

GLOBAL MARKET OVERVIEW MANDARINS

The global mandarin market is currently shaped by weather-related production issues in parts of Europe, strong export flows from Turkey, and shifting supply dynamics in markets such as India and North America. In several producing regions, adverse weather conditions have reduced available volumes, while imports from competing origins are influencing prices and market positioning. At the same time, new supplies from the Southern Hemisphere are beginning to enter the market.

Across Europe, the season shows mixed conditions. Weather damage has reduced production in parts of Italy, Spain, and Portugal, while imports from Morocco and Egypt are putting pressure on sales in some markets. Spanish mandarins remain widely available across Europe, but warmer temperatures and competing imports have slowed demand in countries such as Germany and the Netherlands. At the same time, quality concerns and inconsistent supply have influenced consumption patterns in Belgium and France. In Italy, lower domestic production has supported prices for controlled varieties such as Tango and Orri.



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Outside Europe, market dynamics differ by region. In North America, supply from California remains stable, supported by favorable growing conditions and larger fruit sizes. South Africa has just begun its mandarin export season with the first Satsuma shipments, while Turkey reports higher yields and steady export demand across Russia, Eastern Europe, and Central Asia. In India, the decline of domestic Kinnow supplies has led to increased imports of easy peelers such as Nadorcott and Murcott, with stronger arrivals expected to continue through Ramadan and into the summer period.

Italy: Weather damage reduces supply while premium varieties hold prices

Mandarin production in Calabria and Sicily, as well as in Andalusia, has declined significantly due to excessive rainfall and strong winds in these regions. Many producers in Calabria have already run out of available stocks. According to a southern Italian wholesaler, varieties marketed through club systems or protected by patents, such as Tango and Orri, continue to record consistently high prices due to strict control over production volumes.

As of early March 2026, the wholesale citrus market shows varying price levels across major trading hubs. In Rome and Turin, the Spanish Nadorcott variety ranges from €1.60 to €1.80, while the Orri variety commands higher prices, particularly for fruit of Israeli origin, reaching around €2.70 to €3.00, depending on size and market. Spanish products show somewhat lower values. Late-season Sicilian mandarin prices remain low, generally ranging from €1.20 to €1.70, depending on size. In Verona, Nadorcott prices are slightly lower (around €1.25 to €1.70, depending on size and origin), while premium citrus such as Israeli Orri and Spanish Tango range between €2.00 and €2.50. Late-season Sicilian mandarins also remain at moderate levels in this market, around €1.20 to €1.50.

According to YouGov data, 67 per cent of Italian households purchase mandarins and clementines. Purchase frequency has remained stable over time at approximately eight times per year. However, average spending per purchase and the quantity bought per purchase have shown a slight decline over the past two years. Supermarkets remain the most important distribution channel, although their market share is shrinking. Discount stores rank second.

Belgium: Quality issues dampen clementine consumption

The supply of Spanish clementines has been more difficult than desired this season, says a Belgian importer. "There are no real shortages, however. Any lower volumes are quickly supplemented with product from other countries, such as Morocco, Egypt, and Turkey. Egypt has started with Valencia, and Morocco is supplying Nour clementines. There is sufficient volume available, but quality has suffered due to weather problems in Spain and Morocco.

From Spain, we are working with Tango Gold, Nadorcott, and various easy peelers. In addition, Sanguinelli is available and, in the juice segment, Salustiana. Although there is therefore enough supply, the quality level remains inconsistent, which pushes up prices for good-quality fruit and, in turn, dampens consumption.

Consumers are making more selective choices, especially now that spring is approaching and the fruit shelf is expanding with new products. Perhaps consumers are also somewhat tired of citrus at this stage and are looking for something different."

France: Lower volumes due to weather impact

It is a difficult season for mandarins, characterized by a significant lack of volume due to recent adverse weather, as well as poor fruit set conditions last spring. Although consumption is currently somewhat subdued because of the school holidays, supply remains insufficient to meet demand.

In Spain, Orri mandarins are showing a sharp decline in volumes, with the harvest estimated at nearly 50 per cent of last year's level. Strong winds and heavy rainfall have also led to sorting losses of 40 to 50 per cent in some orchards in Italy. In Portugal, orchards and production have also been affected by adverse weather conditions. Israeli fruit is more visible on the market, but there is a significant price gap between Israeli Orri and Spanish Orri.

Spain: Mandarin sales slow due to import pressure

The citrus season in Spain is currently experiencing a period of lower mandarin sales due to strong pressure from imports from third countries in European markets, although prices have remained good and stable since the beginning of February.

From mid-January onwards, sales slowed due to the arrival of large volumes of Nadorcott and Tango mandarins from Morocco and Murcott from Egypt at low prices, which had a serious impact on sales.

"Fruit from these origins is sold already packed at similar or even lower prices than our production costs," says a grower and exporter. "We are at a clear disadvantage when it comes to permitted active ingredients, social obligations, or certifications, and although there used to be a clearer difference in terms of quality, we have to acknowledge that, in recent years, competing countries have achieved improvements in this regard. February is usually a quieter month, but this year there has been less activity than usual."

The sector expects that demand may pick up again during March and that the situation could improve.

Germany: Spanish mandarins dominate as warm weather weakens demand

Spanish mandarins dominated the market, followed by Israeli, Turkish, and Moroccan varieties in terms of volume. Small quantities of Italian and Egyptian fruit were also available. Although overall availability was limited, supplies were sufficient to meet demand.

Higher temperatures noticeably reduced demand, and trading remained generally quiet. Price developments varied between markets. In Frankfurt, Israeli Orri mandarins became cheaper due to heavy deliveries. In Munich, prices increased as Moroccan competitors lost market share. In Berlin, prices also declined, while large-sized fruit was rarely available in the capital. In Hamburg, prices remained largely unchanged as the quality of the offerings was convincing.

In Munich, the first Spanish Leanri mandarins appeared. These were very expensive and were marketed alongside Nadorcott from the same origin.

After a somewhat uneven start, the outlook for the second half of this year's citrus season is considered positive. "We started with the first early varieties of clementines in mid-October, but with lower supply volumes compared to last year. The Clemenules variety in particular saw a significant decline in harvest volumes. In line with forecasts, the switch to the Tango and Nadorcott varieties took place this year immediately after Christmas, about 2-3 weeks earlier than usual," an importer concluded.

The Netherlands: Moroccan Nadorcott arrivals pressure Spanish leaf mandarins

For one Dutch importer, the Spanish leaf mandarin season has ended on a subdued note. "At a certain point, the influx of Moroccan mandarins was so substantial that it put downward pressure on leaf mandarin prices. Over the coming weeks, we will still be receiving Nadorcott mandarins from Morocco, and demand remains steady. Prices for the larger sizes are around €12 to €13, medium sizes are trading at €10 to €11, and the smallest sizes are selling for approximately €10."

North America: Weather influences supply and fruit size

Mandarin supply from California is good, as is typical from late January to mid or late April. This comes after a significant amount of fruit dropped in the field in December, which slightly impacted the overall supply this season.

Mild weather last summer and this winter, combined with above-average rainfall, has also led to larger fruit sizes and accelerated maturity. Overall quality has been good.

At this time of year, Tango and Murcott are the predominant varieties being shipped.

In addition to California production, some mandarin imports from Europe are currently arriving, although this mainly affects supply on the East Coast and in Canada. Florida production has finished for the season. Growers harvested ahead of the recent freeze in the state, which led to an early end to the season.

Demand is good and is expected to remain so. Pricing is therefore similar to last year. Some changes in open market pricing could occur later in the season, as supply may become more limited.

South Africa: Mandarin season begins with first Satsuma shipments

The South African mandarin season has not yet fully commenced; the first Satsumas from northern South Africa were packed and shipped last week.

Last year, South African exporters shipped almost 52 million 15kg cartons of soft citrus in total, ten million more cartons than the year before. The first crop estimate for South African mandarins is expected toward the end of this month or the beginning of next.

The average market price for soft citrus is currently around €0.50 per kilogram and is expected to move downward as volumes increase.

Turkey: Higher yields and steady export demand

This year's Turkish mandarin season has been one of the strongest in recent years. Yield and quality have both improved compared with last season. Trees carried fruit more evenly, and overall orchard performance has remained stable.

Early varieties moved more slowly at the beginning due to warm weather and the late withdrawal of southern hemisphere fruit from Europe. Once temperatures normalized, demand increased, and sales gained momentum.

Mandarin programs have been running more smoothly than other citrus lines. Quality consistency helped reduce sorting pressure and allowed shipments to move without major interruptions. Overall, the season has shown a good balance between supply and demand, supporting a more structured export flow.

In many regions, mandarin yield increased by around 40 to 50 per cent, supported by favorable flowering conditions and balanced tree development. Fruit sizes are mostly medium to large, which aligns well with export preferences.

Demand remains steady and well distributed. Markets such as Russia, Eastern Europe, and Middle Asia continue to absorb large volumes. Turkey maintains a strong position in these destinations, particularly in Russia. European markets are also active, especially as expectations for the Spanish mandarin season are lower this year, creating additional space for Turkish fruit.

India: Imports rise as local Kinnow supplies decline

Supplies of local Kinnow mandarins from Punjab, a major producing state, have nearly run dry, opening the door for imports of easy peelers such as Nadorcott and Murcott through Ramadan and into summer. Chinese volumes are holding steady year on year, second only to South Africa. Current arrivals are 2 to 3 times higher than January levels to meet demand for sweet, colorful snack varieties with strong shelf life.

During the 2025–26 season, imported fruit prices are averaging 16–20 per cent below last year due to higher South African supply, while domestic mandarins have risen by more than 10 per cent due to shortages. The outlook for the coming weeks points to firmer prices and quicker stock turnover as summer heat builds and domestic supply gaps widen.

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