

Monthly dashboard – Orange

HSN Code: 080510

February - 2026



Acreage and production trends

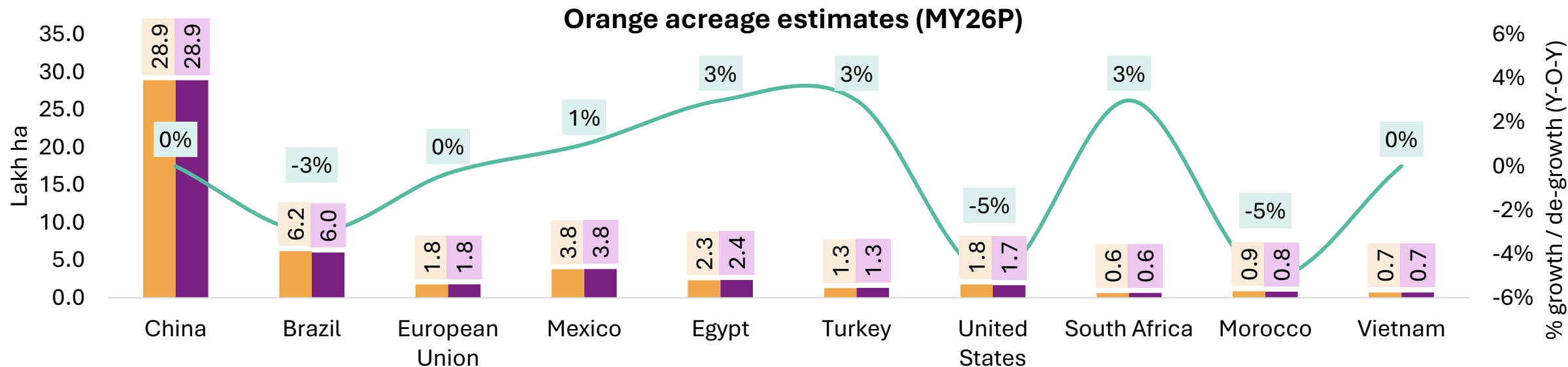


Major producing countries

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
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, Midnight, Cara Cara
Morocco	Mediterranean (Gharb, Souss Valley)	Oct-Jul	Navel, Salustiana, Maroc Late, Valencia
Vietnam	Northern Midlands & Tropical and Sub tropical highland (Mekong Delta)	Sept-May	Vinh Orange, Canh Orange, Navel, V2

- 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, 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).

Acreage estimates of major producing countries



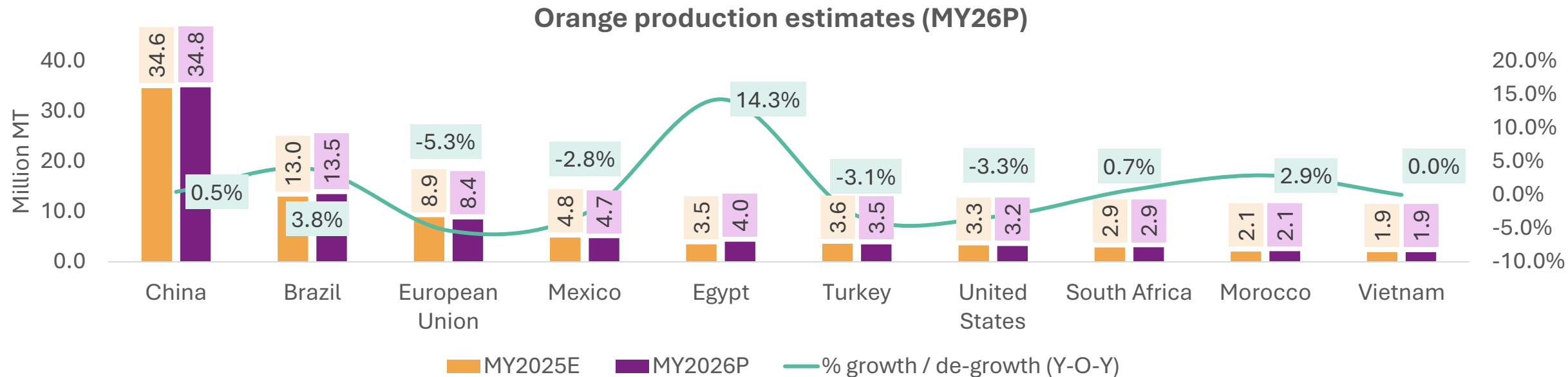
P – Projected value; E- Estimated value; MY – Marketing year (Nov-Oct)

MY2025E MY2026P % growth / de-growth (Y-O-Y)

- The countries shown in the chart collectively **account for ~70% of total global orange acreages**.
- In MY26P, global orange acreage is estimated to **rise marginally by 0–1% Y-o-Y**, supported by stable to marginally increasing areas in countries like **Mexico, Egypt, Turkey, and South Africa**, but offset by sharp declines in **the US and Morocco**.
- **The US¹** orange sector has sharply declined, with **production dropping 11% from MY20 to MY26P**, primarily due to **citrus greening, hurricanes, and shrinking acreage in Florida**. **Higher labor and input costs** have further **strained growers**, leading to the **lower output in decades, rising prices, and greater reliance on imports**.
- **In Brazil**, rising incidence of **Citrus Greening (HLB)** has **discouraged new plantings**, while **elevated input costs** and **weaker farmgate returns** have **limited expansion**; coupled with **weather variability**, this is driving a **~3% acreage decline to ~6.0 lakh hectares in MY 2026**.

Note: The country-wise acreage 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: Acreage for MY2025E and MY2026P is estimated based on data from USDA; India's acreage sourced from MoA&FW and projection based on trends and interactions; 1. Orlando Weekly Newsletter.

Production estimates of major producing countries



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

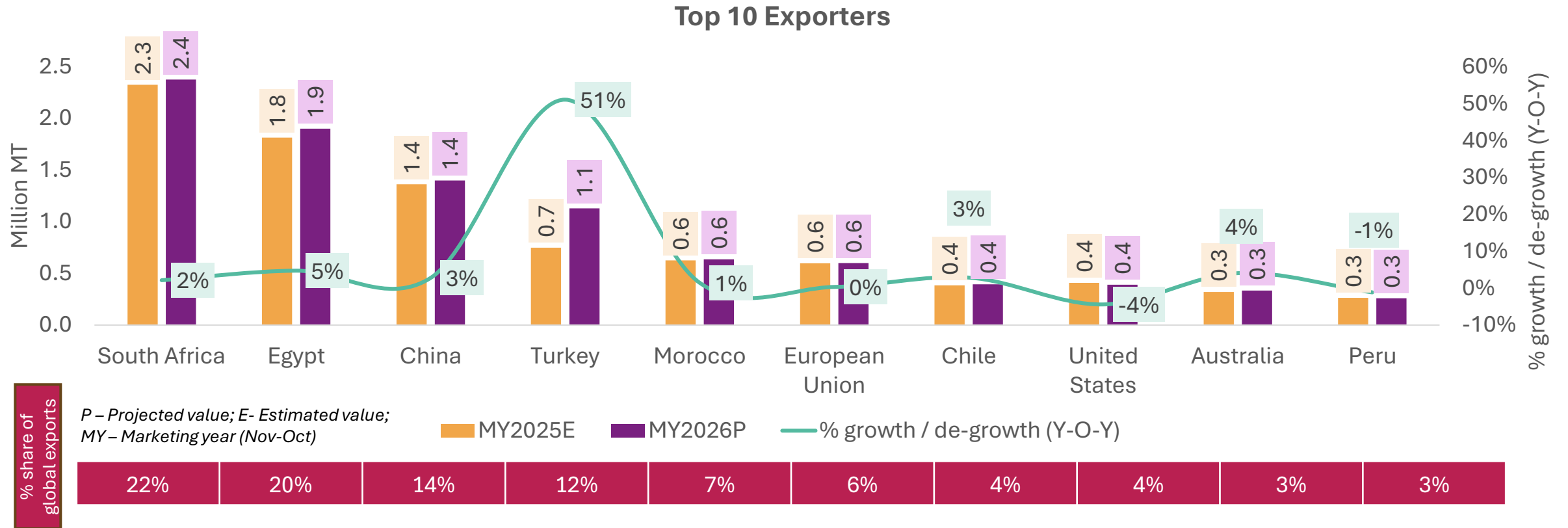
- The countries in the chart **collectively account for 95% of the global production**. For MY26P, **global orange production is likely to remain flat (+0–1%)**, with **Egypt’s strong 14% recovery** from improved yields offsetting declines in the EU (–5.3%), Turkey (–3.1%), Mexico (–3%), and US (–3.3%) 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 **better crop management practices**.
- **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 is projected to **decline (Spain ~9%, Italy ~6%)** driven by **prolonged drought conditions, irrigation restrictions**, and **heat-induced fruit drop**, constraining marketable volumes across key producing regions such as **Andalucia and Valencia**.
- **India’s** orange production is expected 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 reportedly 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: Production for MY2025E and MY2026P is estimated based on data from USDA; India’s production sourced from MoA&FW and projection based on trends and interactions



Export trends and price outlook

Major exporters of Orange



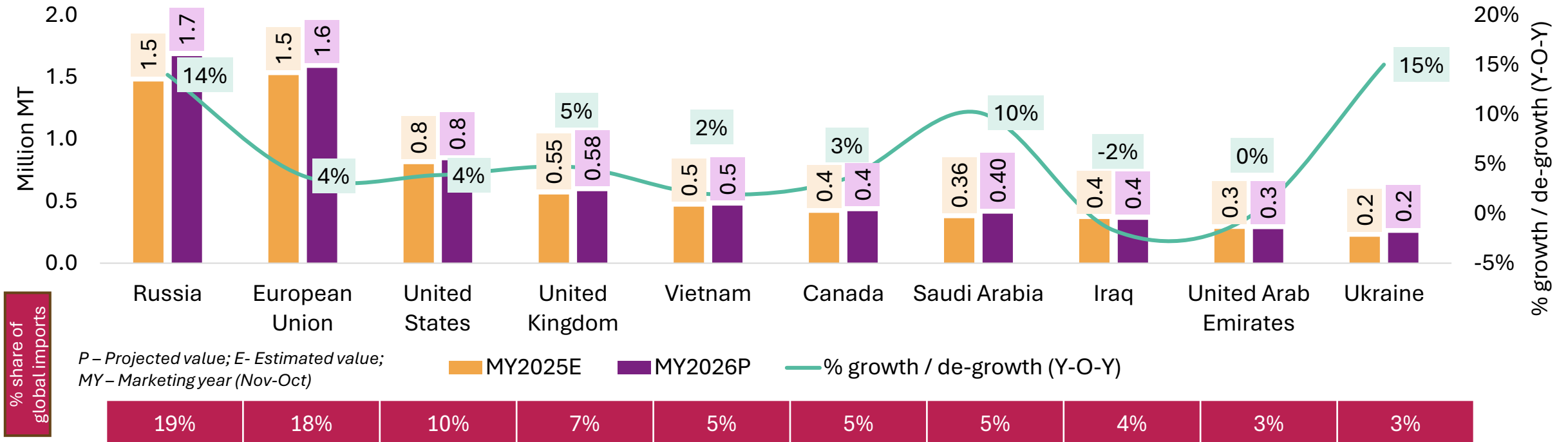
- The countries shown in the chart **collectively account for ~97% of total global orange exports.**
- Global orange exports are projected to **rise ~6% in MY2026P**, led by **Turkey’s ~45-50% surge**, supported by **strong 2025 export momentum (+41%), improved yields and quality, competitive pricing, and sustained demand from Russia, and Eastern Europe markets.**
- **Geopolitical tensions¹ in the Middle East** have disrupted **Red Sea shipping routes**, forcing containers to **reroute via the Cape of Good Hope, extending the transit times by 10-14 days and raising freight costs for Egypt’s orange exports.**
- **South Africa’s** orange exports are projected to remain stable at **~2.4 million metric tons (+2%)**, highlighting a mature export base with limited growth potential, while incremental global expansion in orange exports is increasingly shifting toward emerging exporters such as Turkey.

Note: MY25E export volumes are from USDA, with the combined output of oranges, tangerines, and mandarins. estimates used where recent data is unavailable;; MY26P figures are based on trade estimates & export trends.

Source 1. [Freshplaza Newsletter](#)

Major importers of Orange

Top 10 Importers

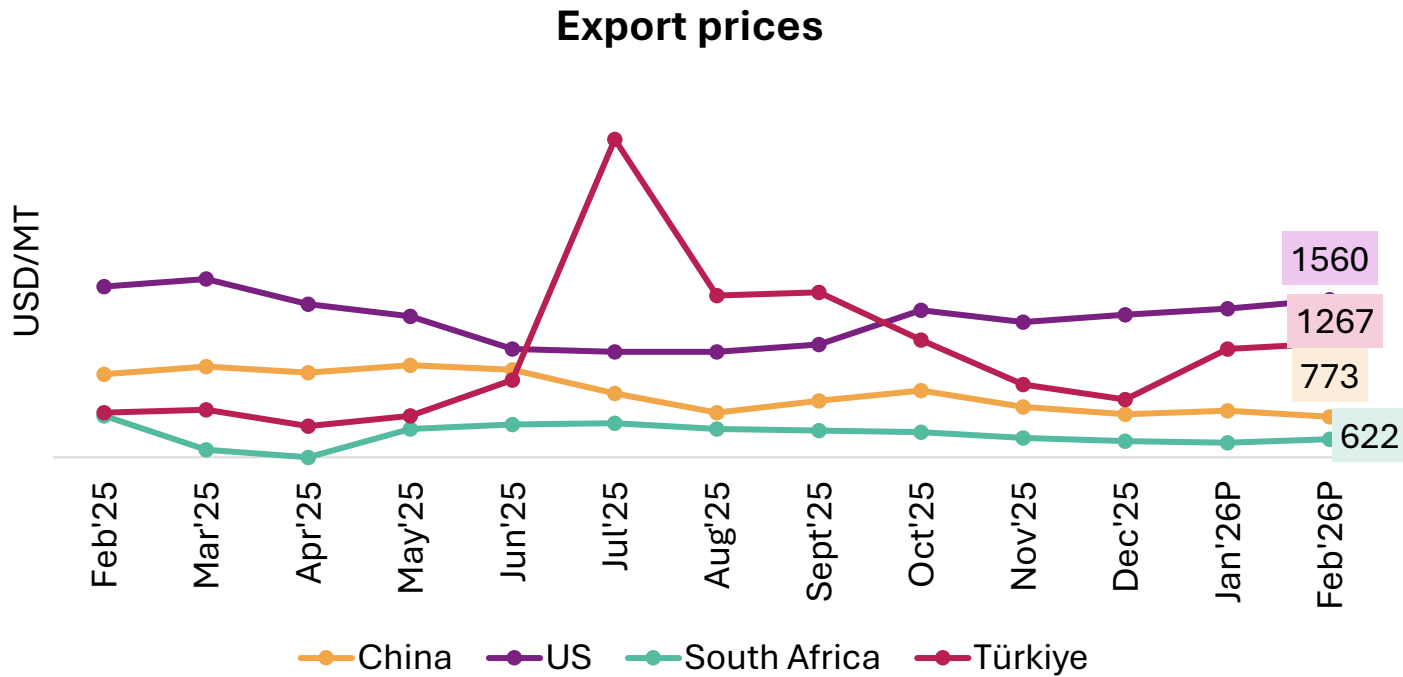


- The countries shown in the chart **collectively account for ~80% of total global orange imports.**
- **Global orange imports are projected to rise slightly by 4-5% year-over-year. Russia's¹ orange imports are projected to rise from 1.5 MMT (2025) to ~1.7 MMT (2026);** however, **Middle East shipping disruptions may delay Egyptian Valencia shipments,** potentially affecting supply from **Egypt and Turkey.**
- **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 US²** 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 is likely to** enhance competitiveness and normalize shipment patterns, following earlier front-loading to avoid tariffs.

Note: MY25E import volumes are from USDA, with the combined output of oranges, tangerines, and mandarins. estimates used where recent data is unavailable;; MY26P figures are based on trade estimates & import trends.

Source: 1. ["Ongoing tensions in the Middle East have an indirect impact on our season"](#) 2. [US Tariff Exemption](#)

Export prices trend and forecast for Orange (Mar-May'26)

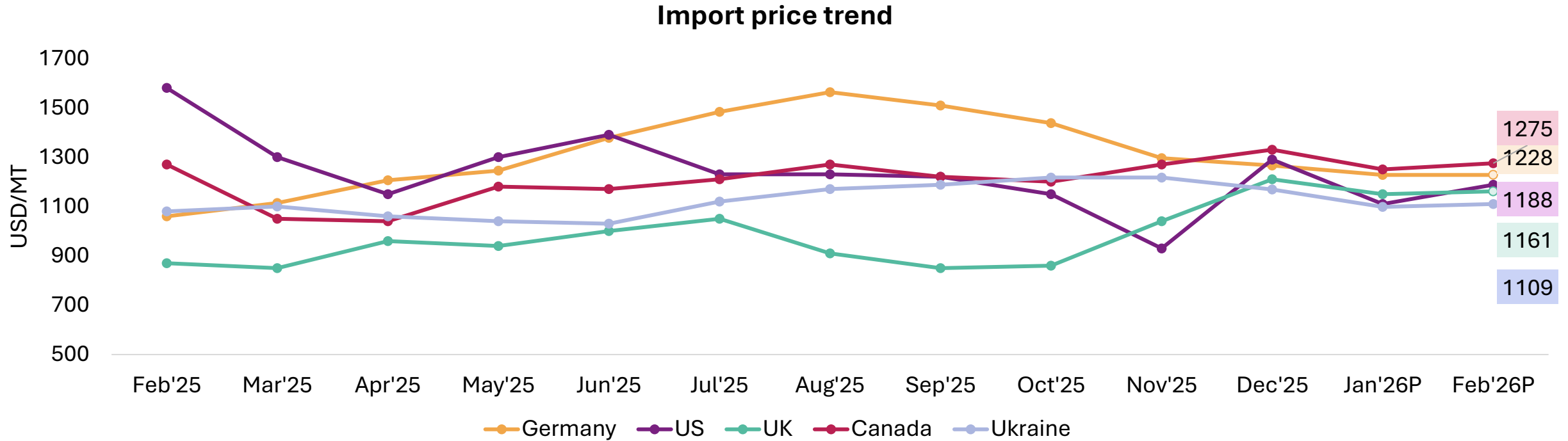


Country	Feb'26P Price (USD/MT)	Feb'25 Price (USD/MT)	%age change	Indicative price change direction	Forecasted average price range for MAM (USD/MT)
China	773	1,060	-27%	Sideways	750-790
US	1,560	1,650	-5%	Bearish	1,470-1,530
South Africa	622	780	-20%	Bullish	660-730
Türkiye	1,267	800	58%	Bullish	1,300-1,360

- **Rising maritime insurance costs and longer shipping routes amid Middle East tensions may elevate U.S. export logistics costs, support slightly higher orange prices in the upcoming quarters.**
- **China's prices are expected to stay flat next quarter, as abundant new crop arrivals increase supply, while steady export demand helps limit further declines.**
- **Due to Red Sea disruptions, South African citrus exporters are rerouting shipments around the Cape of Good Hope, increasing transit times and freight costs. This has raised international export prices for South African citrus compared to the previous month.**
- **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: Prices are from ITC Trade Map (till Dec 2025); Jan & Feb 2026 figures are seasonality and trend-based estimates, (HSN Code: 080510)- Fresh or dried oranges
 Note: MAM stand for March, April & May

Price trends of key importing nations



- Between **February 2025** and **February 2026**, **orange import prices** rose **16–33%** in **Germany** and **the U.K.**, **fell** by about **25%** in **the U.S.**, **marginally rose by 3%** in **Ukraine**, and **stayed flat** for **Canada**.
- Import prices in across all the countries except Germany experienced an increase in February 2026 compared to the previous month, primarily driven by South Africa, a major exporter to these countries, being in its lean production season.
- **Rising freight** and **insurance costs** due to **Middle East shipping disruptions** may **push U.S. orange import prices 2–4% higher** from the current level (**~USD 1,150-1,200/MT**) , in the subsequent quarters as longer routes increase landed costs.

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



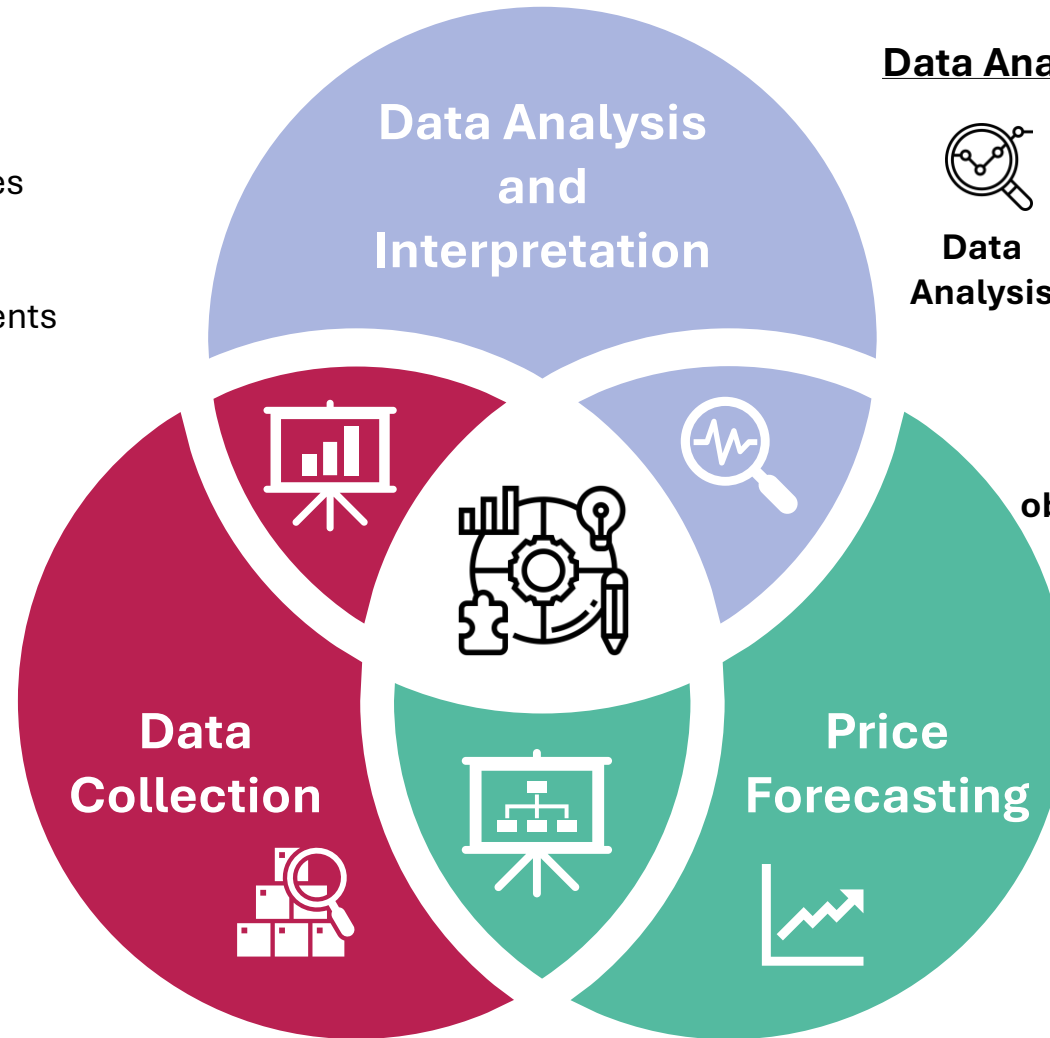
Sources

- 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 of FOB prices
- Macro-Economic & Trade Variables Integration of commodity fundamentals 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.