USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 12/1/2004

GAIN Report Number: CH4062

China, Peoples Republic of

Citrus

Annual

2004

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Report Highlights:
China's MY 2004/05 citrus production is forecast between 13-14 MMT. Total acreage remains stable, with orange area growing slightly and tangerine area declining. In the next few years, citrus production will likely stabilize at current levels while quality improves. Government support focuses on technical extension and market information but there is no significant investment. Demand for high quality fruit will outpace production over the short to medium run leading to fresh orange and other citrus import growth.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Annual Report
Beijing [CH1]
[CH]

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Executive Summary

Official data indicates China produced a record 13.5 MMT of total citrus in MY2003/04 in a high year of the biannual production cycle. The MY2004/05 crop is forecast at the same level even though it is on a down year, as more trees mature. Citrus acreage over the next few years should remain stable at 1.5 MHa due to policy adjustments and geographic/climatic constraints. Yields and quality will maintain steady improvement through more rational farming practices and management.

The Ministry of Agriculture's (MOA) national plan for citrus production in advantageous regions is outlined in its strategy to "plant suitable varieties in suitable areas." To achieve this goal, all levels of government are helping farmers obtain desirable varieties and adopt wholesome farming practices through research institutes and extension work. There are also incentives to attract large agro-businesses to invest in the marketing and processing sectors.

Orange production occupies an increasing share of total citrus production in China, but the supply of high quality fruit will not be sufficient to meet growing demand anytime soon. Although domestic juice consumption is increasing dramatically, Chinese juicing companies source only a tiny share of domestic fruit. Large supplies of juicing oranges are simply unavailable and the short supply season makes operation costs even higher.

Fruit quality is improving steadily, yet post-harvest handling such as grading, washing, waxing, and packing remains primitive. There are no nationally recognized brand names and there is very little domestic marketing. Domestic citrus is mostly early- to middle-arrival varieties harvested in September-December. As cold storage facilities remain insufficient, domestic fresh citrus is rarely found on the market from April to August.

Government and industry infrastructure construction and competitive prices boosted China's citrus exports, which also benefited from lower duties from trade pacts with ASEAN countries. Fresh tangerines have been the main export, mostly to neighboring countries, while canned citrus, being the largest processed citrus, has found stable buyers in developed markets in North America, the EU, and Japan.

Although citrus export volume is much greater than imports, fresh orange import growth is steady. Unlike Chinese oranges, imported oranges are available throughout the year and their appearance and taste attract many high-income urban residents. Imports of FCOJ have grown even faster. Increasing juice consumption is driven by income growth and health concerns. Imported juice will remain the major supply source given limited Chinese production. Reports of reclassification of FCOJ into a higher-tariff category (see Trade) could raise prices, slowing demand growth.

Production

Acreage and production stable or slightly higher with improved quality

Official data on citrus production will not be available until the State Statistical Bureau (SSB) publishes its preliminary statistical report in the first quarter of 2005. Post estimates the MY2004/05 citrus harvest, despite a drought in southern China from September through November, at between 13 and 14 MMT; stable or slightly higher than 2003. With tangerine production flat, oranges make up most of the increase as acreage grows and mature trees yield more. MY2003/04 production estimate has been raised to 13.5 MMT in line with SSB reports on a high-year of the production cycle, an increase of 12 percent. Although dry weather resulted in smaller-sized fruit, the overall quality improved given better management and farming skills. Obtaining accurate official data is not an easy task in China, as farmers tend to underreport their production volume due to concerns about paying more taxes. The government has announced elimination of the agricultural tax in five years' time, but each province decides how fast to implement the cut. Analysts hope future SSB data will more closely reflect reality. Some media reports predict the 2004 citrus crop could top 15 MMT.

Citrus is planted in 19 provinces and municipalities, with major producing regions in southern China. According to MOA statistics, citrus acreage reached 1.5 MHa in 2003. Planted area dedicated to citrus farming is projected to stay at the current levels in the next few years given limited availability of suitable land, both geographically and climatically. New legislation from July 2004 is expected to make reclaiming unused land for commercial production more difficult. The Administrative Reconsideration Law provides that a contractor needs to get the concurrence from landowners and pay compensation when contracting other's land. Under the old system, a farmer could be obliged to follow an administrative order to grow a certain crop on allocated land, or contract his land to others to grow the crop when a lower-level government was pursuing a regional development program. MOA says citrus plantings have been moving from eastern regions to central parts of China and from plains to more hilly areas on economic reasons. The majority of citrus groves are operated by individual rural households on government-allocated land ranging from a couple of mu to dozens of mu (15 mu = 1 hectare).

Tangerines predominate, but orange production catching up on increased area
More than 90 percent of citrus is harvested between September and December, with early (September-October), middle (November-December) and late maturing varieties (January-June) accounting for 15 percent, 75 percent and 10 percent, respectively. Industry specialists indicate loose-skin tangerine (Satsuma mandarins, tangerines and Clementines) acreage accounts for 55 percent of total citrus area but is gradually giving way to oranges. Main tangerine producing provinces are Zhejiang, Fujian, Sichuan, Hunan, Hubei, Guangxi, and Guangdong. All feature locally bred varieties. Navel and sweet oranges occupy more than 35 percent of citrus-planted area and an estimated 30 percent of total production. Main orange producing areas are Sichuan, Guangxi, Jiangxi, Chongqing, Guangdong, Hunan, and Jiangxi. The areas grow varieties or hybrids introduced from overseas. SSB statistics show a lower orange volume, most likely because farmers do not distinguish oranges from mandarins ("gan") when reporting production. Pomelos and a few grapefruit from Fujian, Guangxi, and Sichuan, together with lemons and limes from Sichuan make up the remaining 10 per cent of acreage and production.

Wholesome farming improves fruit quality with lower costs
MOA data indicates the national average citrus yield is around 7.5 MT per hectare. Reports indicate on average 30 percent of harvested citrus is considered top quality. Despite price increases for inputs such as chemicals and fertilizers in recent years, production costs remain basically unchanged or lower due to new farming practices that reduce chemical and fertilizer application. Government offices at several levels encourage and assist adoption of so-called "wholesome" farming in which fruit farmers build hog pens near orchards and apply manure as fertilizer and also adopt bio-chemicals/insects to control pests and diseases. A recent MOA report showed the cost of producing one kilogram of oranges was RMB 0.7-1.3 (RMB 8.265 = USD 1) and tangerines RMB 0.4-0.7, not including labor costs. Farmers consider earnings from citrus as adequate even though increased production resulted in flat market prices over recent years.

Farmers usually graft and prune trees by themselves or hire laborers for $2-3 per person per day. Labor will remain cheap and abundant for the next 5 to 10 years, but could become expensive and scarce in the long run; particularly in more developed coastal provinces.

New plantings are rare. Farmers, instead, prefer to top graft new varieties provided by public-funded research institutes. This practice allows trees to bear fruit in one year. Farmers normally replace only a small fraction (less than 20 percent) of their groves with new seedlings in any year to avoid a complete loss of income. Research institutes recommend new citrus groves planted to be 750 stems per hectare, but tree density in some old groves ranges from 1,200 to 1,500 stems per hectare. MOA officials indicate the national average density rate was 900 trees per hectare. The government encourages lower-density planting to improve fruit quality, yet farmers in some areas are reluctant to thin standing trees for fear of production losses. In some areas, farmers face difficulties in controlling pests and diseases. Other constraints identified by the government and farmers include low yields, limited land for expansion, occasional freezing temperatures, inadequate sunshine (Sichuan), high temperatures (Guangdong), and difficulties integrating groves for commercial production given current production models and small operations.

Canned citrus dominates processed products, orange juice limited
Less than 10 percent of harvested citrus goes to processing. Canned "mandarin oranges" dominate processed citrus products. Canned citrus is primarily produced in Zhejiang province and canneries depend heavily on exports. The domestic market is limited, as consumers prefer fresh fruit that is widely availability. Post estimates China produced nearly 320,000 MT of canned citrus in MY2003/04 market year. MY2004/05 production is forecast to fall below 300,000 MT due to increased costs and tariff rate quotas imposed by the EU (see Trade). Small canneries in Zhejiang will have a hard time as the 2004 production season begins in October. As world market demand remains stable, the production volume is expected to stand near current levels or grow only marginally in the next few years. The trend has been to move canned citrus processing businesses from coastal areas to inner citrus-producing provinces like Hunan and Hubei as labor costs rise. For example, one Hubei official indicated the province would see its canned citrus production increase from 20,000 MT in 2003 to 50,000 MT in 2004.

Local orange juice production lags far behind the dramatic growth in demand. Demand will expand robustly in the years to come. Industry sources indicate only about 1,000 MT of orange juice concentrate is produced in China at this time, mainly in Chongqing municipality. Production is limited because large volumes of low-cost oranges for juicing are simply unavailable. The local Jincheng variety (sweet orange) is desirable for both fresh consumption and juicing; yet the sourcing costs of such oranges makes the final product uncompetitive with imported concentrate. Furthermore, juicing plants can only operate about three months a year due to fruit seasonality, further raising costs. Chinese companies are using lower grade and cheaper oranges as raw materials for juicing. Industry sources estimate that in China it takes approximately 14 MT of oranges to produce one MT of concentrated orange juice. One major juicing company, with the support of the local government, has invested in new juicing facilities in Chongqing. The plan will take 4-5 years for the estimated 100,000 mu of orange varieties dedicated to juicing to begin bearing fruit. Similar investment is also seen in Guangxi province. Some experts advise Chinese juicing companies to produce fresh orange juice blended with tangerine juice to compete with juice from imported concentrate.

Government support focuses on technology extension and information
MOA mapped out an ambitious national plan for citrus production in advantageous regions (see 2003 Citrus Annual, CH3132). The plan calls for integrated production with an extended supply season. The plan would turn the upper and middle reaches of Yangtze River basin into an orange juice production base and the Jiangxi-Hunan-Guangxi belt into a navel orange base. Both would be the largest orange-producing areas in Asia by the year 2012. To realize this goal, local government levels are instructed to adopt favorable land use policies and encourage enterprises to invest in these regions and set up leading agro-businesses. Government support also stresses introducing new varieties and farming technologies through research institutes and extension services, establishing a market information system, and training farmers. However, achieving these ambitious goals will prove extremely

difficult: despite government encouragement, private companies must decide whether such investment is profitable, and current prices for citrus and citrus products are not high enough to guarantee success. New land available for citrus planting is scarce, and other crops competitive, so increases in area will depend on farmers agreeing to change crops.

On the quality side, in 2002, MOA launched a “Wholesome Food Action Plan” calling for wholesome farming practices for all agricultural products to reach the quality threshold of a medium level developed country in five to eight years. Many provinces already have removed the agricultural specialty tax that was once levied on cash crops including fruit. The central government has promised to eliminate the regular agricultural tax within five years; how fast to phase out the tax is up to each province. Rural credit remains a significant national policy problem, but loans, usually less than RMB 10,000, are available to some farmers.

Despite policy and technical extension service support, government investment and information services support is weak. Sometimes different levels of government find it difficult conveying messages to farmers. For example, some farmers refuse to chop down trees in exchange of better quality fruit, and, in some cases, farmers are too poor to invest in managing their groves or adopting new farming methods.

Consumption

Domestic production of high quality citrus will not satisfy increasing demand

China’s overall fruit consumption will grow significantly as consumer incomes grow, particularly in urban areas. MOA officials estimate China’s per capita consumption of citrus at 9 kilograms, lower than the world average. Another government agency forecasts per capita consumption will reach 11.7 kilograms and 16 kilograms, in 2015 and 2030 respectively, based on current consumption trends and purchasing ability growth. As supermarkets and hypermarkets selling quality fruit bloom in large and medium cities, traditional wet market are disappearing. Most experts agree demand for high quality fruit will far outpace domestic production for the foreseeable future. Despite overall fruit quality improvements, top grade fruit accounts for only 30 percent of production.

Fast-growing juice consumption will be accommodated by imports

Demand for orange juice will continue increasing dramatically. Juicing companies’ increasingly advertise the nutritional benefits of orange juice through all media. Young consumers are driving drink consumption at a fantastic speed with demands for drinks with different juice contents. MOA reports per capita consumption of orange juice in China was 0.1 liter in 2001 and it is expected to reach 0.5 liters in 2005 and 2 liters in 2010. This translates into 650,000 MT in 2005 and 2.6 MMT of orange juice consumption in 2010. Forecasts may be overly optimistic given constraints, but the growth rate remains amazing. The local juicing industry will not be able to produce such quantities of orange juice in the absence of sufficient raw materials. A few companies have invested in juicing facilities and commercial groves, but it will take years before sizable orange juice volume is produced. Imports, mostly from Brazil, will satisfy the thirst for orange juice in the short to medium term.

Trade

Tangerines dominate fresh citrus exports; orange exports growing

Tangerines dominate China’s exports of fresh citrus. Primary export markets are Southeast Asia, Russia and Canada. China exported more than 295,000 MT of tangerines in MY 2003/04, nearly 40 percent above the previous year due to a bumper harvest. The trend is likely to continue in MY 2004/05 given abundant fruit and stable prices. China’s fresh citrus is shipped mainly during the September to November production season.

Navel and Valencia oranges are the principle fresh citrus fruit imports. The United States was the largest supplier of oranges to China, followed by Australia –usually transshipped through New Zealand– and South Africa. The demand for imported oranges is strong and stable. Sunkist orange varieties, by no means all genuine Sunkist, supply the market almost year round. Navel oranges start arriving in November-December and serve the market until May, and then Valencia oranges become available and remain in supply through October. Southern hemisphere countries primarily export oranges during their production season in July-October. In general, orange imports see the largest volumes in August and September, just prior to China's Mid-Autumn Festival and National Day when locally produced oranges are rare. Although more oranges are arriving directly at northern ports such as Qingdao and Dalian, about 85 percent of imported oranges enter through southern Chinese ports or are transshipped in Hong Kong due to tax privileges and more experience in trade. At the same time, locally produced oranges have improved in both quality and quantity, and with convenient transportation systems and competitive prices, will take an increasing share of Hong Kong and Vietnamese markets.

Canned mandarins lead the exports in processed citrus; OJ keeps robust imports
China exported 274,860 MT of canned citrus in MY 2003, up 14 percent on year, mainly to the United States, Europe and Japan. On November 7, 2003, the European Commission announced it would impose a temporary duty of 155 Euro per ton on imported canned citrus following the Spanish government calls for safeguard measures against the increasing volume of imported processed citrus. Subsequently the EU instituted safeguard measures and imposed a Tariff Rate Quota (TRQ) on Chinese processed citrus in May 2004. The quota was set at 30,843 MT between 11 April 2004 and 10 April 2005, an amount that is a half of previous annual export volumes to Europe.

China's orange juice import growth is explosive. Brazil remains the single largest supplier of orange juice to China (80 percent), followed by Israel. U.S. juice is of better quality, but more expensive thereby limiting its appeal. U.S. exports of orange juice to China dropped dramatically from 3,809 MT in 2003 to 245 MT in 2004. Imported juice was shipped into the country year round, but faded in August and September when there were large arrivals of fresh oranges. Large juice imports arrive in April and May, just prior to the peak summer demand for drinks.

Trade policy
Tariffs for fresh and processed citrus reached their final bound rate in 2004 following China's 2001 Accession to the WTO (see 2003 Citrus Annual CH3132). With no further tariff reductions scheduled, the effective rate (tariff + VAT) remains high at between 25 percent and 50 percent for most items. Industry sources indicate that the General Administration of Customs notified its local customs offices in July that concentrated orange juice shipped at temperatures greater than minus 18 degree Celsius would be classified as "not frozen" orange juice as opposed to "frozen," thereby imposing a tariff of 30 percent instead of 7.5 percent. As most juice is shipped at this temperature, the reclassification will probably slow down juice imports. Both domestic industry and the Brazilian citrus export group have complained and lobbied the Ministry of Finance, the tax setting body, to reconsider this policy change. The new classification makes it difficult to distinguish concentrate from single strength in trade data because under the new classification they are both treated as "not frozen".

China has protocols with the United States, New Zealand, Thailand, South Africa, and Uruguay to allow fresh citrus shipments to China (see attached table of "Citrus Variety and Country/Region Eligibility List" or CH4048). China's quarantine authorities (AQSIQ) have pushed for Chinese citrus access to the U.S. market, but USDA's APHIS has not scheduled a pest risk assessment (PRA).

On August 6, 2004, China notified to the WTO a draft revision to the existing Administrative Measures of Inspection, Quarantine and Supervision on Entry Fruit in effect since January 1, 2000 (CH1058). With planned implementation on November 20, 2004, these Measures put new requirements for exporters, notably SPS requirements to be written into contracts, new language to be included in exporting country's Quarantine Certificate, Hong Kong and Macao fruit transshipments to receive additional certification, and Chinese language labeling for certain items to be applied on packing. Although this revised regulation has not yet been implemented, exporters should carefully study and discuss this regulation and its implication with importers (see GAIN report CH4036).

Price

Wholesale market prices available online, fruit prices flat

MOA publishes on its web site (www.agri.gov.cn/jghq/gp) wholesales market prices for a wide range of agricultural products on a daily basis. Also available through local government extension services and publications, this price information has become the major information source for fruit buyers and sellers. Prices do not distinguish between imported and locally produced fruit, but do provide indication about the general price situation across the country.

The attached tables contain average quarterly wholesale prices for citrus in different regions. As reflected in the tables, citrus prices have been fluctuating within small ranges over the past few years. However, prices vary significantly from production areas to consumption areas. The price peaks normally appear in the third quarter of the year when stocks drop to the lowest levels prior to new crop harvest. Prices in the tables have been converted into U.S. dollars.

Stocks

Little investment seen in building cold storage on low returns

Very little citrus is stored for long periods due to a lack of large cold storage facilities in citrus production regions. Farmers store citrus in their houses, self-built storage facilities or underground in plastic, with or without first dipping or spraying with preserving agents. Some growers keep oranges unpicked until New Year or even later to Spring Festival in late January or early February in hope of higher prices. Over the years, local governments and industry built some small storage facilities for fruit. The national storage capacity is estimated at 12 MMT, less than 20% of the total fruit production. Cold chain distribution lacks and is used only for high-end fruit, in most cases imported fruit. Industry and growers have considered building cold storage, yet no significant investments have taken place in citrus producing regions due to high costs and low returns. Industry sources indicate that, unlike deciduous fruit that can be stored as long as a year, the citrus storage period lasts only 3-5 months before fruit quality starts deteriorating.

Marketing

Buyer collecting fruit at groves becomes most commonly used marketing practice

In China, citrus marketing mainly relies on traders or their agents. During citrus maturation season, traders negotiate prices directly with citrus growers based on fruit quality. They hire laborers to pick the fruit and truck the citrus to provincial or regional wholesale markets where the fruit is sold to retailers, hotels and individuals. In other cases, farmers pick the fruit by themselves and ship it to local agents who later sell the fruit to wholesalers coming from other regions. Simple hand or machine grading based on size and appearance may happen after harvest, but washing and waxing are rare. Traders seem to have built this distribution network through years of fruit business and most citrus growers have accepted this type of marketing channel. Although farmer groups are forming, their marketing role is limited due to a lack of resources and experience in fruit business. The government is reviewing its policies on agricultural cooperatives.

In some citrus producing areas, such as Hunan and Jiangxi, local governments organize citrus festivals to attract outside buyers. A national agricultural expo that takes place each year in Beijing is aimed at promoting national brands for quality farm produce. Some citrus brands exist, but few enjoy national recognition. Governments at different levels are encouraging leading agro-businesses to achieve such a goal. Some trading companies are promoting their citrus online, but volume sold through this type of advertisement seems marginal.

Citrus grading standards exist, and can be downloaded from China's quarantine agency's web site (www.aqsiq.gov.cn/cms/template/item_dzwjy.html?did=1792&cid=1174\2103). MOA has created an expert committee to develop industry standards for oranges that will be published in the near future. The new industry standards provide specifications for size, color and brix that will become the basis of citrus grading and eventually facilitate the overall quality of Chinese citrus.

Sunkist has made its oranges known and liked by Chinese consumers through innovative promotion activities and extensive advertisements. The dark side of this success is that nearly all imported oranges, as well as the best domestic ones, get labeled as "Sunkist." Sunkist labels even appear on apples and kiwifruit. Despite complaints by industry and the U.S. government, this sort of IPR violation is too widespread to control at this time. Foreign suppliers target large high-income cities like Guangzhou, Beijing, Shanghai, Dalian, and Qingdao. Promotions in hypermarkets are the most commonly used marketing activity. Wholesale market promotions aim at improving wholesalers and consumers knowledge of products. Seminars for importers and update them with new crop information and developments. Billboards and advertisements on buses have gradually replaced TV commercials. Despite higher prices, people are attracted by imported orange's size uniformity, color and taste. Some hotels and higher-income urban residents are stable buyers of imported oranges. Unlike domestic citrus, that is highly seasonal due to variety and lack of storage facilities, imported oranges can be found all year long.

Contact the following USDA Agricultural Trade Offices in China or in-country representatives for Sunkist and Florida Department of Citrus for additional information about marketing and new developments related to citrus:

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Sunkist Growers	Florida Dept. of Citrus	
Attn: Mr. Robin Wang	Attn: Mr. Louis Ng	
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Historical Production Tables by Province in 1000 Ha and 1000 MT

Orchard Area and Production by Province								
	2000		2001		2002		2003	
	1000 Ha	1000 MT	1000 Ha	1000 MT	1000 Ha	1000 MT	1000 Ha	1000 MT
Fujian	137.9	1,306	164.2	1,810	163.8	1,932	164.0	1,944
Sichuan	155.2	1,328	163.8	1,498	180.7	1,662	191.7	1,862
Zhejiang	125.2	972	123.9	1,638	124.0	1,643	125.0	1,767
Hunan	247.9	1,259	253.5	1,588	261.8	1,489	259.9	1,728
Guangxi	110.0	880	115.7	1,321	118.0	1,373	122.0	1,521
Guangdong	82.2	811	94.3	1,135	105.9	1,234	149.9	1,351
Hubei	99.1	946	98.5	1,072	100.3	939	109.6	1,241
Chongqing	63.2	584	68.8	599	92.6	657	96.3	752
Jiangxi	169.3	283	154.5	434	166.4	490	186.0	620
Shanghai	4.8	102	4.4	137	6.0	159	9.5	174
Guizhou	32.9	101	33.4	128	34.9	135	33.9	150
Yunnan	19.5	92	21.6	102	23.2	118	25.1	133
Shaanxi	12.1	35	13.5	42	14.6	59	16.6	99
Jiangsu	3.3	43	3.5	55	3.3	49	3.2	54
Henan	4.9	21	4.7	22	4.0	22	8.1	30
Hainan	2.2	14	2.6	15	2.6	18	2.5	15
Anhui	1.8	5	2.6	9	2.3	8	2.2	11
Gansu	0.2	2	0.2	3	0.2	3	0.2	3
Total	1,271.7	8,783	1,323.7	11,608	1,404.6	11,990	1,505.7	13,454
Production Source: State Statistics Yearbooks Planting Area Source: Ministry of Agriculture Abstracts								

2002 and 2003 Production Tables by Citrus Variety in 1000 MT

Citrus Production by Groups in 2002 and 2003 by volume in 1000 Metric Tons										
	2002					2003				
	1000MT	Gan	Ju	Cheng	You	1000MT	Gan	Ju	Cheng	You
Shanghai	159	0.0	159.4	0.0	0.0	174	0.0	174.4	0.0	0.0
Jiangsu	49	15.1	34.0	0.0	0.0	54	12.5	41.7	0.0	0.0
Zhejiang	1,642	626.6	811.4	20.5	143.5	1,767	752.4	769.4	30.7	169.0
Anhui	8	0.2	7.8	0.0	0.0	11	0.1	10.6	0.0	0.0
Fujian	1,931	516.2	835.2	132.4	427.3	1,944	508.0	818.4	133.3	472.3
Jiangxi	490	92.7	259.2	91.1	12.6	620	104.9	333.7	141.4	12.3
Henan	22	0.0	21.8	0.0	0.0	30	0.0	29.5	0.0	0.0
Hubei	939	237.3	604.2	85.7	2.5	1,241	363.5	743.0	105.9	6.2
Hunan	1,489	482.5	831.4	128.7	46.6	1,728	559.9	951.1	163.4	53.3
Guangdong	1,234	401.4	284.3	133.5	414.8	1,351	434.2	365.3	171.2	380.8
Guangxi	1,373	868.9	0.0	241.3	263.2	1,521	944.3	0.0	295.7	281.3
Hainan	18	8.9	2.5	6.6	0.4	15	1.3	3.3	8.9	0.6
Chongqing	657	223.0	169.6	198.8	62.7	752	259.7	195.8	225.5	67.4
Sichuan	1,662	669.1	385.0	444.8	139.4	1,862	714.6	408.9	511.9	184.9
Guizhou	135	64.9	53.7	8.4	6.1	150	73.2	58.4	10.3	6.9
Yunnan	118	35.9	66.8	7.6	6.2	133	41.9	72.3	10.0	6.5
Shaanxi	59	6.4	45.4	1.5	0.6	99	72.0	17.6	0.6	0.2
Gansu	3	0.0	2.9	0.0	0.0	3	0.0	3.2	0.0	0.0
Total	11,990	4,249.1	4,574.6	1,500.8	1,525.9	13,454	4,842.7	4,996.5	1,808.6	1,641.8
Source: Chinese Ministry of Agriculture Statistical Abstract										

All Citrus Trade
Chinese Citrus Imports from the World by Volume and Value

Fresh and Processed Citrus Imports							
		Volume (MT)			Value (US $ Million)		
HS Code	Description	10/00-9/02	10/02-9/03	10/03-9/04	10/00-9/02	10/02-9/03	10/03-9/04
080510	Oranges	42,828	59,749	53,059	21.840	36.917	37.729
080520	Mandarins	5,701	8,412	6,332	1.972	4.048	3.896
08052010	-Chiao-kan	0	1,152	22	0.000	0.588	0.022
08052020	-Broad-Leafed	0	0	1,312	0.000	0.000	0.875
08052090	-Other Mandarins	5,701	7,260	4,998	1.972	3.460	2.999
080540	Grapefruit	3,509	3,597	2,195	1.178	1.550	1.467
080530	~~*Lemons/Limes*~~	840	0	0	0.388	0.000	0
080550	*Lemons/Limes*	2,930	5,303	5,921	1.378	3.666	5.148
080590	*Other Citrus*	8	15	28	0.009	0.057	0.02
200791	Citrus Jams/Jellies	61	45	152	0.075	0.071	0.23
200830	Citrus Prep.	562	1,163	2,365	0.340	0.922	1.66
200911	Frozen OJ	33,226	42,112	47,675	39.644	53.284	52.615
200912	*OJ <20 Brix*	235	862	1,299	0.171	0.507	0.962
200919	*OJ <20 Brix*	2,610	1,611	4,206	2.002	2.085	4.513
200921	*Grapefruit Juice <20 Brix*	139	331	460	0.121	0.345	0.367
200929	*Grapefruit Juice <20 Brix*	195	295	329	0.312	0.477	0.576
200930	~~*Citrus Fruit Juice*~~	13	0	0	0.022	0.000	0
200931	*Citrus Fruit Juice <20 Brix*	103	219	350	0.049	0.144	0.215
200939	*Citrus Fruit Juice >20 Brix*	192	157	58	0.225	0.272	0.121
Source of Data: China Customs							

Chinese Citrus Exports to the World by Volume and Value

Fresh and Processed Citrus Exports							
		Volume (MT)			Value (US $ Million)		
HS Code	Description	10/00-9/02	10/02-9/03	10/03-9/04	10/00-9/02	10/02-9/03	10/03-9/04
080510	Oranges	5322	14108	28,792	0.861	4.926	9.09
080520	Mandarins	169242	219660	298,684	41.692	55.062	93.111
08052010	-Chiao-kan	6918	7235	3,446	0.968	0.970	1.512
08052020	-Broad-Leafed	747	267	136	0.176	0.091	0.076
08052090	-Other Mandarins	161577	212159	295,101	40.548	54.001	76.218
080530	~~*Lemons/Limes*~~	37	0	0	0.006	0.000	0
080540	Grapefruit	7404	12522	15,207	1.482	2.017	2.642
080550	*Lemons/Limes*	35	39	253	0.013	0.011	0.093
080590	*Other Citrus*	10677	9761	11,048	2.941	2.860	3.48
200791	Citrus Jams/Jellies	103	1573	1,794	0.072	2.070	2.081
200830	Citrus Prep.	216749	240863	274,860	126.049	153.930	164.728
200911	Frozen OJ	2229	2961	2,540	2.542	2.665	2.568
200912	*OJ <20 Brix*	296	117	49	0.232	0.056	0.024
200919	*OJ <20 Brix*	620	446	529	0.561	0.414	0.461
200921	*Grapefruit Juice <20 Brix*	129	198	187	0.146	0.217	0.207
200929	*Grapefruit Juice <20 Brix*	0	1	1	0.000	0.001	0.002
200930	~~*Citrus Fruit Juice*~~	41	0	0	0.032	0.000	0
200931	*Citrus Fruit Juice <20 Brix*	306	285	47	0.171	0.147	0.028
200939	*Citrus Fruit Juice >20 Brix]*	57	42	15	0.077	0.064	0.026
Source of Data: China Customs							

Tariff, VAT, and Effective Rate for Citrus in 2005
Fresh Citrus

HS Code	Description	Tariff	VAT	Effective
08051000	Oranges	11.0%	13.0%	25.4%
08052010	Mandarins (Chiao-kan)	12.0%	13.0%	26.6%
08052020	Mandarins (Broad-leafed)	12.0%	13.0%	26.6%
08052090	Mandarins (Other)	12.0%	13.0%	26.6%
08054000	Grapefruits/Pomelos	12.0%	13.0%	26.6%
08055000	Lemons and Limes	11.0%	13.0%	25.4%
08059000	Citrus, Other	30.0%	13.0%	46.9%
Source: China Customs				

Processed Citrus

HS Code	Description	Tariff	VAT	Effective
20079100	Citrus, Jams and Jellies	30.0%	17.0%	52.1%
20083010	Citrus, In Airtight Containers	20.0%	17.0%	40.4%
20083090	Citrus, Non-Airtight Containers	20.0%	17.0%	40.4%
20091100	Frozen Orange Juice	7.5%	17.0%	25.8%
20091200	Non-Frozen Orange Juice <20 Brix	30.0%	17.0%	52.1%
20091900	Non-Frozen Orange Juice <20 Brix	30.0%	17.0%	52.1%
20092100	Grapefruit Juice <20 Brix	15.0%	17.0%	34.6%
20092900	Grapefruit Juice <20 Brix	15.0%	17.0%	34.6%
20093100	Other Citrus Juice <20 Brix	18.0%	17.0%	38.1%
20093900	Other Citrus Juice <20 Brix	18.0%	17.0%	38.1%
Source: China Customs				

Imported Citrus Variety and Country/Region Eligibility List
(as of November 5, 2004)

Citrus Variety	Exporting Country/Region
Citrus-Tangerines/Satsuma/Mandarin	U.S. (parts of California, Florida, Arizona, Texas), New Zealand, Thailand, Uruguay, South Africa, Taiwan
Citrus-Oranges	U.S. (parts of California, Florida, Arizona, Texas), New Zealand, Thailand, Uruguay, South Africa
Citrus-Grapefruit/Pomelo	U.S. (parts of California, Florida, Arizona, Texas), Thailand, Uruguay, South Africa, Taiwan
Citrus-Lemons/Limes	U.S. (parts of California, Florida, Arizona, Texas), New Zealand, Uruguay, South Africa

Wholesale Market Price Data

Wholesale Market Quarterly Prices for Oranges

Region	Central	North	Northeast	South	Southwest	West	Avg. per kg
Time	(Quarterly average prices in USD per kilogram, RMB 8.265 = US $1)						
Avg Q3 2002	N/A	1.50	1.21	N/A	N/A	N/A	1.36
Avg Q4 2002	0.37	0.92	0.70	0.58	N/A	0.27	0.63
Avg 2002	0.37	1.11	0.87	0.58	N/A	0.27	0.87
Avg Q1 2003	0.26	0.46	0.56	0.43	0.21	0.37	0.42
Avg Q2 2003	0.31	0.68	0.99	0.48	0.20	0.33	0.54
Avg Q3 2003	0.84	1.09	1.37	0.83	N/A	0.16	1.04
Avg Q4 2003	0.26	0.99	0.89	0.78	N/A	0.27	0.71
Avg 2003	0.40	0.85	1.00	0.65	0.20	0.30	0.72
Avg Q1 2004	0.25	0.51	0.81	0.48	0.18	0.17	0.43
Avg Q2 2004	0.23	0.69	0.98	0.41	0.14	0.24	0.47
Avg Q3 2004	N/A	1.16	1.54	0.64	0.11	N/A	0.82
Avg Q4 2004	0.27	0.92	1.12	0.96	0.17	N/A	0.89
Avg 2004	0.24	0.83	1.07	0.59	0.14	0.21	0.64

Wholesale Market Quarterly Prices for Tangerines

Region	Central	North	Northeast	South	Southwest	West	Avg. per kg
Time	(Quarterly average prices in USD per kilogram, RMB 8.265 = US $1)						
Avg Q3 2002	0.13	0.19	0.24	N/A	N/A	N/A	0.19
Avg Q4 2002	0.19	0.22	0.27	0.31	0.11	0.23	0.23
Avg 2002	0.17	0.21	0.26	0.31	0.11	0.23	0.22
Avg Q1 2003	0.20	0.22	0.26	0.23	0.48	0.26	0.24
Avg Q2 2003	0.21	0.29	0.25	0.37	0.31	0.25	0.28
Avg Q3 2003	0.16	0.23	0.33	0.22	0.24	0.47	0.26
Avg Q4 2003	0.17	0.18	0.23	0.21	0.13	0.23	0.20
Avg 2003	0.18	0.23	0.27	0.26	0.26	0.28	0.25
Avg Q1 2004	0.20	0.23	0.23	0.28	0.24	0.22	0.23
Avg Q2 2004	0.20	0.22	0.20	0.27	0.31	0.26	0.24
Avg Q3 2004	0.18	0.28	0.33	0.29	0.25	N/A	0.26
Avg Q4 2004	0.16	0.22	0.20	0.24	0.20	0.28	0.22
Avg 2004	0.19	0.24	0.24	0.27	0.26	0.25	0.24

Wholesale Market Prices for Pomelos

Region	Central	North	Northeast	South	Southwest	West	Avg. per kg
Time	(Quarterly average prices in USD per kilogram, RMB 8.265 = US $1)						
Avg Q3 2002	0.23	0.29	0.44	0.25	N/A	N/A	0.30
Avg Q4 2002	0.25	0.27	0.60	0.23	0.22	0.31	0.33
Avg 2002	0.24	0.27	0.55	0.24	0.22	0.31	0.32
Avg Q1 2003	0.26	0.33	0.45	0.24	N/A	0.45	0.34
Avg Q2 2003	0.21	0.28	0.73	0.19	N/A	0.27	0.27
Avg Q3 2003	0.27	0.33	1.08	0.12	N/A	0.16	0.40
Avg Q4 2003	0.27	0.30	0.38	0.21	N/A	0.36	0.29
Avg 2003	0.25	0.31	0.67	0.21	N/A	0.30	0.33
Avg Q1 2004	0.24	0.36	0.51	0.26	0.23	0.30	0.30
Avg Q2 2004	0.22	0.31	0.51	0.28	0.34	0.30	0.30
Avg Q3 2004	0.32	0.34	0.38	0.24	0.30	0.48	0.31
Avg Q4 2004	0.25	0.30	0.37	0.20	0.24	0.33	0.28
Avg 2004	0.26	0.33	0.43	0.25	0.28	0.33	0.30

Wholesale Market Prices for Lemons/Limes

Region	Central	North	Northeast	South	Southwest	West	Avg. per kg
Time	(Quarterly average prices in USD per kilogram, RMB 8.265 = US $1)						
Avg Q3 2002	1.21	0.85	1.45	N/A	N/A	1.33	1.21
Avg Q4 2002	1.18	0.98	1.30	0.70	N/A	1.45	1.13
Avg 2002	1.19	0.93	1.35	0.70	N/A	1.39	1.16
Avg Q1 2003	0.99	0.92	0.97	1.15	N/A	1.33	1.00
Avg Q2 2003	0.92	0.89	1.27	0.70	N/A	N/A	1.01
Avg Q3 2003	1.13	0.68	1.05	1.32	N/A	N/A	0.98
Avg Q4 2003	0.90	0.59	1.33	0.43	N/A	N/A	0.83
Avg 2003	0.99	0.75	1.16	0.83	N/A	1.33	0.95
Avg Q1 2004	1.21	1.11	1.31	N/A	N/A	N/A	1.20
Avg Q2 2004	1.11	0.75	1.47	1.06	0.48	N/A	1.05
Avg Q3 2004	0.70	1.04	1.77	1.27	N/A	N/A	1.14
Avg Q4 2004	1.21	0.92	1.19	0.84	N/A	N/A	1.10
Avg 2004	1.01	0.96	1.45	1.10	0.48	N/A	1.12

Production, Supply, and Demand (PSD) Tables
Oranges

PSD Table						
Country	China, Peoples Republic of					
Commodity	Fresh Oranges				(HECTARES)(1000 TREES)(1000 MT)	
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		10/2002		10/2003		10/2004
Area Planted	562000	570000	570000	581400	0	590120
Area Harvested	0	0	0	0	0	0
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	3600	3600	3675	4036	0	4200
Imports	60	60	55	55	0	58
TOTAL SUPPLY	3660	3660	3730	4091	0	4258
Exports	14	14	20	29	0	35
Fresh Dom. Consumption	3601	3625	3660	4037	0	4195
Processing	45	21	50	25	0	28
TOTAL DISTRIBUTION	3660	3660	3730	4091	0	4258

Import Trade Matrix			
Country	China, Peoples Republic of		
Commodity	Fresh Oranges		
Time Period	Oct-Sep	Units:	MT
Imports for:	2002		**2003**
U.S.	32359	U.S.	32267
Others		Others	
New Zealand	22374	New Zealand	16923
South Africa	4883	South Africa	3477
Egypt	97	Uruguay	284
Taiwan	33	Chile	101
Thailand	3	Brazil	5
		Taiwan	1
		Thailand	1
Total for Others	59749		53059
Others not Listed	0		0
Grand Total	59749		53059

Export Trade Matrix			
Country	China, Peoples Republic of		
Commodity	Fresh Oranges		
Time Period	Oct-Sep	Units:	MT
Exports for:	2002		**2003**
U.S.	0	U.S.	0
Others		Others	
Hong Kong	9848	Hong Kong	17461
Vietnam	1928	Vietnam	4931
Macau	1227	Singapore	1778
Singapore	570	Russia	1410
Russia	212	Thailand	881
Malaysia	121	Macau	877
Indonesia	106	Malaysia	822
Philippines	48	Kazakhstan	224
Canada	26	Indonesia	212
North Korea	16	Philippines	100
Total for Others	14102		28696
Others not Listed	6		96
Grand Total	14108		28792

Tangerines

PSD Table						
Country	China, Peoples Republic of					
Commodity	Fresh Tangerines				(HECTARES)(1000 TREES)(1000 MT)	
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		10/2002		10/2003		10/2004
Area Planted	702500	702500	695000	695000	0	688000
Area Harvested	0	0	0	0	0	0
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	6545	6545	6500	6870	0	6950
Imports	8	7	10	5	0	4
TOTAL SUPPLY	6553	6552	6510	6875	0	6954
Exports	220	212	230	295	0	368
Fresh Dom. Consumption	5982	5980	5900	6100	0	6061
Processing	351	360	380	480	0	525
TOTAL DISTRIBUTION	6553	6552	6510	6875	0	6954

Import Trade Matrix			
Country	China, Peoples Republic of		
Commodity	Fresh Tangerines		
Time Period	Oct-Sep	Units:	MT
Imports for:	2002		2003
U.S.	56	U.S.	755
Others		Others	
New Zealand	6886	New Zealand	3737
Taiwan	259	North Korea	216
Japan	42	South Korea	216
Thailand	17	Japan	43
		Uruguay	24
		Taiwan	7
Total for Others	7204		4243
Others not Listed	0		0
Grand Total	7260		4998

Export Trade Matrix			
Country	China, Peoples Republic of		
Commodity	Fresh Tangerines		
Time Period	Oct-Sep	Units:	MT
Exports for:	2002		2003
U.S.	0	U.S.	24
Others		Others	
Vietnam	53365	Vietnam	99158
Malaysia	44387	Malaysia	55948
Indonesia	25393	Indonesia	34839
Philippines	22198	Russia	30932
Russia	19342	Philippines	24956
Singapore	19176	Hong Kong	18186
Hong Kong	13300	Singapore	12502
Canada	11311	Canada	11062
Macau	1058	North Korea	1927
Kyrgyzstan	836	Kyrgyzstan	1881
Total for Others	210366		291391
Others not Listed	1793		3686
Grand Total	212159		295101

Pomelos and Grapefruits

PSD Table						
Country	China, Peoples Republic of					
Commodity	Fresh Grapefruit				(HECTARES)(1000 TREES)(1000 MT)	
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		10/2002		10/2003		10/2004
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	0	1526	0	1642	0	1724
Imports	0	4	0	2	0	4
TOTAL SUPPLY	0	1530	0	1644	0	1728
Exports	0	13	0	15	0	18
Fresh Dom. Consumption	0	1517	0	1629	0	1710
Processing	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	1530	0	1644	0	1728

Import Trade Matrix			
Country	China, Peoples Republic of		
Commodity	Fresh Grapefruit		
Time Period	Oct-Sep	Units:	MT
Imports for:	2002		**2003**
U.S.	502	U.S.	789
Others		Others	
Thailand	2044	Taiwan	899
Taiwan	1052	Thailand	503
		South Africa	3
Total for Others	3096		1405
Others not Listed	0		0
Grand Total	3598		2194

Export Trade Matrix			
Country	China, Peoples Republic of		
Commodity	Fresh Grapefruit		
Time Period	Oct-Sep	Units:	MT
Exports for:	2002		**2003**
U.S.	13	U.S.	0
Others		Others	
Hong Kong	9073	Hong Kong	10873
Macau	1127	Philippines	1359
Canada	1052	Canada	1253
Philippines	641	Macau	674
Singapore	232	Netherlands	319
Malaysia	149	Malaysia	197
Indonesia	66	France	131
Belgium	52	Belgium	112
Russia	43	Singapore	99
France	21	Russia	74
Total for Others	12456		15091
Others not Listed	53		116
Grand Total	12522		15207

Orange Juice

PSD Table						
Country	China, Peoples Republic of				Degrees Brix	
Commodity	Juice, Orange				(MT)	
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		10/2002		10/2003		10/2004
Deliv. To Processors	45000	45000	50000	50000	0	0
Beginning Stocks	0	0	0	0	0	0
Production	1800	1500	2000	1800	0	2000
Imports	43723	42525	54246	48592	0	53450
TOTAL SUPPLY	45523	44025	56246	50392	0	55450
Exports	3406	3054	3600	2636	0	1850
Domestic Consumption	42117	40971	52646	47756	0	53600
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	45523	44025	56246	50392	0	55450

Note: figures have been converted into concentrated orange juice using a ratio of 6:1 single strength and concentrate. Products under HS codes 20091200 and 20091900 are both treated as single strength juice.

Import Trade Matrix			
Country	China, Peoples Republic of		
Commodity	Juice, Orange		
Time Period	Oct-Sep	Units:	MT
Imports for:	2002		**2003**
U.S.	3809	U.S.	245
Others		Others	
Brazil	26059	Brazil	39094
Israel	8628	Israel	8300
Netherlands	2838	Netherlands	354
Italy	303	Italy	239
Belgium	302	Australia	148
Australia	124	Spain	89
Taiwan	100	South Africa	43
Germany	97	Hong Kong	23
Spain	57	South Korea	15
Pakistan	44	Taiwan	8
Total for Others	38552		48313
Others not Listed	164		34
Grand Total	42525		48592

Export Trade Matrix			
Country	China, Peoples Republic of		
Commodity	Juice, Orange		
Time Period	Oct-Sep	Units:	MT
Exports for:	2002		**2003**
U.S.	2	U.S.	0
Others		Others	
Hong Kong	2941	Hong Kong	2368
Taiwan	87	Australia	132
Japan	23	Japan	72
		Taiwan	57
		North Korea	3
		Singapore	2
Total for Others	3051		2634
Others not Listed	1		2
Grand Total	3054		2636

Note: figures have been converted into concentrated orange juice using a ratio of 6:1 between single strength and concentrate. Products under HS codes 20091200 and 20091900 are both treated as single strength juice.

Grapefruit Juice

PSD Table						
Country	**China, Peoples Republic of**					
Commodity	**Juice, Grapefruit**				(MT)	
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		10/2002		10/2003		10/2004
Deliv. To Processors	0	0	0	0	0	0
Beginning Stocks	0	0	0	0	0	0
Production	0	0	0	0	0	0
Imports	0	104	0	132	0	160
TOTAL SUPPLY	0	104	0	132	0	160
Exports	0	33	0	31	0	35
Domestic Consumption	0	71	0	101	0	125
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	104	0	132	0	160

Note: figures have been converted into concentrated grapefruit juice using a ratio of 6:1 between single strength and concentrate. Products under HS codes 20092100 and 20092900 are both treated as single strength juice.

Import Trade Matrix			
Country	China, Peoples Republic of		
Commodity	Juice, Grapefruit		
Time Period	Oct-Sep	Units:	MT
Imports for:	2002		2003
U.S.	71	U.S.	99
Others		Others	
South Africa	12	Israel	10
Spain	6	South Korea	10
Israel	6	Japan	4
Australia	4	Australia	3
Japan	2	South Africa	2
South Korea	2	Taiwan	2
Total for Others	32		31
Others not Listed	1		2
Grand Total	104		132

Export Trade Matrix			
Country	China, Peoples Republic of		
Commodity	Juice, Grapefruit		
Time Period	Oct-Sep	Units:	MT
Exports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
Hong Kong	31	Hong Kong	29
Bangladesh	2	Singapore	2
Total for Others	33		31
Others not Listed	0		0
Grand Total	33		31

Note: figures have been converted into concentrated grapefruit juice using a ratio of 6:1 between single strength and concentrate. Products under HS codes 20092100 and 20092900 are both treated as single strength juice.