

Monthly Dashboard Orange

HS Code: 080510

June 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	Tropical and Subtropical Regions (Northern Midlands & Mekong Delta)	Sept-May	Vinh Orange, Canh Orange, Navel, V2

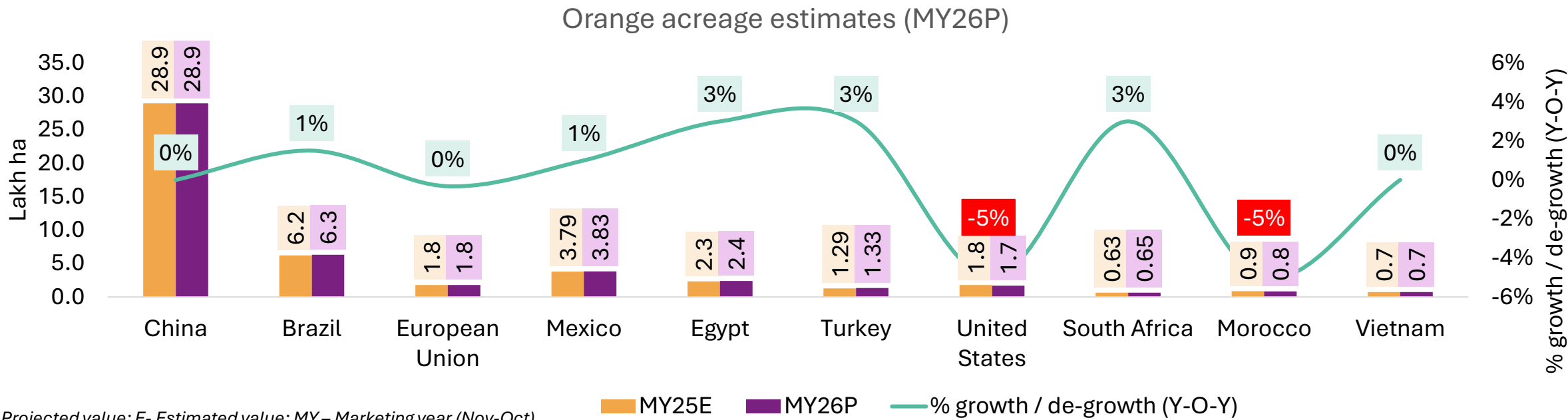
- Global orange availability is supported by geographically diverse production regions with complementary harvest seasons.
- **Northern Hemisphere producers** (EU, U.S., Egypt, Turkey, Morocco, and Mexico) primarily harvest between October and June, while **Southern Hemisphere suppliers** (Brazil and South Africa) harvest mainly from May to September.
- This seasonal overlap ensures a continuous global supply, creates distinct export windows, and supports year-round trade flows across major importing markets.

Source: USDA

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

Note : These are representative citrus harvest windows

Acreage Estimates of Major Producing Countries



- The countries shown in the chart collectively **account for ~70% of global citrus acreage and represent the major orange-producing regions worldwide.**
- **In MY26P, global orange acreage is expected to remain broadly stable with modest growth,** 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.**
- **China's acreage** is expected to remain broadly stable in MY26P, reflecting mature cultivation areas and limited new expansion.
- **Brazil's² acreage is projected to increase by ~1% YoY in MY26P,** supported by orchard replanting and young groves entering bearing age.

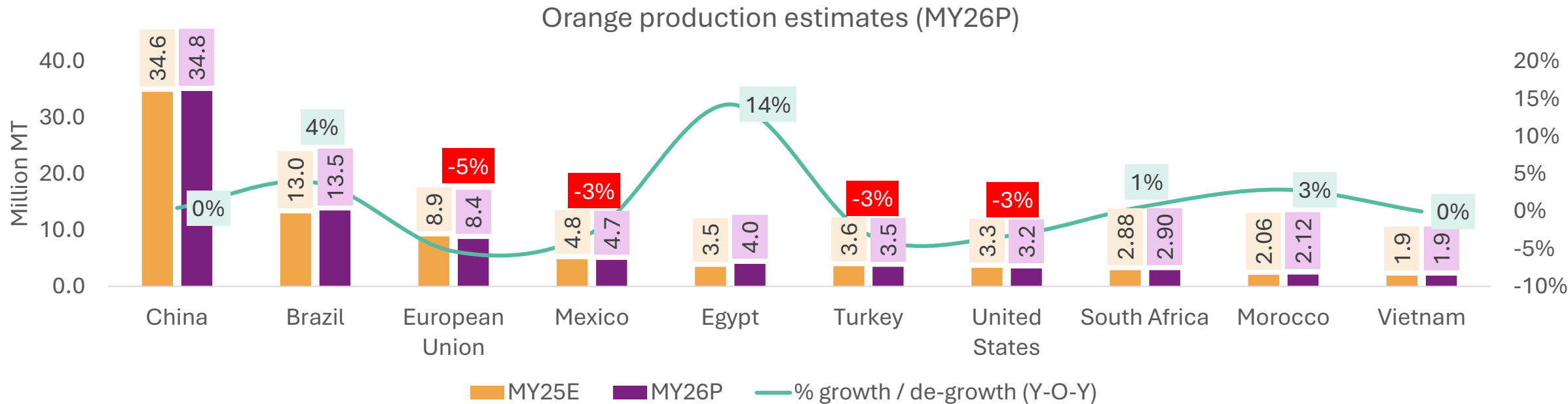
Note: The country-wise acreage figures in the chart represent major citrus acreage (oranges, tangerines, and mandarins) where separate orange acreage data is unavailable

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](#)

Note: Growth rates are calculated using unrounded acreage values

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 is expected to grow ~4% YoY**, supported by recovery from last season’s drought, improved weather conditions, and a 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.
- **Turkey¹: 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;

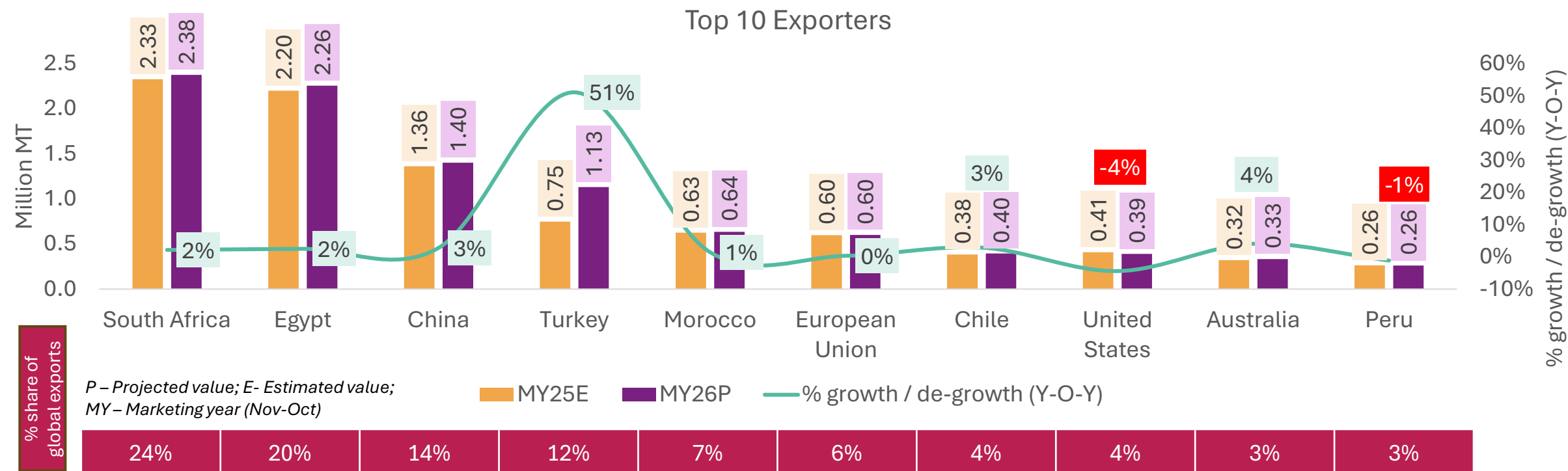
Source 1: [Turkey’s production](#)

Note: Growth rates are calculated using unrounded production values

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, stacked in neat rows. The ship's white superstructure is visible at the stern, and a small wake is visible in the water. In the background, a smaller ship is visible on the horizon under a clear sky.

Export Trends and Price Outlook

Major Exporters of Oranges

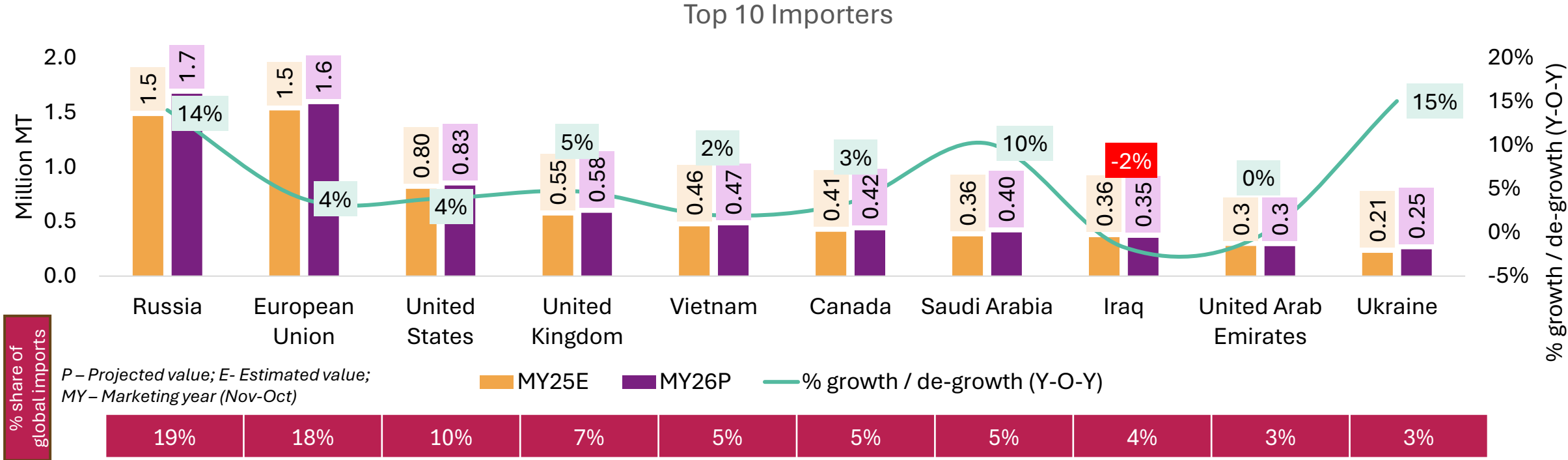


- The countries shown in the chart **collectively account for ~97% of total global orange exports.**
- Global orange exports are projected to **rise ~6% in MY26P**, led by **Turkey’s ~50-55% surge**, supported by **strong 2025 export momentum (+41%), improved yields and quality**, and **sustained demand from Russia, and Eastern European 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)**, sustained demand across key markets like Russia, the Netherlands, and Saudi Arabia, and strong phytosanitary compliance, strengthening its competitiveness in the global trade.

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](#)

Note: Growth rates are calculated using unrounded actual export values

Major Importers of Oranges



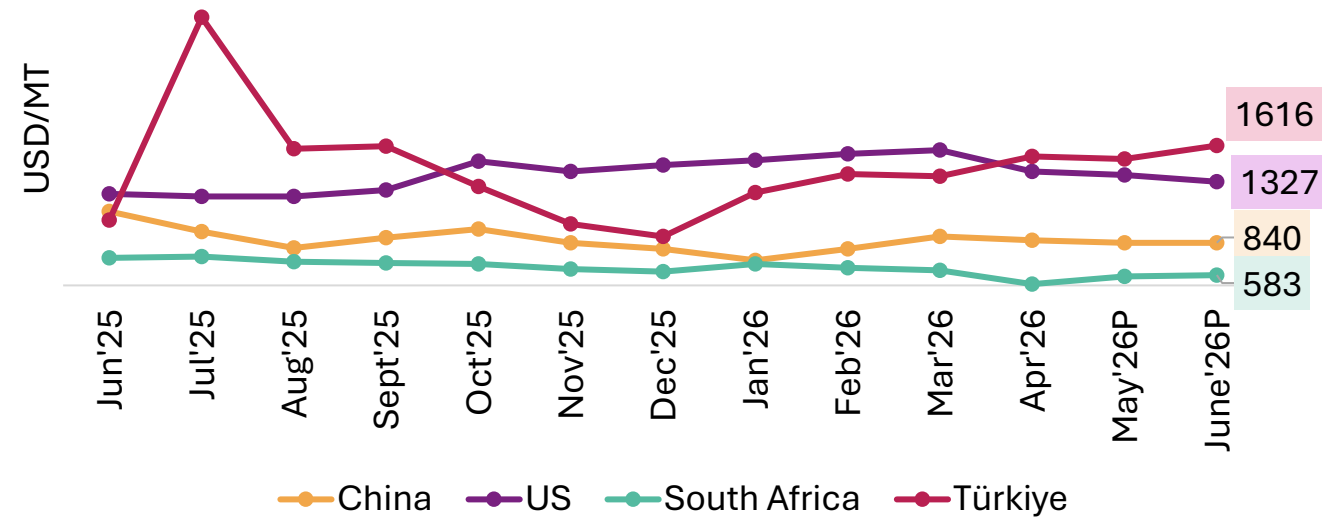
- The countries above collectively account for **~80%** of global orange imports. Global orange imports are projected to **rise** modestly by **~5–6% YoY**, driven by growth in **Ukraine, Russia, and Saudi Arabia**.
- **Russia’s¹** orange imports are projected to increase by **~12–14%** in **MY26P**, 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](#)

Note: Growth rates are calculated using unrounded actual import values

Export Prices Trend and Forecast for Orange

Export prices



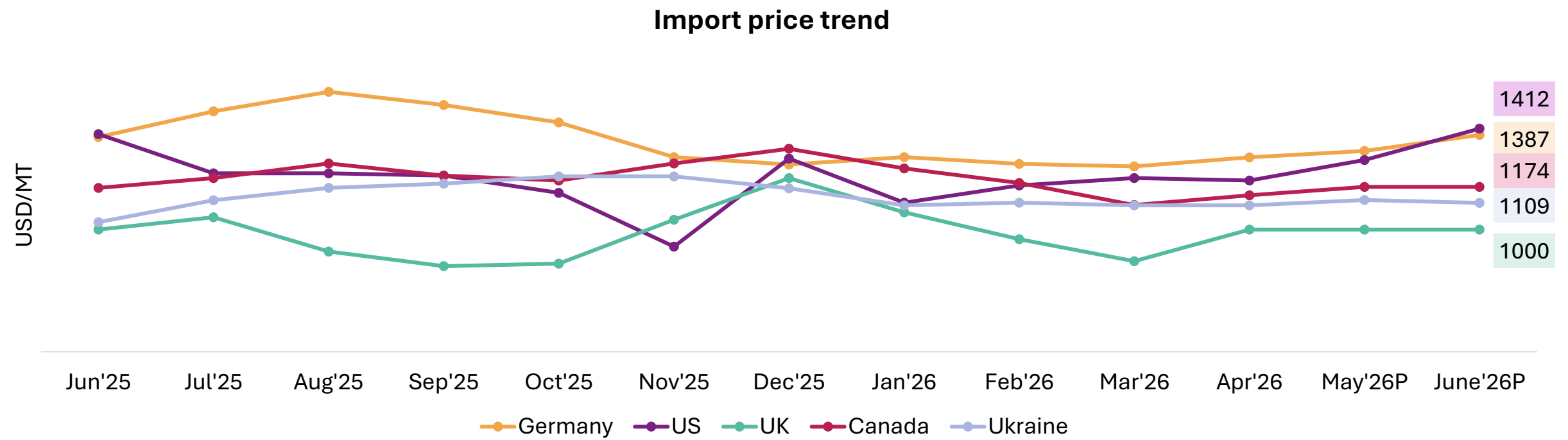
	Price outlook for next quarter (JAS)*				
Countries	June'26 P Price (USD/MT)	June'25 Price (USD/MT)	%age change	Price direction	Average projected price range for JAS (USD/MT)
China	840	1090	-23%	Bearish	770-830
US	1327	1230	8%	Bearish	1195-1255
South Africa	583	720	-19%	Sideways	530-590
Türkiye	1616	1020	58%	Bullish	1630-1690

- China's prices are estimated to hover at ~USD 835–845/MT in June'26P and are anticipated to remain **bearish** in the coming quarter, as seasonal price weakness during **June–August** and adequate supply availability are expected to outweigh the impact of steady export demand.
- U.S. orange export prices are estimated to be ~4% lower MoM in June'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 ~19% lower YoY (~USD 580-590/MT) in June'26P and are expected to stay sideways through July-Sep 2026, supported by stable **China-led demand**, improved market access, and early-season supply tightness despite rising volumes.
- Turkey's orange export prices (~USD 1,610-1,620/MT) are expected to stay **bullish through July-Sep'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 Apr 2026); prices for May & June 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. JAS stands for July, August and September 2026.

Price Trends of Key Importing Nations



- Between **June 2025** and **June 2026**, orange import prices are estimated to have risen by ~2% in the **U.S.**, and ~8% in **Ukraine**, and remained broadly stable in the **U.K.**, and **Canada**.
- Canada’s and the UK orange import prices** are expected to remain **broadly stable YoY**, supported by **dependable global availability** despite **reduced supply** from **Egypt**, while **Germany and prices** are expected to remain firm YoY during **June’26** due to **frost-driven supply tightness** in key origin like **Spain**, **waning euro appreciation**, and a **sterling weakness increasing landed costs**.
- U.S.** orange import prices are expected to **rise** sharply (~10% MoM) in **June’26P** as the domestic **harvest season** (Oct–Jun) nears **completion**, **reducing** local availability and **increasing reliance** on Southern Hemisphere supplies from **South Africa** and **Chile**.

Source: ITC Trade Map (up to Apr 2026); prices for May & June 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



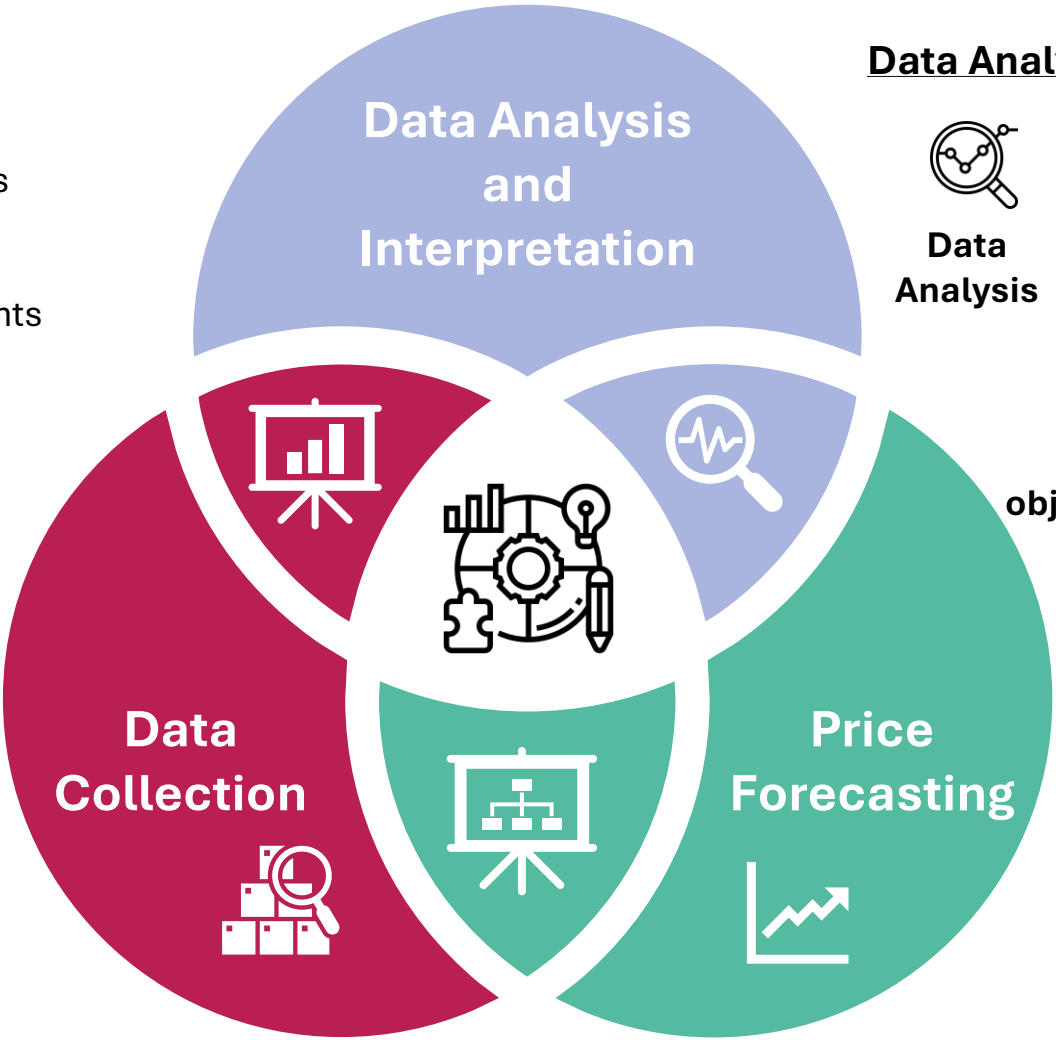
Sources

- 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.