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# Brazil

# CITRUS ANNUAL

# 2009

**Approved By:**
Fred Giles, Director - Agricultural Trade Office, Sao Paulo

**Prepared By:**
Sergio Barros, Agricultural Specialist

**Report Highlights:**
This report updates BR9006. In MY 2010/11, the Brazilian orange crop is forecast at 435 MBx, up 8 MBx compared to MY 2009/10 (427 MBx). The Sao Paulo commercial citrus area should produce 335 MBx, up 2 percent from the current season. Total FCOJ, 65 Brix equivalent production for MY 2010/11, is projected at 1.305 mmt, up 47,000 mt vis-à-vis MY 2009/10, due to projected higher availability of fruits for processing.

**Commodities:**

Oranges, Fresh

**Production:**

**PS&D Table**

The following table provides revised data for total Brazilian fresh orange production, supply and demand (PS&D) for marketing years (MY) 2008/09, 2009/10 (July-June) and the initial forecast for MY 2010/11.

| Brazil: Fresh Oranges PS&D (Jul-Jun) (1,000 ha, million trees & million 40.8 kg boxes) | | | |
|---|---|---|---|
| Item/Marketing Year | 2008/09 | 2009/10 | 2010/11 |
| (Bloom/Harvest) | (07/08) | (08/09) | (09/10) |
| Area Planted | 845.0 | 853.0 | 848.0 |
| Sao Paulo | 645.0 | 653.0 | 648.0 |
| Others | 200.0 | 200.0 | 200.0 |
| Area Harvested | 729.6 | 727.6 | 724.6 |
| Sao Paulo | 537.0 | 535.0 | 532.0 |
| Others | 192.6 | 192.6 | 192.6 |
| Bearing Trees | 218.0 | 218.0 | 217.0 |
| Sao Paulo | 166.0 | 166.0 | 165.0 |
| Others | 52.0 | 52.0 | 52.0 |
| Non-Bearing Trees | 43.0 | 49.0 | 48.0 |
| Sao Paulo | 39.0 | 45.0 | 44.0 |
| Others | 4.0 | 4.0 | 4.0 |
| Total Trees | 261.0 | 267.0 | 265.0 |
| Total Production | 413.0 | 427.0 | 435.0 |
| Sao Paulo | 315.0 | 330.0 | 335.0 |
| Others | 98.0 | 97.0 | 100.0 |
| Exports | 1.0 | 0.5 | 1.0 |
| Sao Paulo | 1.0 | 0.5 | 1.0 |
| Domestic Consumption | 123.0 | 126.5 | 125.0 |
| Delivered to processors | 289.0 | 300.0 | 309.0 |
| Sao Paulo (FCOJ + NFC exports) | 276.0 | 285.0 | 294.0 |
| Others | 13.0 | 15.0 | 15.0 |

**General**

The Agricultural Trade Office (ATO/Sao Paulo) forecasts the total Brazilian orange crop for MY 2010/11 (Jul-Jun) at 435Mbx, a 2 percent increase compared to the current crop (MY 2009/10), assuming that good weather conditions prevail as of mid-December 2009 to support fruit setting and size. The commercial area of the state of Sao Paulo and the western part of Minas Gerais should produce 335 Mbx. *Note that this figure takes into account the 4 major varieties of citrus used for processing orange juice (Hamlin, Pera Rio, Natal and Valencia) plus a limited volume (12 million boxes) of other citrus* *varieties such as Lima, Bahia, Murcorte and Poncan which are used for processing juice.* Production from other states is projected at 100 MBx.

It is still too early to project MY 2010/11 production. *More precise numbers should be available in the beginning of the second quarter of 2010*. The current production forecast is based on the excellent first blossoming (August-September) in the majority of the citrus areas and steady warm and wet weather in all growing regions; therefore, promoting strong development of the fruit. The projection also takes into account an expected third blossoming in December-January. Note that the unusual wet weather that prevailed during August-October has negatively affected the first blossoming in some growing regions, especially the South, thus reducing the potential for a higher crop.

ATO/Sao Paulo revised the Brazilian orange crop estimate for MY 2009/10 to 427 Mbx, up 20 Mbx compared to previous estimate (407 Mbx). The commercial citrus area in Sao Paulo should account for 330 Mbx. The steady rainfall during the second semester of 2009 has contributed to the large size of the fruit . The aforementioned volume includes approximately 10 million boxes of Hamlim not picked in the beginning of the season. *Note that this figure takes into account the 4 major varieties of citrus used for processing orange juice (Hamlin, Pera Rio, Natal and Valencia) plus a limited volume (12 million boxes) of other citrus varieties such as Lima, Bahia, Murcorte and Poncan which are used for processing juice.* The production estimate for states other than Sao Paulo is 97 Mbx.

The Sao Paulo State Institute of Agricultural Economics (IEA) released the results of the fourth orange crop survey (September 2009) for the 2008/09 crop (MY 2009/10). The Sao Paulo crop, including both commercial and non-commercial areas, is estimated at 360.8 Mbx, up 1.7 percent compared to the previous crop. *Note that IEA takes into account the entire state of Sao Paulo and all varieties of orange, while ATO estimates follow the citrus industry methodology which includes the commercial area of the state plus the western part of Minas Gerais and the 4 major citrus varieties for juice processing.* IEA reports that the state of Sao Paulo orange tree inventory is estimated at 230.3 million trees (193.8 million bearing and 36.5 million non-bearing trees).

Additional information provided by IEA reports that approximately 22 million boxes of oranges out of the total estimated volume should be left in the groves and/or represent picking/hauling losses, thus the effective volume of oranges for domestic consumption and processing is estimated at 338.7 million boxes.

**Area, Tree Inventory and Yields**

In MY 20010/11, the Brazilian agricultural yield is forecast at 2 boxes/tree, a 2 percent increase vis-à-vis the current season (1.96 boxes/tree), assuming normal weather conditions as of mid-December 2009. The Sao Paulo commercial grove yield for MY 2009/10 was revised to 1.99 boxes/tree, up 6 percent from the previous estimate, due to larger fruit size.

Total orange area for MY 2010/11 is projected at 848,000 hectares (ha), down 5,000 ha from MY 2009/10, due to increasing density of plantings. Total Brazilian tree inventory for MY 2010/11 is projected at 217 million trees, 1 million trees lower than the previous crop. Greening has not yet significantly affected the reduction of the tree inventory. Note that there are not actual area and tree inventory data for states other than Sao Paulo. ATO/Sao Paulo estimates report stable area and tree population for “Other” states based on uniform production figures provided by the Brazilian Institute of Geography and Statistics (IBGE)

As reported by the Citriculture Defense Fund (Fundecitrus), 488 inspected nurseries were in operation in November 2009. All the nurseries are protected, e.g., they maintain seedlings within screened enclosures, in accordance with Sao Paulo state law. The number of inspected seedlings totaled for 16,300,378 whereas the number of inspected rootstock totaled 6,525,530.

**Diseases**

The results of the 2009 Citrus Variegated Chlorosis (CVC) field survey (July-September 2009) indicate that 39.19 percent of the sampled trees are affected by the disease, a 9 percent reduction compared to the last survey in 2005 (43.28 percent)

The 2009 citrus canker sampling survey in the commercial area of the state of Sao Paulo and Minas Gerais indicates that 0.14 percent of sampled blocks showed citrus canker, down from the 2008 result (0.17 percent). The table below shows the evolution of citrus canker for 2009 (January-September), according to Fundecitrus. Cumulative tree eradication from commercial groves in 2009 was 261,746, up 100,000 trees from 2008.

| Evolution of Citrus Canker in the State of Sao Paulo, 2009 | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Block | | | | Domestic Grove | | Nurseries | |
| Month | New | Recontamination | Tot | Plants Eradicated | Total | Plants Eradicated | Tot | Plants Eradicated |
| Jan-Mar | 27 | 46 | 73 | 71,114 | 407 | 10,090 | 0 | 0 |
| Apr-Jun | 73 | 99 | 172 | 152,951 | 666 | 13,676 | 0 | 0 |
| Jul-Sep | 47 | 47 | 94 | 37,681 | 685 | 11,579 | 0 | 0 |
| Total | 147 | 192 | 339 | 261,746 | 1,758 | 35,345 | 0 | 0 |

**Source: Sao Paulo State Fund for Defense of Citriculture (FUNDECITRUS).**

**Production Costs**

The table below shows the evolution of orange production costs in Bebedouro in the state of Sao Paulo as reported by the Brazilian Government (GOB), through the National Supply Company (CONAB) of the Ministry of Agriculture, Livestock and Supply (MAPA). According to CONAB, total costs for 2009 are estimated at $US 6.85/box, down 20 percent from 2008 ($US 8.61/box), mainly due to the appreciation of the real.

| Citrus Production Costs ($US/Box, Bebedouro region, 400 trees/hectare, 1.79 boxes/tree, 5th Blossoming) | | | | |
|---|---|---|---|---|
| **ITEM** | **2006** | **2007** | **2008** | **2009** |
| **PLANTING COSTS** | | | | |
| 1 - Mechanized operations | 0.35 | 0.35 | 0.46 | 0.42 |
| 2 - Irrigation | 0.01 | 0.01 | 0.02 | 0.02 |
| 3 - Temporary labor | 0.71 | 0.79 | 1.01 | 0.86 |
| 4 - Fixed labor | 0.21 | 0.22 | 0.27 | 0.33 |
| 5 - Seedlings | 0.03 | 0.03 | 0.04 | 0.02 |
| 6 - Fertilizer | 0.53 | 0.56 | 1.00 | 0.91 |
| 7 - Pesticide | 0.93 | 1.27 | 2.76 | 0.99 |
| 8 - Others (administrative costs, tariffs, taxes) | 0.32 | 0.31 | 0.46 | 0.27 |
| TOTAL PLANTING COSTS (A) | **3.09** | **3.53** | **6.00** | **3.82** |
| **II - COSTS AFTER HARVEST** | | | | |
| 1 - Transport (off-farm) | 0.21 | 0.23 | 0.29 | 0.34 |
| 2 - Technical assistance | 0.06 | 0.07 | 0.12 | 0.08 |
| TOTAL COSTS AFTER HARVEST (B) | 0.28 | 0.30 | 0.41 | 0.43 |
| **III - FINANCIAL COSTS** | | | | |
| 1 - Interest | 0.37 | 0.43 | 0.76 | 0.40 |
| TOTAL FINANCIAL COSTS (C) | 0.37 | 0.43 | 0.76 | 0.40 |
| **VARIABLE COSTS (A+B+C = D)** | **3.74** | **4.27** | **7.17** | **4.65** |
| **IV - DEPRECIATION** | | | | |

| | | | | |
|---|---|---|---|---|
| 1 - Depreciation farm/improvements | 0.00 | 0.00 | 0.01 | 0.01 |
| 2 - Implement depreciation | 0.01 | 0.01 | 0.02 | 0.02 |
| 3 - Machinery depreciation | 0.02 | 0.02 | 0.02 | 0.02 |
| 4 - Grove depreciation | 0.64 | 0.58 | 0.92 | 0.80 |
| TOTAL DEPRECIATION (E) | 0.67 | 0.62 | 0.97 | 0.84 |
| **V - OTHER FIXED COSTS (F)** | | | | 0.00 |
| 1 - Regular machinery maintenance | 0.01 | 0.01 | 0.01 | 0.01 |
| 2 - Benefits | 0.12 | 0.13 | 0.15 | 0.19 |
| TOTAL OTHER FIXED COSTS | 0.13 | 0.14 | 0.17 | 0.21 |
| FIXED COSTS (E+F = G) | 0.81 | 0.76 | 1.14 | 1.05 |
| **OPERATIONAL COSTS (D+G = H)** | **4.54** | **5.03** | **8.31** | **5.70** |
| **VI - FACTOR INCOME** | | | | |
| 1 - Estimated income over fixed capital | 0.02 | 0.02 | 0.02 | 0.03 |
| 2 - Estimated income over orange grove | 0.02 | 0.02 | 0.03 | 0.03 |
| 3 - Land | 0.19 | 0.20 | 0.25 | 1.07 |
| TOTAL FACTOR INCOME | 0.23 | 0.24 | 0.30 | 1.12 |
| **TOTAL COSTS (H+I = J)** | **4.77** | **5.27** | **8.61** | **6.85** |

**Source: CONAB/DIGEM/SUINF/GECUP**
**Note: Rate of Exchange: 03/31/06 - US$ 1 = R$ 2.1724; 01/31/07 - US$ 1 = R$ 2.1247; 04/30/08 - US$ 1 = R$ 1.6872; 06/30/09 - US$ 1 = R$ 1.9508**

### Producers' Prices

The Orange Index price series is published by the University of Sao Paulo's College of Agriculture "Luiz de Queiroz" (ESALQ) for both the fresh domestic market and product delivered to orange juice processing plants in the state of Sao Paulo. Both series track orange prices from September 1994. Prices for the fresh market are for fruit on the tree. The Center for Advanced Studies on Applied Economics (CEPEA) reports that industry contracts have been set on average at $US 3.50/box of oranges for MY 2009/10.

| **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** | **2004** | **2005** | **2006** | **2007** | **2008** | **2009** |
| **Jan** | 9.87 | 7.08 | 12.13 | 15.46 | 13.46 | 6.80 |
| **Feb** | 7.05 | 6.83 | 9.90 | 15.50 | 12.39 | 5.92 |
| **Mar** | 5.29 | 6.01 | 8.66 | 13.68 | 9.66 | 4.95 |
| **Apr** | 4.91 | 5.85 | 7.58 | 8.79 | 8.38 | 4.50 |
| **May** | 5.03 | 6.10 | 7.21 | 7.88 | 8.27 | 4.05 |
| **Jun** | 4.99 | 7.14 | 8.10 | 7.97 | 9.72 | 3.68 |
| **Jul** | 5.51 | 8.71 | 10.06 | 10.93 | 10.95 | 3.65 |
| **Aug** | 6.22 | 8.44 | 10.76 | 10.16 | 9.71 | 5.04 |
| **Sep** | 5.98 | 7.94 | 11.04 | 9.78 | 9.33 | 5.66 |
| **Oct** | 6.39 | 7.86 | 11.52 | 9.89 | 9.57 | 5.86 |
| **Nov** | 7.23 | 9.70 | 12.51 | 11.77 | 8.63 | 6.41 |
| **Dec** | 7.31 | 11.53 | 14.26 | 12.61 | 7.27 | |

**Source: CEPEA/ESALQ.**

| **Orange Prices received by Producers in the Domestic Market (Pera Variety, average** |
|---|

| prices in reais - $R, 40.8 kg box, fruits on the tree). | | | | | | |
|---|---|---|---|---|---|---|
| **Month** | **2004** | **2005** | **2006** | **2007** | **2008** | **2009** |
| **Jan** | 11.29 | 9.13 | 15.68 | 15.08 | 15.38 | 10.00 |
| **Feb** | 10.43 | 9.78 | 19.53 | 17.10 | 16.95 | 9.82 |
| **Mar** | 9.42 | 12.64 | 19.08 | 19.02 | 17.03 | 11.13 |
| **Apr** | 8.95 | 11.66 | 13.72 | 16.60 | 14.65 | 10.46 |
| **May** | 8.68 | 9.36 | 10.68 | 13.82 | 12.04 | 9.13 |
| **Jun** | 7.86 | 8.79 | 9.38 | 11.28 | 11.39 | 7.66 |
| **Jul** | 6.97 | 8.97 | 10.12 | 10.98 | 11.38 | 6.48 |
| **Aug** | 6.78 | 9.13 | 11.47 | 11.06 | 11.01 | 6.47 |
| **Sep** | 6.85 | 9.73 | 12.51 | 10.48 | 10.64 | 7.04 |
| **Oct** | 7.91 | 11.04 | 12.60 | 11.48 | 10.83 | 7.58 |
| **Nov** | 8.62 | 12.51 | 12.76 | 13.45 | 10.24 | 8.48 |
| **Dec** | 9.00 | 13.85 | 13.48 | 14.10 | 9.70 | |

**Source: CEPEA/ESALQ.**

## Consumption:

Total Brazilian orange consumption for MY 2010/11 is forecast at 125 Mbx, similar to the current season (126.5 Mbx). These figures include actual domestic consumption plus losses from natural drop, harvesting, transportation and packing.

Fruit delivered to processors for "not from concentrated (NFC)" orange production for the domestic market is also included in these figures. 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 exports.

## Trade:

Total fresh orange exports for MY 2010/11 are projected at 1 Mbx, up 0.5 million boxes from the previous season. Note that the majority of exports occur during the harvest of the commercial crop (June-December). The table below shows official fresh orange exports (NCM 0805.10.00) by country of destination, for MY 2008/09, and 2009/10, according to SECEX.

| Brazilian Fresh Orange Exports (MT and US$ 1,000 FOB) | | | | | | |
|---|---|---|---|---|---|---|
| | **MY 2008/09 1/** | | **MY 2008/09 2/** | | **MY 2009/10 2/** | |
| **Country** | **Quantity** | **Value** | **Quantity** | **Value** | **Quantity** | **Value** |
| **Netherlands** | 10,096 | 5,168 | 9,781 | 5,003 | 8,147 | 3,883 |
| **Spain** | 6,399 | 3,152 | 6,399 | 3,152 | 3,554 | 1,572 |
| **Saudi Arabia** | 3,913 | 1,918 | 3,553 | 1,771 | 3,504 | 1,401 |
| **Portugal** | 2,856 | 1,451 | 2,664 | 1,360 | 1,800 | 840 |
| **Russia** | 1,416 | 720 | 1,416 | 720 | 1,459 | 625 |
| **United Kingdom** | 1,802 | 917 | 1,801 | 909 | 1,191 | 539 |
| **Ireland** | 1,812 | 913 | 1,716 | 862 | 1,147 | 462 |
| **Paraguay** | 243 | 13 | 0 | 0 | 726 | 39 |
| **Coveite** | 714 | 360 | 714 | 360 | 552 | 241 |

| | | | | | | |
|---|---|---|---|---|---|---|
| **Italy** | 456 | 198 | 456 | 198 | 552 | 221 |
| **Others** | 4,245 | 2,133 | 3,505 | 1,763 | 1,391 | 646 |
| **Total** | 33,952 | 16,945 | 32,005 | 16,097 | 24,022 | 10,470 |

**Source : Brazilian Department of Foreign Trade (SECEX), NCM 0805.10.00**
**Note : 1/July-June - 2/July-October**

## Production, Supply and Demand Data Statistics:

| Oranges, Fresh Brazil (Hectares, 1000 Trees, 1,000 MT) | | | | | | | |
|---|---|---|---|---|---|---|---|
| | MY 2008/2009 | | | MY 2009/2010 | | | MY 2010/11 |
| | USDA | Old Post | New Post | USDA | Old Post | New Post | New Post |
| **Area Planted** | 845,000 | 845,000 | 845,000 | 840,000 | 840,000 | 853,000 | 848,000 |
| **Area Harvested** | 729,600 | 729,600 | 729,600 | 727,600 | 727,600 | 727,600 | 724,600 |
| **Bearing Trees** | 218,000 | 218,000 | 218,000 | 218,000 | 218,000 | 218,000 | 217,000 |
| **Non-Bearing Trees** | 43,000 | 43,000 | 43,000 | 44,000 | 44,000 | 49,000 | 48,000 |
| **Total No. Of Trees** | 261,000 | 261,000 | 261,000 | 262,000 | 262,000 | 267,000 | 265,000 |
| **Production** | 16,850 | 16,850 | 16,850 | 16,600 | 16,606 | 17,422 | 17,748 |
| **Imports** | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total Supply** | 16,850 | 16,850 | 16,850 | 16,600 | 16,606 | 17,422 | 17,748 |
| **Exports** | 41 | 41 | 41 | 41 | 41 | 20 | 41 |
| **Fresh Dom. Consumption** | 4,977 | 4,977 | 5,018 | 4,727 | 4,733 | 5,161 | 5,100 |
| **For Processing** | 11,832 | 11,832 | 11,791 | 11,832 | 11,832 | 12,241 | 12,607 |
| **Total Distribution** | 16,850 | 16,850 | 16,850 | 16,600 | 16,606 | 17,422 | 17,748 |

## Commodities:

Orange Juice

## Production:

### PS&D Table

The following table provides revised data for total Brazilian fresh orange juice production, supply and demand (PS&D) for MY 2008/09, 2009/10 (July-June) and the initial forecast for MY 2010/11. The tables include NFC production for exports converted to Frozen Concentrate Orange Juice (FCOJ), 65 Brix equivalent, using the following conversion factor: 1 metric ton of FCOJ 65 Brix equals 5.6 metric tons of NFC 11.6 Brix.

| Brazil: FCOJ PS&D (Jul-Jun)<br>(Million 40.8 kg boxes, TMT, 65 degrees brix) | | | |
|---|---|---|---|
| **Item/Marketing Year** | **2008/09** | **2009/10** | **2010/11** |
| **(Bloom/Harvest)** | **(07/08)** | **(08/09)** | **(09/10)** |

| | | | |
|---|---|---|---|
| **Delivered to Processors** | 289.0 | 300.0 | 309.0 |
| **Sao Paulo (FCOJ + NFC exports)** | 276.0 | 285.0 | 294.0 |
| **Others** | 13.0 | 15.0 | 15.0 |
| **Beginning Stocks *** | 166.0 | 102.0 | 58.0 |
| **Total Production** | 1,245.0 | 1,258.0 | 1,305.0 |
| **Sao Paulo FCOJ** | 1,030.0 | 1,020.0 | 1,075.0 |
| **Sao Paulo NFC (FCOJ equiv)** | 165.0 | 180.0 | 172.0 |
| **Others** | 50.0 | 58.0 | 58.0 |
| **Total Supply** | 1,411.0 | 1,360.0 | 1,363.0 |
| **Exports** | 1,275.0 | 1,268.0 | 1,260.0 |
| **Sao Paulo FCOJ** | 1,060.0 | 1,030.0 | 1,030.0 |
| **Sao Paulo NFC (FCOJ equiv)** | 165.0 | 180.0 | 172.0 |
| **Others FCOJ** | 50.0 | 58.0 | 58.0 |
| **Domestic Consumption** | 34.0 | 34.0 | 35.0 |
| **Ending Stocks** | 102.0 | 58.0 | 68.0 |
| **Total Distribution** | 1,411.0 | 1,360.0 | 1,363.0 |

* Sao Paulo FCOJ equivalent stocks only.

**General**

ATO/Sao Paulo forecasts total Brazilian FCOJ 65 Brix equivalent production for MY 2010/11 (July-June) at 1.305 million metric tons (mmt), up 4 percent from MY 2009/10, due to expected higher availability of fruit for processing. The Sao Paulo industry should process 294 Mbx of oranges for orange juice production (250Mbx and 44 MBx for FCOJ and NFC production, respectively), accounting for 1.247mmt of juice (1.075mmt and 172,000 metric tons of FCOJ and NFC, respectively). Other producing states should deliver 15Mbx for processing.

Total Brazilian FCOJ 65 Brix equivalent production for MY 2009/109 is estimated at 1.258 mmt, up 13,000 tons from the previous season, due to higher availability of fruit for processing. The Sao Paulo industry should account for 285 Mbx for crushing, whereas other states should contribute 15 Mbx.

Note that orange juice figures include Not From Concentrate (NFC) production for exports converted to FCOJ 65 Brix equivalent. There is no official estimate for NFC supply and demand in Brazil.

## Consumption:

FCOJ domestic consumption for MY 2010/11 is forecast at 35,000 mt, 65 Brix, similar to MY 2009/10.

## Trade:

Total Brazilian FCOJ 65 Brix equivalent exports for MY 2010/11 are forecast at 1.26 mmt, similar to the revised figure for MY 2009/10 (1.268 mmt). The Sao Paulo industry should account for 1.202 mmt, 65 Brix equivalent.

The tables below show official FCOJ exports (NCM 2009.11.00, NCM 2009.12.00 and 2009.19.00) by country of destination for MY 2008/09, and 2009/10, according to SECEX. The “Others” category includes both FCOJ and Not From Concentrate (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

**Frozen Concentrated / Non-Concentrated Orange Juice Exports**
**(MT and US$ 1,000 FOB)**

| | MY 2008/09 1/ | | MY 2008/09 2/ | | MY 2009/10 2/ | |
|---|---|---|---|---|---|---|
| Country | Quantity | Value | Quantity | Value | Quantity | Value |
| Belgium | 287,037 | 391,369 | 119,721 | 172,405 | 64,579 | 83,879 |
| U.S.A. | 74,139 | 104,880 | 22,092 | 35,001 | 28,173 | 29,426 |
| China | 31,542 | 48,944 | 8,430 | 14,288 | 20,150 | 23,722 |
| Switzerland | 46,715 | 64,717 | 21,142 | 30,930 | 15,269 | 18,688 |
| Netherlands | 37,128 | 45,419 | 17,542 | 24,072 | 14,310 | 12,500 |
| Japan | 63,480 | 87,620 | 11,727 | 17,384 | 13,648 | 17,502 |
| Australia | 10,543 | 14,903 | 3,067 | 4,775 | 4,419 | 5,077 |
| South Korea | 14,010 | 21,068 | 1,037 | 1,874 | 3,091 | 4,048 |
| Israel | 5,163 | 6,464 | 2,223 | 3,323 | 2,541 | 2,165 |
| Chile | 3,984 | 6,392 | 1,582 | 2,779 | 1,702 | 1,537 |
| Others | 37,696 | 55,809 | 10,363 | 16,906 | 12,853 | 14,410 |
| Total | 611,437 | 847,585 | 218,927 | 323,737 | 180,735 | 212,955 |

**Source : Brazilian Department of Foreign Trade (SECEX), NCM 2009.11.00**
**Note : 1 / July-June - 2/July-October**

| Brazilian Orange Juice Exports, Not Frozen and Brix under 20 (MT and US$ 1,000 FOB) | | | | | | |
|---|---|---|---|---|---|---|
| | MY 2008/09 1/ | | MY 2008/09 2/ | | MY 2009/10 2/ | |
| Country | Quantity | Value | Quantity | Value | Quantity | Value |
| U.S.A. | 232,664 | 72,570 | 67,124 | 20,819 | 129,721 | 42,520 |
| Belgium | 346,081 | 96,751 | 126,553 | 34,338 | 88,527 | 27,161 |
| Netherlands | 327,019 | 125,590 | 99,262 | 36,092 | 72,326 | 27,844 |
| Switzerland | 9,627 | 3,031 | 0 | 0 | 14,109 | 4,313 |
| New Zealand | 0 | 0 | 0 | 0 | 202 | 148 |
| Chile | 563 | 430 | 215 | 157 | 104 | 83 |
| Hong Kong | 101 | 71 | 0 | 0 | 50 | 35 |
| Japan | 237 | 99 | 237 | 99 | 18 | 14 |
| Aruba | 0 | 0 | 0 | 0 | 5 | 3 |
| Guiana | 0 | 0 | 0 | 0 | 4 | 3 |
| Others | 1,634 | 998 | 880 | 543 | 0 | 1 |
| Total | 917,925 | 299,540 | 294,271 | 92,049 | 305,065 | 102,125 |

**Source : Brazilian Department of Foreign Trade (SECEX), NCM 2009.12.00**
**Note : 1/ July-June - 2/July-October**

| Brazilian Orange Juice Exports, Others (MT and US$ 1,000 FOB) | | | | | | |
|---|---|---|---|---|---|---|
| | MY 2008/09 1/ | | MY 2008/09 2/ | | MY 2009/10 2/ | |
| Country | Quantity | Value | Quantity | Value | Quantity | Value |
| Belgium | 216,373 | 297,033 | 51,488 | 81,114 | 95,121 | 91,496 |

| | | | | | | |
|---|---|---|---|---|---|---|
| **Netherlands** | 169,940 | 247,703 | 53,743 | 85,622 | 62,556 | 63,252 |
| **United Kingdom** | 48,310 | 65,986 | 18,419 | 30,125 | 18,360 | 16,123 |
| **U.S.A.** | 29,708 | 40,065 | 12,300 | 19,099 | 9,873 | 9,193 |
| **Australia** | 13,668 | 19,232 | 4,510 | 6,766 | 4,514 | 4,515 |
| **Switzerland** | 2,024 | 3,191 | 2,000 | 3,150 | 2,183 | 2,074 |
| **Denmark** | 392 | 478 | 0 | 0 | 314 | 251 |
| **Argentina** | 306 | 718 | 49 | 196 | 266 | 475 |
| **Israel** | 235 | 204 | 25 | 26 | 228 | 160 |
| **Japan** | 354 | 558 | 56 | 94 | 53 | 66 |
| **Others** | 3,903 | 5,469 | 417 | 617 | 125 | 177 |
| **Total** | 485,212 | 680,638 | 143,008 | 226,809 | 193,595 | 187,783 |

**Source : Brazilian Department of Foreign Trade (SECEX), NCM 2009.19.00**
**Note : 1/July-June - 2/July-October**

## Stocks:

Post forecasts total ending stocks for MY 2010/11 at 68,000 mt, 65 Brix, up 10,000 mt relative to the revised MY 2009/10 estimate (58,000 mt). Actual stocks data are not available.

## Production, Supply and Demand Data Statistics:

| Oranges, Juice - Brazil (1,000 MT) | | | | | | | |
|---|---|---|---|---|---|---|---|
| | MY 2008/2009 | | | MY 2009/2010 | | | MY 2010/11 |
| | USDA | Old Post | New Post | USDA | Old Post | New Post | New Post |
| **Deliv. To Processors** | 11,832,000 | 11,832,000 | 11,791 | 11,832,000 | 11,832,000 | 12,240,000 | 12,607,000 |
| **Beginning Stocks** | 166,000 | 166,000 | 166,000 | 72,000 | 72,000 | 102,000 | 58,000 |
| **Production** | 1,235,000 | 1,235,000 | 1,245,000 | 1,240,000 | 1,240,000 | 1,258,000 | 1,305,000 |
| **Imports** | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total Supply** | 1,401,000 | 1,401,000 | 1,411,000 | 1,312,000 | 1,312,000 | 1,360,000 | 1,363,000 |
| **Exports** | 1,295,000 | 1,295,000 | 1,275,000 | 1,220,000 | 1,220,000 | 1,268,000 | 1,260,000 |
| **Domestic Consumption** | 34,000 | 34,000 | 34,000 | 34,000 | 34,000 | 34,000 | 35,000 |
| **Ending Stocks** | 72,000 | 72,000 | 102,000 | 58,000 | 58,000 | 58,000 | 68,000 |
| **Total Distribution** | 1,401,000 | 1,401,000 | 1,411,000 | 1,312,000 | 1,312,000 | 1,360,000 | 1,363,000 |

To reiterate, the tables include Not From Concentrate (NFC) production for exports converted to Frozen Concentrate Orange Juice (FCOJ) 65 Brix equivalent using the following conversion factor: 1 metric ton of FCOJ 65 Brix equals 5.6 metric tons of NFC 11.6 Brix.

## Author Defined:

**Exchange Rate**

| Exchange Rate ($R/$US1.00 - official rate, last day of period) |
|---|

| Month | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
|---|---|---|---|---|---|---|---|
| **January** | 3.53 | 2.94 | 2.62 | 2.22 | 2.12 | 1.76 | 2.32 |
| **February** | 3.56 | 2.91 | 2.60 | 2.14 | 2.12 | 1.68 | 2.38 |
| **March** | 3.35 | 2.91 | 2.67 | 2.17 | 2.05 | 1.75 | 2.25 |
| **April** | 2.89 | 2.94 | 2.53 | 2.09 | 2.03 | 1.69 | 2.18 |
| **May** | 2.97 | 3.13 | 2.40 | 2.30 | 1.93 | 1.63 | 1.97 |
| **June** | 2.87 | 3.11 | 2.35 | 2.16 | 1.93 | 1.64 | 1.95 |
| **July** | 2.97 | 3.03 | 2.39 | 2.18 | 1.88 | 1.57 | 1.87 |
| **August** | 2.97 | 2.93 | 2.36 | 2.14 | 1.96 | 1.63 | 1.88 |
| **September** | 2.92 | 2.86 | 2.22 | 2.17 | 1.84 | 1.92 | 1.78 |
| **October** | 2.86 | 2.99 | 2.25 | 2.14 | 1.74 | 2.12 | 1.74 |
| **November** | 2.95 | 2.73 | 2.21 | 2.17 | 1.78 | 2.33 | 1.75 |
| **December 1/** | 2.89 | 2.65 | 2.26 | 2.14 | 1.77 | 2.34 | 1.73 |

Source : Gazeta Mercantil and BACEN (as of October 2006)
1/ December 2009 refers to December 1.