Crisil
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एपीडा
APEDA

Monthly dashboard – Orange

HSN Code: 080510

March 2026

Acreage and production trends

Major Producing Countries

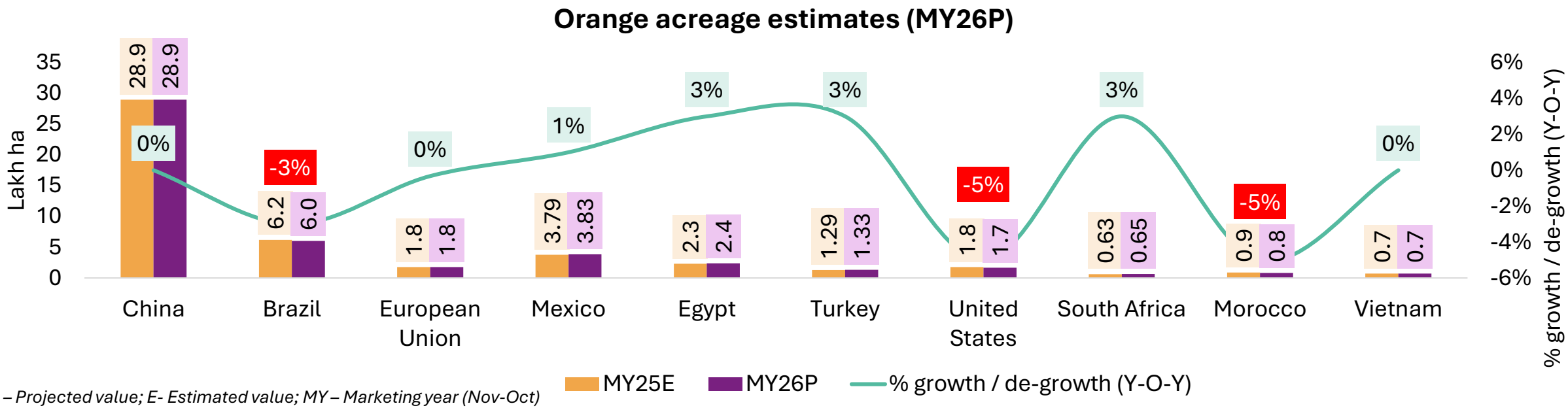
Countries	Agro-Climatic Zone	Harvesting Period	Major Export Varieties
China	Subtropical (Hunan, Jiangxi, Sichuan)	Navel Oranges - late October to late December. Temple Oranges - December to March. Clementines and Tangerines - late October to January	Navel, Valencia, Jincheng
Brazil	Tropical & Subtropical (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, Midknight, 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).

Source: USDA

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

Acreage Estimates of Major Producing Countries

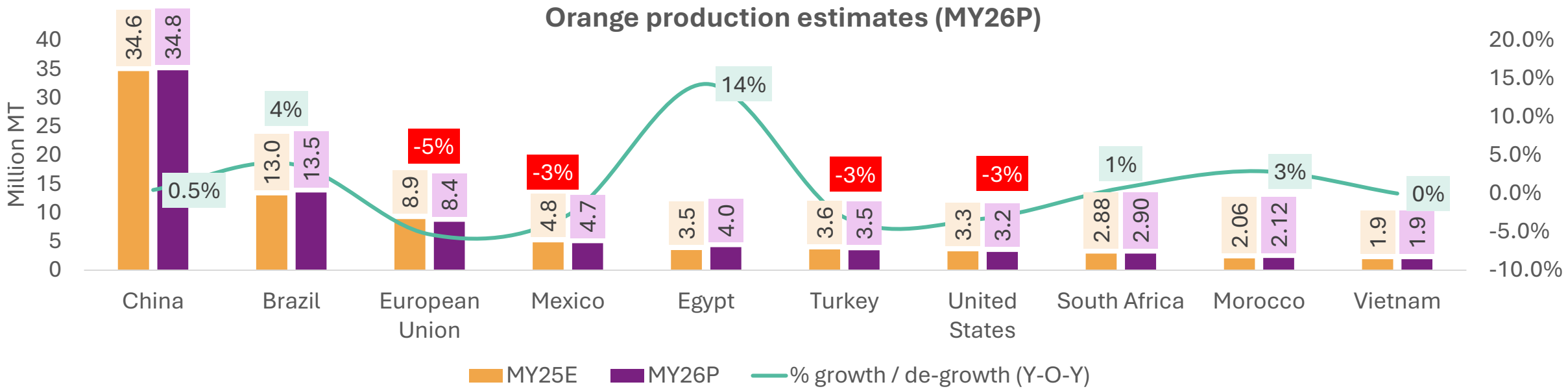


P – Projected value; E- Estimated value; MY – Marketing year (Nov-Oct)

- 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, Morocco, and Brazil**.
- **U.S. orange acreage** has **declined sharply**, with **production down ~11%** from **MY20–MY25E**, as **citrus greening**, **hurricane damage**, and **rising labor/input costs** have **reduced grower viability**, **accelerated orchard removals** and **limiting replanting**, particularly in **Florida.**
- **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 **MY26P.**

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: USDA*; MY25 acreage estimated and MY26 projected based on historical trends and secondary research; *India's acreage referred from MoA&FW and projection based on trend analysis and interactions 1. Orlando Weekly Newsletter.*

Production Estimates of Major Producing Countries



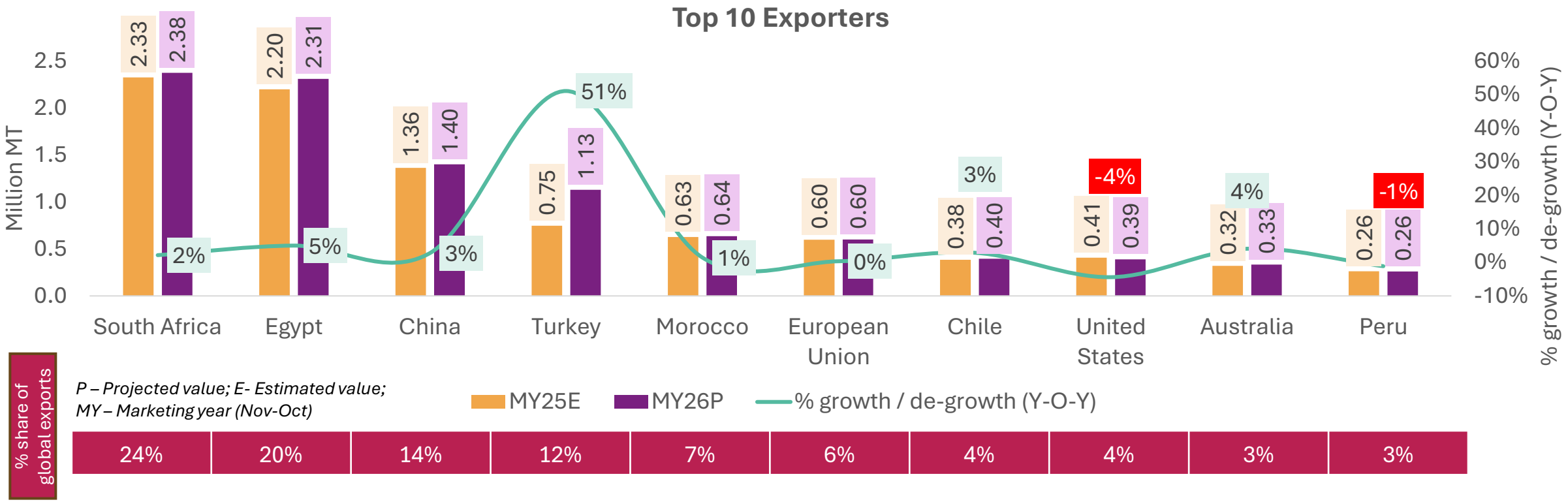
P – Projected value; E- Estimated value; MY – Marketing year (Nov-Oct)

- 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: USDA:* MY25 production estimated and MY26 projected based on historical trends and secondary research. *India's production referred from MoA&FW and projection is based on trend analysis and on ground interactions*

Export trends and price outlook

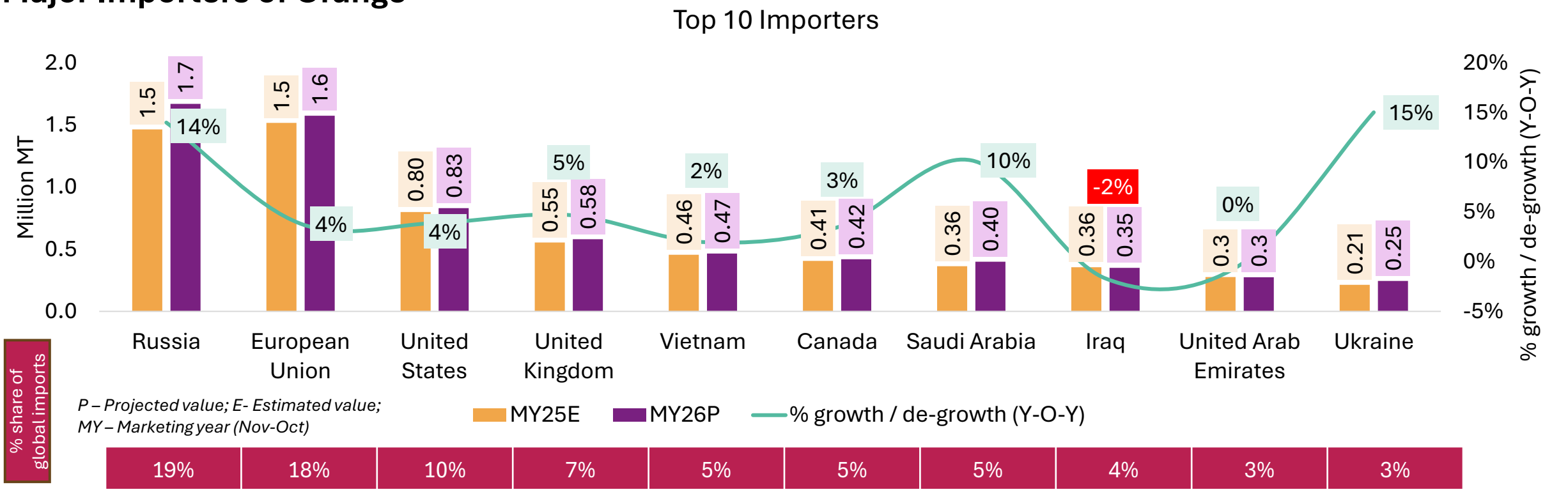
Major Exporters of Orange



- The countries shown in the chart **collectively account for ~97% of total global orange exports.**
- Global orange exports are projected to **rise ~6%** in **MY26P**, led by **Turkey's ~50-55% surge**, supported **by strong 2025 export momentum (+41%), improved yields** and **quality**, **competitive pricing**, and **sustained demand** from **Russia**, and **Eastern Europe markets.**
- **South Africa's**[1] orange exports are projected to **rise ~2% to ~2.4 MMT** in **MY26P**, driven by the **April 2026 China agreement** removing **extreme cold treatment**, **enabling zero tariffs**, **lowering compliance costs**, and **boosting Navel and Valencia competitiveness** in **China's** high-growth **import market.**
- **Egypt's**[2] orange exports reached **~2.2 MMT** in **MY25E** and are projected to **rise ~5%** to **~2.31 MMT in MY26P**, driven by varieties like **Valencia (~70%) demand**, as **EU/Russia shifts sourcing** from **Spain/Turkey** amid **tighter supply** and **pricing pressures.**

Source: USDA; MY25E export volumes include estimates where recent data is unavailable; MY26P based on trade estimates and export trends.
Source 1. South Africa-China Agreement ; 2. Egypt's export momentum

Major Importers of Orange

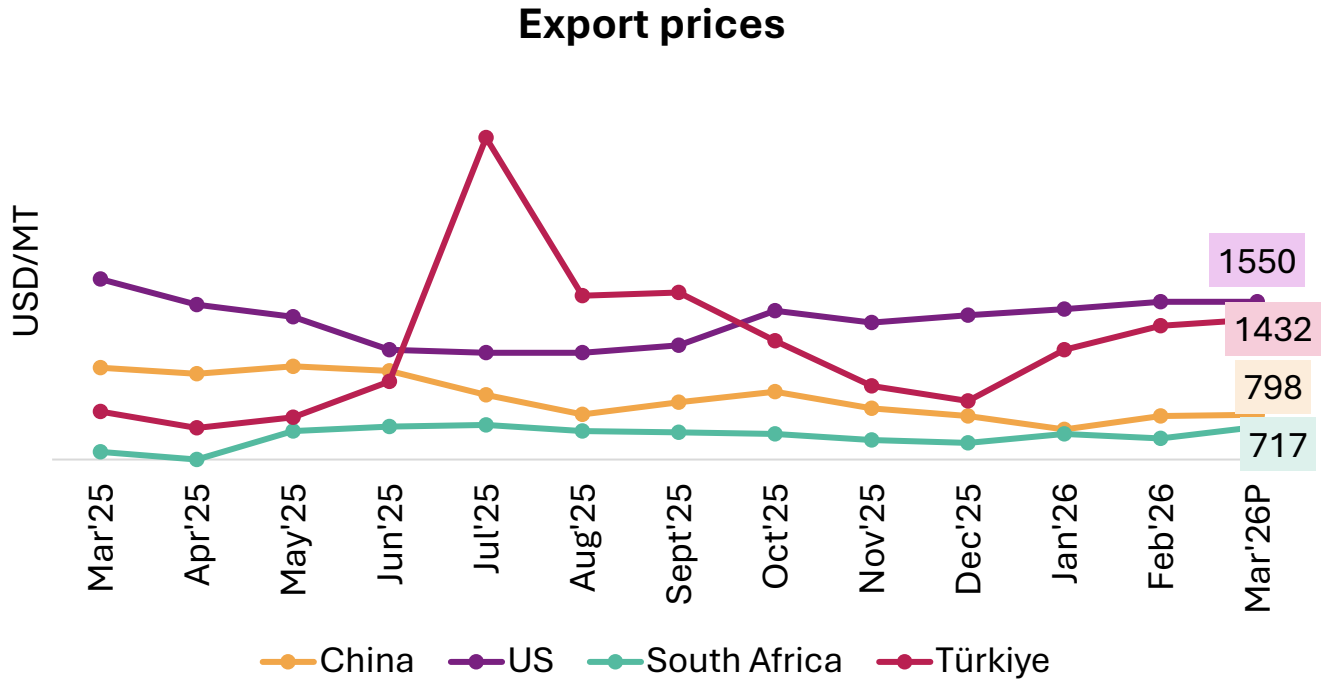


- The countries shown in the chart **collectively account for ~80% of total global orange imports.**
- **Global orange imports are projected to rise slightly by 4-5% Y-o-Y. Russia's**[1] orange imports are projected to **rise** from **~1.5 MMT** to **~1.7 MMT** in **MY26P**, driven by **strong winter demand** and **import dependence. Geopolitical tensions, trade restrictions, and embargo driven market access shifts** are accelerating diversification towards a competitively priced **alternative origins like South Korea**.
- **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**.
- **Saudi Arabia's**[2] orange imports are projected to **grow ~10%** in **MY26P**, driven by **strong Gulf demand** for **Egyptian Valencia oranges**, **resilient supply** via alternative land routes despite logistics disruptions, and rising consumption across **regional import markets.**

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. Russia's Orange Imports ; *2. Saudi Arabia's citrus imports*

Export Prices Trend and Forecast for Orange

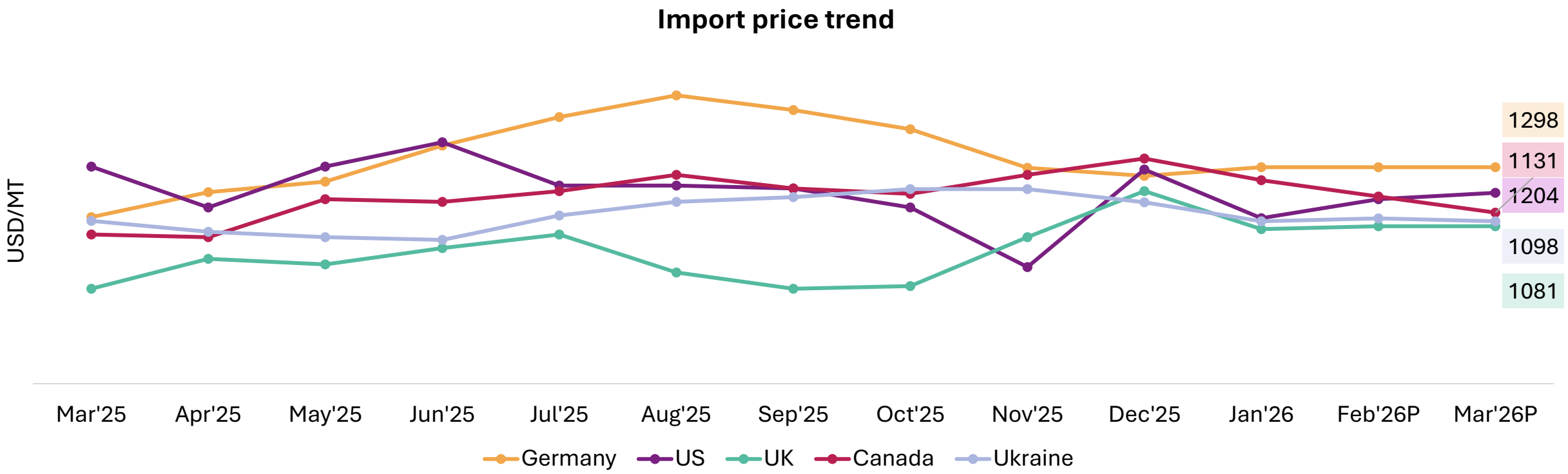


Country	Mar'26P Price (USD/MT)	Mar'25 Price (USD/MT	%age change	Indicative price change direction	Forecasted average price range for AMJ (USD/MT)
China	798	1,110	-28%	Sideways	780-840
US	1,550	1,700	-9%	Bearish	1,420-1,480
South Africa	717	550	30%	Bullish	790-850
Türkiye	1,432	820	75%	Bullish	1,480-1,540

Source: ITC Trade Map (up to Jan 2026); prices for Feb and Mar 2026 are estimated based on seasonal patterns, trade trends and trade estimates, (HSN Code: 080510)- Fresh or dried oranges
Note: AMJ stand for April, May & June 2026

- **U.S. orange prices** are **~9–10% lower YoY** and are expected to remain **bearish** in the **next quarter**, as **Brazil's supply recovery improves global availability**, while **Middle East** geopolitical tensions **disrupt trade flows**, **dampening export demand** and **exerting downward price pressure** despite **tighter domestic output.**
- **China's** prices are anticipated to **remain stable** in the coming quarter, with **sufficient incoming harvests** bolstering **supply levels**, while consistent international demand serves to prevent additional **price erosion.**
- **South Africa's** orange export prices are **~25–30% higher YoY (~USD 715–720/MT)** and remain **bullish** for **Apr–Jun 2026**, as **strong China-led demand**, **improved market access**, and **early-season supply tightness** outweigh rising export volumes.
- **Turkey's** orange prices remain **bullish** in the **next quarter**, as **production declines (~3%)** due to **frost** and **weather shocks**, while **Dec–Feb harvest delays** tighten supply, and steady export demand sustains **firm pricing.**

Price Trends of Key Importing Nations



- Between **March 2025** and **March 2026**, **orange import prices** rose **8-27%** in **Canada, Germany** and **the U.K.**, **fell** by about **12%** in **the U.S., stayed flat for Ukraine.**
- Import prices are expected to decline across Canada, and Ukraine due to increased low-cost supply from **Egypt** and improving global availability, easing tightness, while **Germany** and **the UK** remained **stable** due to **steady contracts** and **diversified sourcing**.
- **Rising freight** and **insurance costs** due to **Middle East shipping disruptions** may **push U.S. orange import prices 1-2% higher** from the current level **(~USD 1,150-1,200/MT)** , in the subsequent quarters as longer routes increase landed costs.

Source: ITC Trade Map (up to Jan 2026); prices for Feb and Mar 2026 are estimated based on seasonal patterns, trade trends and trade estimates, (HSN Code: 080510)- Fresh or dries 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.

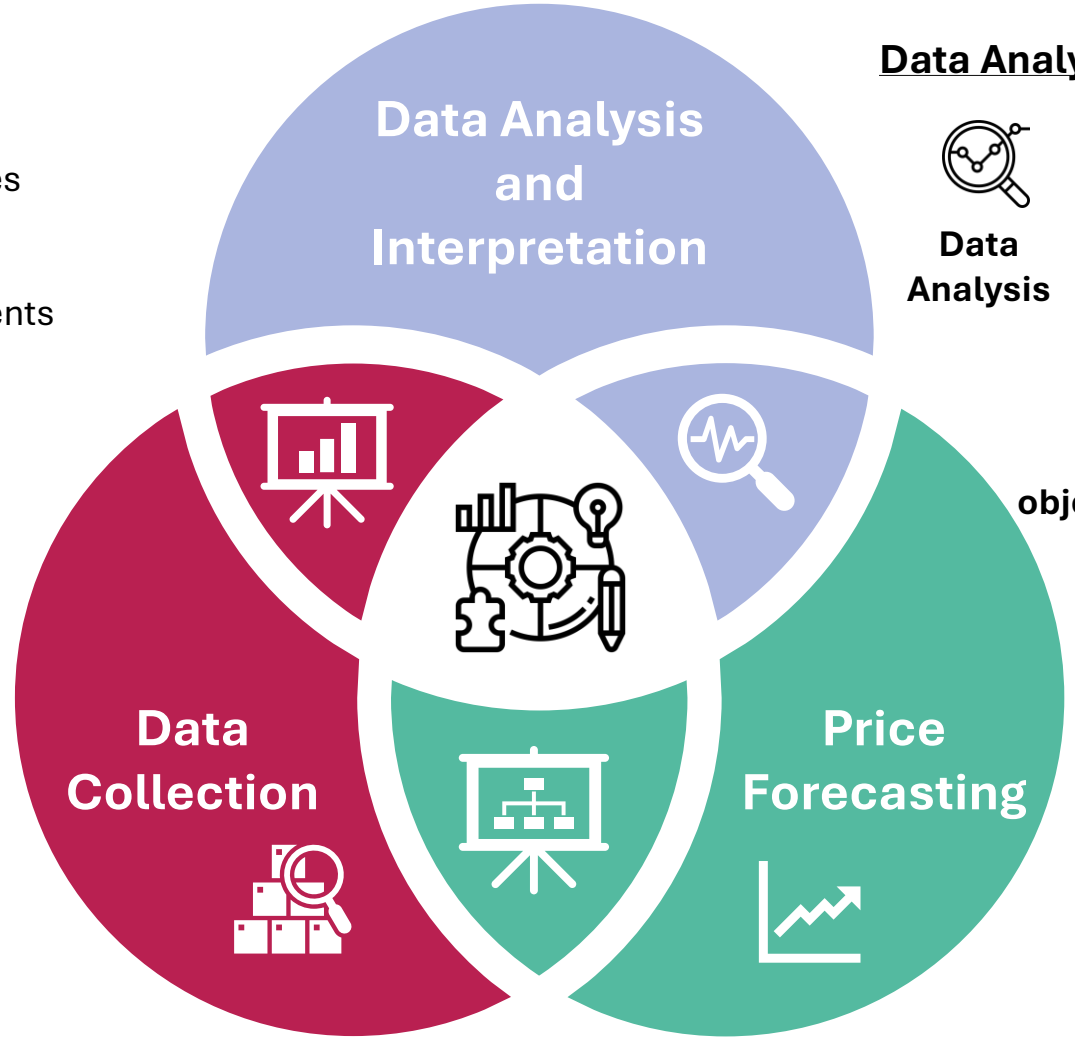
Data Collection

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 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.