Crisil
a company of S&P Global

एपीडा
APEDA

Monthly dashboard – Orange

Oct- 2025

Acreage and production trends

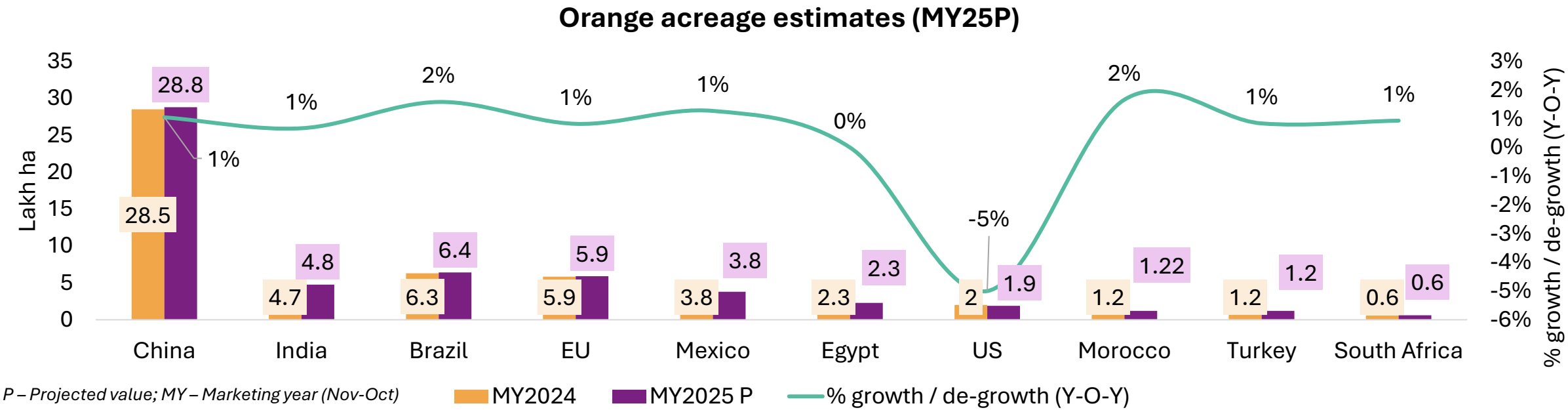
Major producing countries

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****.*

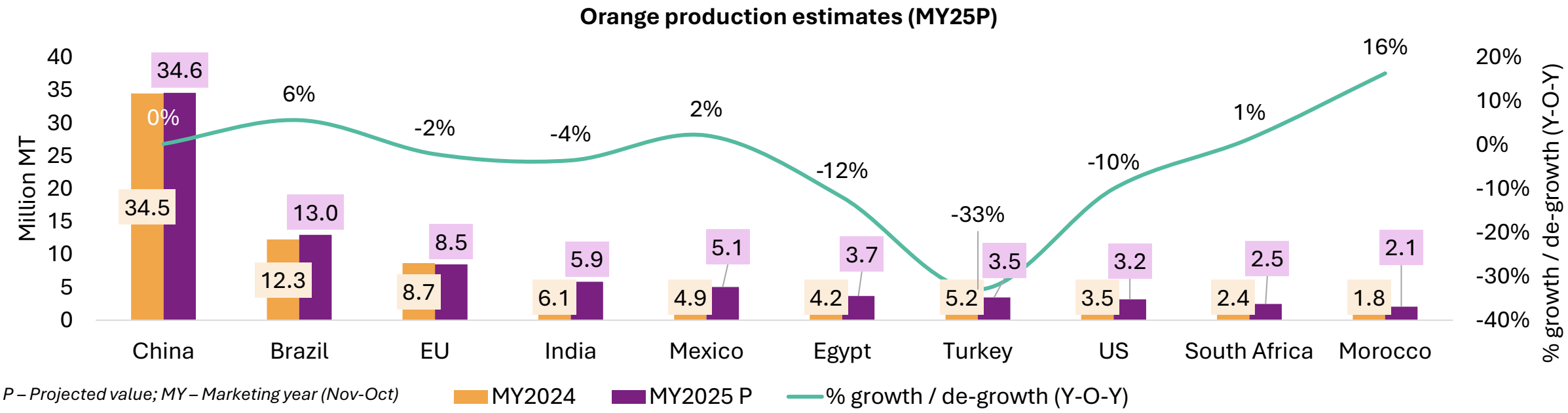
Acreage estimates of major producing countries



- 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



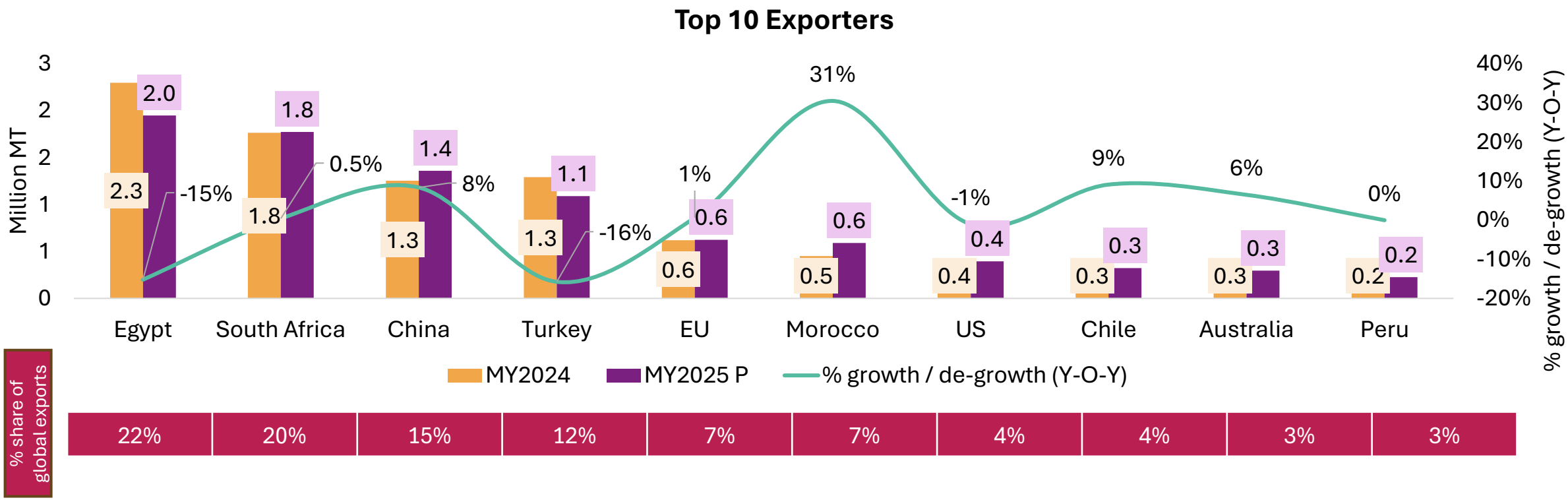
P – Projected value; MY – Marketing year (Nov-Oct)

- 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.
- **In EU, 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**.
- **Mexico's** citrus sector is **forecasted to grow by ~4%** in MY 2025P, but for **orange-specific growth** is likely to be **very modest**; planted **area** is projected to expand by **~1%,** and **fresh orange production** is expected to **rise by ~2%,** hampered by **drought**, **high temperature**, and **erratic rainfall** in key growing regions.
- **India's orange production** is anticipated to **decrease** this year due to yield concerns in major producing states such as **Maharashtra**, **Madhya Pradesh**, and **Punjab**. Specifically, Punjab's yield is expected to decline because of poor flowering caused by low sub-surface water levels, while Madhya Pradesh and Maharashtra are experiencing high pest pressure, further contributing to the expected decline.

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

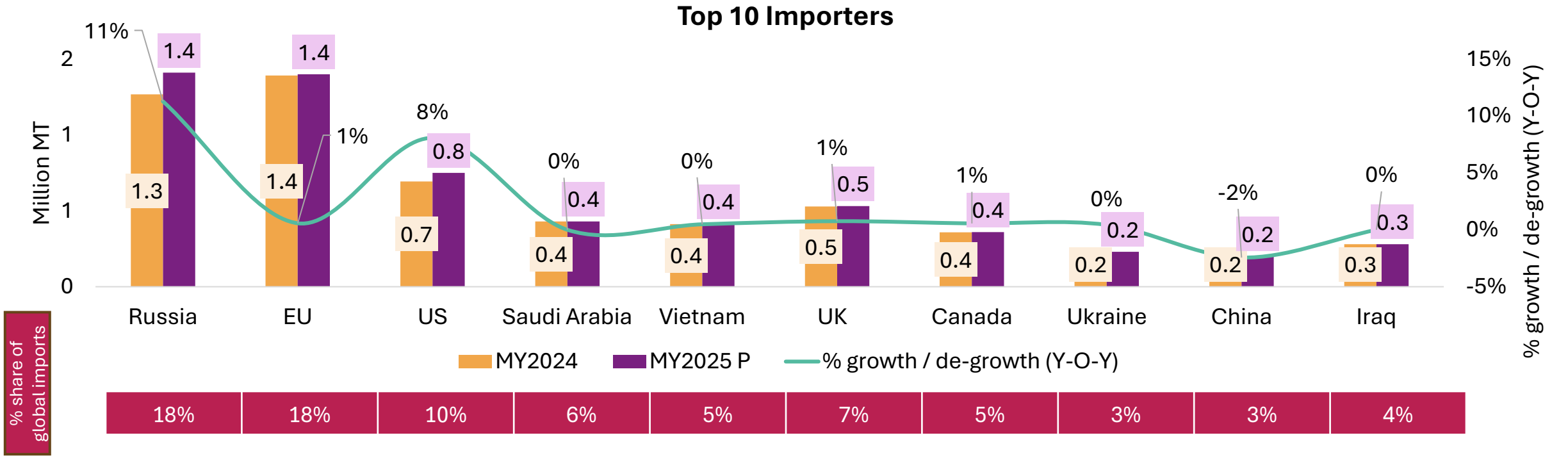
Major exporters of Orange



- 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.
- In contrast, **MY25P orange exports** are anticipated to **drop by 6-7%,** primarily due to reduced exports from Egypt and Argentina. However, export growth from the EU, China, and South Africa is expected to mitigate the decline, preventing a more significant decrease.
- **South Africa's orange** sector is enjoying a **record packed-export** season in **2025** with **203 million 15 kg cartons**, reporting a **22% increase YOY**. Despite **trade policy** uncertainty, **maturing orchards** and **strong global demand** are driving **strong export volumes**. This surge signals that production and export trends are likely to be marginally higher on year, supporting continued growth in South Africa's orange exports in the near term.

Source: USDA

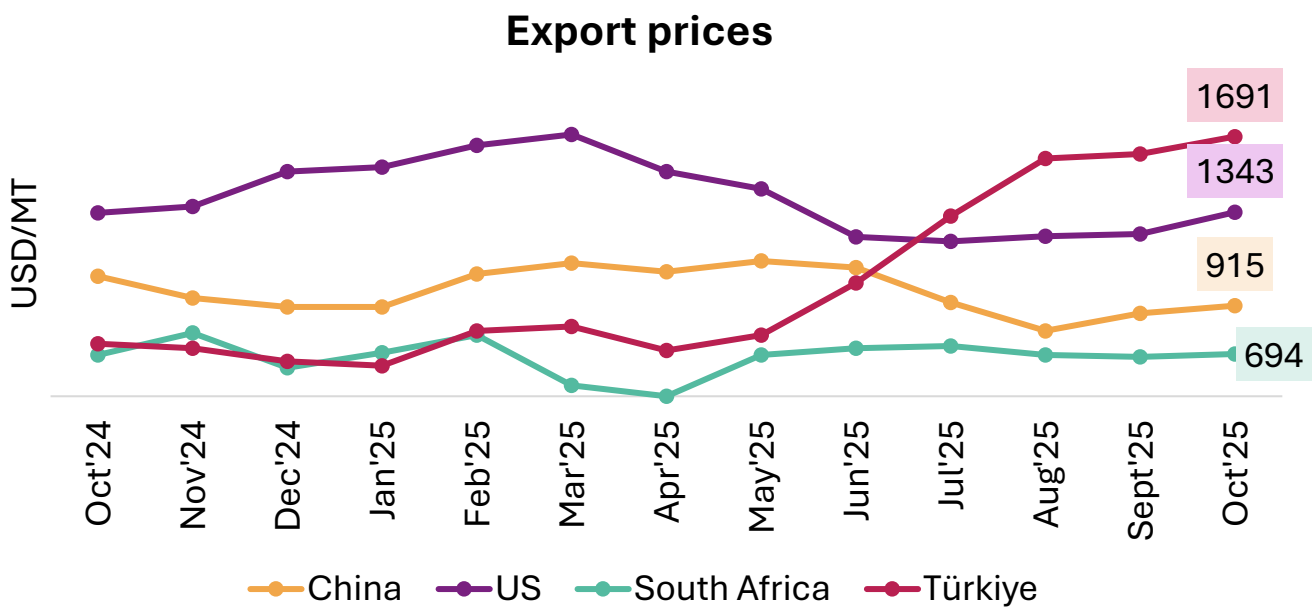
Major importers of Orange



- 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.
- **EU orange imports slowed** at the start of the 2025-26 season, dropping to 113,146 tonnes in Oct-2025 versus 166,825 tonnes a year earlier. This **32% YoY decline** signals a **weaker early season demand**, likely easing short-term pressure on suppliers and lead them to redirect some volumes to other markets leading to an increase competition globally.
- **Russian importers** are facing a **shortage** of the **large sized oranges** they prefer, even though **54% of its imports** come from **Egypt**. Exporters report **limited availability** of **bigger fruit**, creating a **supply mismatch** that may force **Russian buyers** to **pay premium** or diversify beyond their dominant **Egyptian sourcing** origins.

Source: USDA

Export prices trend and forecast for Orange (Nov'25-Jan'26)

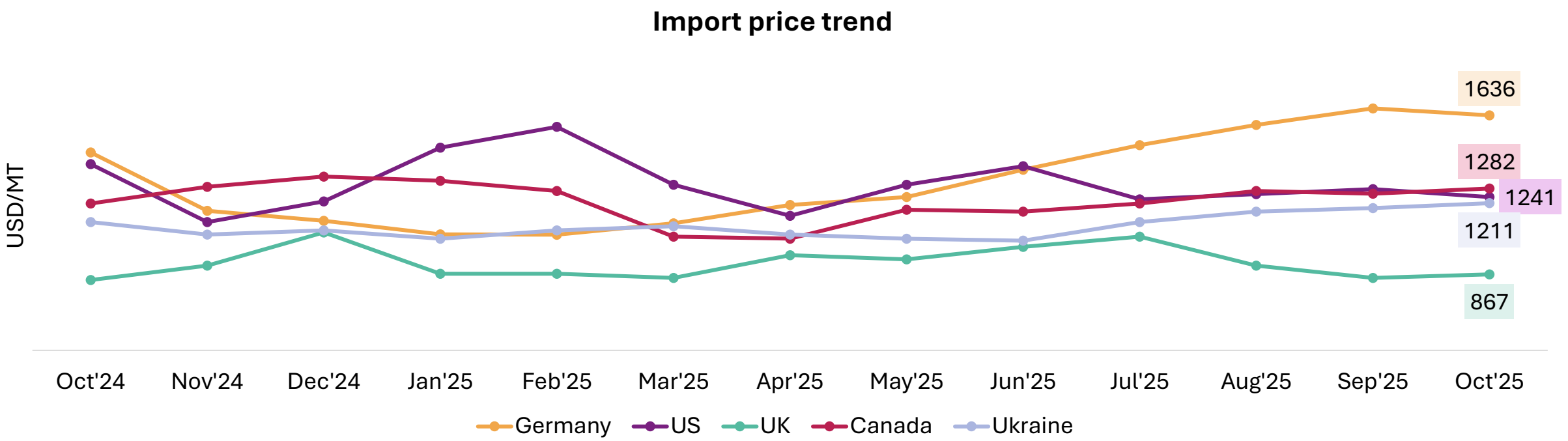


Country	Oct'25 Price (USD/MT)	Oct'24 Price (USD/MT	%age change	Indicative price change direction	Forecasted average price range for NDJ (USD/MT)
China	915	1,050	-13%	Bearish	880-900
US	1,343	1,340	0%	Bullish	1,440-1,480
South Africa	694	690	1%	sideways	687-695
Türkiye	1,691	740	128%	Bullish	1,700-1,800

- **US orange export prices** witnesses an increase on month in October 2025 and are **anticipated to rise further** in the upcoming quarter, driven by growing demand and reduced production levels.
- **China's prices are expected to decline** in the upcoming quarter driven by full fledged arrivals of the new crops while export demand to keep prices in check.
- **South African prices** rose marginally in October 2025 but are **forecast to stabilize in the next quarter** as robust export demand is offset by a bountiful harvest.
- **Turkey's prices** surged in October 2025, on account of decline in production and are **expected to continue rising** due to tight supply and export demand.

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

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 Germany and USA experienced an increase in October 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.

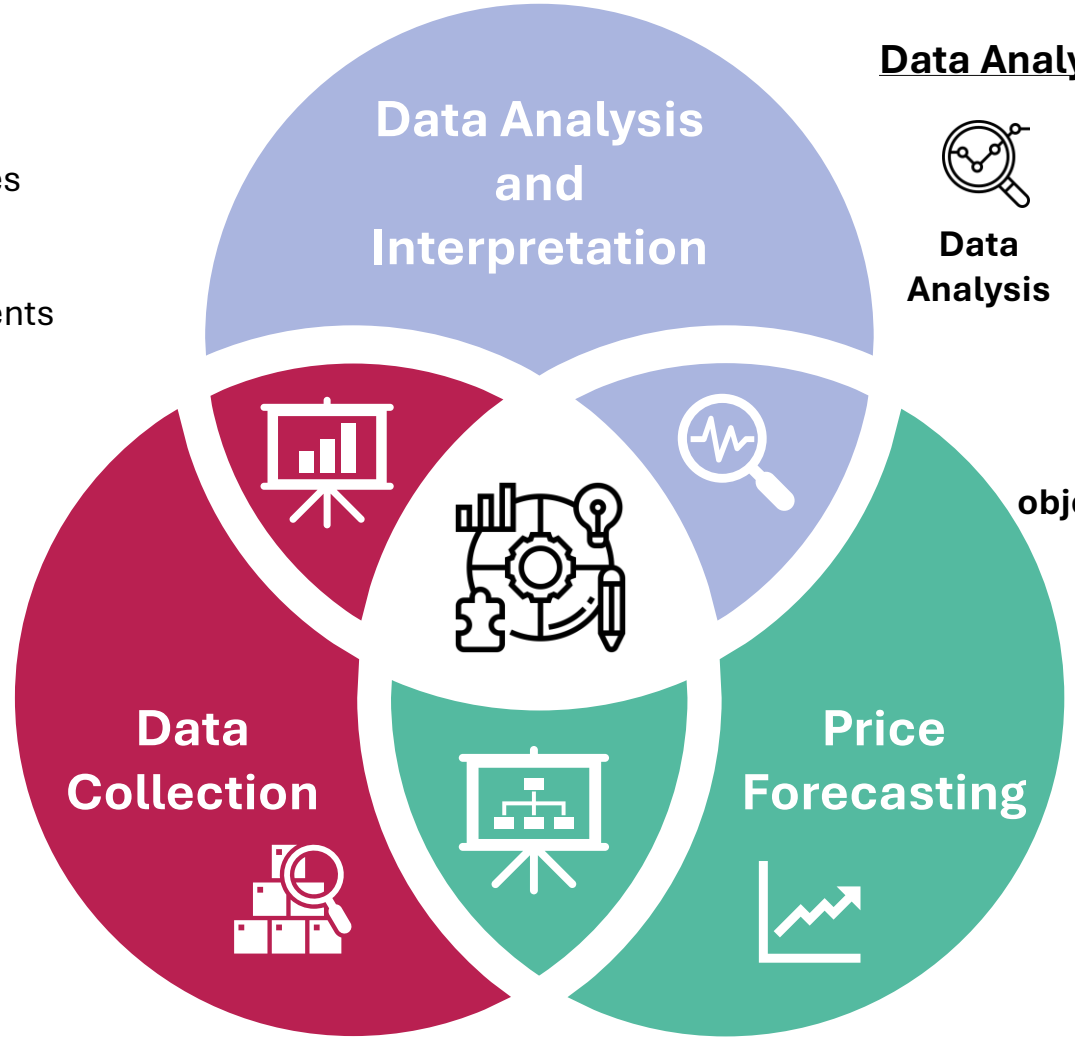
Data Collection

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.