due to rounding.						

Table 8

Brazilian Fresh Orange Imports (MT and US\$ 1,000 FOB)						
Country	Jul 2020 - Oct 2020		Jul 2021 - Oct 2021		Jul 2022 - Oct 2022	
	Value	Quantity	Value	Quantity	Value	Quantity
Uruguay	1,647	2,312	2,507	3,895	1,930	2,852
Argentina	900	1,215	645	1,059	1,138	1,594
Chile	268	255	78	91	411	427
Spain	-	-	-	-	4	5
Total	2,815	3,782	3,230	5,045	3,483	4,878
Source: Trade Data Monitor (LLC) NCM 0805.10.00. Numbers may not add due to rounding.						

Production, Supply, and Distribution

Table 9

Oranges, Fresh Market Year Begins	2020/2021		2021/2022		2022/2023	
	Jul 2021		Jul 2022		Jul 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Brazil						
Area Planted (HECTARES)	604400	604400	614100	614100	0	614100
Area Harvested (HECTARES)	546100	546100	546400	546400	0	546400
Bearing Trees (1000 TREES)	221600	221600	228000	228000	0	228000
Non-Bearing Trees (1000 TREES)	28000	28000	34300	34300	0	34300
Total No. Of Trees (1000 TREES)	249600	249600	262300	262300	0	262300
Production (1000 MT)	14676	14676	16908	16932	0	16524
Imports (1000 MT)	24	24	24	8	0	8
Total Supply (1000 MT)	14700	14700	16932	16940	0	16532
Exports (1000 MT)	0	0	8	0	0	0
Fresh Dom. Consumption (1000 MT)	4582	4582	4643	4659	0	4619
For Processing (1000 MT)	10118	10118	12281	12281	0	11913
Total Distribution (1000 MT)	14700	14700	16932	16940	0	16532
(HECTARES) ,(1000 TREES) ,(1000 MT)						

ORANGE JUICE

Production

PS&D Tables

The following tables provide revised data for Sao Paulo and total Brazilian orange juice production, supply, and distribution (PS&D) for Brazilian (BR) marketing years (MY, July-June) 2021/22 and 2022/23, and the initial forecast for MY 2023/24. The MY mentioned above are equivalent to U.S. MY 2020/21, 2021/22 and 2022/23, respectively.

The tables include NFC production for exports converted to Frozen Concentrated Orange Juice (FCOJ), 65 Brix equivalent. The following conversion factor: 1 metric ton of FCOJ 65 Brix equals 5.4 to 5.6 metric tons of NFC 11.6 Brix.

Table 10

Brazil: FCOJ PS&D (Jul-Jun, Million 40.8 kg boxes, TMT, 65 degrees brix)			
Item/U.S. Marketing Year	US 20/21	US 21/22	US 22/23
Item/ Brazilian Marketing Year	2021/22	2022/23	2023/24
Delivered to Processors	248	301	292
Sao Paulo (FCOJ + NFC exports)	224	277	268
Others	24	24	24
Beginning Stocks - Total	151	15	14
Total Production	944	1134	1119
Sao Paulo FCOJ	536	695	680
Sao Paulo NFC (FCOJ equiv)	312	343	343
Others	96	96	96
Total Supply	1095	1149	1133
Exports	1010	1060	1040
Sao Paulo FCOJ	710	720	700
Sao Paulo NFC (FCOJ equiv)	270	310	310
Others FCOJ	30	30	30
Domestic Consumption	70	75	80
Ending Stocks - Total	15	14	13
Total Distribution	1095	1149	1133

* Note: There is a one-year lag between the BR MY and the U.S. MY. For example, BR MY 2022/23/24 is equivalent to U.S. MY 2022/23. To ensure data continuity, the current Brazilian MY 2023/24 will be referred to as U.S. MY 2022/23 throughout this report.

General

ATO/Sao Paulo forecasts the total Brazilian FCOJ 65 Brix equivalent production for MY 2022/23 at 1.12 million metric tons (MMT), a drop of one percent vis-avis the orange juice production for MY 2021/22, due to expected lower availability of fruit for processing. The Sao Paulo industry is expected to process 268 MBx of oranges for orange juice production (180 MBx for FCOJ and 88 MBx for NFC production), accounting for 1.02 MT of juice (680,000 MT and 343,000 MT of FCOJ and NFC converted to FCOJ equivalent, respectively). Other producing states should deliver 24MBx, accounting for 96,000 MT of juice.

Post estimates an increase of ten percent in fruit for NFC processing (88 MBx or 3.59 MMT) for MY 2021/22 to supply the U.S. market, given that hurricane Ian has hugely devastated the Floridian crop. The total Brazilian FCOJ 65 Brix equivalent production estimate for MY 2021/22 has been revised downward to 1.13 MMT, a decrease of 4,000 MT compared to the previous estimate due to the expected lower industrial yield than previously estimated. Orange juice figures include NFC production for exports converted to FCOJ 65 Brix equivalent. There is no official estimate for NFC supply and demand in Brazil.

Consumption

ATO/SaoPaulo projects domestic FCOJ equivalent consumption for MY 2022/23 at 80,000 MT, 65 Brix, up 5,000 MT compared to MY 2021/22 (75,000 MT), given that orange juice consumption, especially NFC has steadily increased in Brazil. Note that NFC consumption converted to FCOJ equivalent is included in the orange juice statistic.

Trade

ATO/Sao Paulo projects total Brazilian FCOJ 65 Brix equivalent exports for MY 2022/23 at 1.04 MMT, similar to the revised number for MY 2021/22 (1.06 MMT), given that fruit availability for processing will likely remain tight. The Sao Paulo industry should contribute 1.01 MT, 65 Brix equivalent. Total exports for MY 2021/22 were revised to 1.06 MMT, an increase of 20,000 MT compared to the previous estimate, based on updated information from the industry. Note that NFC exports for MY 2021/22 are estimated at 310,000 MT, 65 Brix equivalent, an increase of 15 percent compared to the previous season, mainly to supply the U.S. market due to limited juice availability from Florida due to hurricane Ian.

Overall, cumulative orange juice exports during July-October 2022 are 388,022 MT, 65 Brix, FCOJ equivalent, according to the Trade Data Monitor, LLC, an increase of 26,622 MT vis-à-vis to the same period in 2021 (361,400 MT, 65 Brix, FCOJ equivalent), especially due to increased volume of NFC exports. Cumulative exports to the United States during July-October 2022 increased over 60 percent to 112,432 MT, 65 Brix, relative to 69,945 MT during July-October 2021, pushed by the continuous decrease in the Floridian production. The European Union remains the largest export destination of Brazilian orange juice, with approximately 70 percent of total exports.

The tables below show fresh orange juice exports (NCM 2009.11.00, 2009.12.00, and 2009.19.00) by country of destination, according to the Trade Data Monitor, LLC, based on data from the Secretariat of Foreign Trade (Secex) for BR MY 2019/20, 2020/21 and 2021/22 (July-June), as well as for BR 2020/21, 2021/22 and 2022/23 (July-October).

The “others” category includes both FCOJ and NFC exports. Post considers the average monthly price by country of destination for the “others” category as a criterion to distinguish between FCOJ and NFC exports.

Table 11

Frozen/Unfermented Orange Juice Exports (MT and US\$ 1,000 FOB)						
Country	Jul 2019 - Jun 2020		Jul 2020 - Jun 2021		Jul 2021 - Jun 2022	
	Value	Quantity	Value	Quantity	Value	Quantity
Belgium	271,180	165,417	163,043	120,876	178,862	113,584
China	62,443	45,218	68,783	57,237	86,658	76,504
United States	27,946	19,069	61,411	45,792	65,720	39,208
Netherlands	87,820	62,938	66,174	48,333	54,399	36,785
Japan	100,694	58,009	41,598	28,775	40,412	23,903
Israel	8,863	7,332	11,170	9,419	15,444	10,163
Australia	21,948	12,712	22,999	16,151	16,374	9,868
Austria	17,219	10,782	1,019	888	14,436	8,482
Chile	8,822	5,534	7,434	4,613	12,032	7,192
Turkey	4,322	3,314	3,999	2,652	4,859	3,283
Others	71,892	43,212	72,491	47,297	67,479	39,499
Total	683,149	433,537	520,121	382,033	556,675	368,471

Source: Trade Data Monitor (LLC). NCM 2009.11.00 Numbers may not add due to rounding.

Table 12

Frozen/Unfermented Orange Juice Exports (MT and US\$ 1,000 FOB)						
Country	Jul 2020 - Oct 2020		Jul 2021 - Oct 2021		Jul 2022 - Oct 2022	
	Value	Quantity	Value	Quantity	Value	Quantity
Belgium	50,498	40,004	61,124	41,616	60,272	34,247
China	15,699	14,033	24,184	24,841	21,855	22,288
United States	7,272	6,421	21,952	13,901	28,854	15,981
Netherlands	30,489	21,979	23,822	16,641	22,593	13,508
Japan	18,382	12,971	15,065	9,429	17,214	9,413
Australia	9,304	6,758	6,638	4,236	6,642	3,659
Chile	1,422	945	4,166	2,484	4,135	2,307
Israel	3,021	2,445	6,122	4,644	2,401	1,424
Italy	2,340	1,634	1,152	784	1,586	855
Indonesia	812	415	1,732	833	1,340	659
Others	17,425	11,839	18,898	11,608	14,700	8,174
Total	156,665	119,444	184,853	131,017	181,594	112,515

Source: Trade Data Monitor (LLC). NCM 2009.11.00 Numbers may not add due to rounding.

Table 13

Brazilian Orange Juice Exports, Not Frozen and Brix Under 20 (NCM 2009.1200, MT and US\$ 1,000 FOB)						
Country	Jul 2019 - Jun 2020		Jul 2020 - Jun 2021		Jul 2021 - Jun 2022	
	Value	Quantity	Value	Quantity	Value	Quantity
United States	140,358	437,326	159,118	494,789	228,200	634,590
Belgium	178,466	495,518	176,190	581,006	152,114	440,969
Netherlands	124,646	381,418	124,946	375,435	131,121	390,551
Austria	16,745	44,728	-	-	7,615	22,398
Spain	2,545	9,288	7,181	24,838	1,898	5,582
China	317	377	4,571	5,423	4,507	5,352
Chile	994	955	1,284	1,324	1,834	1,964
Israel	-	-	343	818	164	343
Paraguay	71	80	231	301	264	288
Canada	-	-	5	1	316	163
Others	793	1,461	789	1,095	699	724
Total	464,936	1,371,151	474,657	1,485,030	528,732	1,502,924
Source: Trade Data Monitor (LLC). NCM 2009.12.00 Numbers may not add due to rounding.						

Table 14

Brazilian Orange Juice Exports, Not Frozen and Brix Under 20 (NCM 2009.1200, MT and US\$ 1,000 FOB)						
Country	Jul 2020 - Oct 2020		Jul 2021 - Oct 2021		Jul 2022 - Oct 2022	
	Value	Quantity	Value	Quantity	Value	Quantity
United States	40,969	129,584	63,397	184,938	113,314	299,846
Belgium	57,183	200,858	51,590	154,632	72,206	195,637
Netherlands	42,538	127,338	41,923	125,450	40,000	116,305
Spain	1,434	5,681	1,898	5,582	1,446	3,614
Chile	327	319	585	683	596	579
Paraguay	54	79	90	104	94	99
China	1,093	1,305	3,952	4,692	73	83
Philippines	59	54	46	50	58	69
Angola	15	14	89	83	59	63
Malaysia	5	4	8	7	19	18
Others	52	57	270	186	87	58
Total	143,730	465,293	163,847	476,407	227,951	616,371
Source: Trade Data Monitor (LLC). NCM 2009.12.00 Numbers may not add due to rounding.						

Table 15

Brazilian Orange Juice Exports, Others (MT and US\$ 1,000 FOB)						
Country	Jul 2019 - Jun 2020		Jul 2020 - Jun 2021		Jul 2021 - Jun 2022	
	Value	Quantity	Value	Quantity	Value	Quantity
Netherlands	310,418	214,394	230,937	166,847	275,325	163,639
Belgium	210,151	116,868	193,560	121,318	211,129	126,980
United States	108,629	76,183	77,006	62,595	69,798	46,595
Japan	391	215	13,388	10,035	15,887	9,928
U.K.	26,058	17,939	27345.824	19622	14,381	8,988
Spain	141.579	118	2009.908	1221	1,091	650
Turkey	510.359	358	2.964	2	659.168	356
Austria	0	0	0	0	558.567	329
Israel	0	0	0	0	548.569	323
Paraguay	150.764	243	156.91	236	170.198	241
Others	3,054	1,875	1,525	1,077	417.553	306
Total	659,503	428,193	545,931	382,953	589,965	358,335
Source: Trade Data Monitor (LLC). NCM 2009.19.00 Numbers may not add due to rounding.						

Table 16

Brazilian Orange Juice Exports, Others (MT and US\$ 1,000 FOB)						
Country	Jul 2020 - Oct 2020		Jul 2021 - Oct 2021		Jul 2022 - Oct 2022	
	Value	Quantity	Value	Quantity	Value	Quantity
Netherlands	74,212	55,372	99,805	63,617	121,470	59,570
Belgium	56,491	35,107	84,766	47,225	107,631	52,560
United States	29,993	24,723	30,797	23,613	79,643	42,049
U.K.	5,134	3,875	9,609	6,006	14,456	6,965
Paraguay	35	57	58.562	82	44	59
Argentina	20.409	23	19.766	23	40	47
Portugal	0.056	0	0	0	14.382	10
France	1.295	1	1.612	1	11.31	7
Spain	70.549	47	556.063	319	8.276	7
Mexico	0	0	1.956	2	6.205	5
Others	13,677	10,282	539	308	23.805	18
Total	179,636	129,487	226,154	141,196	323,348	161,297
Source: Trade Data Monitor (LLC). NCM 2009.19.00 Numbers may not add due to rounding.						

Stocks

Ending stocks for MY 2022/23 are forecast at 13,000 MT, 65 Brix, a decrease of 1,000 MT compared to the revised figure for MY 2021/22 carry-over stocks (14,000 MT) and one of the lowest stock levels ever reached by the citrus industry. Stock figures include only stocks in the storage tanks of orange juice facilities (processing plants, port terminals, etc.) in Brazil. They do not include stocks owned by Brazilian companies abroad, e.g., in transit and port terminals in the United States, Europe, and Japan.

According to the Brazilian Association of Citrus Exporters (CitrusBR), global Brazilian orange juice inventories were 143,104 MT (66 Brix) on June 30, 2022, a drop of 54 percent relative to stocks on June 30, 2021 (316,929 MT, 66 Brix). CitrusBR forecasts carry-over stocks for June 30, 2023 at 140,000 MT similar to June 30, 2021 and the second lowest stock level since June 30, 2017. Global inventories include orange juice in storage tanks at processing plants and port terminals in Brazil and stocks abroad (vessels and port facilities worldwide).

Production, Supply, and Distribution

This table includes NFC production for exports converted to FCOJ 65 Brix equivalent using the following conversion factor: 1 metric ton of FCOJ 65 Brix equals 5.4 - 5.6 metric tons of NFC 11.6 Brix.

Table 17

Orange Juice Market Year Begins	2020/2021		2021/2022		2022/2023	
	Jul 2021		Jul 2022		Jul 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Brazil						
Deliv. To Processors (MT)	10118400	10118400	12280800	12280800	0	11913600
Beginning Stocks (MT)	151000	151000	15000	15000	0	14000
Production (MT)	944000	944000	1138000	1134000	0	1119000
Imports (MT)	0	0	0	0	0	0
Total Supply (MT)	1095000	1095000	1153000	1149000	0	1133000
Exports (MT)	1010000	1010000	1040000	1060000	0	1040000
Domestic Consumption (MT)	70000	70000	75000	75000	0	80000
Ending Stocks (MT)	15000	15000	38000	14000	0	13000
Total Distribution (MT)	1095000	1095000	1153000	1149000	0	1133000
(MT)						

Attachments:

No Attachments