

Monthly Dashboard Orange

HS Code: 080510

May 2026



Acreage and Production Trends

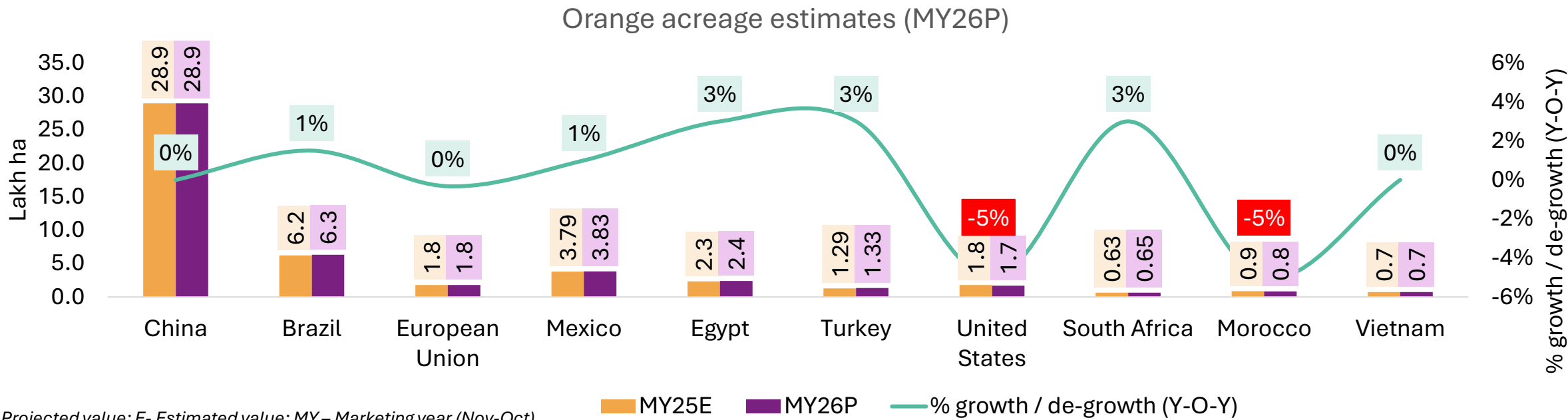


Major Producing Countries

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

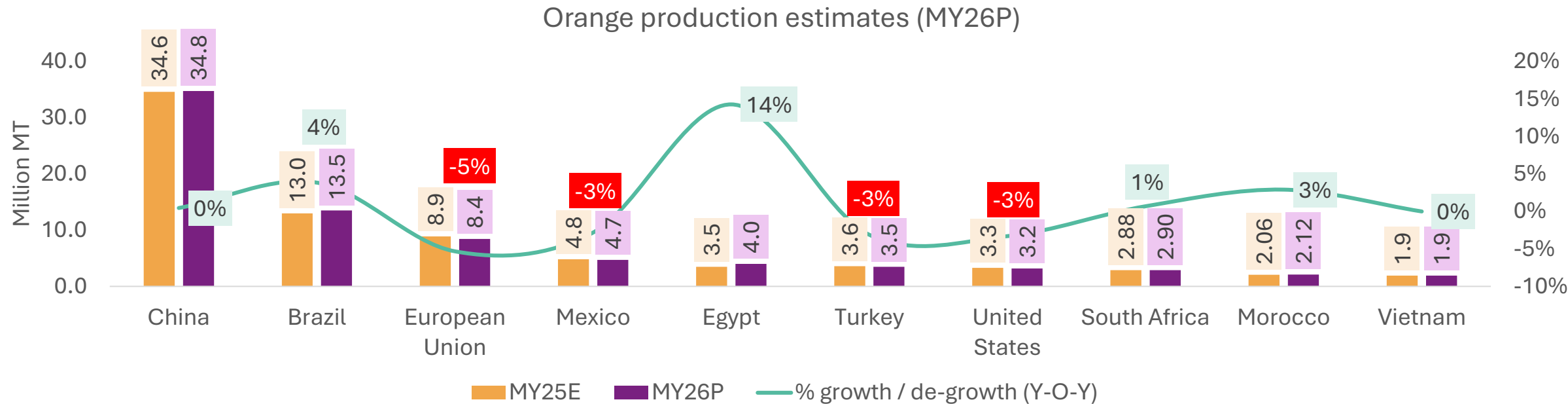


- The countries shown in the chart collectively **account for ~70% of global orange acreage**.
- **In MY26P, global orange acreage is expected to remain broadly stable with modest growth (~0–3% YoY)**, supported by expansion in Egypt, Turkey, and South Africa, partly offset by declines in the US and 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 limited 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, Includes major citrus variants where relevant
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](#)

Abbreviations used:
• YoY: Year on year
• CAGR: Compound annual growth rate

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 global orange production.
- **For MY26P, production is expected to remain broadly stable (~0–1% YoY)**, with strong growth in Egypt (~14%) and moderate gains in Brazil (~4%), offsetting declines across the EU, Turkey, Mexico, and the US amid weather and disease pressures.
- **Brazil: Output to grow ~4% YoY**, supported by recovery from last season’s drought, improved weather conditions, and higher bearing trees, partly offset by citrus greening pressures.
- **European Union: Production to decline** (Spain ~9%, Italy ~6%) due to prolonged drought, irrigation constraints, and heat-induced fruit drop, limiting marketable volumes in key regions such as Andalucia and Valencia.
- **Egypt: Output to rise ~14% YoY**, driven by favorable weather, improved yields, and additional bearing area as orchards mature, supported by strong export momentum and better crop management.
- **Turkey: Production to decline ~3% YoY** (~3.5 MMT), due to spring 2025 frost impacting key regions (Antalya, Adana, Hatay) and continued Mediterranean fruit fly pressure affecting yield and quality.

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

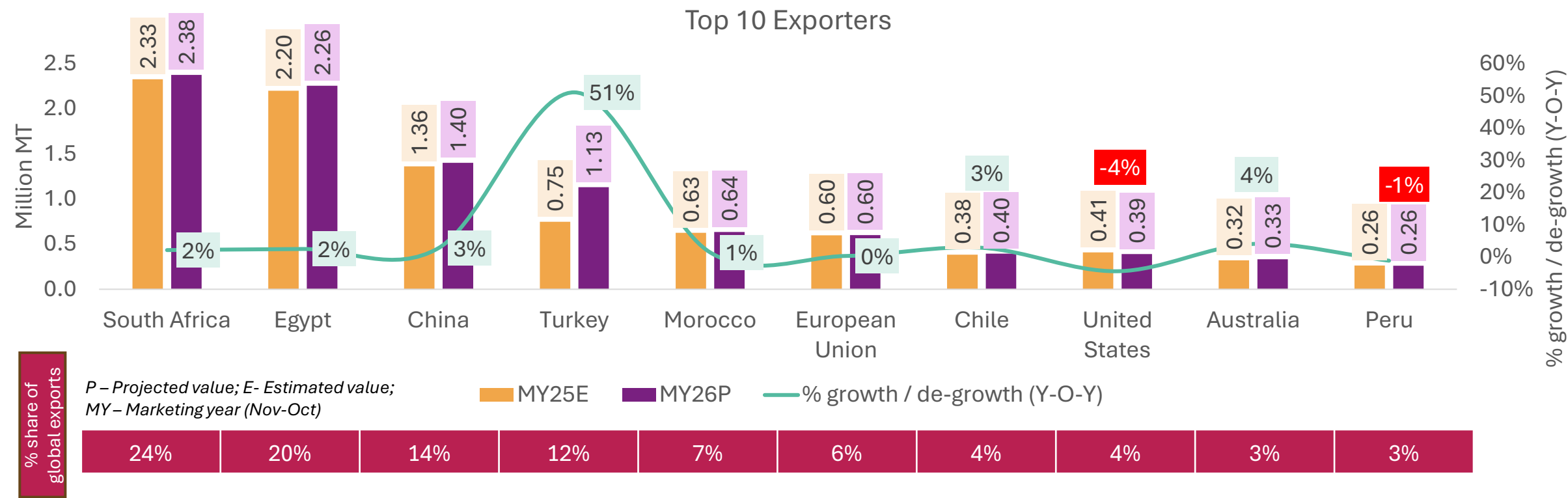
Source: USDA; MY25 production is estimated and MY26 figures are projected based on historical trends and secondary research;

Source 1: [Turkey's production](#)

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.

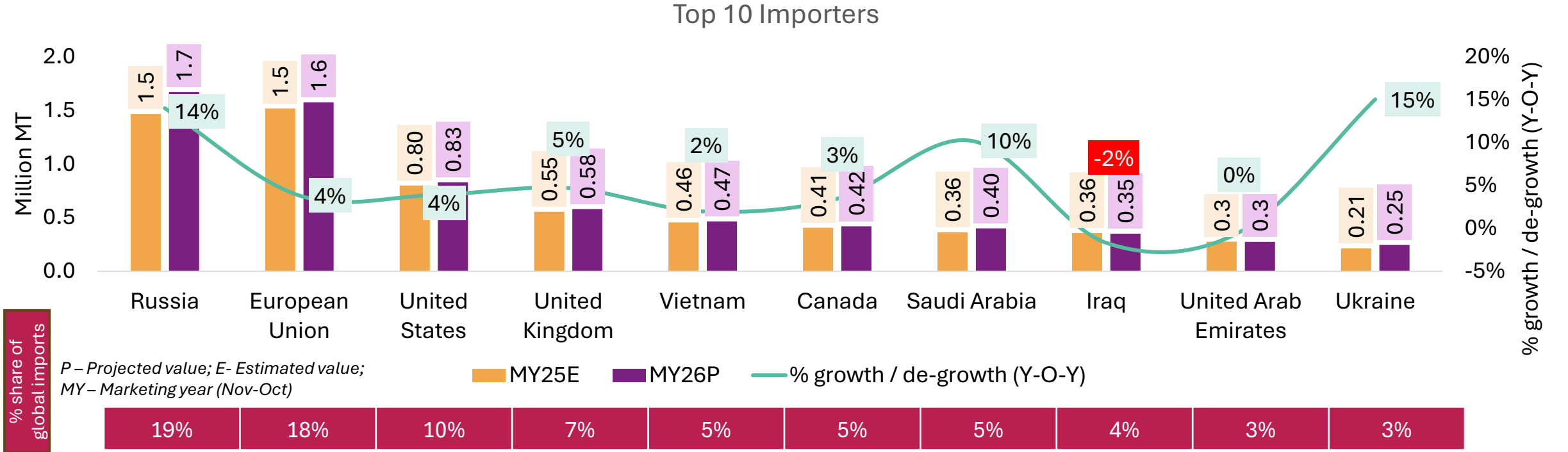
Export Trends and Price Outlook

Major Exporters of Oranges



- 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 to **rise ~2% YoY to 2.26 million MT**, backed by a **14% jump in production (~4 MMT)** from expanded **Nile Delta orchards**; **Navel** (Dec-Apr) and **Valencia** (late-season) shipments sustain demand across **the EU, Russia, and GCC markets.**

Major Importers of Oranges

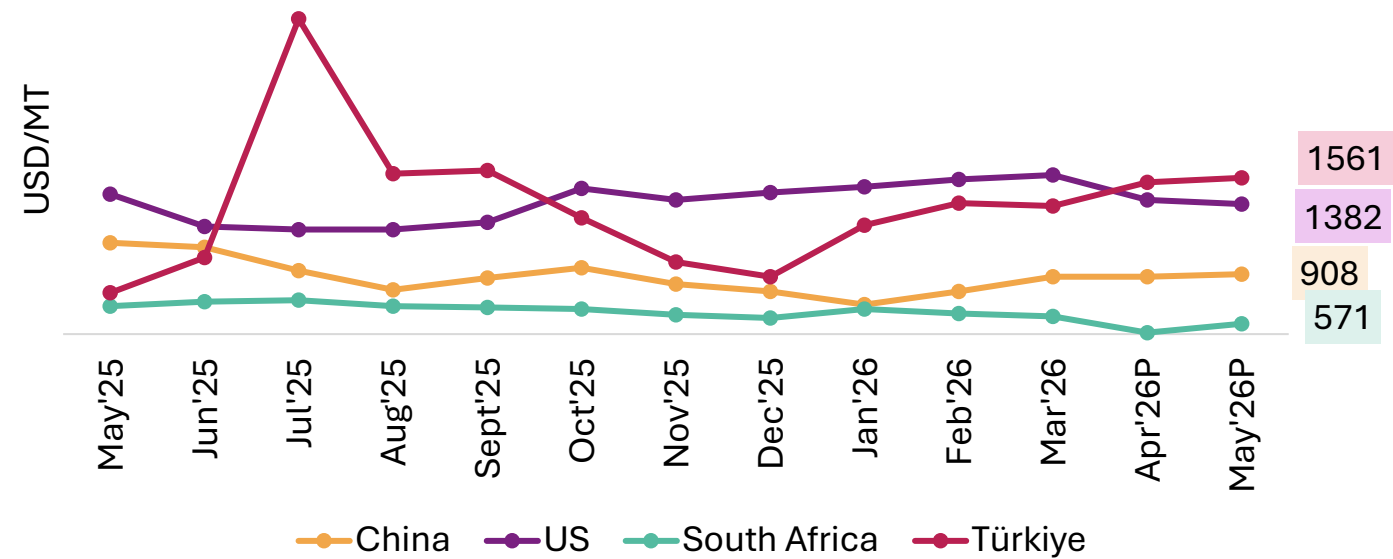


- The countries above collectively account for **~80%** of global orange imports. Global orange imports are projected to **rise** modestly by **~5–6% YoY**, driven by growth in **Ukraine, Russia, and Saudi Arabia**.
- **Russia’s¹** orange imports are projected to increase by **~12–14%** in **MY26P**, supported by a diversified **supplier base, expanded phytosanitary clearances** in regions such as **Krasnoyarsk** and **Dagestan**, and steady **year-round demand**.
- **Saudi Arabia’s²** orange imports are projected to **grow** by **~8–10%** in **MY26P**, driven by **strong Gulf demand** for **Egyptian Valencia oranges**, resilient supply through alternative **land routes** despite logistics disruptions, and rising consumption across regional import markets.
- **Ukraine’s³** orange imports are projected to **increase** by **~13–15%** in **MY26P**, supported by **post-war supply chain stabilization**. **Turkey’s** dominant position as a **citrus supplier (~75% of shipments)**, and a diversified supplier base spanning **Egypt, China, Spain, and South Africa**, which is expected to sustain consistent volume growth.

Source: USDA; MY25E import 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

Export prices

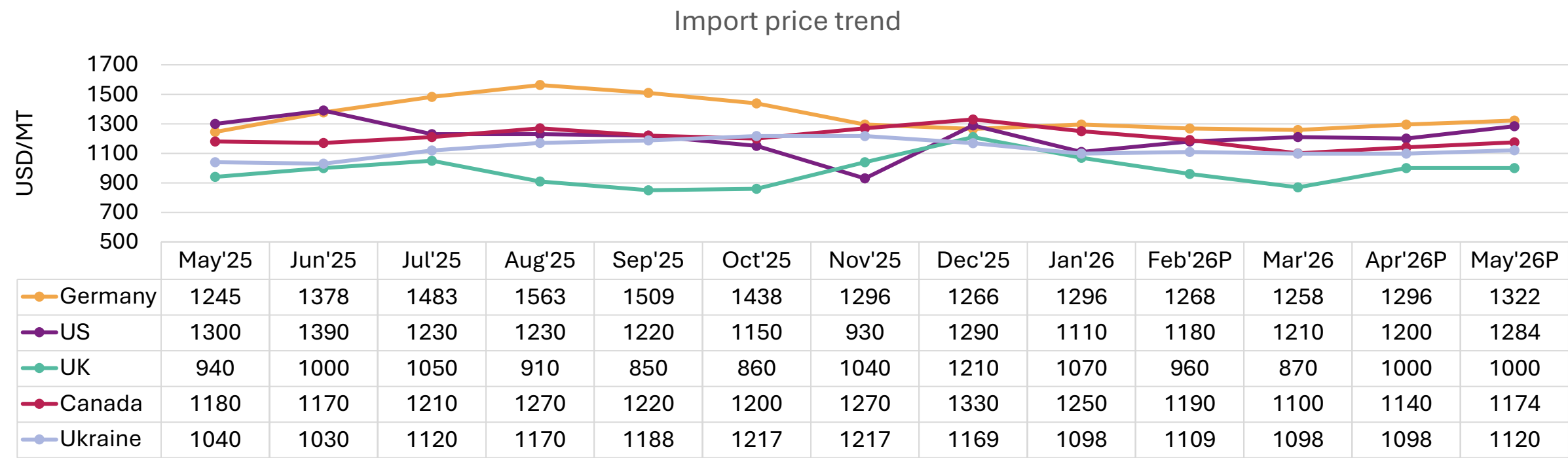


Price outlook for next quarter (JJA)					
Countries	May'26 P Price (USD/MT)	May'25 Price (USD/MT)	%age YoY change	Price direction	Average projected price range for JJA (USD/MT)
China	908	1120	-19%	Sideways	850-910
US	1382	1450	-5%	Bearish	1230-1290
South Africa	571	690	-17%	Sideways	530-590
Türkiye	1561	780	100%	Bullish	1640-1700

- China's prices are estimated to be hovering at ~USD 900-910/MT in May'26P 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.
- U.S. orange export prices are estimated to be ~5% lower YoY in May'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.
- South Africa's orange export prices are estimated to be ~17% lower YoY (~USD 565-575/MT) in May'26 and are expected to stay sideways through Jun-Aug 2026, supported by stable China-led demand, improved market access, and early-season supply tightness despite rising volumes.
- Turkey's orange export prices (~USD 1,555-1,565/MT) are expected to stay bullish through Jun-Aug'26, driven by a ~3% 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 Mar 2026); prices for Apr and May 2026 are estimated based on seasonal patterns, trade trends and trade estimates, (HSN Code: 080510)- Fresh or dried oranges
Note: JJA stands for June, July, & Aug 2026

Price Trends of Key Importing Nations



- Between **May 2025** and **May 2026**, **orange import prices are estimated to have risen** in the range of ~6-8% in **Germany, the U.K, and Ukraine**.
- Canada’s orange import prices** are expected to remain **broadly stable YoY**, supported by **dependable global availability** despite **reduced supply** from **Egypt**, while **Germany and UK prices are expected to remain firm on year** during **May’26** due to **frost-driven supply tightness** in key origin like **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 ~6-7% higher** from current levels (~USD 1,280–1,290/MT).

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



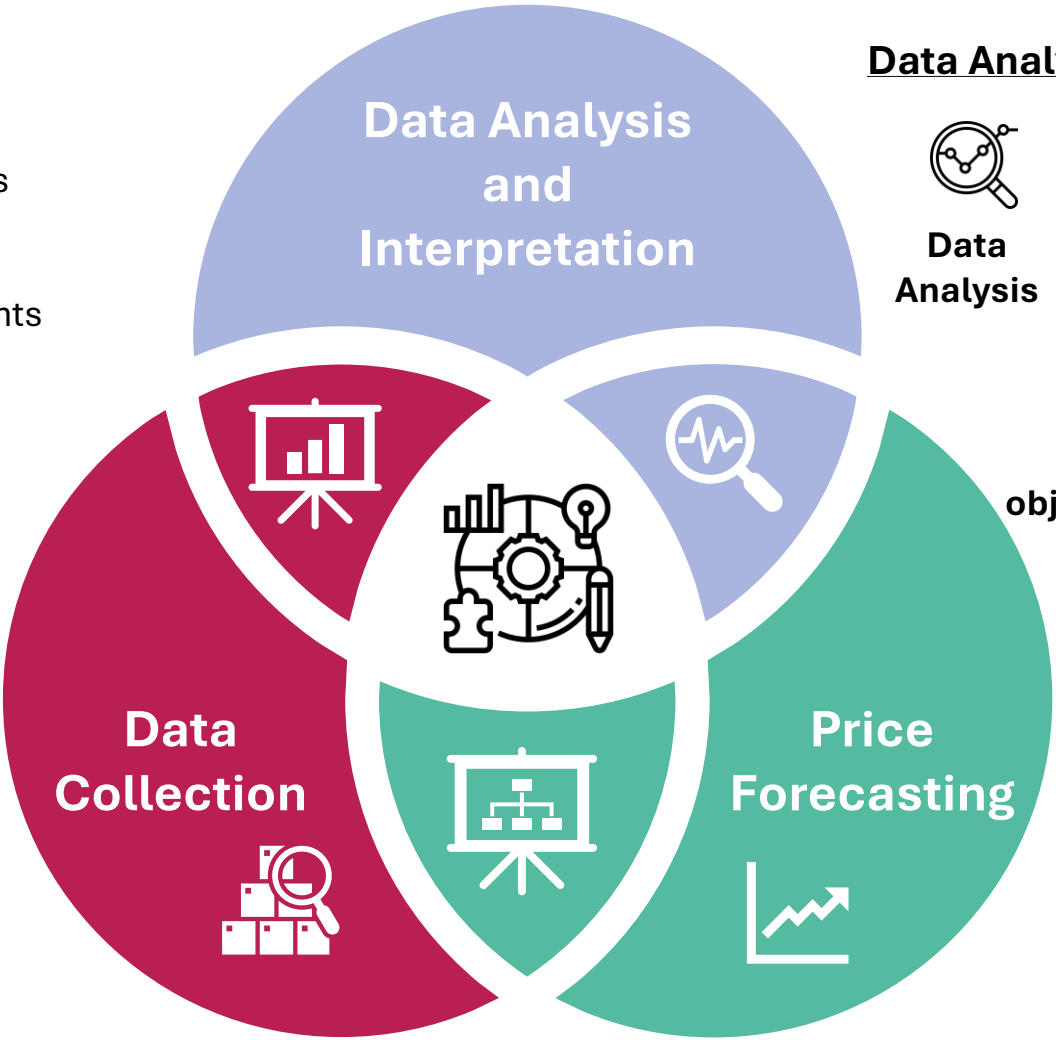
Sources

- 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.