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## ORANGE JUICE

### USA

The latest forecast from the USDA on Florida's 2024/25 orange crop is 12.0 million boxes, unchanged from the previous report. If realized, this will be 33% less than last season's final production.

The forecast for non-Valencia production is unchanged at 5.0 million boxes. Final fruit size is smaller than the average, requiring 327 pieces to fill a 90lb box. Fruit droppage is above the maximum and projected to be above the maximum at harvest. The Navel forecast (included in the non-Valencia forecast) is 150 000 boxes.

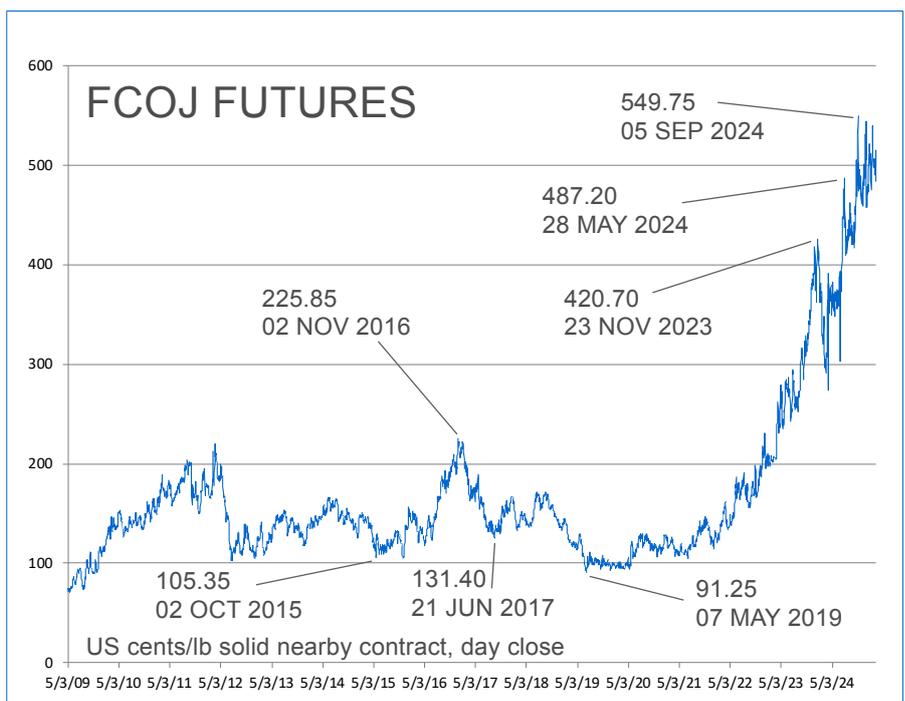
The forecast for Valencia production is 7.0 million boxes - unchanged from the previous forecast. Current fruit size is average and is projected to be average at harvest. Current droppage

is projected to be above the maximum at harvest.

The initial projection for Florida's current all-orange crop in October last year was 15.0 million boxes and the subsequent cuts to the number are predominantly attributed to storm damage and fruit droppage from hurricane Milton which hit the state on 9 October 2024.

### Industry opinion

Local sources in Florida says the industry agrees with the USDA figure. Producers have now harvested the early and mid-season fruit and the Valencia harvest is well under way. So far the Valencia output looks like it maybe slightly better than expected so there could be a small add on at some point from the USDA. Any revisions to the forecast from now on are expected to be minor, given that the crop is in



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advanced stages and also that it is already a very small crop.

Juice ratios are at 14.86 compared with 15.95 at the same time last year and juice yields are registering at 5.83 gallons/box, against 5.68 gallons/box last year.

The 2024/25 crop is expected to wind up early to mid-May.

In terms of growing conditions in Florida; the state has had a very cool winter so far and there was plenty of rainfall at the end of January which arrived at the same time as one of the cold fronts, say local producers. In addition, North Florida encountered below-freezing temperatures and historic snowfall at the end of January.

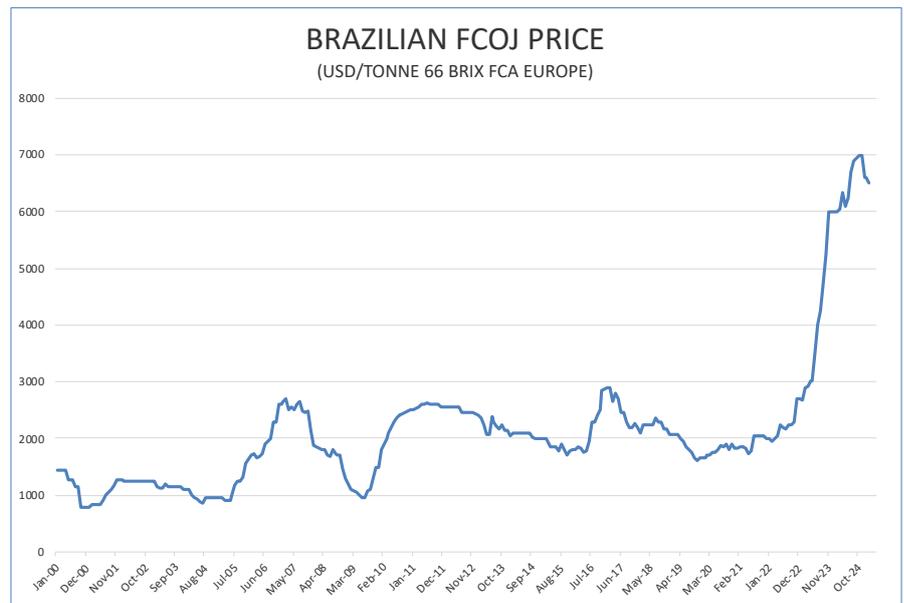
The climate is expected to warm up soon and the trees have stored up energy for a potentially good bloom.

**Futures**

Pricing on the frozen concentrated orange juice (FCOJ) futures market for the nearby month (March) traded up to a contract high of USD5.43/lb solid mid-December and the trade was a good seller. Traders say the selling picked up steam and the speculators that bought the rally were then liquidating their long positions, which took the market down to USD4.61/lb in mid-January. The market has since been mainly bouncing between USD4.50-5.00/lb, but sank to USD4.37/lb this week.

Analysts point out that price levels on the futures market, while still elevated, are in the upper range of price levels for Brazilian FCOJ delivered to Europe (see Brazil section below).

They add that until the global market sees juice supplies increase further, the market is hesitant to sell off. Furthermore, buyers in Europe were holding longer term contracts at lower prices, insulating them from higher pricing to a certain degree. In contrast, buyers in the US have had to



pay the high prices for juice for quite some time, so there is buying demand whenever the market dips, which has kept the market elevated.

**Market drivers**

There is a focus on Mexico at the moment and analysts say they keep receiving conflicting reports about the current crop there – in that it could be bigger than originally forecast. Mexico is ramping up production at the moment, so US market players will be watching for import volumes.

Meanwhile, the next (2025/26) Brazilian crop is expected better than the current crop, which is also continues to be monitored closely by futures traders.

Another wild card is the tariffs that have been implemented by the Trump administration of 25% for Mexico exports to the US. Analysts question whether these tariffs will be a long-lasting tool or just a short-term measure to effectuate immigration policy? And will juice be included?

In terms of price direction on the futures market, traders suggest that the market sentiment is shifting. With a bigger crop coming in Brazil for 2024/26 and possibly better than

expected near-term production from Mexico, as well as waning global, a breakout in pricing is more likely to occur on the downside than the upside.

Recent A C Nielsen retail data for the US shows that total orange juice consumption was down 10.4% in 2024, compared with 2023. So far this year consumption in the US is down around 9%.

**Mexico**

Cold and rainy weather has slowed down the development of ratios in recent weeks in Mexico. Processors are expecting warmer temperatures to enable higher juice ratios, which have been stuck in the 12-13 range. The trees have recovered after the drought in 2024 and look healthy for next bloom period in February-March this year.

The Valencia processing season is in full swing now, but some processors are limiting their procurement volumes because of the low ratios and brix levels. Juice yields are also reportedly poor.

In terms of production; growers report additional fruit coming from an off-season bloom in some of the sourcing

regions. Also, fruit size has increased as result of good rain patterns in the Autumn and Winter period. With these conditions, fruit availability is expected to increase and the crop should be 30% lower than the previous season – which is an improvement on previous estimates. However, the quality of the off-season fruit still needs to be validated for processing purposes.

**Mexico pricing**

Prices for Mexican FCOJ are around USD7000/tonne 66 brix FCA Europe - aligned with current futures prices – but higher than offers last month of USD6500/tonne.

Meanwhile, offers for NFC supplies are on par with the previous two months at USD1300-1400/tonne single strength FCA Europe.

Producers say that demand from US buyers is still strong and that the market there expects the Mexican FCOJ to cover the first half of 2025 demand. Recent news on Trump’s confirmation of a 25% tariff on goods coming from Mexico may impact the processing volumes because most of the industry serves the US market. The consequence of this scenario on the USD/MXP exchange rate and futures market is yet to be seen.

Consumption in Asia and Europe has reportedly been slow due to the high juice prices.

The Mexican Industry is holding low ratio inventory and the quality does not comply with the market expectations. This applies to both FCOJ and, in some cases, NFC. Organic orange juice is following the same pattern.

Processors believe that regular crop will finish in mid-March, however, depending on off-season fruit quality, there may be additional processing in late April and May.

The outlook for the 2025/26 season outlook is still unknown. The bloom is expected to occur later this month and

**BRAZIL ORANGE JUICE PRODUCTION**

Brazilian FCOJ (66 brix equivalent) production for 2024/25 is expected to reach at 1.0 million tonnes, a decrease of 3.6% from the previous year. FCOJ consumption in Brazil is projected at 68 000 tonnes, 2.8% less than 2023/24. Brazilian FCOJ exports for 2024/25 are projected at 932 100 tonnes, a decrease of 6.8% against the previous year. Europe continues to be the main market for Brazilian orange juice, with 121 502 tonnes shipped from July to September 2024, down 30% from the 170 825 tonnes shipped in the same period in 2023.

Total sales of orange juice to the world were USD511.2 million, up 42.51% on the USD359.4 million in the first quarter of the previous harvest. Shipments to the United States fell by 19% to 67,323 tonnes, compared with 83,667 tonnes exported in the same period the year before.

In an attempt to guarantee the supply of juice and maintain exports, some industries, especially in São Paulo (which recorded a 2.22% drop in orange production in 2023) have purchased oranges from Bahia to process into juice, according to Exame.

**Stocks**

FCOJ equivalent ending stocks for 2024/25 are expected to remain at 4 000 tonnes, the same as last year. Stock figures only include inventory in storage tanks at orange juice facilities (processing plants and port terminals) in Brazil.

Ten years ago, according to CitrusBR, global inventories, which include orange juice in storage tanks at processing plants and port terminals in Brazil and stocks abroad (vessels and port facilities worldwide), were over one million tonnes,

Global stocks of orange juice (FCOJ equivalent) held by CitrusBR members on 30 June 2024, totalled 116 710 tonnes, a recovery of 37.7%, compared with the 84 745 tonnes recorded in the same period of the previous year, but the third lowest number in historical data.

According to CitrusBR, the current inventory level still defies supply and blending capacity. The sector is passing through the smallest harvest within the last three decades; it is possible to foresee disruptions in supply throughout the season.

It is expected that stocks will remain close to historic lows for another year, considering the supply and demand projection for 2023/24, which should sustain international prices at high levels in the first half of 2025.

**BRAZIL ORANGE JUICE (65 brix equivalent) Tonnes**

Season	2022/23	2023/24	2024/25
Beginning stocks	9 000	8170	4000
Production	1 080 337	1 065 830	1 100 100
Exports	1 006 167	1 000 000	932 100
Dom. consumption	75 000	70 000	68 000
Ending stocks	8 170	4 000	4 000
<b>Total distribution</b>	<b>1 089 337</b>	<b>1 074 000</b>	<b>1 004 100</b>

Source: USDA

the industry will then need to wait for the fruit set and fruit development to make a first judgement call.

*Editor's note: There is a recent USDA report on Mexico citrus available, but the information in the report does not correspond with the information that Juice Market is receiving from citrus contacts in Mexico. It is possible that there is an issue with deciphering 'marketing year' and 'calendar year' in the USDA report.*

### Brazil

The Fundecitrus forecast on production from the current 2024/25 crop in Brazil stands at 223.14 million boxes, up 3.4% on the previous forecast in September of 215.80 million boxes. Industry expectations are in line with the current figure. The next crop forecast from Fundecitrus will be released on 10 February 2025, followed by a final forecast on 10 April 2025.

The industry continues to run fruit from the current crop, due to the late blooming crop. Much of the fruit is now from the groves owned by the larger Brazilian producers or from fresh fruit market eliminations. Ratios are still low – as they have been all season. Juice yields remain at 300+ boxes per tonne of concentrate. Recent rains are not helping the juice yields or brix levels.

### Brazil pricing

There is not much fruit available on the spot market - it is mostly contracted fruit - but raw material pricing is similar to last month at BRL95-105/box.

Offers for FCOJ out of Brazil are very hard to pin down. Some analysts suggest that offers are on par with last month at USD6400-6800/tonne 66 brix FCA DUP Europe. Others say that lower demand has led to lower pricing from many Brazilian producers

## BRAZIL ORANGE JUICE EXPORTS

With declining volumes and rising revenue, orange juice exports declined in the first six months of the 2024/25 harvest season.

Although export volume decreased by 19.7%, revenue reached USD1.877 billion, a 43.7% increase compared with last year.

The exported volume of orange juice (FCOJ equivalent to 66 brix) during the first six months of the 2024/25 harvest season (July to December) was 430 078 tonnes, representing a 19.7% drop compared with the 535 604 tonnes shipped during the same period of the previous harvest season. Revenue, however, totalled USD1.877 billion, an increase of 42.7% compared with USD1.316 billion recorded during the same period of the 2023/24 harvest season. The data was provided by the Foreign Trade Secretariat and compiled by CitrusBR.

Europe remains the primary destination for Brazilian orange juice exports, accounting for 42.7%. The volume exported in the 2024/25 season reached 228 692 tonnes, a 22.21% reduction compared with the 294 033 tonnes shipped during the first half of the 2023/24 season. However, revenue increased by 41.0%, totalling USD1.037 billion, compared with USD735 million in the previous period.

The United States registered shipments of 161 641 tonnes of FCOJ equivalent to 66 Brix, a reduction of 7.2% compared with the 174 128 tonnes exported during the 2023/24 harvest season. In terms of revenue, there was a 56.4% increase, totalling USD675.8 million, compared with USD432.1 million in the same period of the previous year.

Exports to Japan recorded a 14.07% decrease in the first six months of the 2024/25 harvest season, with a volume of 11 441 tonnes compared with 13 313 tonnes in the previous harvest season. Revenue, however, experienced a significant increase of 79.8%, totalling USD63.0 million, compared with USD35,028,853 in the prior season.

In the case of China, imports from July to December of the 2024/25 harvest season totalled 19 223 tonnes, a 46.1% decline compared with the 35 651 tonnes recorded during the same period of the 2023/24 harvest season. Revenue also dropped by 17.35%, totalling USD52.3 million, compared with USD63.2 million in the first half of the previous season.

Other markets accounted for 114 607 tonnes and USD48.8 million, rounding out the total values for the period.

Source: CitrusBR

of USD6200-6400/tonne on the same delivery basis.

Asking prices for NFC supplies are at USD1250-1400/tonne single strength FCA DUP Europe, against USD1300-1400/tonne last month.

Meanwhile, both Spain and Egypt reportedly have some limited supplies of NFC juice available. Offers out of Spain are around EUR1000/tonne single strength ex works Spain.

Demand continues to weaken, particularly for FCOJ. Analysts say that while January is usually a slow month for sales, uptake is definitely down on last year. They estimate that consumption of reconstituted orange juice in Europe is down by -25-30%, while uptake for NFC juice is only declining around -8-9%.

The short supply has meant that many European retailers are now stocking nectars or juice drinks, instead of

100% orange juice. Nevertheless, some bottlers in Europe are still holding older contracts at lower prices and so are still able to offer some deals in the supermarkets for 100% orange juice

**Uptake**

With the weaker demand on the global market, analysts now do not expect a shortage in the run up to the next crop in Brazil. Buyers are receiving all the supplies they need and some importers in Europe have already started to delay deliveries of shipments. While the carryover into the next crop in Brazil will be extremely low, it may not be as low as the industry was originally expecting.

In addition, the possibility of a tariff on juice imports into the US, particularly out of Mexico, is a concern and would impact market conditions in Brazil. There is the possibility that buyers in the US imported increased volumes from Mexico at the end of January in a bid to avoid being hit by these new taxes.

**Next crop**

Growing conditions are favourable for the next crop in Brazil, with plenty of rainfall and warm temperatures. Flowering occurred right into January, so it will be a later crop again and a multi-bloom season, which often plays havoc with juice quality.

Early indications on production are between 270-300 million boxes. Tree strippings are occurring right now, but the first official forecast on the crop from Fundecitrus won't be available until 10 May.

There has been a lot of investment into both the Sao Paulo and Minas Gerais growing regions in Brazil and analysts say that 300 million boxes next season is achievable. However, greening disease, which is now impacting 40-45% of the trees in Brazil, continues to

**EUROPEAN UNION ORANGE AND ORANGE JUICE PRODUCTION**

EU orange production in 2024/25 is projected to reach 5.7 million tonnes – similar to the previous year.

EU orange juice production in 2024/25 is projected at 50 200 tonnes, down from the 54 900 tonnes in 2023/24. The improved calibre of oranges in Spain in 2024/25 compared with the previous season are expected to result in reduced volumes devoted to processing. Hence EU orange juice production is expected down from previous season levels. A smaller number of oranges is expected to be devoted to orange juice also in Italy, where citrus production is largely intended for fresh consumption.

In 2024/25, orange juice import levels are expected to increase to 527 000 tonnes compared with 479 100 tonnes the previous season, when the tight global market balance and price surge pushed imports down. Egypt is the EU's second largest supplier of orange juice after Brazil, which accounts for over 85% of the EU's import market.

In 2024/25, EU orange juice exports are expected to decline to 111 000 tonnes, from 114 000 tonnes the year before. The United Kingdom remains by far the largest destination of EU orange juice, accounting for over half of the EU's exports.

In 2024/25, orange juice consumption is expected to bounce back to 466 200 tonnes, from 419 000 tonnes in 2023/24.

Source: USDA

have a bearish impact on production in the form of early fruit droppage.

*Editor's note: There is a recent USDA report on "Citrus: World Markets and Trade" available, but the information in the report on global orange juice production does not correspond with the information that Juice Market is receiving. It is possible that there is an issue with deciphering 'marketing year' and 'calendar year' in the USDA report.*

**APPLE JUICE**

There has only been limited processing from cold store apples in Poland over the past month.

The official figure on production from the recent 2024/25 crop from the statistical office in Poland (published on 18 December 2024) is 3.4 million

tonnes, but there are doubts from the industry that output will reach that level.

Nevertheless, by the end of the season the industry in Poland should be able to produce between 200 000-250 000 tonnes of apple juice concentrate, say industry sources.

Prices for industrial fruit are now between PLN1.05-1.10/kg, against PLN0,95-1.10/kg last month.

Offers for medium acid concentrate are between EUR2200-2400/tonne 70 brix 2.0-2.5% acid ex factory Poland, compared with EUR2350-2600/tonne last month.

High acid concentrate is more expensive at EUR2500-2600/tonne 70 brix 3.0+% acid ex factory Poland, against EUR2550-2700/tonne last month.

Market uptake is reportedly quiet, but traders say they are still getting regular requests from buyers.

Analysts suggest that buyers are not covered that far forward and expect the market to pick up in April when expectations for the new season in Europe and China will be clearer.

In terms of the current supply; assuming that the season started with more or less empty stocks and production was around 200 000 tonnes at the start of December, analysts suggest that around 100 000 tonnes could be still in stock with the Polish companies, if the export figures during this time are factored in. In addition, Poland imported 35 000-45 000 tonnes of apple juice concentrate in the second half of 2024. How much of these stocks are still unsold is difficult to determine, say analysts.

**Other sources**

Producers in Turkey are offering around EUR2200-2400/tonne 70 brix low acid FOB Turkey, compared with EUR2300-2400/tonne last month.

Access to finance is difficult there and very expensive, costs are constantly increasing, and the need for working capital is also increasing. Fruit juice producers maintained their cash flow by exporting apple juice concentrate as soon as it was produced. Turkish exports grew this season by around 8% as a result. In addition, the expectation of new tariffs expected by the USA also led to prompt shipments recently. Compared with previous seasons, juice producers now have a much lower amount of free stock. Producers are also trying to stay away from contracts with long loading schedules in order to provide quick cash inflow to their businesses.

Moldova is reportedly still sitting on good volumes of fresh apples. Moldavian processing plants received about 220 000 tonnes of apples from the recent harvest, which is much less than was originally forecast (230 000-250 000 tonnes). So there is not

much apple concentrate available at the moment.

Meanwhile, producers in Ukraine are reportedly offering concentrate for around EUR2150-2200/tonne 70 brix 2.5% acid ex factory Ukraine.

**China**

The Chinese New year is now over and the processing plants have started again. There are only limited supplies of fruit being run and raw materials remain expensive at USD0.20/kg.

According to official figures recently reported, apple juice concentrate production from the 2024/25 crop in China will reach around 480 000 tonnes, compared with the 350 000-400 000 tonnes the market was expecting. Nevertheless, exports have been strong and stocks levels are limited there as a result.

The increase in exports are attributed in part to efforts to avoid the tariffs from the US market.

Offers for Chinese apple concentrate are around USD1550-1700/tonne 70 brix low acid FOB China, compared with USD1600-1750/tonne last month. However, the price situation going

forward is very unclear - it will depend on the reaction from the Chinese industry on the tariffs. Analysts expect any tariffs to include juices.

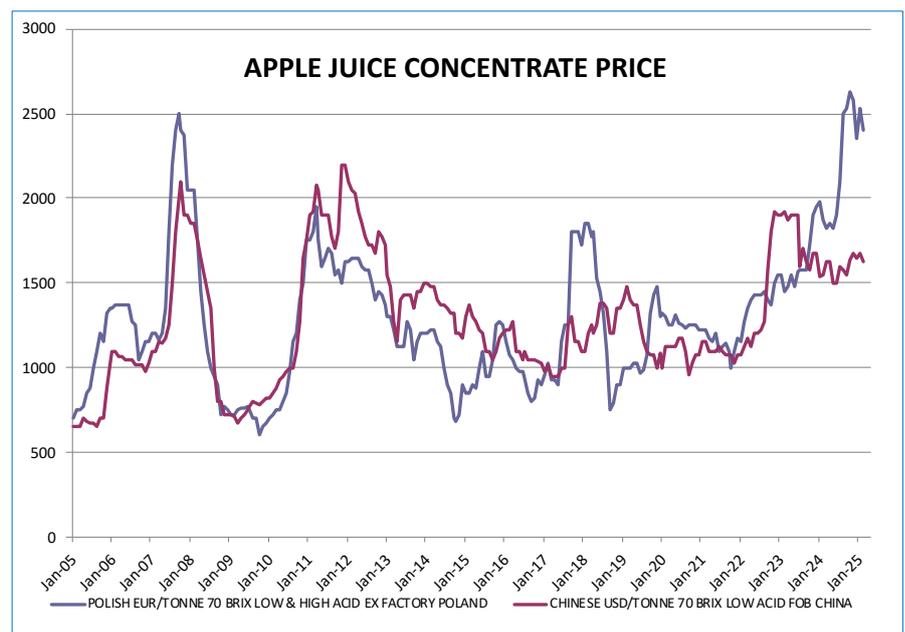
**GRAPEFRUIT JUICE**

The USDA forecast for grapefruit production for the 2024/25 crop in Florida is 1.20 million boxes, unchanged from the previous forecast.

The red grapefruit forecast is unchanged at 1.05 million boxes. Fruit size of red grapefruit at harvest is projected to be above the maximum, and droppage is projected to be above the maximum. The white grapefruit forecast is unchanged at 150 000 boxes. Projected fruit size of white grapefruit at harvest is above average. White grapefruit droppage is projected to be above the maximum.

Local producers in Florida suspect that production could be even lower due to the possibility of fruit drop being higher than forecasted.

Growing and harvesting conditions in the main grapefruit regions have been favourable over the past month, but there were a couple of cold snaps at the end of January. The trees should



be in dormant state, based on these cooler weather conditions.

As mentioned last month, Florida processors say there will only be limited fruit run through the plants this season and those volumes will go towards red NFC production.

### **Texas**

The USDA has increased its forecast for grapefruit production in Texas for the 2024/25 crop to 2.5 million boxes, from 1.9 million boxes. However, local industry sources in Texas suggest that the crop will be lower at around 2.0 million boxes.

They add that juice production in January was lower than expected due to strong utilization from the fresh packing houses. Nevertheless, the juice plants ran more fruit in January than they did in December.

In terms of growing and harvesting conditions, the grapefruit regions in Texas experienced two freeze events on 21 and 22 January. It is still too early to know how much of an impact the frost has had on the crop and producers say they will know more in a couple of weeks.

At this stage, they suggest that the Valencia orange crop was impacted, but that grapefruit should be okay with minimal damage. Texas has experienced some very difficult weather events over the past few years, the like of which has not been seen in decades.

### **Mexico**

The grapefruit season in Mexico wound up in December. Some out-of-season fruit was left out on the trees, but processors decided to focus on orange processing.

The coloured grapefruit was late to develop, but finally reached acceptable ratio and brix levels in December allowing the industry to fulfil most of

the market requirements.

Current pricing for coloured grapefruit concentrate out of Mexico is at USD4000-4200/tonne 58 brix CFR Europe – on par with last month.

Offers for white grapefruit concentrate from Mexico are also unchanged on last month at USD4000-4200/ tonne 58 brix CFR Europe.

Most of the inventory has been allocated to buyers in the US, Asia and Latin America, but there are still some stocks of white grapefruit concentrate available, say local processors.

Meanwhile, traders in Europe say that the grapefruit juice market very quiet and that all eyes are on the next crop in South Africa which will start in April/ May.

According to the USDA, in 2024/25 grapefruit production in the European Union is forecast at 111 000 tonnes, against 110 000 tonnes the previous year. Of this, 12 000 tonnes are earmarked for processing.

## **GRAPE JUICE**

The 2025 grape crop in Argentina will begin in March and plantations have been receiving strong and repetitive hailstorms over the past month. Nevertheless, producers say that production is still expected to reach 2.0-2.2 million tonnes - a fairly typical crop. Last year the crop was cut back to 1.9 million tonnes.

Meanwhile, the outlook for the government quota on the volume of grapes that will be destined for the juice industry is still unclear, but local industry sources suspect that a minimum of 25% of the grapes this season will go to the juice sector. The remainder can then be used for wine or more juice.

Offers for white concentrate from Argentina are at USD1650-1750/tonne 68 brix in drums FOB Buenos Aires.

Demand is reportedly firm and buyers are reportedly keen to begin negotiations on new crop supplies. Producers say there will start quoting from mid-February

Carry over stocks from last season are sufficient to meet demand until the 2025 crop begins.

Last year Argentina more than doubled its exports of grape juice concentrate. Between January-December 2024 Argentina shipped 82 500 tonnes, against 40 550 tonnes during the same period the year before.

Producers in Argentina are keeping a close eye on the tariff situation for apple juice concentrate exports from China to the US. White grape concentrate and apple juice concentrate have similar properties and can be substituted for each other in many blends. At the moment grape juice concentrate is cheaper than apple juice concentrate.

### **Europe**

Production from the 2024 grape crop in Spain was reportedly 17% higher than the previous year, but still short compared with the average output over the past 10 years.

Offers for white grape juice concentrate are at EUR1950-2050/tonne 65 brix ex factory Spain.

The next crop will begin in September, with near zero carry in supplies and there is also strong demand for white wine (i.e. white must). As a result, prices for grape juice concentrate in Spain are expected to remain firm this year.

Meanwhile production from the 2024 crop in Italy was below average and strong demand for rectified grape must has put additional pressure on the mute must market, say analysts.

Asking prices for white grape juice concentrate are at EUR2000+/tonne 65 brix ex factory Italy. The market is expected to remain firm until the start of the new crop.

## LEMON JUICE

The 2025 lemon crop in Argentina will begin in the second half of April and while it is still too early for any accurate estimates on production, growers suggest that the total lemon crop (for fresh and processing) will be smaller than last year at 1.3-1.7 million tonnes.

The lower output is good news for the industry which has been under an oversupply and low pricing situation until very recently.

Offers for concentrate are between USD1400-1600/tonne 400gpl FOB Buenos Aires, on par with last month

Demand has reportedly been strong and the industry will enter the new crop with zero carry-in supplies. In addition, producers in Argentina are facing high costs due to the strong Peso against the US Dollar, as well as energy, labour and freight, therefore analysts expect prices for concentrate to continue to remain firm.

Producers add that essential lemon oil is also increasing in price and demand is increasing.

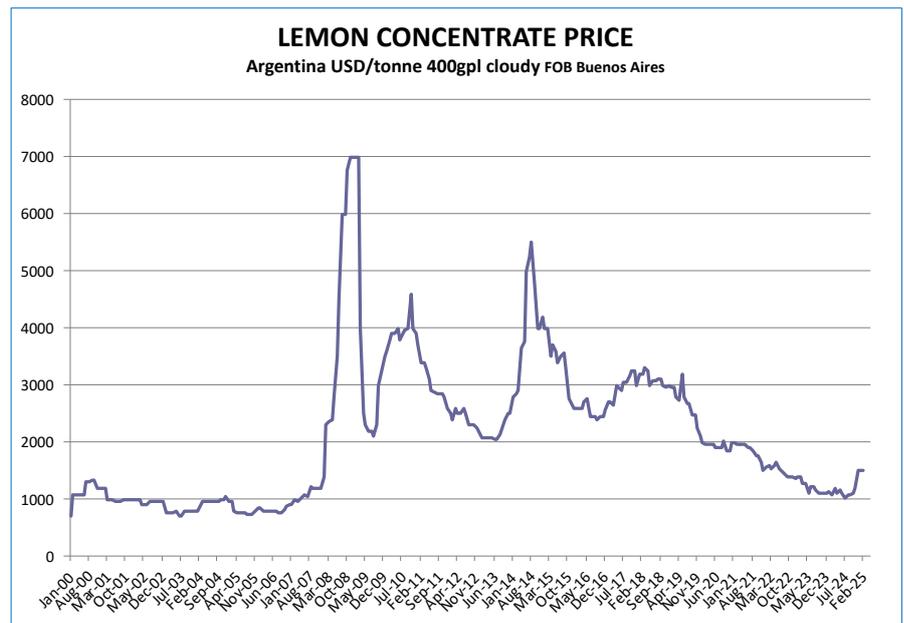
### Europe

In Spain, the overall crop is expected to be down to 1.25 million tonnes, from 1.50 million tonnes the year before. Around 300 000 tonnes are expected to be earmarked for processing. Prices for lemons for processing are increasing.

Over in Sicily, climatic conditions have resulted in smaller fruit which is good for the juice industry, but not so good for juice yields. Prices are expected to be slightly higher than last year due to higher costs such as labour, transport and packaging.

### USDA data

According to the USDA, global production of lemons and limes in



2024/25 is forecast down 651 000 tonnes to 10.2 million tonnes due to the drop in production in the EU and Turkey as a result of unfavourable weather.

Lemon and lime production in the EU in 2024/25 is expected to decline to 1.52 million tonnes, against 1.77 million tonnes the year before. Of this, 302 000 tonnes are earmarked for processing in 2024/25, against 438 000 tonnes in 2023/24.

## PINEAPPLE JUICE

The Winter crop in Thailand is now over. Output there remains well below par due to a sustained drought four months ago. Raw material prices are now at record highs of THB15/kg and some of the larger process are willing to pay “almost any price” in order to secure supplies, which industry sources say is bad for the market.

With the high rewards on offer, growers have been cutting any fruit over 1.5kg, which could have an impact on production from the forthcoming Summer crop, which will begin in April.

Growing conditions for the Summer crop are favourable.

Offers for concentrate from Thailand

are at USD4000+/tonne 60 brix FOB Bangkok – on par with last month.

Demand is extremely strong and some buyers are reportedly lowering their expectations on juice quality due to the dearth of supplies.

There are still two and a half months to go before the next crop and so market prices are expected to remain firm in between crops.

The Thai producers have tried to import supplies from Indonesia, only to discover that the Indonesian producers are also sold out.

Expectations on total fresh production in Thailand for 2024 remain at 650 000-700 000 tonnes. While output this year is expected to be slightly higher, there is a significant backlog of orders to be delivered on.

Those end users than can, are reducing pineapple in recipes, or eliminating it as an ingredient. However, some of the other major juices such as apple and particularly orange are also expensive at the moment, so it is difficult to manage the multi-juice blend products.

### Other sources

In Costa Rica, the situation is described as dire. Processors are reportedly

struggling to meet commitments for NFC supplies and have no spare volumes to offer. The main issue is reportedly the small fruit. The fresh market has been forced to take on smaller fruit sizes which has further reduced supply to the processors. As a result, the farmers are asking the processors to pay more for fruit, in spite of already having agreed contracts. Fruit prices have gone up from to USD400/tonne, from USD320/tonne in October.

This is expected to continue until at least the summer unless there is a strong flowering, better growing conditions or demand subsides. As a result, processors are revising their budgets for juice production down by 25-35% for 2025, say analysts.

Last month, producers in Costa Rica were giving forward indications on pricing of USD4000+/tonne for the next crop in May, say analysts.

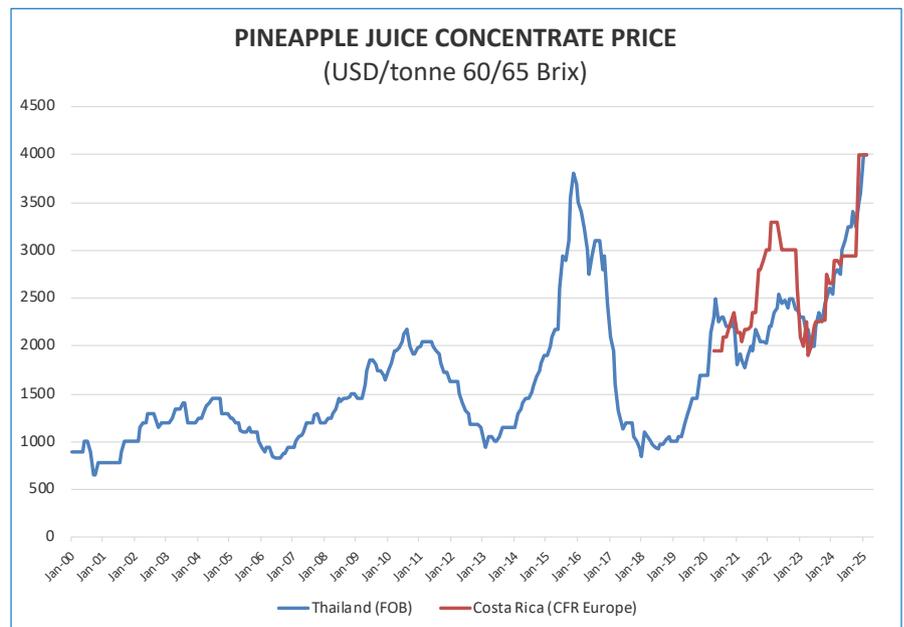
Producers in Kenya are also struggling to meet demand commitments, in spite of the current peak production period, due to rains preventing fruit reaching the processing plants. This has led to concerns about high nitrate levels. In addition, demand from the fresh market is strong.

## MANGO JUICE

### Alphonso

Producers in India describe the Alphonso mango puree market as static. In spite of production from the 2024 being 20-30% down on the previous year, there is a good amount of inventory of both 100% and blended Alphonso and the industry is hoping for a revival in demand from both the domestic and export markets ahead of the new crop.

Offers for Indian Alphonso USD1300-1450/tonne single strength FOB India – on par with last month. Prices remain at the same level as last month.



Local industry sources say that one development that could have long term impact is that the beverage industry seems to be moving away from Alphonso due to higher pulp prices, and price fluctuations from year to year.

### Totapuri

Demand for Totapuri puree and concentrate has picked up over the past month, which has been helped by the end of hostilities in the Middle East – a key market for India. Uptake is predicted to continue to be buoyant with the run up to the Summer season in the northern hemisphere and the industry is confident in moving the surplus inventory.

Asking prices for Totapuri puree are between USD720-750/tonne single strength FOB India, compared with USD750-925/tonne last month.

Offers for Totapuri concentrate are now at USD1300/tonne 28 brix FOB India, against USD1225-1500/tonne at the start of January.

In related news, freight rates from India have now stabilised at around USD100/tonne with normalisation of shipping through the Suez Canal. The industry expects that freight rates will

remain stable or possibly move further down by another USD20/tonne.

### Colombia and Mexico

The Winter mango crop in Colombia has now wound up. The supply of fruit for the whole of the Colombian industry from the 2024 Summer crop is estimated at 150 000-155 000 tonnes, and this Winter crop will add a further 12 000-14 000 tonnes.

Growing conditions for the forthcoming Summer crop, which will begin in late march to early April, are favourable.

There are only limited supplies of concentrate in Colombia and offers are similar to last month at USD1295/tonne 28 brix FOB Colombia, Asking prices for NFC mango juice are also unchanged on last month at USD1050/tonne single strength FOB Colombia.

Producers say that forward prices for the upcoming 2025 main Summer crop will be available soon.

While demand is reportedly stable, there has been an uptick in enquires from companies in the US recently due to the uncertainty of the possible 25% tariff for Mexican products. Processors in Colombia are preparing for the possibility that some US buyers will want to close deals as soon as

quotes are available for 2025 supplies in Colombia.

Meanwhile, the crop in Mexico will begin in late March or early April and producers say the crop looks good so far. There are no carry over inventories in Mexico, demand is reportedly strong and shipments are running to schedule. However, as mentioned, there are major concerns over US tariffs.

## PASSION FRUIT JUICE

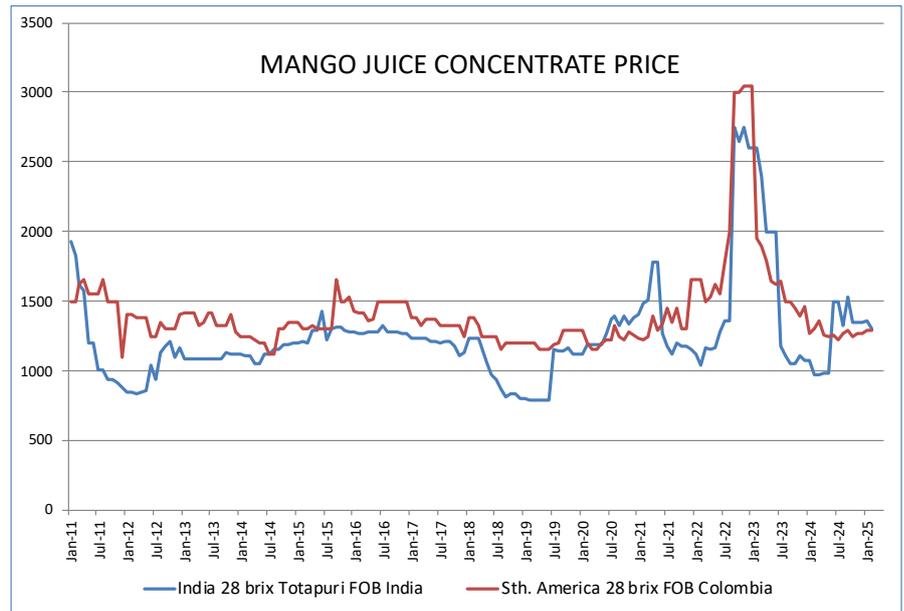
### Ecuador

In Ecuador, production of passion fruit remains poor due to the worst drought in 60 years, which that has affected the country over the past five months. Production in Ecuador in 2024 was reportedly 40–50% lower than in 2023. Nevertheless, the rainy season has recently begun, which has offered hope for improvement in output. The extent of a recovery remains uncertain and it is likely that production will remain modest until the next peak season in March/April.

Industry sources in Ecuador anticipate some volume increases from new plantations entering production in March/April, as well as increased output from the older farms that will start to benefit from recent rains.

Juice yields in Ecuador have slightly improved over the past six months, but remain far below average. Improvements in juice yields going forward will depend on weather conditions.

Raw material pricing is around USD0.55-0.60/kg, against USD0.60/kg last month. Processors in Ecuador expect fruit prices to decrease slightly by early March as the peak crop approaches, providing that competition for fruit remains the same as it is today. However, overall fruit costs are expected to remain elevated for the first quarter of the year.



Most producers are currently focussing on fulfilling existing contracts, but recent new trades for concentrate have been reported at USD10500/tonne 50 brix FCA Europe – on par with last month. Asking prices for NFC supplies are also unchanged on last month at USD3500/tonne single strength FCA Europe.

Without a clear indication of an improved crop in Ecuador, no firm pricing trends are expected to emerge in the near term, say processors. For this reason, there are not many producers offering supplies at the moment. Both producers and buyers are being cautious until the outlook for production from the main peak crop becomes clearer and mainly securing contracts only for the first quarter of 2025.

The global market supply in 2024 was relatively balanced, bolstered by leftover stocks from Vietnam’s bumper crop in 2023. This ensured that most buyers received their required volumes. For 2025, producers in Ecuador anticipate demand to remain consistent.

Farmers in Ecuador continue to replant, driven by high fruit prices and the support of effective promotion and training programmes. However, the

enthusiasm observed during previous farming cycles has somewhat waned. New challenges, such as pests and viruses exacerbated by extreme temperatures, are impacting plantations. Additionally, some farmers are shifting to higher-value crops such as cocoa. The same is occurring in Peru and Vietnam.

### Peru

Peru’s previous peak production period concluded in September. The output was poor which left minimal fruit volumes available for the remainder of the year. The new season started last month and production is slow at the moment. Producers expect increased fruit availability later this month and in March and the outlook for the second half of the year is optimistic. However, overall production for Peru in 2025 is not expected to surpass the production levels seen in 2024.

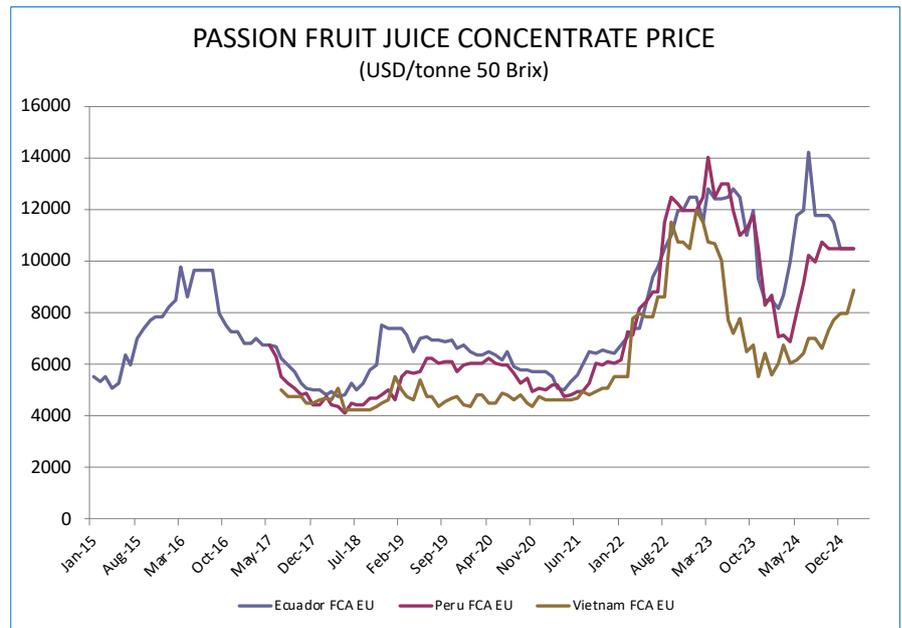
Where available, supplies of concentrate are offered between USD10000-11000/tonne 50 brix FCA Europe, on par with last month. Asking prices for supplies of NFC passion fruit juice are at USD3200-3500/tonne single strength FCA Europe, against USD2800-3000/tonne last month.

**Vietnam**

Vietnam's peak harvest season concluded in September/October 2024, with output significantly lower than in 2023. Despite the reduced production, the market remained balanced thanks to carryover stocks from the bumper crop of 2023. Most buyers are reportedly well covered until March/April 2025, when the new crop will begin.

Currently, China is absorbing the majority of the available fruit at high prices, further tightening the supply. Similar to Ecuador and Peru, pricing discussions are expected to commence once factories have access to more fruit. With stocks anticipated to run out at some point, industry sources foresee intense competition for the available fruit well into the second half of the year.

Offers for passion fruit concentrate



from Vietnam are around USD8500-9200/tonne 50 brix FCA Europe, against USD8000/tonne last month.

Asking prices for NFC supplies from

Vietnam are pegged at USD3100-3400/tonne single strength FCA Europe, compared with USD3000/tonne last month.

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