Crisil
a company of S&P Global

Monthly dashboard – Orange

Jan- 2026

Production trends

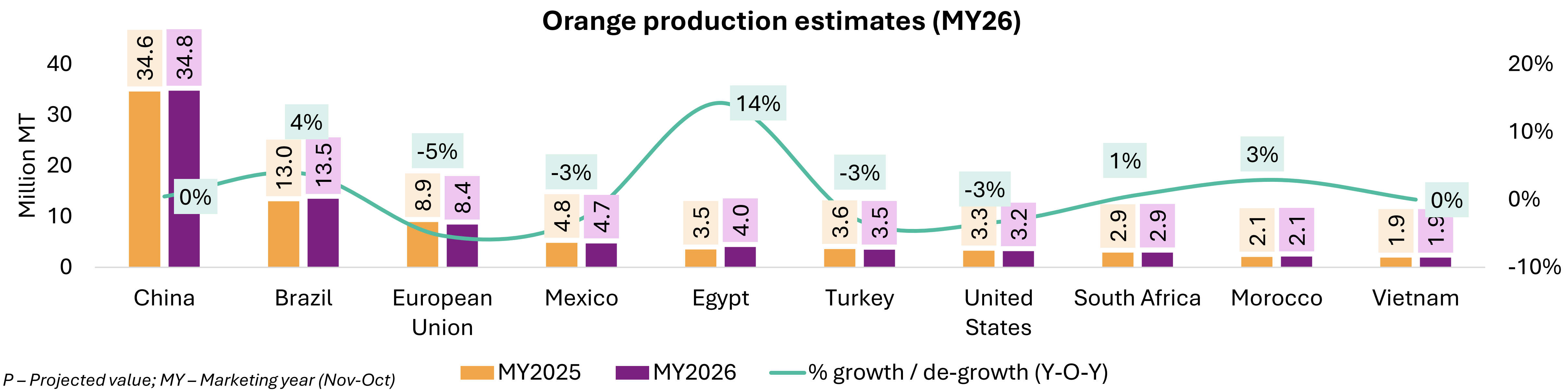
Major producing countries

Countries	Agro-Climatic Zone	Harvesting Period	Major Export Varieties
China	Subtropical (Hunan, Jiangxi, Sichuan)	Navel Oranges - late October to late December. Temple Oranges - December to March. Clementines and Tangerines - late October to January	Navel, Valencia, Jincheng
Brazil	Tropical & Subtropical (São Paulo, Minas Gerais)	Early Varieties - May to August. Mid-Season Varieties - July to Oct. Late-Season Varieties October to January.	Pera Rio, Valencia, Navel, Hamlin
EU	Mediterranean (Spain, Italy, Greece)	Peak seasons: In Spain, Italy, and Portugal, peak seasons are generally from January to April.	Navelina, Valencia Late, Tarocco
India	Semi-arid/tropical (MH, MP, Punjab)	Nov – Mar (Ambia & Mrig)	Nagpur Orange, Malta, Kinnow
Mexico	Tropical/subtropical (Veracruz, Tamaulipas)	Nov – May	Valencia, Navel, Salustiana
Egypt	Arid/Mediterranean (Nile Delta)	Nov – May	Navel, Valencia, Baladi, Sukkari
Turkey	Mediterranean coastal (Adana, Mersin, Antalya)	Nov – May	Washington Navel, Yafa, Valencia
US	Subtropical (Florida, California)	Oct – Jun	Valencia, Navel, Hamlin, Cara Cara
South Africa	Mediterranean & subtropical (Limpopo, EC, MP)	Valencia - July to September. Navel season - June to July.	Navel, Valencia, Midknight, Cara Cara
Morocco	Mediterranean (Gharb, Souss Valley)	Oct-Jul	Navel, Salustiana, Maroc Late, Valencia

- The global orange supply is well-distributed across countries due to diverse agro-climatic zones, enabling year-round availability.
- Northern Hemisphere producers like the EU, US, India, Egypt, Turkey, and Morocco harvest mainly between October and April.
- Southern Hemisphere producers such as Brazil and South Africa fill the supply gap from May to September.
- This seasonal staggering ensures consistent global supply and creates natural trade windows: Countries export when others are off-season. Prices generally peak during lean months (July–October) and decline during major harvests (November–March).

Note: *As per USDA,* ***Marketing year (MY)*** *for Oranges is considered as* ***Nov-Oct****.*

Production estimates of major producing countries



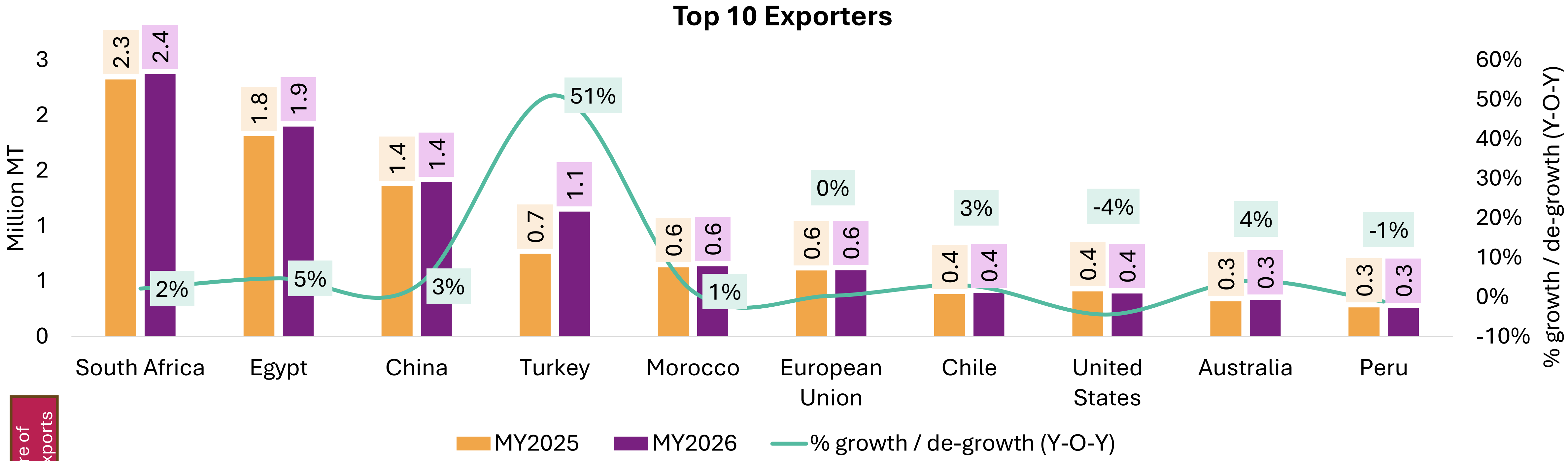
P – Projected value; MY – Marketing year (Nov-Oct)

- The countries in the chart **collectively account for 92% of the global production**. For MY26P, **global orange production is projected to remain flat (+0–1%),** with **Egypt's** strong **14% recovery** from improved yields offsetting declines in the EU (−5.3%), Turkey (-3.1%), Mexico (−3%), and US (−3.3%) amid weather and disease pressures.
- **Egypt:** Orange production is projected to **rise ~14% YoY**, driven by **favorable weather during flowering and fruit set**, **improved yields**, and **additional bearing area** as previously planted orchards reach maturity, alongside sustained export momentum encouraging **higher productive intensity**.
- **Brazil**: Output is expected to **increase ~4% YoY**, supported by a recovery from **last season's drought-impacted low base**, **improved weather conditions**, and a higher number of bearing trees, partially offsetting ongoing citrus greening pressures.
- **European Union** orange production has **declined** (**Spain ~9%, Italy ~6%)** driven by **prolonged drought conditions**, **irrigation restrictions**, and **heat-induced fruit drop**, constraining marketable volumes despite normal flowering across key producing regions such as **Andalucia and Valencia**.
- **India's** orange production is set to **decline** due to **poor yields** in **Maharashtra**, **Madhya Pradesh**, and **Punjab**. Punjab faces **reduced yields** from **poor flowering** linked to **low water levels**, while **pest pressure** is impacting **Madhya Pradesh** and **Maharashtra**.

Note: *The country-wise production figures in the chart represent the combined output of oranges, tangerines, and mandarins. In India's case, sweet oranges (Mosambi) are not included in the orange production. Source: USDA, 3rd Advanced Horticulture Estimates Ministry of Agriculture and Farmer's Welfare*

Export trends and price outlook

Major exporters of Orange

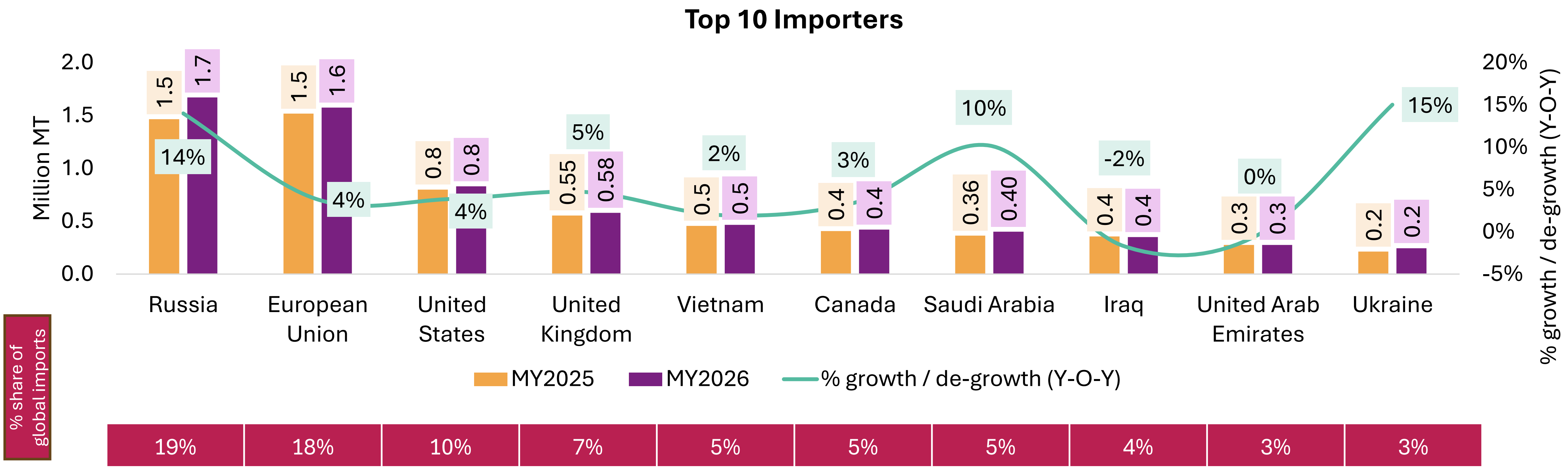


% share of global exports	South Africa	Egypt	China	Turkey	Morocco	European Union	Chile	United States	Australia	Peru
	22%	20%	15%	12%	7%	7%	4%	4%	3%	3%

- The countries shown in the chart **collectively account for ~97% of total global orange exports.**
- In MY2026P, global orange exports are expected to grow by about 6% year-on-year, mainly due to a 51% rebound in Turkey's shipments, driven by better yields, quality, pricing, and renewed demand from Eastern Europe and the Middle East.
- **U.S. citrus exports** have **edged down** about **4%**, as **labor shortages**, **higher production costs**, and **climate stress** continue to squeeze exportable surplus—implying exports are more likely to stay flat or slip slightly rather than return to sustained growth.
- **South Africa** recorded **~2% increase** in **orange exports** in **MY2026**, largely driven by **stronger shipments** to **the European Union**, where exports surged **45% year-on-year** to nearly **0.4 million metric tons.**

The country-wise export figures in the chart represent the combined output of oranges, tangerines, and mandarins.
Source: USDA; 1. S.A regains leadership in the EU orange markets

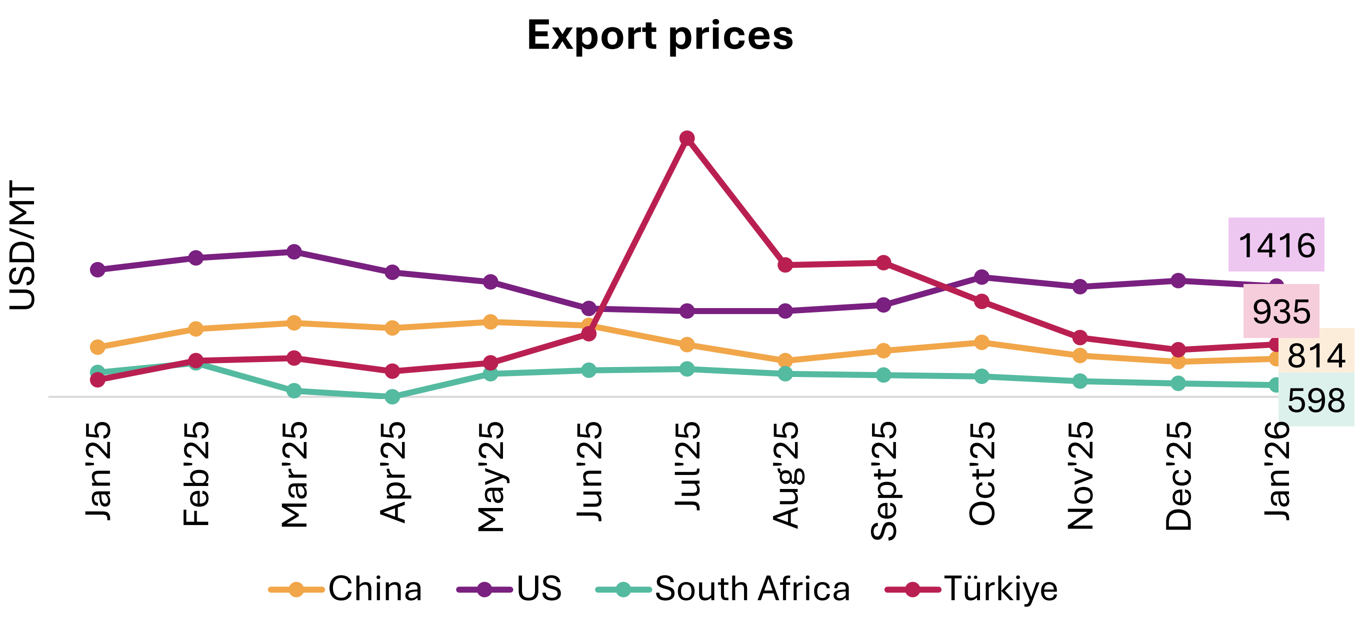
Major importers of Orange



- The countries shown in the chart **collectively account for ~80% of total global orange imports.**
- **Global orange imports are projected to rise slightly by 4-5% year-over-year.** In Russia, imports are anticipated to grow further because domestic production has declined and consumer demand for citrus fruits is increasing.
- **The UK government** has ended routine **SPS border checks** on **fruit** and **vegetables** from **the EU**, including **citrus**, under a **UK-EU agreement**. This removes **inspection delays** and **fees for medium-risk produce**, making **exports to the UK easier and cheaper**.
- **The US[1]** removed the **30% tariff** on **oranges** and **orange juice** in November 2025, which is expected to **boost imports** from major suppliers like **South Africa** in 2026. **Lower landed costs** will enhance competitiveness and normalize shipment patterns, following earlier front-loading to avoid tariffs.

Source: USDA   Source 1: [US Tariff Exemption]
The country-wise export figures in the chart represent the combined output of oranges, tangerines, and mandarins.

Export prices trend and forecast for Orange (Feb’26-Apr’26)

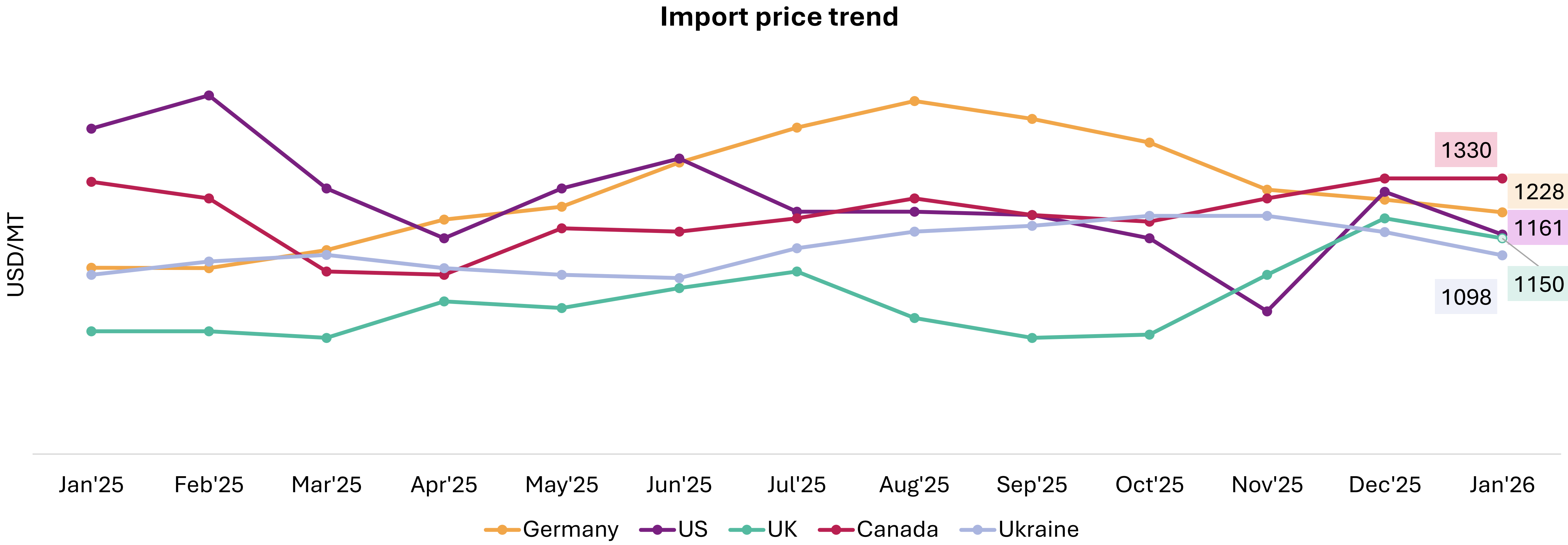


Country	Jan’26 Price (USD/MT)	Jan’25 Price (USD/MT	%age change	Indicative price change direction	Forecasted average price range for FMA (USD/MT)
China	814	910	-11%	Bearish	750-810
US	1,416	1,550	-9%	Sideways	1,380-1,440
South Africa	598	700	-15%	Bearish	530-590
Türkiye	935	640	46%	Sideways	890-950

- In **the US, tariff exemptions introduced in November 2025** have **lowered import costs** and **stabilized shipments**. However, with **limited winter demand**, export prices are expected to **stay flat or soften** in the next quarter.
- **China’s** prices are expected to **stay flat or turn slightly bearish** next quarter, as **abundant new crop arrivals increase supply**, while steady export demand helps limit further declines.
- **South Africa’s** strong exports through **December-January** have kept **supply high** and **prices low**; as shipments slow in **Jan-Feb**, prices may **stabilize** but stay below early season levels.
- **Turkey’s** orange production fell **about 3 % in 2025**, and **harvest delays** tightened exportable supply during **Dec–Feb. Limited availability** and **steady demand** have kept **prices firm** and are expected to do so in the **upcoming quarter.**

Source: ITC trade map
Note: Price forecasting has been done for Jan’26 through fundamental analysis. FMA stand for, February, March , and April 2026
HSN Code used: 080510: Fresh or dried oranges

Price trends of key importing nations



- **Import prices of oranges have been volatile among major importing countries**. Between Jan 2025 and Jan 2026, prices increased significantly by 16-30% in Germany, and U.K, while the U.S. saw a ~15-16% decline.
- A clear seasonal trend emerges in **U.S. orange import prices**, which typically **drop** by **10-15%** from **December to January** as harvests in the **U.S, EU, and Turkey boost supply**. This influx consistently **outpaces demand growth**, easing market tightness and leading to **lower prices—**a pattern that **reliably repeats each citrus season**.

Source: ITC trade map
Note: Price forecasting has been done for Jan’26 through fundamental analysis.
HSN Code used: 080510: Fresh or dried oranges

Thank You

Methodology for price forecasting

Our methodology combines comprehensive secondary research, targeted stakeholder consultations, and rigorous analytical techniques to ensure accuracy and actionable insights. The methodology comprises three key stages: Data Collection, Data Analysis & Interpretation, and Price Forecasting.

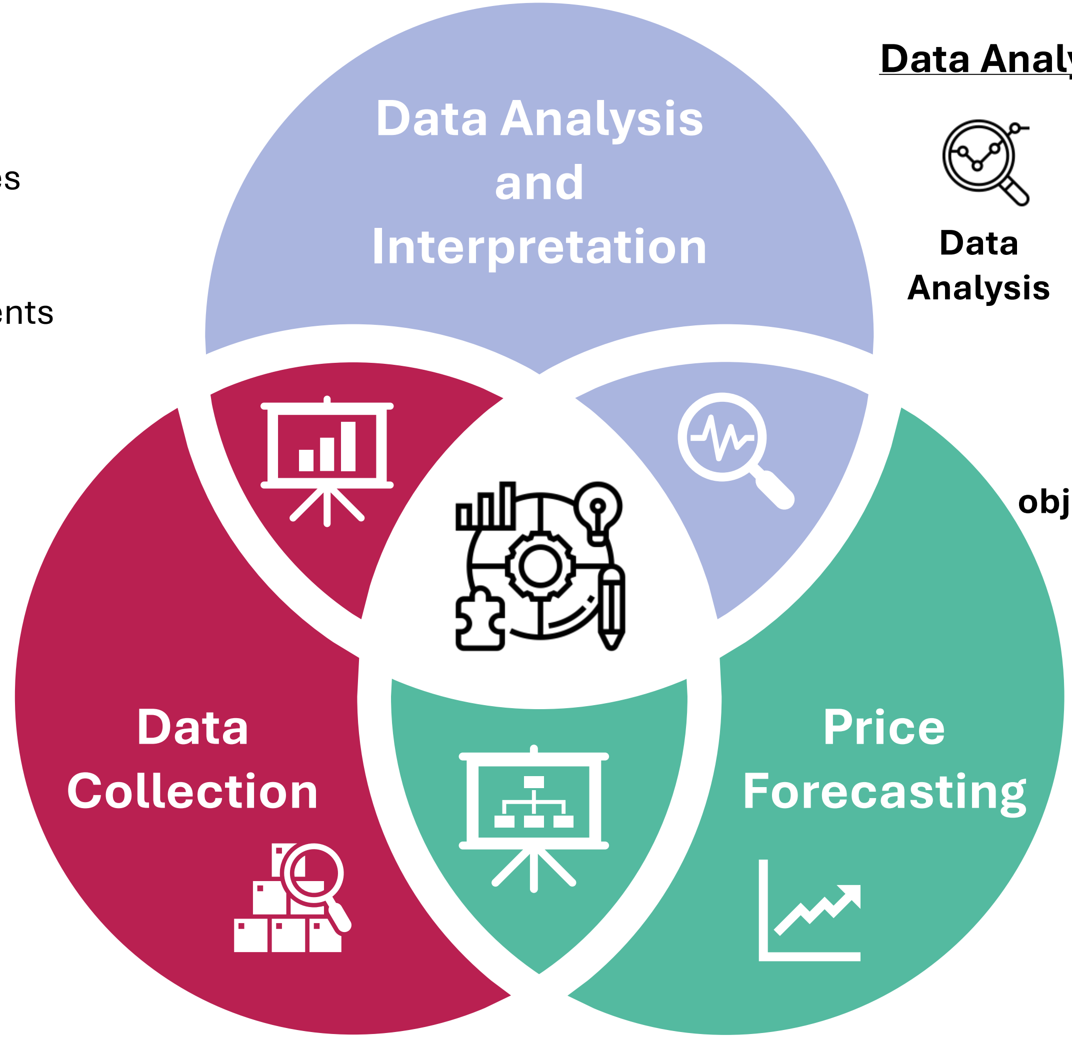
Data Collection

Sources

- Global agricultural databases (USDA, FAO, etc.)
- Country-wise statistics from official agriculture departments
- Industry publications and research reports

Policy Updates

- Detailed review of Production policies & trade barriers for each country
- Data from government websites & official publications



Data Analysis and Interpretation

Data Analysis

- Supply-demand assessment
- Policy impact analysis
- Stakeholder consultations

Key objectives

- Production trends
- Trade dynamics
- Policy implications

Price Forecasting

- Historical Trend & Seasonality
- Macro-Economic & Trade Variables

Integration of commodity fundamentals and their analysis to forecast future price ranges.

Structured consultations with Indian exporters and industry associations, cross-verifying secondary data and validating price forecasts to refine production, trade, and policy assessments.

2026 data is based on trade estimates and fundamental analysis due to unavailability of real time data on secondary sources