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Report Highlights:

Mandarin production in Japan continues to decline because of high summer temperatures, in addition to a decreasing number of farmers and planted acreage. Such factors are not anticipated to markedly increase citrus imports from the United States because of the sustained weak Japanese yen and inflationary pressures in the Japanese economy. The Japanese market is forecasted to continue experiencing orange juice shortages because of a lack of supply and reduced purchasing power for Japanese consumers.

Tangerines/Mandarins

PS&D Table

Tangerines/Mandarins, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Oct 2022		Oct 2023		Oct 2024	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	0	0	0	0	0	0
Area Harvested (HECTARES)	49500	49200	48300	48000	0	46900
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	0	0	0	0	0	0
Production (1000 MT)	882	878	930	871	0	830
Imports (1000 MT)	18	18	16	14	0	16
Total Supply (1000 MT)	900	896	946	885	0	846
Exports (1000 MT)	2	2	2	2	0	2
Fresh Dom. Consumption (1000 MT)	832	827	874	814	0	775
For Processing (1000 MT)	66	67	70	69	0	69
Total Distribution (1000 MT)	900	896	946	885	0	846
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Crop Area and Production

Mandarin citrus production in Japan is comprised of two varieties; one is Satsuma mandarin called "*unshu mikan*" and the other is "*chubankan.*" The harvested area and production of *unshu* has been on a continuous decline since peaking in 1975. This is partially because of Japan's Ministry of Agriculture, Forestry and Fisheries (MAFF) efforts to reduce production to prevent overproduction and maintain sufficient market prices to secure farmers' incomes. Following MAFF terminating production control efforts, the ministry instead started announcing production estimates to provide information to the Japanese market. For the marketing year (MY) 2024/25, MAFF has estimated 702,000 MT of *unshu* production in Japan. However, because of elevated summertime temperatures, growers and industry participants believe that MY 2024/25 production will be lower than expected. Accordingly, FAS/Tokyo estimates *unshu* production for MY 2024/25 will be 646,000 MT, down 5.2 percent from 681,600 MT for the prior marketing year.

The other variety is "*chubankan,*" meaning late maturing citrus. Some farmers replaced their *unshu* trees with *chubankan* varieties when, due to overproduction, *unshu* prices began falling in the early 1970's. Such *chubankan* expansion successfully contributed to more varieties in the market and extended the peak season until early May. Although *chubankan* production compensated for some of the reduction in *unshu*, *chubanka* production has also been in decline since peaking in 1987. Yet, *chubankan* production still accounts for about 20 to 25 percent of domestic mandarin production. For MY 2024/25, Post estimates 184,000 MT of *chubankan* production in Japan.

Overall, FAS/Tokyo forecasts the total harvested area of *unshu*/mandarin in Japan in MY 2024/25 will be reduced to 46,900 ha due to Japan's demographic challenges of aging farmers and a lack of successors. Accordingly, Japan's mandarin production is estimated to be 830,000 MT for MY 2024/25, a 4.7 percent reduction compared to 871,000 MT in MY 2023/24.

Consumption:
Although Japan's *unshu* production has become approximately 20 percent of what it was in 1975 (3.7 million MT), *unshu mikan* is still the third most consumed fresh fruit (based on volume) in Japan after bananas and apples. It thus becomes the second most consumed fresh fruit in Japan when including the *chubankan* variety. For both *unshu mikan* and *chubankan*, approximately 90 percent of domestic production is consumed fresh, with the remaining 7 and 3 percentages used for juice and canned fruit, respectively.

Japanese consumer preferences for fruit have been shifting toward sweeter products. Thus, many retailers display the brix values for fruit, including for *unshu* and *chubankan*, at the point of sale. Accordingly, breeding programs aim for sweeter varieties, and sorting facilities for *unshu* oranges are all equipped with brix sensors. While production has been on a continuous decline, growers focus on producing high quality products to increase unit prices and corresponding income. However, consumers have limited disposable income to spend on citrus and fruit in general. The result is a negative spiral that is leading to further production decreases and increasing unit prices.

FAS/Tokyo anticipates the decline in mandarin consumption will continue for several marketing years going forward. As a result, fresh mandarin consumption in Japan for MY 2024/25 is estimated to decline 4.8 percent to 775,000 MT.

Trade - Imports:
Table 1 - Japanese Mandarin/Tangerine Imports (MT)

	MY 2019/20	**MY 2020/21**	**MY 2021/22**	**MY 2022/23**	**MY 2023/24**
World	21,031	23,103	14,379	18,119	14,396
United States	12,399	12,277	5,910	5,674	3,449
Market Share:	*59%*	*53%*	*41%*	*31%*	*24%*
Australia	6,959	5,901	3,584	3,797	4,432
Turkey	0	0	1,456	5,609	3,639
Peru	824	4,451	2,677	2,031	2,000
Others	849	474	752	1,008	876

Source: Trade Data Monitor

The current trend of Japanese importers seeking lower priced products is clear. Japan's mandarin imports are shifting away from high quality and priced U.S. mandarins to less expensive product from Turkey and Peru. As a result, the United States has decreased its import share to 24 percent in MY 2023/24, relinquishing the leading supplier position to Australia. Despite the forecasted reduction in Japan's domestic production, FAS/Tokyo anticipates that it will not create much opportunity for U.S. mandarin imports as the Japanese market continues to be price sensitive, in addition to the weakened purchasing power of the depreciated Japanese yen. FAS/Tokyo estimates Japan's imports of fresh mandarin will increase 11 percent to 16,000 MT for MY 2024/25, including a marginal increase to 3,500 MT for U.S. exports.

Exports
Following the Government of Japan's policy to increase agricultural exports, including *unshu* (see JA2021-0103 entitled "Japan Releases Details on Agricultural Export Expansion Plan"), Japan's mandarin exports increased 19.3 percent to 1,931 MT in MY 2023/24, compared to 1,618 MT in the previous marketing year. Although the efforts for expanding *unshu* exports will continue, FAS/Tokyo forecasts Japan's tangerine/mandarin exports will remain almost the same at 2,000 MT for MY 2024/25 due to reduced domestic production.

Policy
During this reporting cycle there have been no policy changes related to tangerines/mandarins in Japan. The import tariff for tangerines/mandarins (Harmonized System Code (HS) 0805.21), clementines (HS 0805.22) and similar varieties (HS0805.29) remains at 17 percent. There is no import tariff rate for the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) member countries, including Australia and Peru.

Oranges

PS&D Table

Oranges, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Oct 2022		Oct 2023		Oct 2024	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	0	0	0	0	0	0
Area Harvested (HECTARES)	390	366	381	353	0	339
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	0	0	0	0	0	0
Production (1000 MT)	6	5	6	5	0	5
Imports (1000 MT)	68	68	74	69	0	65
Total Supply (1000 MT)	74	73	80	74	0	70
Exports (1000 MT)	0	0	0	0	0	0
Fresh Dom. Consumption (1000 MT)	73	72	79	73	0	69
For Processing (1000 MT)	1	1	1	1	0	1
Total Distribution (1000 MT)	74	73	80	74	0	70
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production
Japan's orange production is limited to about 5,000 MT, of which approximately 90 percent is navel oranges. With similarities to *unshu* production, the harvested area for oranges has been on a continuous decline because of structural problems, such as the aging of farmers and the lack of successors. FAS/Tokyo estimates that the harvested area for oranges in Japan decreased another 3.6 percent to 353 ha in MY 2023/24. As this underlying structural problem is anticipated to continue in Japan, FAS/Tokyo forecasts a further reduction of Japanese orange harvested area to 339 ha for MY 2024/25. Corresponding to this reduction, FAS/Tokyo estimates Japan's orange production for MY 2024/25 to decrease marginally from 5,000 MT to 4,800 MT (note: PS&D figure shows the same number because of rounding).

Consumption
Due to the limited domestic production of oranges, the annual consumption of fresh oranges in Japan is highly dependent on the volume of fresh orange imports. The Japanese yen depreciation against the U.S. dollar has had a significant negative impact on the purchasing power for imported agricultural products including fresh oranges. In MY 2023/24, orange consumption in Japan increased 1.4 percent to 74,000 MT. For the post-Covid period, the slight increase in consumption was very weak, resulting in orange consumption currently about 75 percent of the pre-Covid amount. With the forecasted reduced production in California (critical supplier for Japan's orange imports) combined with the ongoing weak Japanese currency, FAS/Tokyo estimates orange consumption in Japan will decrease to 70,000 MT for MY 2024/25.

Trade - Import
Table 2 - Japanese Orange Imports (MT)

	MY 2019/20	MY 2020/21	MY 2021/22	MY 2022/23	MY 2023/24
World	91,116	85,935	71,951	68,364	69,064
United States	49,994	45,883	29,030	30,118	30,701
Market Share:	*55%*	*53%*	*40%*	*44%*	*44%*
Australia	39,668	38,898	37,018	34,324	34,755
Turkey	0	0	3,991	2,249	2,425
Others	1,454	1,154	1,911	1,673	1,182

Source: Trade Data Monitor

Japan imported 69,064 MT of fresh oranges in MY 2023/24, one percent higher than in MY 2022/23. However, the trend has been on the decline in the medium term (see Table 2). Following Australia, the United States is the second largest supplier of fresh oranges to Japan with approximately 44 percent of imports. An indicator of Japan's weakened purchasing power due to currency depreciation, importers have been sourcing oranges from Turkey in recent years. Since the quality of Turkish oranges has been relatively inconsistent compared to U.S. oranges, import volumes from Turkey are fluctuating. However, industry sources mention that the quality gap is decreasing year-by-year. As mentioned, Australia was the leading supplier of fresh oranges to Japan in MY 2023/24 with an approximately 50 percent import share. However, Australian oranges do not compete directly with U.S. oranges since Australia's market season is from July to November.

With the anticipation of a continued weak yen against the U.S. dollar, FAS/Tokyo forecasts Japanese imports of fresh oranges will decrease another 5.8 percent to 65,000 MT for MY 2024/25.

Exports
Japanese orange exports are negligible, around 30 MT in MY 2023/24.

Policy
During this reporting cycle, there have been no major policy changes for fresh oranges to Japan. U.S. fresh oranges have a stepwise tariff elimination schedule based on the U.S.-Japan Trade Agreement

(USJTA). The tariff for U.S. oranges varies depending on the import window (see Table 3). In addition, the tariff on U.S. orange imports to Japan may be subject to a safeguard if imports exceed the safeguard trigger volume (see Table 4). This safeguard is only applicable between December 1 to March 31.

Table 3. Tariff Schedule for U.S. Oranges (HS 0805.10) under the USJTA

Period of the Year	JFY 2024	JFY 2025
1) Between April 1 and November 30	Free	Free
2) Between December 1 and March 31*	5.1%	Free

Source: FAS/Tokyo
* This time period is subject to the safeguard.

Table 4. Safeguard on U.S. Oranges to Japan between December 1 and March 31 under the USJTA

Year	Safeguard Trigger (MT)	Over-safeguard Duty
JFY 2024	44,650	20.0%
JFY 2025	Eliminated	N/A

Source: FAS/Tokyo

Grapefruit

PS&D Table

Grapefruit, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Oct 2022		Oct 2023		Oct 2024	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	0	0	0	0	0	0
Area Harvested (HECTARES)	1240	1170	1235	1170	0	1160
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	0	0	0	0	0	0
Production (1000 MT)	27	25	27	25	0	25
Imports (1000 MT)	33	33	35	35	0	33
Total Supply (1000 MT)	60	58	62	60	0	58
Exports (1000 MT)	0	0	0	0	0	0
Fresh Dom. Consumption (1000 MT)	58	56	60	58	0	56
For Processing (1000 MT)	2	2	2	2	0	2
Total Distribution (1000 MT)	60	58	62	60	0	58
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production
Japan produces negligible amounts of grapefruits domestically. However, Japan produces several domestic and unique pomelo or grapefruit-like citrus varieties such as *buntan*. These domestic grapefruit-like citrus are popular among elderly consumers in Japan. The harvested area and production of these grapefruit-like citrus have been declining, which is a similar situation to *unshu* and other citrus varieties in Japan (note: PS&D carry the same number due to rounding). For marketing year (MY) 2023/24, Japanese pomelo production remains 25,000 MT with harvested area marginally decreased to 1,170 ha. For MY 2024/25, FAS/Tokyo estimates a further marginal reduction of harvested area to 1,160 ha, which is expected to produce a comparable 25,000 MT of grapefruit-like citrus in Japan.

Consumption
Japan's fresh grapefruit consumption traces a downward trend after peaking in 2002, when an in compatibility of grapefruit with hypertension medicine was reported. While the major consumers of fresh grapefruit in Japan are elder generations, Japan's young consumers seek fruits that are sweet and easy handle. Sourness, bitterness, and pealing are characteristics that they tend to avoid.

Grapefruit consumption (including grapefruit-like citrus) in Japan was 60,000 MT in MY 2023/24, a 3.4 percent increase compared to 58,000 MT in MY 2022/23, which is attributed to increased grapefruit imports. However, FAS/Tokyo anticipates reduced grapefruit imports in MY 2024/25 (described below in the "Trade" section), hence domestic grapefruit consumption is estimated to be 58,000 MT for the corresponding marketing year.

Trade – Imports
Table 5 –Japanese Grapefruit Suppliers

	MY 2019/20	**MY 2020/21**	**MY 2021/22**	**MY 2022/23**	**MY 2023/24**
World	60,931	53,865	44,910	33,312	35,272
United States	15,848	12,659	7,968	4,823	5,539
Market Share:	*26%*	*24%*	*18%*	*14%*	*16%*
South Africa	26,269	26,519	23,147	16,075	17,925
Turkey	1,013	636	1,651	5,249	6,526
Australia	1,218	1,505	946	1,167	2,218
Mexico	6,070	4,733	3,120	1,365	1,725
Israel	10,491	7,770	7,996	4,564	1,147
Others	23	41	83	69	192

Source: Trade Data Monitor

Japan's grapefruit imports increased by 5.9 percent to 35,272 MT for MY 2023/24, with the United States supplying 5,539 MT or 16 percent. Following the United States losing the leading supplier position in MY 2016/17, U.S. market share has decreased primarily because of increased pricing for U.S. grapefruits. Given that reduced grapefruit production is estimated in the United States (NASS Citrus

October Forecast) combined with an inflated unit price, FAS/Tokyo estimates Japan's imports of U.S. grapefruits will reduce to 5,000 MT for MY 2024/25.

South Africa has been the leading supplier of grapefruits to Japan after taking over from the United States in MY 2016/17. Separately, Israel's production and trade volume significantly decreased because of the ongoing Middle East conflict. In addition, Turkey continues to expand its market share because of attractive pricing compared to other trading partners.

Given the estimated reduction for South African grapefruit exports in addition to the decrease in U.S. grapefruit production, FAS/Tokyo forecasts Japan's grapefruit imports to decrease 5.7 percent to 33,000 MT for MY 2024/25.

Trade – Exports
Japan's fresh grapefruit exports were negligible in MY 2023/24. FAS/Tokyo forecasts grapefruit exports from Japan will continue to remain minimal for MY 2024/25 because of limited domestic production.

Policy
During this reporting cycle, there have been no significant policy changes related to grapefruit in Japan. The current tariff rate is 10 percent for U.S. fresh grapefruit (HS 0805.40) to Japan.

Lemons/Limes

PS&D Table

Lemons/Limes, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Oct 2022		Oct 2023		Oct 2024	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	0	0	0	0	0	0
Area Harvested (HECTARES)	4650	4620	4700	4650	0	4680
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total No. Of Trees (1000 TREES)	0	0	0	0	0	0
Production (1000 MT)	51	51	52	51	0	53
Imports (1000 MT)	45	45	45	45	0	46
Total Supply (1000 MT)	96	96	97	96	0	99
Exports (1000 MT)	0	0	0	0	0	0
Fresh Dom. Consumption (1000 MT)	66	67	66	67	0	70
For Processing (1000 MT)	30	29	31	29	0	29
Total Distribution (1000 MT)	96	96	97	96	0	99
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production
Located 450 miles west of Tokyo, Hiroshima is the prefecture with the largest production of lemons in Japan, accounting for about 50 percent of the total. In October 2024, the Japan Agriculture Cooperative (JA) announced a lemon production forecast that included a 30 percent increase in Hiroshima for MY 2024/25. As a result, FAS/Tokyo estimates Japan's fresh lemon production to be approximately 12,000 MT in MY 2024/25.

Despite negligible production of limes in Japan, many other types of lemon-like citrus (such as *yuzu*) are cultivated domestically. Such production accounts for nearly 60 percent of Japanese acidic citrus. Typically, domestically produced lemon-like citrus varieties are used as garnishes or for seasoning. For example, *yuzu* production has been steadily increasing due to consumer preference for its distinctive flavor. The unique flavor and scent of *yuzu* clearly distinguishes it from lemon, even though the fruit's functionality is like lemon. FAS/Tokyo anticipates the growth of acidic citrus in Japan to continue and will reach approximately 41,000 MT for MY 2024/25.

In aggregate, FAS/Tokyo estimates total Japanese production of lemon and other flavorful acidic citrus to be 53,000 MT in MY 2024/25, a 3.9 percent increase from the previous marketing year.

Consumption

Unlike other citrus varieties, fresh lemons and other unique lemon-like citrus in Japan are largely utilized in the food sector as garnishes or seasonings for food and beverages. For example, the main use of domestic varieties is for processed products such as salad dressings and jams. Based on industry input, FAS/Tokyo estimates that approximately 50 to 60 percent of domestically produced lemon-like varieties (excluding lemons) are used for processing.

In MY 2023/24, the total consumption of lemons and lemon-like citrus in Japan was 96,000 MT, of which 53,000 MT and 2,000 MT were lemons and limes, respectively.

With an anticipated increase in domestic lemon production and imports, FAS/Tokyo estimates that MY 2024/25 lemon and lime consumption in Japan will increase to 99,000 MT, of which 70,000 MT will be fresh consumption while 29,000 MT will be for processing.

Trade – Imports

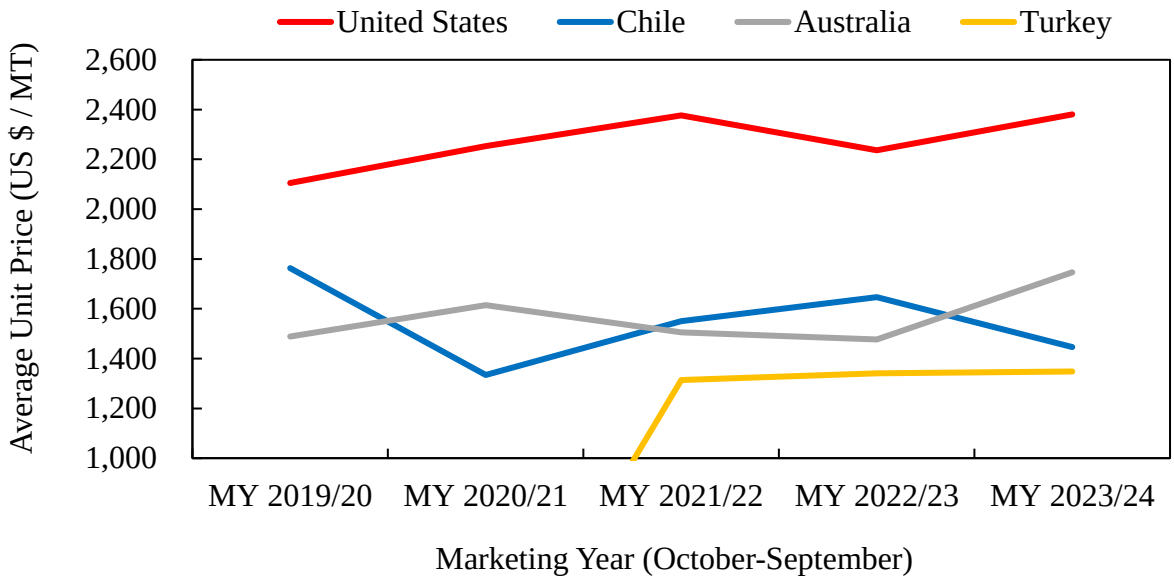
Table 6 - Japanese Lemon and Lime Imports (MT)

	MY 2019/20	**MY 2020/21**	**MY 2021/22**	**MY 2022/23**	**MY 2023/24**
World	48,383	44,003	45,684	45,080	44,637
United States	24,957	20,751	21,936	19,404	16,436
Market Share:	*52%*	*47%*	*48%*	*43%*	*37%*
Chile	17,681	16,310	16,472	15,999	17,665
Australia	561	492	1,828	2,261	3,969
Mexico	1,888	1,658	1,869	1,982	2,092
Turkey	20	0	764	2,733	1,995
South Africa	1,402	2,524	1,776	2,138	1,743
Others	1,874	2,268	1,039	563	736

Source: Trade Data Monitor

Due to the average price difference between U.S. lemons and others in addition to recent Japanese yen depreciation against the U.S. dollar, U.S. lemon market share in Japan has been declining. In MY 2023/24, the United States exported 16,436 MT of fresh lemons to Japan and became the second largest supplier of fresh lemons to Japan following Chile. Chile supplies fresh lemons between June and October when U.S. lemons are generally unavailable, but the average CIF prices of Chilean lemons are about 40 percent cheaper than U.S. lemons (Chart 1). Japanese traders tend to purchase Chilean lemons during transitional months such as June. Furthermore, some of the recent decrease in U.S. fresh lemon supply was supplemented with Turkish lemons, whose average CIF prices are even less expensive than Chilean lemons (Chart 1). Thus, FAS/Tokyo forecasts U.S. fresh lemon imports to Japan continue to marginally decrease, while Japan continues to source more from less expensive suppliers.

Chart 1 – Average Unit Price of Lemons to Japan



Source: Trade Data Monitor

Mexico has dominated the trade in limes to Japan over the past two decades with a stable volume around 2,000 MT. FAS/Tokyo anticipates that the fresh lime trade will remain unchanged in MY 2024/25.

Overall, Japan imported 44,637 MT of fresh lemons and limes in MY 2023/24, a decrease of one percent compared to the previous marketing year. Given increased U.S. lemon production forecasted for MY 2024/25, FAS/Tokyo estimates that Japan's fresh lemon and lime imports will increase three percent to 46,000 MT for MY 2024/25

Trade – Exports
Japan's lemon and lime exports were negligible (less than two MT) in MY 2023/24, and FAS/Tokyo forecasts it will remain the same for MY 2024/25.

Policy:
There have been no significant policy changes this reporting cycle for lemons and limes in Japan. There is no tariff on U.S. lemons and limes imported into Japan.

Orange Juice:

PS&D Table

Orange Juice	2022/2023		2023/2024		2024/2025	
Market Year Begins	Oct 2022		Oct 2023		Oct 2024	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	0	0	0	0	0	0
Beginning Stocks (MT)	14909	14909	15696	8696	0	11584
Production (MT)	0	0	0	0	0	0
Imports (MT)	56868	56868	52000	58915	0	57000
Total Supply (MT)	71777	71777	67696	67611	0	68584
Exports (MT)	81	81	100	27	0	50
Domestic Consumption (MT)	56000	63000	56000	56000	0	56000
Ending Stocks (MT)	15696	8696	11596	11584	0	12534
Total Distribution (MT)	71777	71777	67696	67611	0	68584
(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

** Orange juice imports represent the total of imports under HS codes: 2009.11, 2009.12 and 2009.19. **As Japanese import statistics (via Trade Data Monitor) for orange juice are in kiloliters, the table includes all imports converted to Frozen Concentrate Orange Juice (FCOJ) 65 Brix equivalent in MT. In line with industry standards, the conversion factor for concentrated orange juice (2009.11 (frozen) and 2009.19 (non-frozen)) was 1.3154 or the density of FCOJ at 65 Brix. For liquid non-concentrated orange juice (2009.12), the conversion factor was 0.1897 (standard 1.04 density at 11.8 Brix multiplied by the ratio of 11.8 Brix to 65 Brix or 0.18).*

Production

Orange juice production in Japan is negligible due to limited, domestic orange production. It is estimated that annually approximately 7 to 10 percent of fresh *unshu* is processed into *unshu* juice depending on the crop quality that year (note that this *unshu* juice is not included in the PS&D table for orange juice).

Consumption

The orange juice supply shortage is getting more severe in Japan. FAS/Tokyo estimates that the annual demand of orange juice at 65 Brix equivalent is approximately 70,000 MT. During MY 2022/23, many major bottlers/distributors of orange juice announced the temporary suspension of sales for items with large volume due to supply shortage. When distributors suspended such larger volume package sizes, some fast food franchises also suspended the serving of large size orange juice at stores during MY 2023/24. As Brazilian orange juice production is estimated to further decrease according to this USDA report, the FCOJ price is forecasted to remain high. Combined with the ongoing weak Japanese currency, FAS/Tokyo estimates that Japan's orange juice consumption will continue to be constrained to about 80 percent of average annual demand (56,000 MT) in MY 2024/25.

Imports

In MY 2023/24, Japan imported 58,915 MT of FCOJ at 65 Brix equivalent. While Brazil continues to be the leading supplier of orange juice to Japan, FCOJ imports from that country decreased to nearly 50 percent compared to the pre-Covid era. This reduction in Brazilian FCOJ supply has been partially offset

by increased imports from Israel (second largest supplier of FCOJ to Japan). However, Japan's FCOJ imports were not able to meet the average 70,000 MT demand volume (see Table 7). With the global FCOJ price remaining elevated, Japan's weak yen and reduced purchasing power negatively impacts sufficient procurement when competing against other countries. Therefore, unless the Brazilian FCOJ supply recovers, FAS/Tokyo estimates Japan's imports of FCOJ at 65 Brix equivalent will remain around 57,000 MT to fulfill 80 percent of the consumer annual demand for MY 2024/25.

Table 7. Japan's Orange Juice Imports at 65 Brix Equivalent (in MT)

	MY 2019/20	**MY 2020/21**	**MY 2021/22**	**MY 2022/23**	**MY 2023/24**
World	75,992	49,759	58,059	56,868	58,915
United States	322	342	228	230	261
Market Share:	*0.4%*	*0.5%*	*0.5%*	*0.4%*	*0.4%*
Brazil	53,955	29,874	38,848	30,751	29,687
Israel	5,886	5,860	7,460	12,145	15,420
Mexico	8,734	9,238	8,259	9,457	6,642
Others	7,075	4,559	3,262	4,244	6,904

Source: Trade Data Monitor

Exports

Although the current HS codes do not differentiate between *unshu*/mandarin juice and orange juice, FAS/Tokyo understands that all such Japanese exports are *unshu*/mandarin juice. However, such export quantities are included in the PS&D table for orange juice. In MY 2023/24, Japan exported 81 MT of presumed *unshu* juice at 65 Brix equivalent, most of which went to China, Hong Kong, and Taiwan. Given the anticipated decrease in domestic *unshu*/mandarin production, FAS/Tokyo estimates the export volume to remain low at around 50 MT at 65 Brix equivalent for MY 2024/25.

Policy

The USJTA includes a stepwise tariff elimination for non-frozen and non-concentrated orange juice with a 10-20 Brix value without added sugar (see Table 8).

Table 8. USJTA Tariff Schedule for U.S. Orange Juice to Japan (HS 2009.12.290)

Product	JFY 2024	JFY 2025	JFY 2026	JFY 2027	JFY 2028
Orange Juice, Not Frozen, No sugar added, Brix below 20	9.2%	6.9%	4.6%	2.3%	Free

Source: FAS/Tokyo

For other orange juice categories, the tariff rates for U.S. exports to Japan follow tariff rates for the World Trade Organization (WTO) (see Table 9).

Table 9. Japan's Duties on Orange Juice Imports from WTO member countries (as of Dec 15, 2024)

Tariff Code (HS)	Description	WTO Duty Rate
2009.11.110	Orange juice, frozen, containing added sugar, not more than 10% by weight of sucrose, naturally and artificially contained	25.5%
2009.11.190	Orange juice, frozen, containing added sugar, other	29.8% or 23 yen/kg, whichever is greater
2009.11.210	Orange juice, frozen, not containing added sugar, not more than 10% by weight of sucrose	21.3%
2009.11.290	Orange juice, frozen, not containing added sugar, other	25.5%
2009.12.110	Orange juice, not frozen, of a Brix value not exceeding 20, containing added sugar, not more than 10% by weight of sucrose, naturally and artificially contained	25.5%
2009.12.190	Orange juice, not frozen, of a Brix value not exceeding 20, containing added sugar, other	29.8% or 23 yen/kg, whichever is greater
2009.12.210	Orange juice, not frozen, of a Brix value not exceeding 20, not contain added sugar, not more than 10% by weight of sucrose	21.3%
2009.19.110	Orange juice, other, containing added sugar, not more than 10% by weight of sucrose, naturally and artificially contained	25.5%
2009.19.190	Orange juice, other, containing added sugar, other	29.8% or 23 yen/kg, whichever is greater
2009.19.210	Orange juice, other, not containing added sugar, not more than 10% by weight of sucrose	21.3%
2009.19.290	Orange juice, other, not containing added sugar, other	25.5%

Source: Japan Customs

Attachments:

No Attachments