Crisil
a company of S&P Global

एपीडा
APEDA

Monthly dashboard – Orange

Sep- 2025

Acreage and production trends

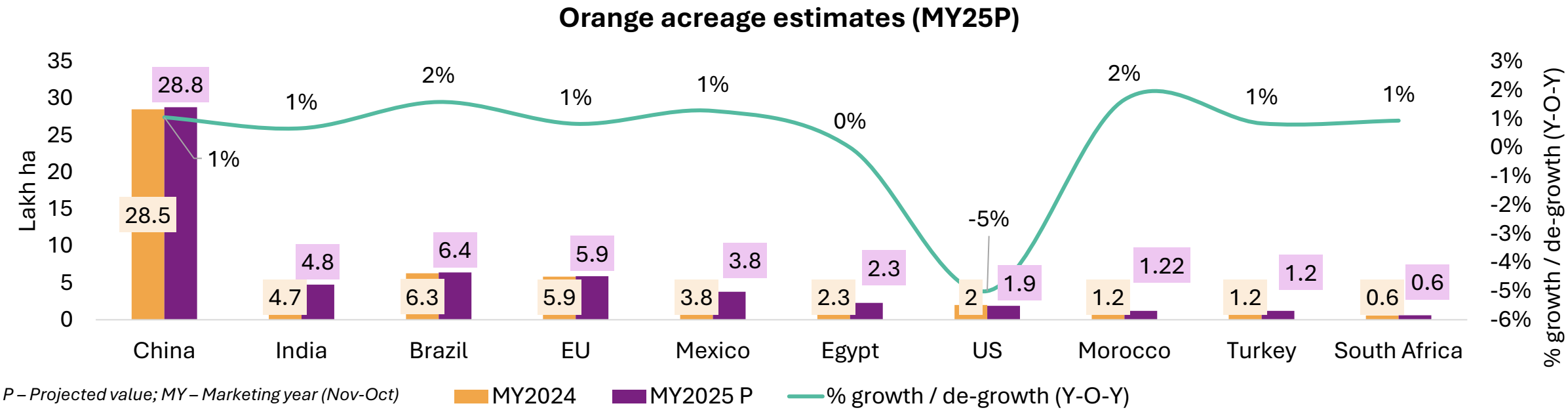
Major producing countries

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****.*

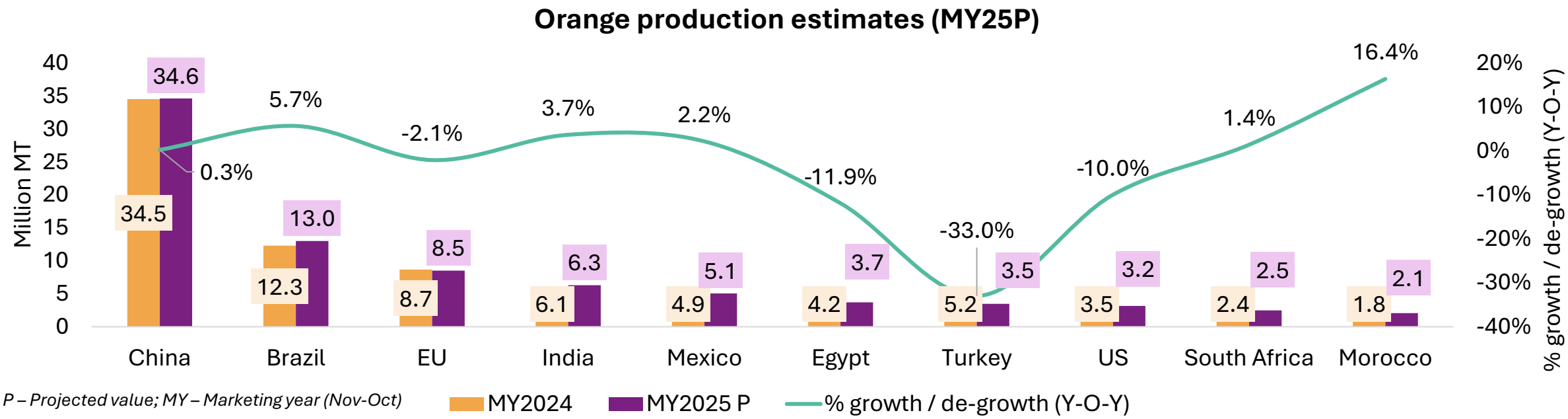
Acreage estimates of major producing countries



- The countries shown in the chart collectively **account for ~80% of total global orange acreages.**
- In MY25, **global orange acreage is projected to rise marginally by 1% year-on-year**, supported by stable to slightly increasing area in most countries except the US, where acreage dropped sharply by 5%.
- **The US orange sector has seen a steep decline**, with production falling 11% between MY20 and MY25, mainly due to citrus greening disease, hurricanes, and reduced acreage in Florida. **Rising labor and input costs have pressured growers**, resulting in one of the lowest outputs in decades, driving prices higher and increasing dependence on imports.
- The Maharashtra govt. has approved a **2-year extension** and **funding boost** for **modern orange processing** facilities in Vidarbha, allocating approximately **INR 40 crores** to enhance infrastructure, quality control, and value addition. This initiative seeks to minimize post-harvest losses and encourage farmers to expand their orchards in the future.

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, Ministry of Agriculture and Farmer's Welfare, Crisil Intelligence*

Production estimates of major producing countries



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

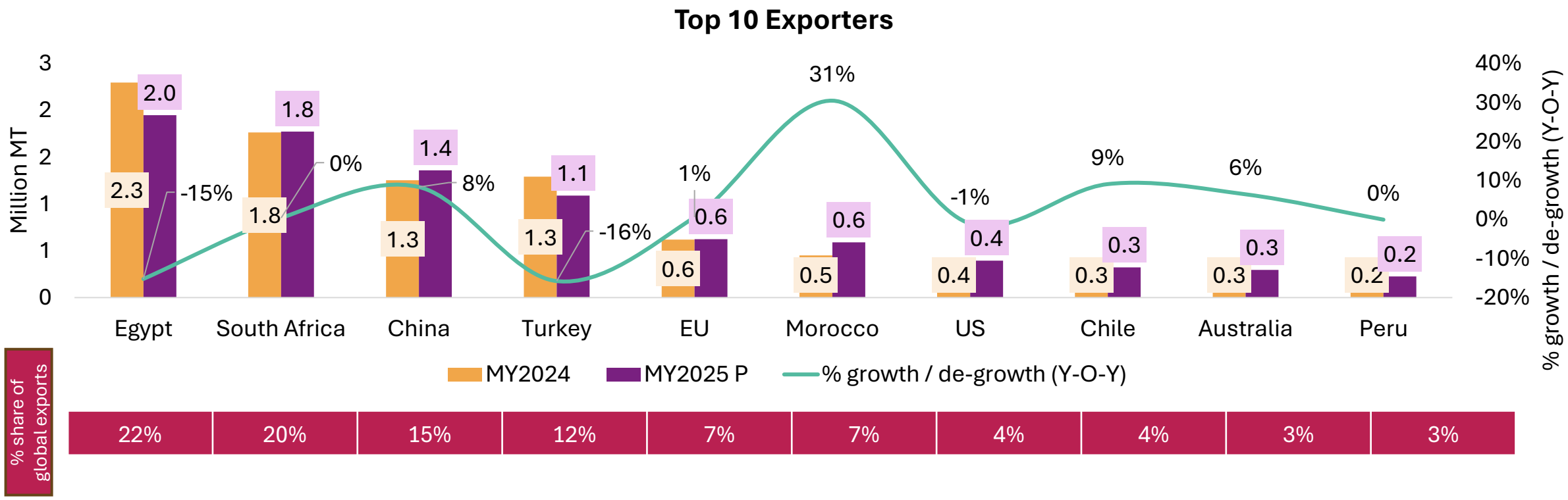
- The countries in the chart **collectively account for 92% of the global production**. For MY25P, **global orange production is expected to decline marginally by 2% on year**. This is largely attributed to sharp production decline in Turkey, Egypt, US (combinedly has 12% global production share).
- In contrary, countries such as Morocco and Brazil are growing at 16% and 6%, respectively.
- **Spain's** orange production is expected to **decline by ~5-6%** in MY25P, driven by **prolonged drought conditions** and **reduced irrigation allocations** across key producing regions such as **Andalucia and Valencia**.
- **Egypt production is expected to decline by 12% in MY25P** due to heat stress during flowering, leading to smaller fruit sizes and lower yields. Export subsidies were cut and hence majority of the produce is routed to domestic juice manufacturing rather than exports.
- **India's production estimates have been revised upwards led by revision in the acreages.**

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, Ministry of Agriculture and Farmer's Welfare, Crisil Intelligence

Export trends and price outlook

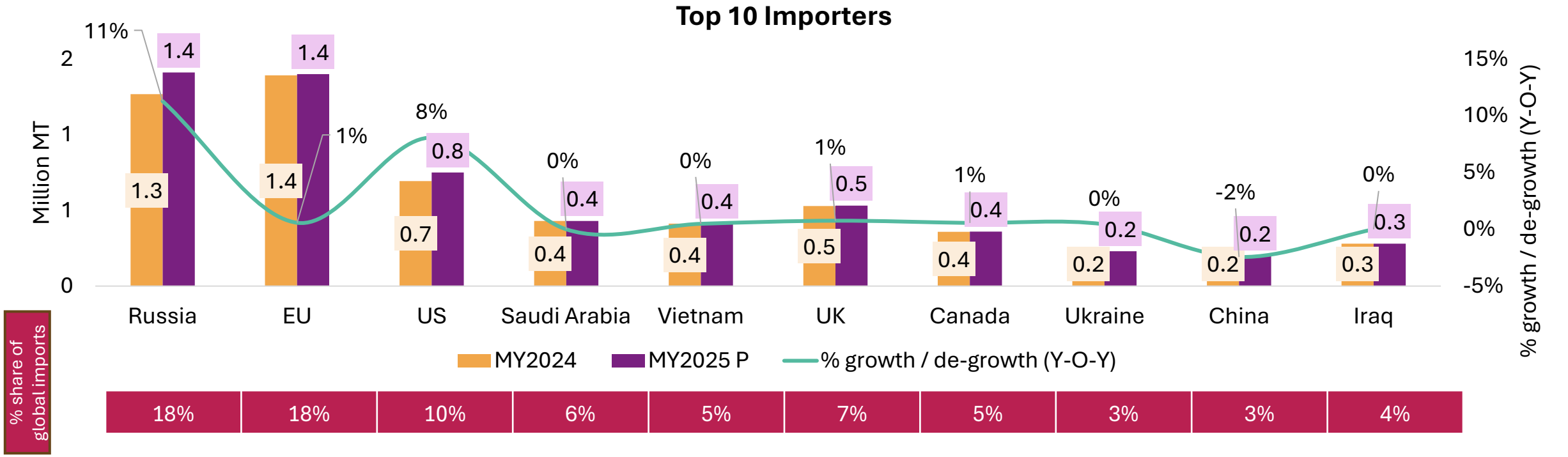
Major exporters of Orange



- The countries shown in the chart **collectively account for ~97% of total global orange exports.**
- In MY24, global orange exports witnessed a robust growth of 12%, driven by sharp increases from Egypt (up 26%), Turkey (up 21%), and China (up 50%). This surge was largely attributed to favorable harvests and strong international demand.
- **Morocco's soft citrus season has started** with lower production volumes and a delayed start due to drought and heat stress. **Export quality has been affected**, with smaller fruit sizes. However, the **Nadorcott variety has shown strong growth**, with exports up 44% to 325,000 tons in 2024-25, and is expected to drive export growth despite the challenges.

Source: USDA

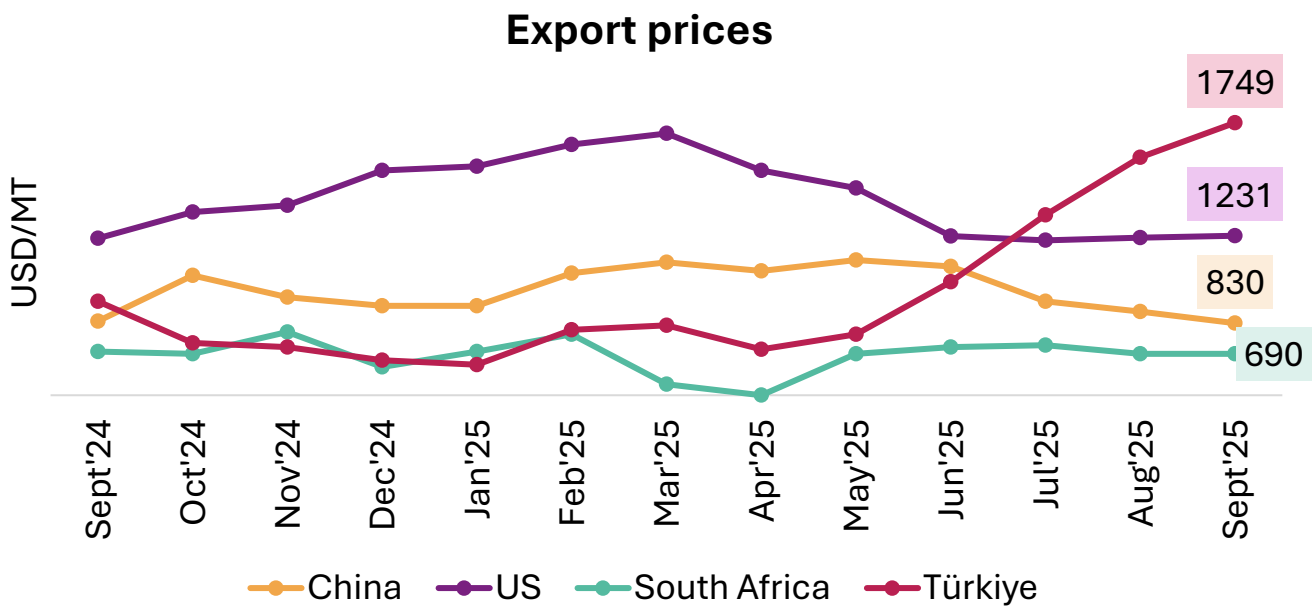
Major importers of Orange



- The countries shown in the chart **collectively account for ~80% of total global orange imports.**
- **Global orange imports are expected to increase marginally by 2-3% on year**. In Russia, higher import volumes are expected due to reduced domestic production and rising consumer demand for citrus fruits.
- **In the United States**, a sharp decline in local orange production particularly in Florida due to ongoing citrus greening disease and unfavorable weather has **led to a greater reliance on imports to meet domestic consumption needs.**
- Additionally, **strong consumer preference in US for fresh citrus,** relatively stable international prices coupled with increasing demand for processing are also **contributing to the upward trend in global import volumes.**

Source: USDA

Export prices trend and forecast for Orange (Oct'25-Dec'25)

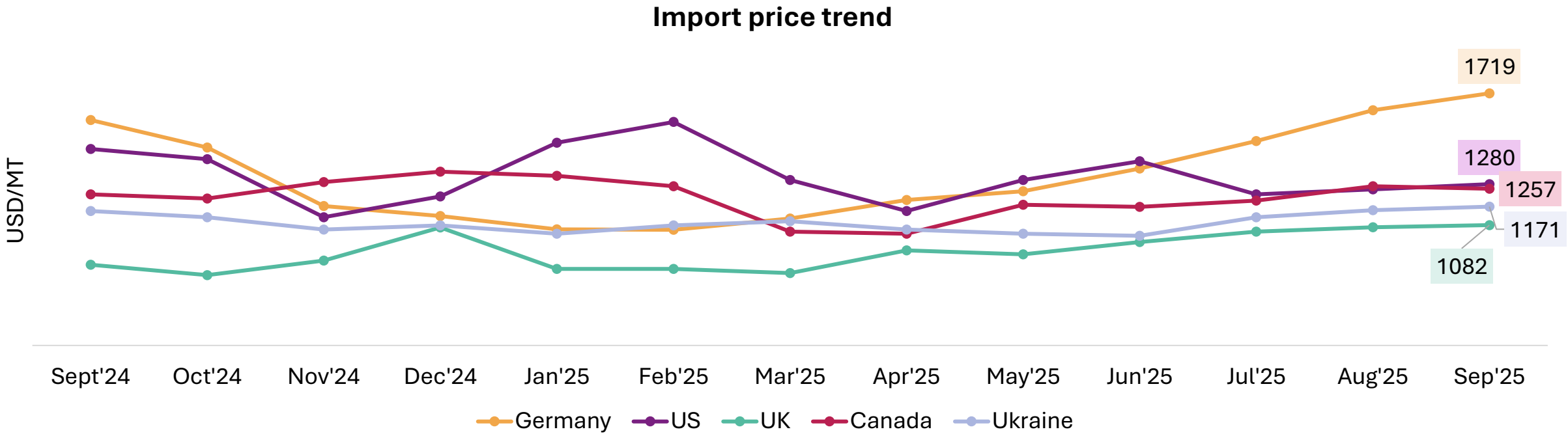


Country	Sep'25 Price (USD/MT)	Sep'24 Price (USD/MT	%age change	Indicative price change direction	Forecasted average price range for OND (USD/MT)
China	830	840	-1%	sideways	825-845
US	1,231	1,220	1%	Bullish	1,380-1,420
South Africa	690	700	-1%	sideways	685-705
Türkiye	1,749	930	88%	Bullish	1,850-1,950

Source: Crisil Intelligence & ITC trade map
Note: Price forecasting has been done through fundamental analysis. OND stand for October, November and December

- **US orange export prices** rose in Sep'25 and are **expected to surge further** in the next quarter due to increased demand and lower production.
- **China's prices are expected to remain stable** due to new crops and export demand.
- **South African prices** rose modestly in Sep'25 but are **forecast to stabilize in the next quarter** as robust export demand is offset by a bountiful harvest.
- **Turkey's prices** surged in Sep'25 due to anticipated production declines and are **expected to continue rising** due to tight supply and export demand.

Price trends of key importing nations



- **Import prices of oranges have been volatile among major importing countries**. Between July 2024 and July 2025, prices increased by 5-22% in Germany, Canada, the UK, and Ukraine, while the US saw a 13-14% decline.
- Import prices in across all the countries except Canda experienced an increase in Sep'2025 compared to the previous month, primarily driven by South Africa, a major exporter to these countries, being in its lean production season.
- Meanwhile, **orange juice prices plummeted over 50% in early 2025, after reaching record highs in late 2024**. The decline is attributed to weak consumer demand due to high prices and poor juice quality from the 2024 harvest, which had low sugar and acid content and high levels of limonin, resulting in a bitter taste, **especially in the US and UK markets.**

Source: Crisil Intelligence & ITC trade map

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.

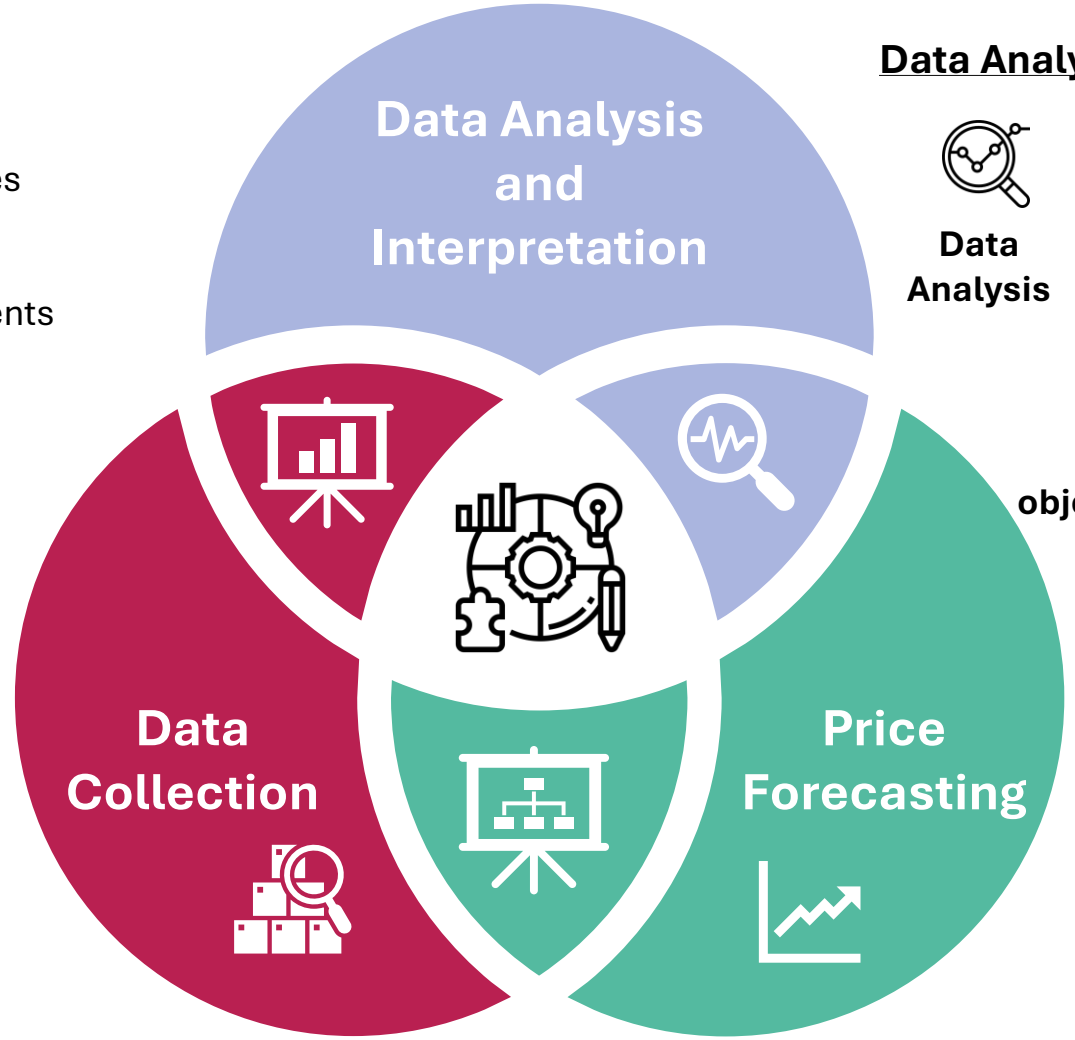
Data Collection

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.