

# GLOBAL MARKET OVERVIEW MANDARINS

The global mandarin market is experiencing a dynamic season, with various countries facing unique challenges and opportunities. Spain is seeing high demand for mandarins, though competition from imports is increasing. In the Netherlands, the strong mandarin season continues with a focus on Moroccan Nadorcott. Belgium has noted an early end to its Nadorcott season due to autumn rain, while Italy has faced a difficult clementine season but remains optimistic about late mandarins.

In Germany, Spanish citrus remains dominant, though prices are declining, whereas France reports a stable mandarin market despite a drop in production. Greece has enjoyed a good season with steady prices and strong quality. In North America, California's organic mandarin supply remains robust, supported by imports from Morocco, Peru, Chile, and South Africa. Meanwhile, Egypt and Morocco are grappling with increased competition in the global mandarin trade.



South Africa is facing delays in its mandarin season, with imports filling the gap, while China struggles with declining Papagan sales due to competition and food safety concerns. Peru has set new citrus export records, driven by strong mandarin shipments, and Argentina is facing supply pressures and growing competition. Chile continues to lead in key export markets, with mandarins remaining a crucial part of its trade. Lastly, Uruguay is strengthening its position in the global citrus sector, focusing on seedless varieties and expanding exports.

### **Spain: Mandarin season sees high demand and rising import competition**

The second part of the Spanish mandarin season is progressing ahead of the 2024 campaign, both agronomically and commercially. Due to the scarcity of mandarins at this time of year, there is strong demand in the fields. According to an exporter, the main varieties currently being shipped are Ortanique, Orri, and Leanri, with limited quantities of Nadorcott and Tango also available. These latter varieties are in high demand and command high prices due to lower supply. "In fact, the greater availability and much better prices are leading more people to focus on Ortanique at the moment," the exporter noted.

The second half of the season is shaping up well, following initial difficulties caused by continuous rains in the fall of 2024. "Clemenules, the most widely grown variety in Spain, finished earlier than expected. Like other varieties at the end of last year, it suffered quality issues due to high humidity," a grower explained. "Everyone involved in clementine or mandarin production faced the same problem—the fruit appeared fine when leaving the warehouse but showed signs of humidity damage upon arrival at supermarkets."

This year, a more selective approach has been taken with mandarins, reducing the amount of lower-quality fruit in the market. Another major issue this season has been thrips, but since the start of the campaign, special attention has been given to ensuring only fruit with flawless skin is shipped, minimizing the risk of defects developing upon arrival.

"As the season nears its end, imports have gained strength," the exporter added. "Morocco, in particular, is establishing a stronger presence in the European market with its high-quality mandarins from the latter part of the season." Imports from third countries are increasing, but Spanish Ortanique remains competitive, meeting all the necessary quality standards. This week, prices for top-quality packaged Ortanique ranged between 80 and 90 cents—just slightly above the price offered by Greece and even lower than Turkish Murcott.

### **Netherlands: Strong mandarin season continues with Moroccan Nadorcott**

"We look back on an excellent citrus season for mandarins. The last Nadorcott from Spain have all been sold at great prices. Over the past few years, we've

transitioned to importing only larger sizes, with size 82 being the smallest. Personally, I prefer smaller mandarins as they tend to be tastier, but our customers prefer the larger ones. When you go down to sizes 120-130, selling them becomes more challenging. Many Spanish suppliers also pack smaller sizes into nets for supermarkets, as they fetch better prices than when sold loose," says a Dutch importer.

"In previous years, we would have continued with the Ortanique variety for a bit longer, but since it's harder to peel, my customers prefer the Moroccan Nadorcott. Over the past few weeks, we've received several containers of these, and we'll continue with them for another week or two. The quality is good, and they are selling well. The price for larger-sized Nadorcott ranges from 12 to 12.50 euros, while the smaller sizes (120s) are priced around 10 to 10.50 euros."

### **Belgium: Nadorcott season ends early due to autumn rain**

"There is plenty of choice in clementines at the moment, and the quality is excellent," says a Belgian trader. "We have sweeter varieties like leafless Orri from Israel and Spain, Italian blood clementines for those looking for something more unique, and for those who prefer a slightly fresher taste, we have new Nadorcott with leaves. These peel easily and have an attractive appearance."

"In the past, everyone preferred clementines with leaves, but now consumer preferences are much more divided. We've noticed that leafless citrus is carefully selected, resulting in little to no waste. It also stacks neatly on store shelves—presentation matters too! However, the Spanish Nadorcott season is ending significantly earlier than in previous years. Due to heavy rainfall in autumn, some crops were lost, causing all varieties to move through the season more quickly."

### **Italy: Challenging season for clementines, strong outlook for late mandarins**

The clementine campaign in Italy's Puglia region ended a few weeks ago. Overall, it was a good season, but not without challenges. Sales declined from early January, and fewer clementines were exported compared to last year, despite an abundance of smaller fruit. After the Christmas holidays, markets became oversaturated, leading to a collapse in prices for "Comune" clementines. This drop occurred despite lower volumes, contrary to expectations. The situation was worsened by bad weather, including rain and morning fog, which damaged the fruit and required careful selection. Concerns over fruit durability also contributed to price declines of up to 0.15 €/kg. However, raw product prices never fell below 0.45 €/kg, reaching peaks of 0.70-0.80 €/kg during the holiday period.

The harvest of late Sicilian mandarins began on January 20 and will continue until the end of April. The fruit quality is good, thanks to the well-draining soils of the Paternò area in Catania, which absorbed recent floodwaters without adverse

effects. Most of the fruit is medium-sized, though larger sizes are also available, fetching prices of around 0.70-0.80 €/kg for the best-quality produce.

Meanwhile, the "Tardivo di Ciaculli" Mandarin campaign in the Palermo province began in mid-January and is expected to conclude by the end of March, earlier than last year. Around 3,000 tons of this citrus variety, known for its high sugar content, will be distributed mainly through Italian retail channels. The campaign was marked by a lack of rain and three days of heavy hail at the end of December, which affected nearly all growing areas in the province.

### **Germany: Spanish citrus leads, but prices decline**

Spanish citrus continued to dominate the German market. In terms of volume, Israeli Orri followed, ahead of Turkish Murcott. Moroccan and Italian supplies completed the selection. In Frankfurt, the Egyptian Nadorcott was too small to attract much attention. However, Israeli Orri arrived in larger quantities and sold well despite higher prices. In contrast, Spanish Tango and Nadorcott became cheaper in Frankfurt.

Spanish citrus prices generally trended downward in other markets as well. Despite the cold weather, customer demand showed signs of saturation. As a result, clementines were withdrawn from marketing and were no longer available for sale.

### **France: Mandarin market remains stable despite production drop**

As with most fruits and vegetables, mandarin consumption remains moderate. The market is relatively balanced, even as Spain faces a 30-40% drop in production this year. This decline is primarily due to the phenomenon of alternation. As a result, sales are steady, and prices remain reasonable.

In terms of quality, mandarins are performing well, thanks to orchards that are more mature than in previous years. The Orri mandarin continues to be highly appreciated by consumers.

### **Greece: Mandarin season sees steady prices and good quality**

The mandarin season in Greece was better than last year, with more stable prices and good-quality fruit. A key factor in this positive outcome was the absence of major weather disruptions, which minimized crop damage and ensured the produce met expectations. Additionally, the Baltic markets were particularly strong this season.

### **North America: Mandarin supply strong with boost from imports**

In California, the supply of organic mandarins remains strong, with harvesting now moving into varieties such as Tango and Murcotts. This year's crop is sizable

overall. Early-season fruit, such as Page mandarins, were unusually small, but Tangos are on the larger side.

Demand is solid, though pricing is slightly softer compared to this time last year. Wholesale prices are more competitive, and fruit will be available in promotable volumes for the next seven to eight weeks. In Florida, many growers and shippers have finished their tangerine and mandarin production.

On the import side, a strong Mandarin supply is arriving from countries such as Morocco, which has good quality this season and offers a value option for retailers. Morocco typically begins shipping in October or November, though some shippers wait until January to begin with the Nadorcott variety. After Morocco, imports will transition to Peru, Chile, and South Africa, with particularly strong distribution in the Northeastern U.S.

### **Egypt: Egyptian and Moroccan mandarins face rising competition**

In Egypt, the mandarin season began in November with strong demand and higher volumes than last year. Egyptian growers are increasingly focusing on soft citrus, expanding acreage, and improving sorting, while relying on price competitiveness against Morocco and Turkey. By December, one month into the season, exporters reported brisk sales to Europe, the Gulf States, and Russia. However, towards the end of January, demand slowed as competition from Morocco and Turkey intensified. As one exporter noted, "Turkey has the advantage in European markets due to convenient transport, which importers prefer. The same applies to Morocco in West Africa."

In Morocco, mandarin volumes have improved compared to last season but remain below historical levels as the country faces its seventh consecutive year of drought. Rising production costs due to water shortages have made Moroccan mandarins relatively expensive in Europe, though they continue to have a loyal customer base. The season started with strong demand, particularly from Spanish importers relying on Nadorcott for their European programs. Demand was also solid in Russia and North America. However, midway through the season, demand in Europe weakened due to competitors' lower prices. The Nadorcott season is expected to run until the end of April.

### **South Africa: Mandarin season delayed as imports face competition**

South Africa's immature mandarin crop remains on the trees, with local supplies currently sourced from the Northern Hemisphere. Imported mandarins cost around R30 (1.6 euros) per kilogram, but volumes are low. These imports face challenges competing with the abundance of summer fruit available to South African consumers.

Late mandarin harvesting is expected to begin towards the end of April in the northern regions of the country. Official export estimates have not yet been released.

In 2024, the top five export destinations for South African mandarins were the Netherlands—reaching a record 140,000 tons, with total shipments to Europe amounting to 190,000 tons—the United Kingdom, United Arab Emirates, Russia, and the United States.

### **China: Papagan sales decline amid competition and food safety concerns**

Following the Chinese New Year, the market typically sees a surge in Papagan supply from Sichuan, China. To enhance food safety and quality management, authorities in Sichuan implemented strict regulations last year, targeting the use of deacidifiers and other chemical inputs while also enforcing stricter controls on early harvesting.

These regulations have had a significant deterrent effect. Additionally, this year is an off-year for Papagan, with production dropping by more than 50%. As a result, compared to the past two years, the harvest season was delayed, and overall market supply has decreased.

Due to lower yields, many orchards have seen production shrink by nearly half, while some have experienced reductions of more than 60%. This has driven prices up by approximately 30%, with farmgate prices reaching ¥8 per kilogram. On the positive side, dry weather has enhanced fruit sweetness, making this year's Papagan taste better than before.

Unlike previous years, when Papagan was a popular market choice, sales this season have been far from ideal. Both e-commerce platforms and traditional distribution channels have seen a sharp drop in volume, while traders remain hesitant to purchase at the production site. The overall consumption environment has weakened, with lower consumer demand for fruit. Additionally, increased competition from other citrus varieties and lingering food safety concerns have further slowed Papagan sales.

One major competitor is Wogan, a citrus variety harvested around the same time as Papagan and widely grown across multiple regions. This year, Wogan production has been particularly high in Guangxi and Yunnan, leading to an abundant supply and lower prices compared to previous seasons. The farmgate price of top-grade Wogan is nearly half that of Papagan, making it a more affordable alternative. With its strong sweetness and appealing taste, Wogan has become highly competitive in the post-Chinese New Year market, drawing consumers away from Papagan.

Adding to the challenges, food safety concerns have also impacted consumer confidence. Last production season, online discussions emerged about the alleged use of saccharin in fruit, sparking widespread public debate. In response, local authorities implemented strict regulatory measures, enforcing a severe crackdown at the farm level to ensure compliance. While these efforts have been largely successful, some consumers remain skeptical, leading them to choose other fruits instead. The Papagan sales season extends until June, and industry players remain hopeful that sales will improve in the coming months.

### **Peru: Mandarin exports drive record citrus growth**

In 2024, Peru set new citrus export records, surpassing 300,000 tons and \$300 million in exports. A key driver was a 19% increase in mandarin exports, largely attributed to favorable climate conditions, particularly for mid-season and late varieties, which delivered high yields and excellent fruit quality. Additionally, an early fruit shortage in the Northern Hemisphere led to higher prices, further boosting export value.

Looking ahead to 2025, the outlook remains positive, with expectations of early variety recovery and slight growth in mid and late-season campaigns. A continued rise in lime exports is also anticipated, driven by Piura's strong productivity and expanding cultivation.

### **Argentina: Mandarin sector faces supply pressure and competition**

In Argentina, the citrus season runs from March to November, featuring varieties such as Satsuma and Clementine mandarins. The 2024 season saw a significant increase in production, leading to supply pressures that negatively impacted prices. With high internal costs and stagnant pricing, Argentina's Mandarin exports face increasing competition from countries like Peru, South Africa, and Chile. However, demand remains steady in key markets such as Canada, Brazil, and Russia. Projections for 2025 indicate a slight reduction in production and exports, suggesting ongoing challenges for the country's citrus sector.

### **Chile: Mandarins lead in key export markets**

In the 2024 season, Chile exported 128,958 tons of mandarins, with the U.S. as its primary market, receiving 95% of total exports. Despite a slight decline in overall citrus exports compared to 2023, Chile remains a dominant player in the mandarin market, benefiting from strong demand in both the U.S. and Japan. Mandarins continue to be a key component of Chilean exports, contributing to strong export value despite global market fluctuations.

### **Uruguay: Mandarins strengthen position in global citrus trade**

In 2024, Uruguay's citrus production reached 305,000 tons, with mandarins accounting for 41% of total export volume. The country's strategy focuses on

differentiation, particularly through new seedless mandarin varieties that offer improved color and flavor. While Uruguay remains a smaller player compared to major exporters like South Africa and Chile, its Mandarin exports continue to grow steadily. Additionally, the Mercosur-EU agreement presents opportunities to re-enter markets like Europe, potentially enhancing the competitiveness of Uruguayan mandarins in the future.

*Next topic: Cucumbers*

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