Crisil
a company of S&P Global

एपीडा
APEDA

Monthly dashboard – Orange

Nov- 2025

Acreage and production trends

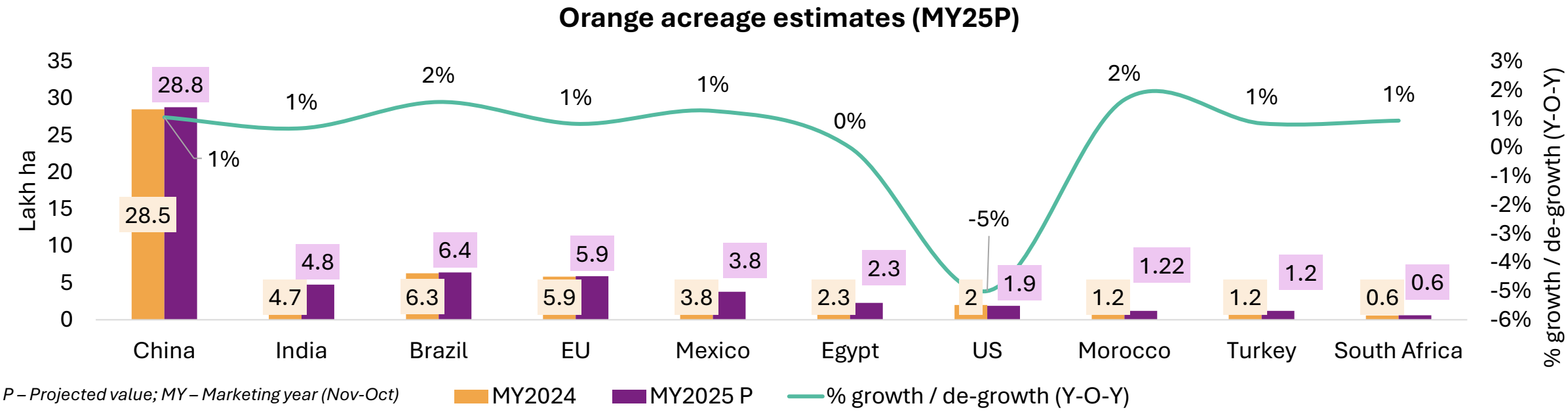
Major producing countries

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

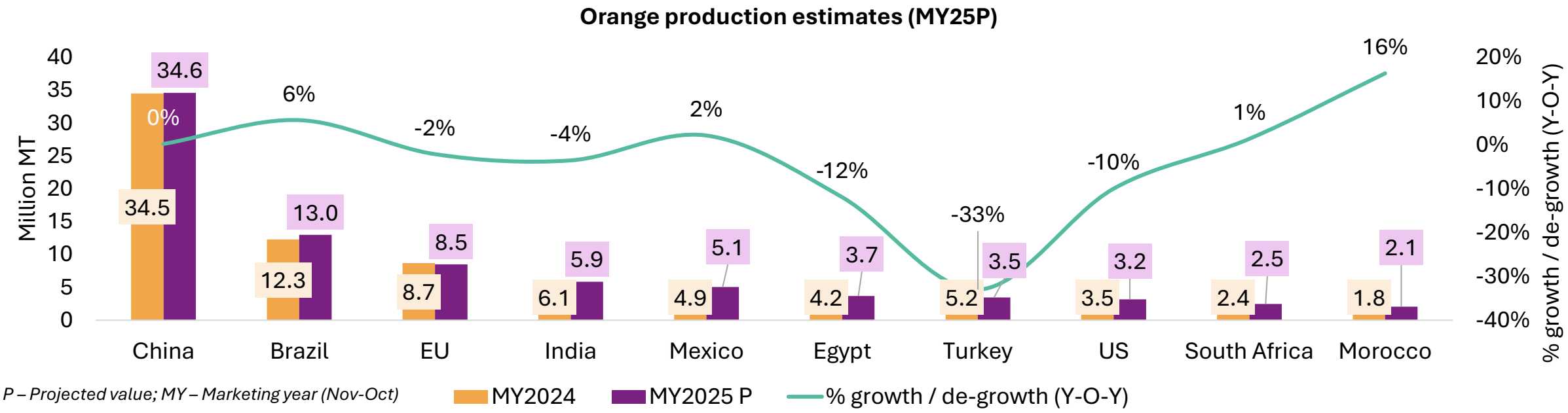


P – Projected value; MY – Marketing year (Nov-Oct)

- 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

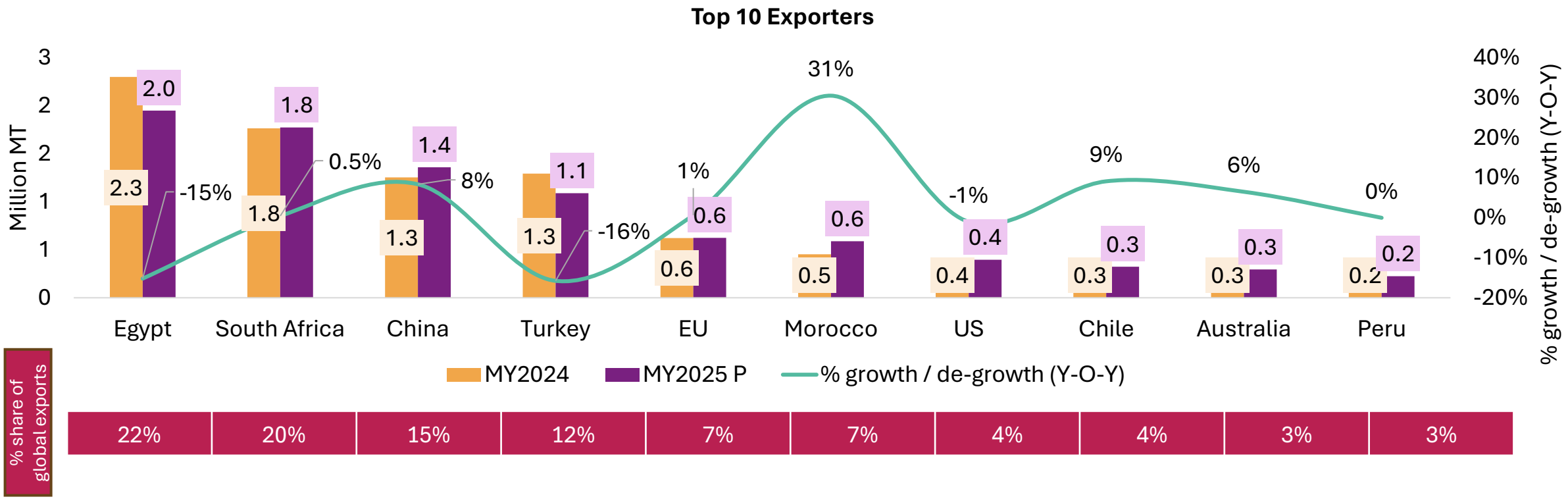


- The countries in the chart **collectively account for 92% of the global production**. For MY25P, **global orange production is expected to decline marginally by 2% on year**. This is largely attributed to sharp production decline in EU, India, Turkey, Egypt, US (combinedly has 25% global production share).
- **Egypt's** orange production estimate for MY 2024/25 has been **lowered** by **~12%**, due to **prolonged elevated temperatures** at the **start of fruit set**, which have **negatively** impacted overall **output**.
- **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**.
- **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 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, Ministry of Agriculture and Farmer's Welfare, Crisil Intelligence*

Export trends and price outlook

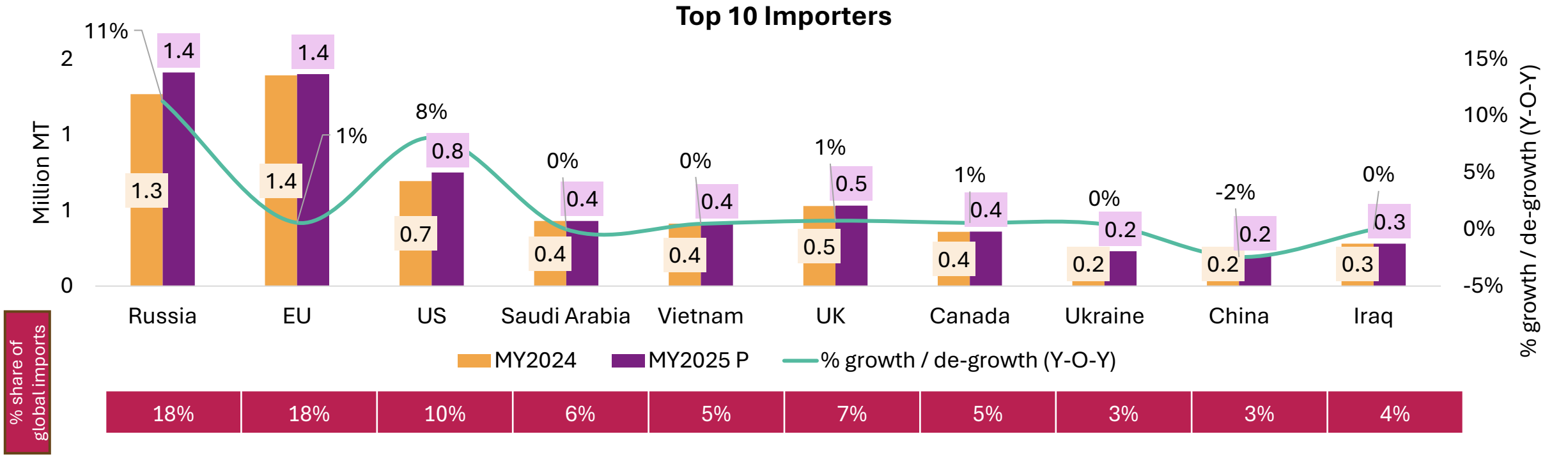
Major exporters of Orange



- 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 countries like Egypt. However, export growth from the EU, China, and South Africa is expected to mitigate the decline, preventing a more significant decrease.
- **Citrus exports in US** have reduced marginally ~1% due to persistent labor shortages, rising production cost, and climate stress are constraining exportable surplus, suggesting exports are likely to remain flat to marginally decline rather than sustain growth.
- **Orange exports** from **South Africa** to the **EU** rose by **~45%** YoY to **0.4 MMT (MY24-25)**, but since EU not being a major market, the overall impact was **limited** with total orange exports increasing marginally by **~0.5% YoY**, keeping **exports largely flat**.

Source: USDA

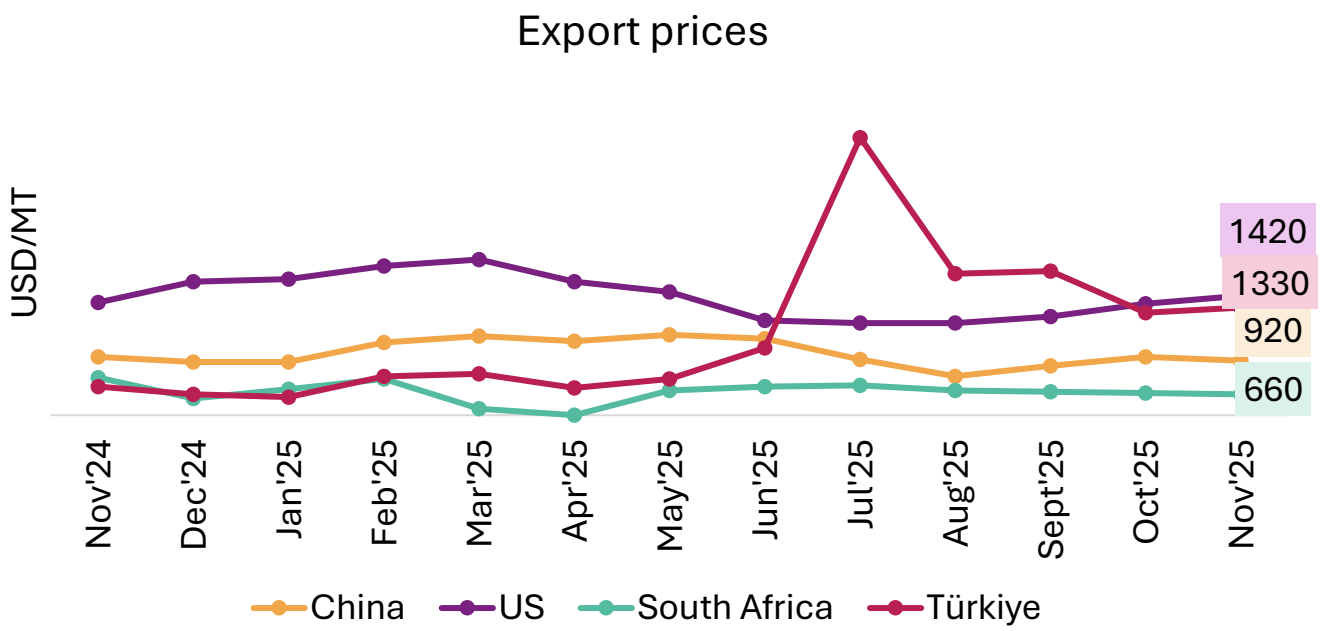
Major importers of Orange



- 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.
- Despite **China** removing a **10% tariff**, **US** citrus still faces **~37%** total duties. With **the US** supplying **~11%** of **China's 0.18 MMT** orange imports in MY 2024-25, **high costs** and **rising domestic output** continue to **limit growth**.
- **The US** 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

Export prices trend and forecast for Orange (Dec'25-Feb'26)

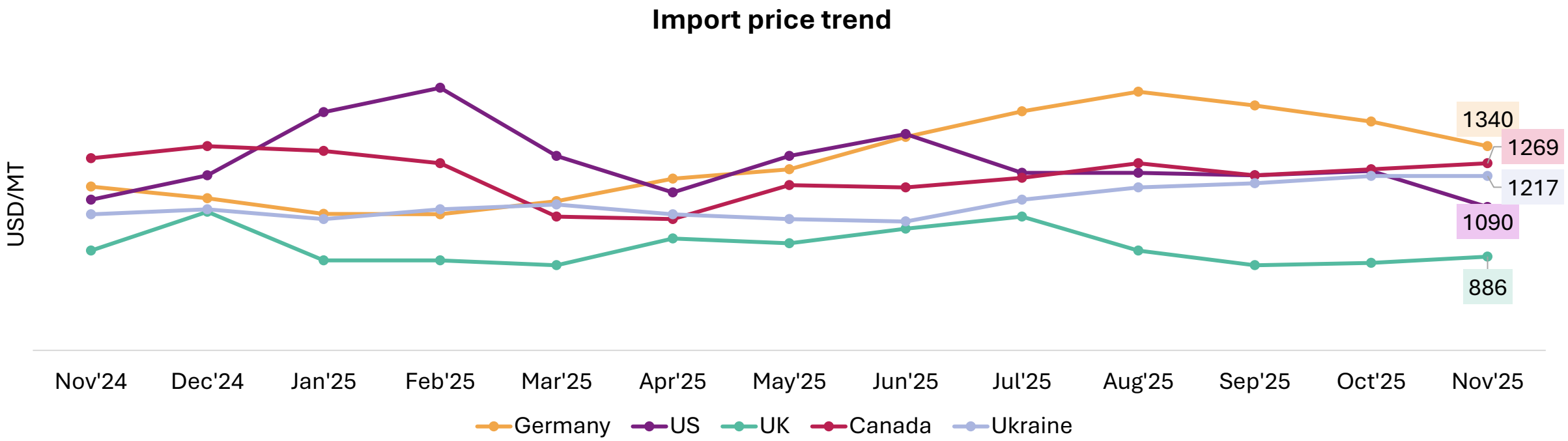


Country	Nov'25 Price (USD/MT)	Nov'24 Price (USD/MT	%age change	Indicative price change direction	Forecasted average price range for DJF (USD/MT)
China	920	950	-3%	Sideways	900-930
US	1,420	1,370	4%	Sideways	1,400-1,440
South Africa	660	790	-16%	Bullish	680-700
Türkiye	1,330	720	85%	Bullish	1,435-1,465

- In the **US**, **tariff exemptions** (Nov 2025) **reduce import costs**, and **normalize shipments**; winter demand provides limited support, so export prices are **expected to remain stable** for the next quarter.
- **China's prices are expected to remain flat** in the upcoming quarter driven by full fledged arrivals of the new crops while export demand to keep prices in check.
- **South Africa's** strong exports through **December** 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 ~30%** in 2025, with **harvest delays** tightening exportable supply during **Dec-Feb**. **Limited availability** and **steady demand** have kept **prices firm**.

Source: Crisil Intelligence & ITC trade map
Note: Price forecasting has been done through fundamental analysis. DJF stand for December 2025, January and February 2026

Price trends of key importing nations



- **Import prices of oranges have been volatile among major importing countries**. Between Nov 2024 and Nov 2025, prices increased by 14-15% in Germany, Canada, and Ukraine, while the US, UK, and Canada saw a ~2-3% decline.
- Import prices in across all the countries except Germany and USA experienced an increase in November 2025 compared to the previous month, primarily driven by South Africa, a major exporter to these countries, being in its lean production season.
- A clear seasonal trend emerges in **U.S. orange import prices**, which typically **drop** by **15–20%** from **October** to **November** 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: 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.

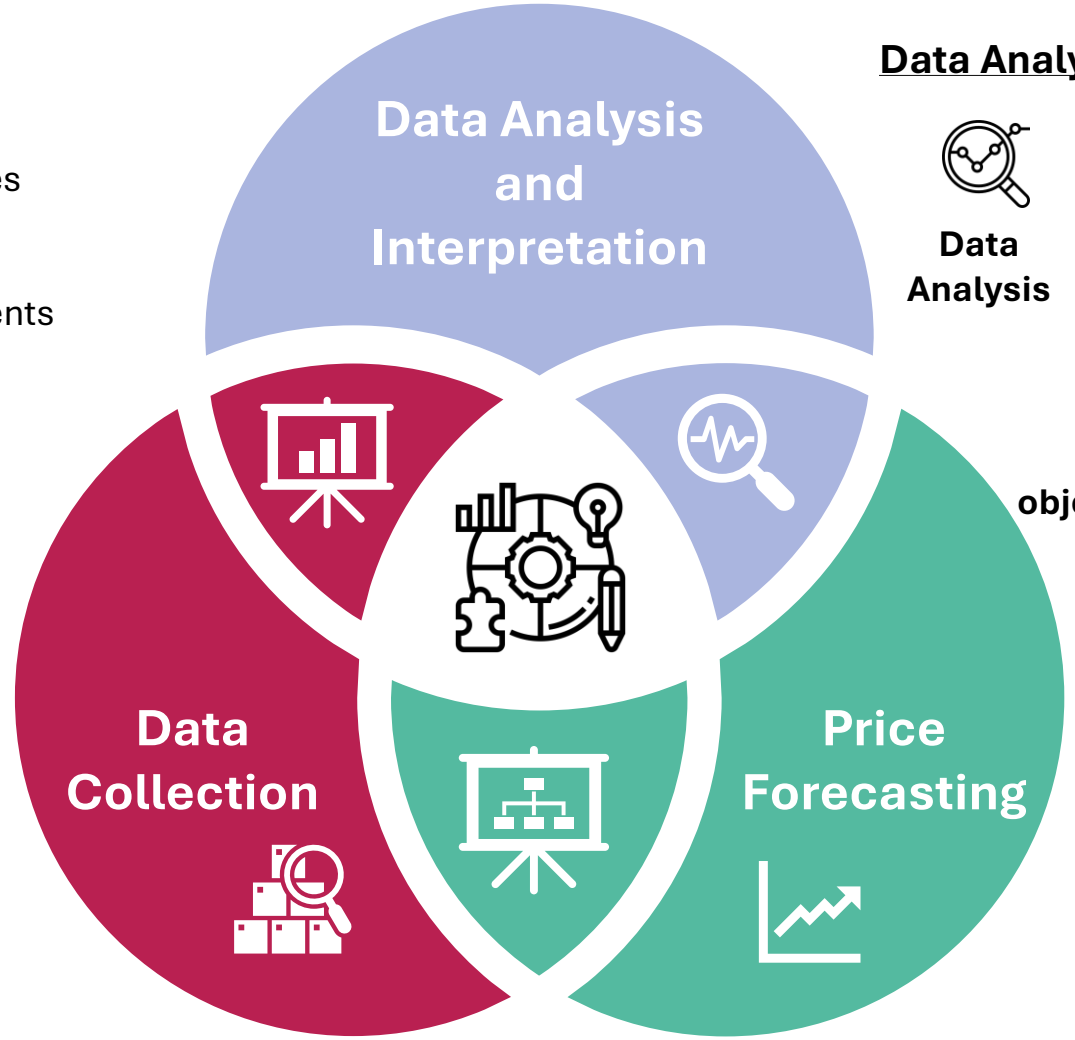
Data Collection

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.