

Monthly Dashboard – Orange

HSN Code: 080510

April 2026

Acreage and Production trends

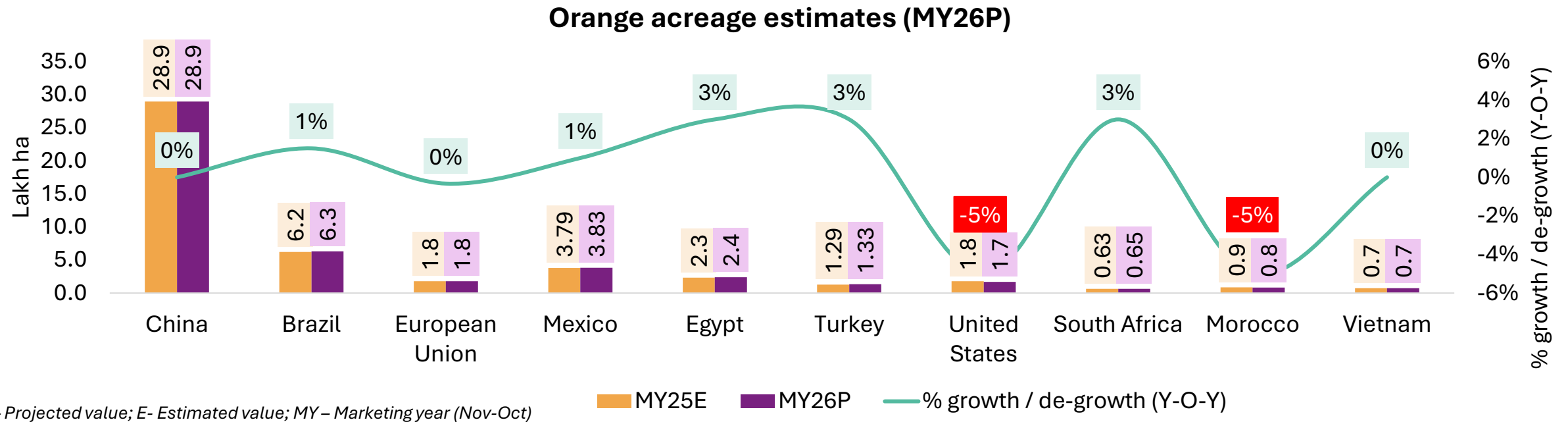


Major Producing Countries

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 primarily harvest 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).

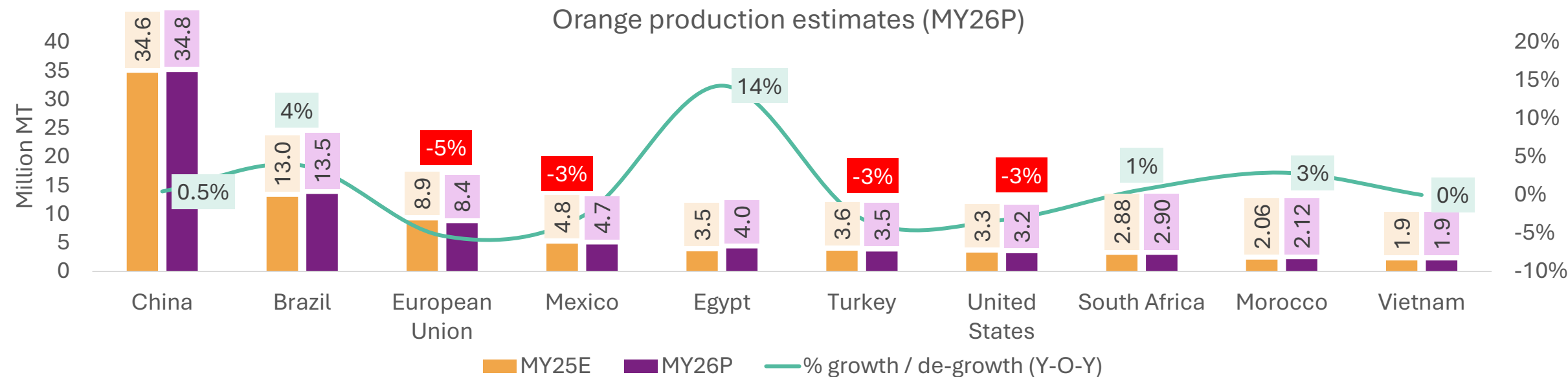
Acreage Estimates of Major Producing Countries



- The countries shown in the chart collectively **account for ~70% of global orange acreage**.
- In MY26P, global orange acreage is **expected to remain broadly stable to marginally higher** (~0–1% YoY), supported by stable to marginally increasing areas in countries like **Mexico, Egypt, Turkey, and South Africa**, partly offset by acreage declines in **the US, and Morocco**.
- **U.S.¹ orange acreage has declined sharply** due to **citrus greening, hurricane-related orchard damage, and rising labor/input costs** that **reduced grower viability**, particularly in **Florida**, which has **accelerated orchard removals** and **limiting replanting**.
- **Brazil's² orange acreage is marginally expanding in MY26P (~1% YoY)**, supported by **orchard replanting** and **young groves entering bearing age**; however, gains remain constrained by **citrus greening pressure** and **weather-led yield volatility**.

Note: The country-wise acreage figures in the chart represent the combined output of oranges, tangerines, and mandarins.
Source: USDA; MY25 acreage is estimated and MY26 figures are projected based on historical trends and secondary research;
1. Orlando Weekly Newsletter. 2. [Brazil's Orange Acreage](#)

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% YoY)**, with **Egypt’s strong ~14% recovery** and **Brazil’s (~4%) higher production** offset output declines in the EU (–5%), Turkey (–3%), Mexico (–3%), and US (–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-impact, improved climatic conditions**, and 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**.

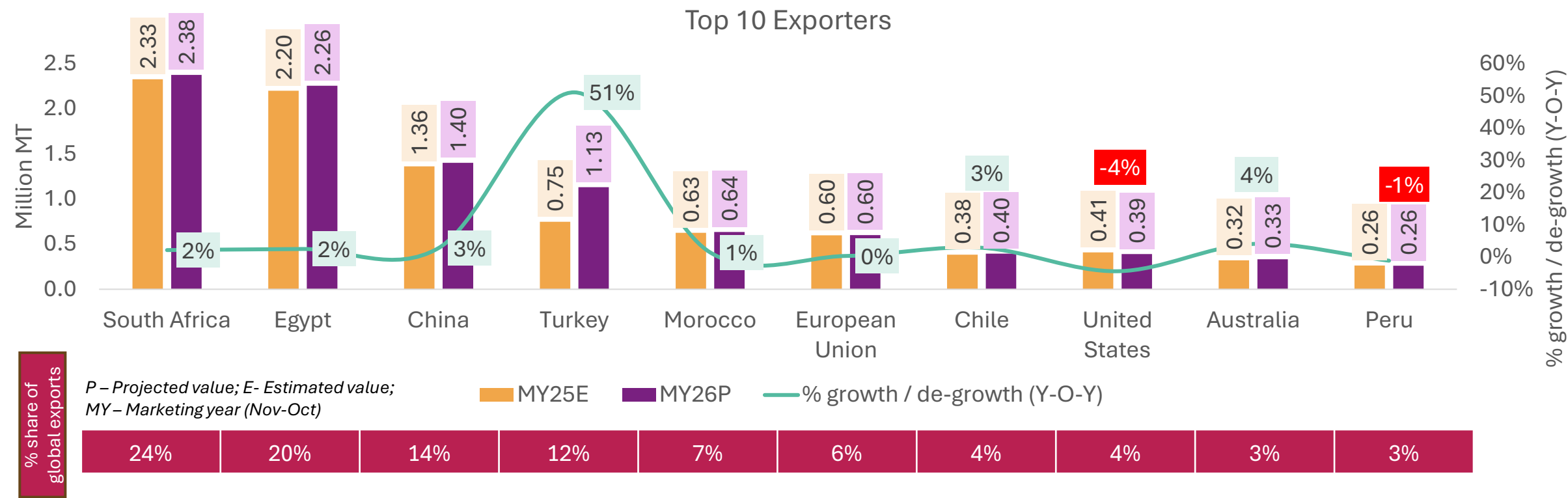
Note: The country-wise production figures in the chart represent the combined output of oranges, tangerines, and mandarins.

Source: USDA; MY25 acreage is estimated and MY26 figures are projected based on historical trends and secondary research;

A large container ship is shown from an aerial perspective, sailing on a deep blue ocean. The ship's deck is covered with numerous colorful shipping containers in shades of red, yellow, blue, and green. The ship has a white superstructure and a dark hull. In the background, a smaller ship is visible on the horizon under a clear sky. The text "Export Trends and Price Outlook" is overlaid in white on the ship's deck.

Export Trends and Price Outlook

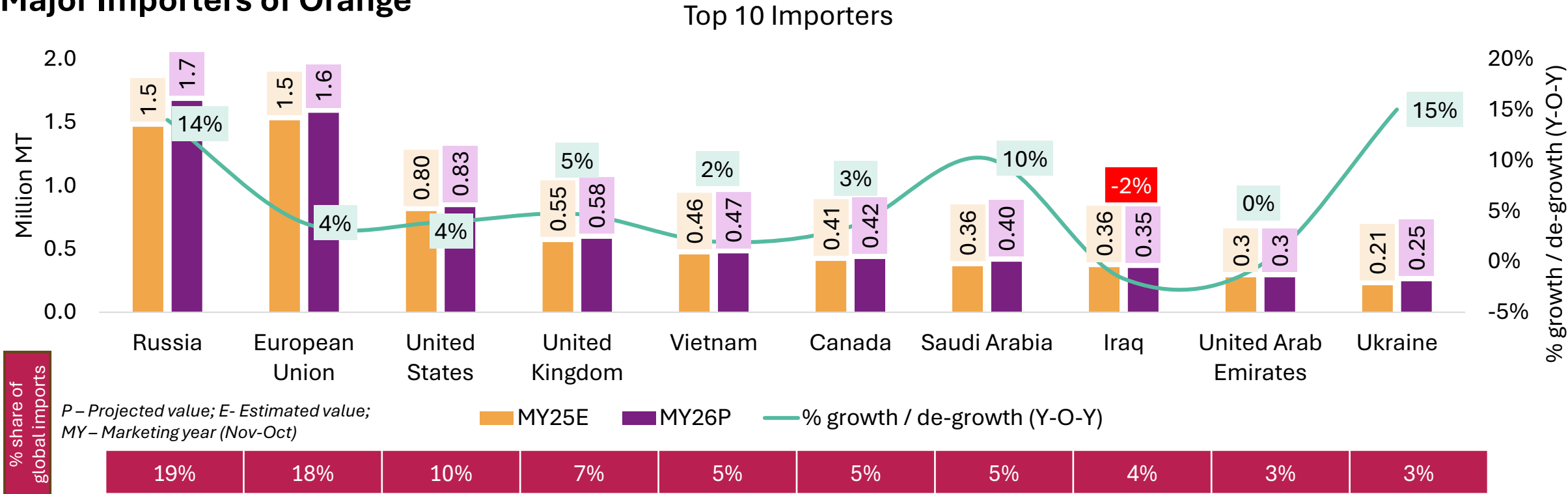
Major Exporters of Orange



- 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**, and **sustained demand from Russia, and Eastern Europe markets.**
- **China’s¹** orange exports are projected to **rise by 2-3% in MY26P**, supported by **improved post-harvest technologies** reducing losses to **below 5%**, expanded **cold-chain logistics** allowing exports to over **40 countries**, and popular varieties like **Ganzhou’s navel oranges**, which have a brand value of **~USD 10.1 billion**, sustaining consistent overseas demand.
- **Egypt’s²** orange exports are expected to grow modestly (~2%) in MY26P, despite a late start, higher freight costs, and increased Chinese competition in East Asia. Steady demand from Gulf and Indian markets will help support overall exports.

Source: USDA; MY25E export volumes include estimates where recent data is unavailable; MY26P based on trade estimates and export trends.
Source 1. [China’s export momentum](#) ; 2. [Egypt’s export momentum](#)

Major Importers of Orange

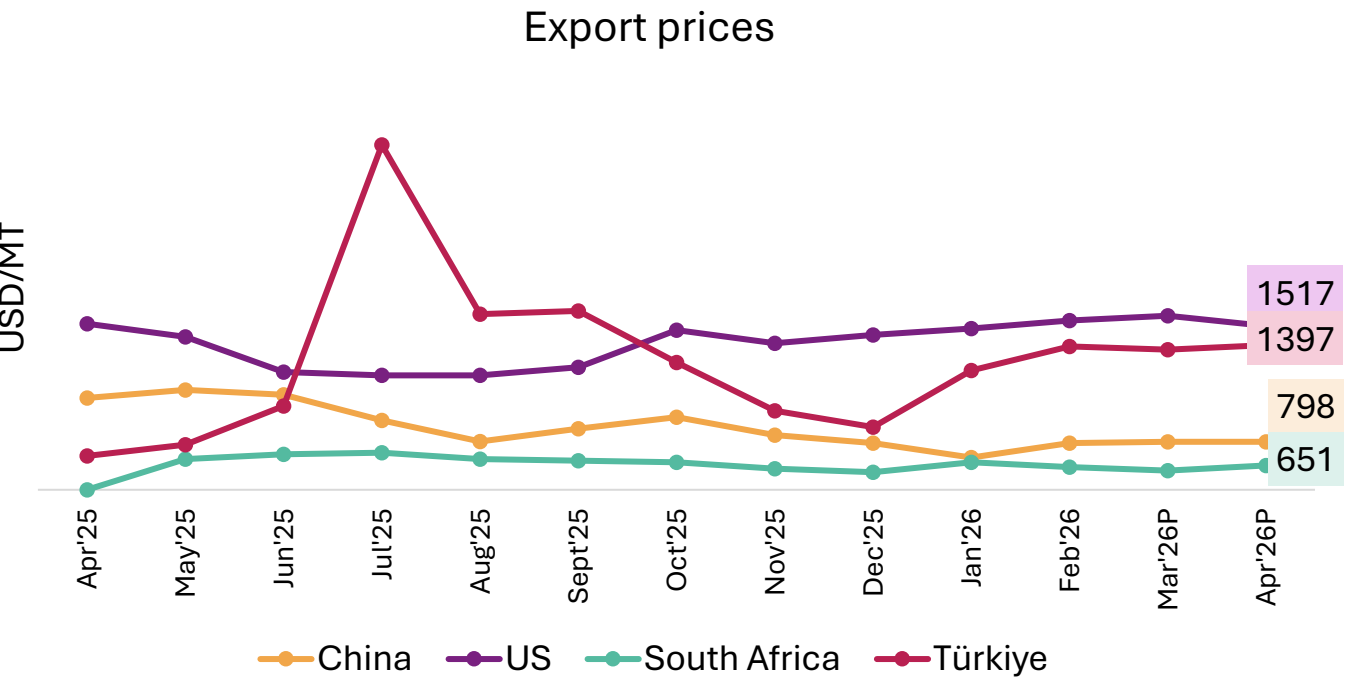


- The countries shown in the chart **collectively account for ~80% of global orange imports.**
- **Global orange imports are projected to rise modestly by 4-5% Y-o-Y.**
- **Russia’s¹ orange imports to rise by ~12-14% in MY26P**, supported by a diversified supplier base, **expanded phytosanitary clearance in regions such as Krasnoyarsk and Dagestan**, and steady year-round demand, with strict quarantine protocols maintaining compliant flows despite recurring pest detections.
- **Saudi Arabia’s² orange imports are projected to grow ~ 8-10% 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.**
- **Ukraine’s³ orange imports are projected to rise ~13-15% in MY26P**, supported by **post-war supply chain stabilisation, Turkey's** dominant citrus sourcing (**~75% of shipments**), and **diversified supplier base** spanning **Egypt, China, Spain, and South Africa** sustaining consistent volume growth.

Source: USDA; MY25E export volumes include estimates where recent data is unavailable; MY26P based on trade estimates and export trends.

Source: 1. [Russia’s Orange Imports](#); 2. [Saudi Arabia’s citrus imports](#); 3. [Ukraine’s Orange exports](#)

Export Prices Trend and Forecast for Orange



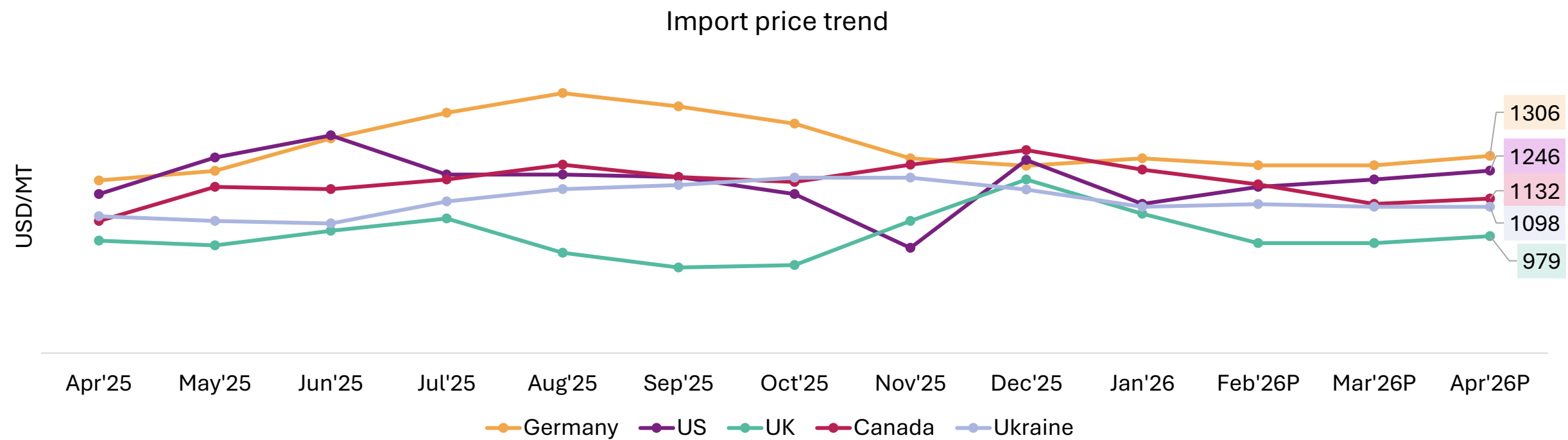
Countries	Apr'26 P Price (USD/MT)	Apr'25 Price (USD/MT)	%age YoY change	Price direction	Average projected price range for MJJ (USD/MT)
China	798	1070	-25%	Sideways	780-840
US	1517	1530	-1%	Bearish	1,380-1,440
South Africa	651	500	30%	Bullish	700-760
Türkiye	1397	710	97%	Bullish	1,440-1,500

- **U.S. orange export prices are estimated to be ~1% lower YoY in Apr'26P** and are likely to remain bearish next quarter, as Brazil's supply recovery boosts availability and Middle East tensions disrupt trade, weighing on demand despite tighter domestic output.
- **China's prices are hovering at ~ USD 750-800/MT in April 2026** and are anticipated to **remain sideways** 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 ~30% higher YoY** (~USD 650–660/MT) and are expected to stay bullish through May–Jul 2026, supported by strong **China-led demand**, improved market access, and early-season supply tightness despite rising volumes.
- **Turkey's orange export prices (~USD 1,380–1,400/MT) are expected to stay bullish through May–Jul'26**, driven by a ~15% YoY frost-led production drop in regions like **Adana** and **Hatay**, tighter exportable surplus, and strong demand from Russia, Ukraine, and Iraq.

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

Note Price forecasting is based on the fundamental analysis. MJJ stands for May, June, and July 2026.

Price Trends of Key Importing Nations



- Between **April 2025** and **April 2026**, orange import prices is estimated to have risen in the range of ~2-9% in **Canada, Germany, the U.K, the U.S, and Ukraine**.
- Import prices are expected to inch-up across Canada** due to reduced low-cost supply from Egypt and dependable global availability, while **Germany and UK prices are expected to remain firm** during **April'26** due to frost-driven supply tightness in key origins (Turkey and Spain), waning euro appreciation, and a weaker sterling increasing landed costs.
- Rising freight and insurance costs amid Middle East shipping disruptions** are forcing longer routing, which could push U.S. orange import prices ~3–4% higher from current levels (~USD 1,200–1,250/MT) in the coming quarters as landed costs increase.

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



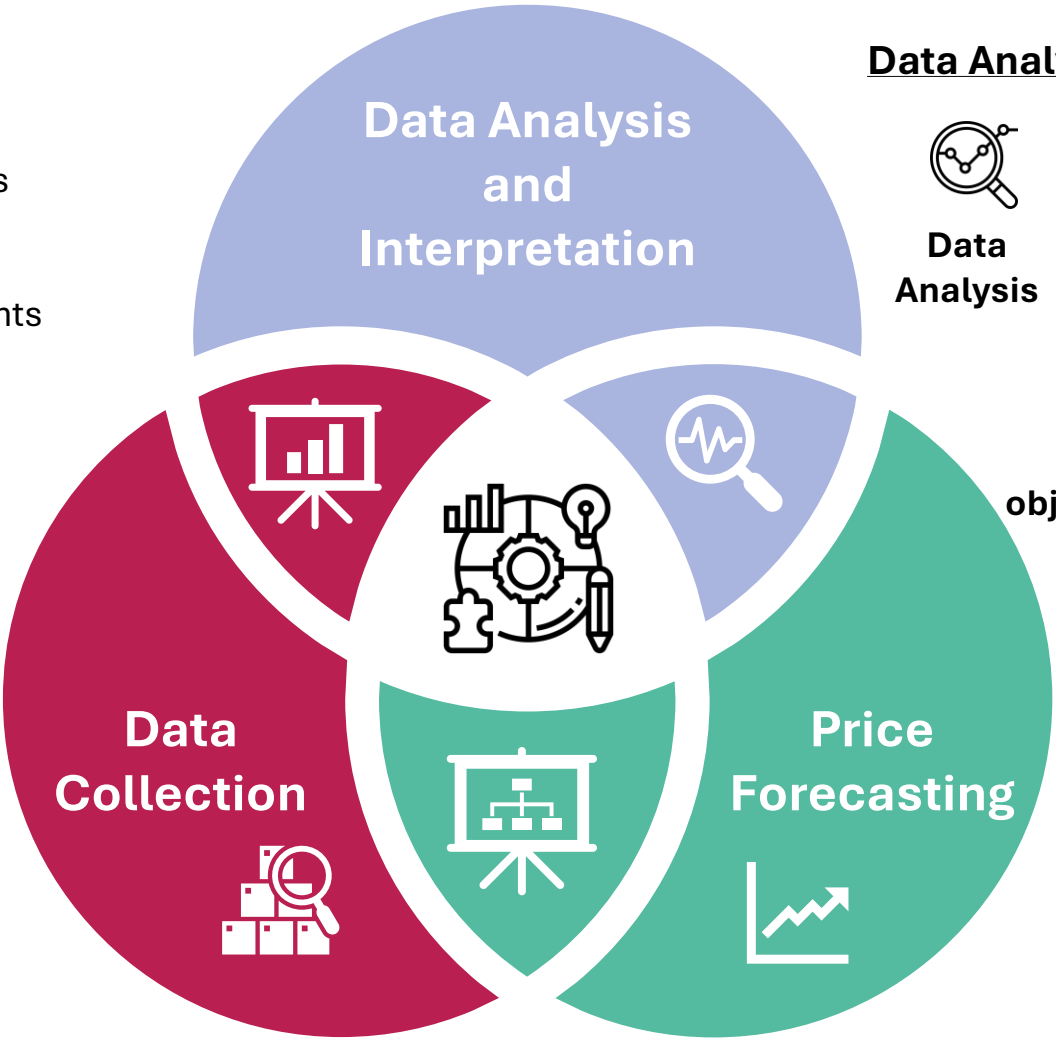
Sources

- 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.