

GLOBAL MARKET OVERVIEW ORANGES

In North America, California's citrus season is concluding with strong demand for Navel and Valencia oranges, while the arrival of South African Navels ensures continued supply. In Brazil, the 2025/26 orange harvest in the São Paulo citrus belt is expected to reach 314.60 million boxes, driven by favorable weather and expanded orchards.

Italy's wholesale markets are dominated by Spanish, Sicilian, and Egyptian oranges, with high demand and stable prices. In the Netherlands, stable prices and declining Egyptian shipments are balanced by limited supplies of Moroccan oranges, which focus on the local market. Germany anticipates the arrival of South African oranges as Spanish and Egyptian supplies decline, with organic shortages expected.



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Spain has seen rising orange prices, up nearly 17% above the five-year average, with weather impacting fruit quality. In France, the Spanish orange season is ending at Rungis, with high demand and rising prices. China's citrus season is

closing with strong demand for Wogan and Papagan varieties, which have gained traction in Southeast Asia.

South Africa's orange exports are directed mainly to the Middle East, with a strong focus on Valencia oranges, while Navel production continues to decline. Egypt's 2024/25 season ended early, with local demand and processing gaining importance over exports due to reduced subsidies and the rise of juice concentrate factories. In Morocco, orange exports have declined as drought and competition from Egypt reduce profitability, making soft citrus and local markets more attractive.

North America: California citrus maintains quality as South African Navels arrive

Demand continues to exceed supply for both Navel and Valencia oranges from California, with grower-shippers working to maintain consistent availability. The California citrus season experienced warmer summer temperatures, which boosted sugar levels and reduced acidity in the fruit, resulting in higher-quality produce compared to 2024. Despite improved fruit quality, prices this season have been slightly lower than last year due to a higher crop yield and promotions aimed at moving the larger harvest. Recently, pricing has shown improvement, a typical trend for this time of year.

The supply of California Navel oranges is gradually winding down as the harvest has concluded. These oranges are expected to remain available in the market until the end of June. Around the same time, the first shipments of Navel oranges from South Africa are anticipated, ensuring a smooth transition from California to the southern hemisphere supply.

For Valencia oranges, a later-season variety, California maintains strong supply levels, complemented by upcoming promotions that are expected to support demand. The strong summer pricing environment is expected to support U.S. citrus programs, with retailers focusing on promoting summer citrus varieties.

Brazil: Higher yields and expanded orchards drive production growth

The 2025/26 orange harvest in the São Paulo and Triângulo/Sudoeste Mineiro citrus belt, the world's largest orange juice-producing region, is projected to reach 314.60 million boxes (40.8 kg each), according to a recent announcement by Fundecitrus. This forecast represents a 36.2% increase compared to the previous season's harvest of 230.87 million boxes and is 4.8% higher than the average of the last ten harvests.

The anticipated increase in production is primarily attributed to a higher number of fruits per tree, a result of favorable weather conditions during the second flowering period and improved orchard management practices. Additionally, the number of productive trees has risen, as confirmed by Fundecitrus' latest Tree Inventory data for the region.

The updated inventory reveals that the citrus belt now has 182.7 million productive trees, covering a total area of 362,000 hectares. This marks an increase of 12.7 million trees (7.5%) and 18,000 hectares (5.2%) compared to the previous census conducted in 2022.

Italy: Spanish, Sicilian, and Egyptian oranges dominate supply

Currently, the main wholesale markets in Italy primarily offer oranges from Spain and Sicily, with additional supplies from Egypt. The most popular varieties include Lane Late and Navelina from Spain, Ovale from Sicily, and Valencia Late from Egypt. Depending on size, category, origin, packaging, and target market, prices range between €0.90 and €1.70 per kilogram.

A Sicilian entrepreneur specializing in Arancia di Ribera DOP reported that the 2024/25 orange season ended a few days ago, nearly a month ahead of schedule. This year, the company marketed 9,582,995 kilograms of PDO-certified oranges, representing approximately 57% of the total certified production of 16.6 million kilograms. The campaign progressed without significant production, weather, or trade issues, despite declining domestic yields. The company experienced strong interest from buyers, while European exports also increased, even in a competitive market.

The director of a major Sicilian citrus consortium confirmed that the orange season concluded in late April, nearly a month earlier than usual. Prices were generally favorable, and demand remained consistently high, occasionally surpassing supply. However, weather conditions affected citrus storage, leading to up to 20% product loss in warehouses. Despite this, the quality of the oranges available for sale remained high, securing above-average prices.

Orange sizes were satisfactory for most of the season but began to decline midway through the campaign. Despite this, the market responded positively, maintaining strong demand for smaller oranges, with prices sufficient to fairly compensate growers.

Netherlands: Weather limits supply, while Moroccan oranges maintain local focus

The orange juice market in the Netherlands is currently stable, with prices

showing a slight increase but remaining well-balanced. Shipments from Egypt have passed their peak, and the challenge now is to manage the remaining late-season arrivals, ensuring they are evenly distributed through to the end of June.

Early in the South African orange season, lower volumes are expected. This reduction is not due to a poor harvest but rather a consequence of favorable weather conditions in Limpopo, Eswatini, and Zimbabwe that promoted the development of Citrus Black Spot. As a result, fewer oranges are available for the European market at the start of the season.

Meanwhile, Moroccan oranges are still present on the market. However, their supply is unpredictable, and local market conditions in Morocco are strong, offering attractive returns. As a Dutch importer explained, this reduces the pressure on Moroccan growers to export, as they can achieve favorable prices domestically.

Germany: Late Spanish and Egyptian seasons wind down, South African arrivals begin

The prices of all oranges, whether from Spain or Egypt, remain higher than in the previous year. The first batches of South African oranges are expected to arrive in the European market soon, around weeks 25 to 26. However, shortages are anticipated this year, particularly in the organic sector, prompting the inclusion of Latin American produce to bridge supply gaps.

The supply of Spanish late-season oranges, including Navel and Valencia Late varieties, is nearing its end, and the same is true for the Egyptian orange season. According to an importer, a significant portion of available fruit is being directed to the juice industry, making it challenging to secure sufficient quantities for the fresh market. This supply bottleneck has resulted in prices that are sometimes double those of last year.

Egyptian shipments are expected to continue until the end of the month, but with limited availability, fresh market supplies may remain constrained.

Spain: Weather impacts quality, while exports show mixed results

Orange prices in Spain have continued to rise, reaching levels nearly 17% above the average of the last five seasons as of early May. In Andalusia, fruit handling centers are closely monitoring and managing quality issues caused by recent rainfall, which has led to problems such as water stains on the fruit. Additionally, the warm temperatures of recent weeks have triggered early flowering in various citrus-producing areas of Andalusia.

In the Valencian Community, Navel Lane Late transactions concluded in March, with only limited purchases occurring in April. Demand for citrus has steadily increased in markets since the start of the second half of the season and remained strong throughout April. As a result, the marketing of the final season citrus varieties has progressed rapidly, nearing completion by the end of April.

Regarding exports, Andalusia reported an 11% increase in export volume up to February, despite a 2% decline in export value compared to the same period last season. The Valencian Community also experienced a 6.5% rise in export volume through September, but with a 1.7% decline in value, according to official data.

France: High demand drives up prices

The Spanish orange season is nearing its end at Rungis, with only a few operators still offering table oranges and slightly more providing juice oranges. For table oranges, the market remains highly active, with strong demand driving up prices significantly.

The Spanish season is expected to conclude in the first half of June, making way for the arrival of South African oranges. As supply from Spain decreases, the transition to South African produce is anticipated to ensure continued availability.

China: Wogan and Papagan varieties lead the market

The citrus export season in China is drawing to a close, with demand picking up significantly since early April. Between late February and the end of March, export demand for citrus remained stable, but it has become more active in recent weeks.

Wogan is the primary citrus variety exported this season, with the export season expected to continue until mid-to-late May. Wogan oranges from Yunnan are particularly popular due to their thick peel, which enhances their resistance to transport and storage—an essential quality for export. Yunnan experienced favorable weather this season, with lower rainfall, resulting in higher-quality fruit with improved taste compared to last year. Prices for Yunnan Wogan were relatively low earlier in the season but began to rise in early April. Wogan from Chongqing is also being exported, but it is generally priced lower.

Before Wogan, Sichuan's Papagan citrus recorded the largest export growth this season. Initially gaining traction in the export market last season, Papagan has drawn significant interest this year, with many businesses exporting large volumes. In Southeast Asian supermarkets, such as those in Malaysia and Singapore, fruits like Lukan mandarin oranges and Ponkan mandarins are typically prominent before Chinese New Year due to their festive appeal. However, this year, Papagan's export volume nearly matched that of Lukan.

Fruit sales were brisk in the lead-up to the Chinese New Year, but local market consumption dropped after the holiday. As a result, Papagan, which is not well-suited for long-term storage, experienced a surplus. The market needed to clear this inventory before citrus orders could resume, contributing to sluggish demand in January and February.

South Africa: Valencia shipments to Middle East surge, while Navel production declines

Continuous rainfall in northern South Africa initially delayed the start of the country's orange export season, affecting both oranges and lemons. Despite this, 65% of the Valencias shipped so far—representing a fraction of South Africa's expected total of 52 million 15 kg cartons for the year—have been directed to the Middle East.

The export forecast for Valencias has increased by over three million cartons compared to last year. In contrast, the Navel category, which has diminished on many farms, is expected to reach 26.1 million cartons this year. The South African citrus industry anticipates that Navel production will continue to decline, eventually stabilizing at around 21.6 million cartons.

The Middle East has shown strong demand for South African oranges, and India is described as an exceptionally large market for Valencia varieties. An exporter explained that demand in India exceeds the supply available from their company. However, whether South Africa as a whole can meet this demand remains an open question.

Last year, there were optimistic expectations that orange juice prices would remain at historically high levels for at least three years. However, prices have already declined. In 2024, the juice price was so high that some farmers opted not to pack any oranges for export, instead sending their entire harvest to juice factories.

Egypt: Local demand and processing gain priority over exports

The 2024/2025 Egyptian orange season ended unusually early, concluding in early April instead of the typical end of June. This season was marked by several significant developments, including a decline in production, a shortage of large-sized oranges, the ongoing Red Sea crisis, reduced export subsidies, and the emergence of orange juice concentrate factories in the country. These factors collectively increased the importance of the local market, driving up prices and leading to shortages in markets traditionally reliant on Egyptian oranges.

The Valencia orange season began earlier than usual in January and quickly faced challenges. Production volumes were nearly 25% lower than the previous season, which had seen a 21% increase in output compared to 2022/2023. Additionally, 90% of the Valencia crop consisted of medium-sized fruits (72, 80, and 88). Updated Global Gap standards prevented many Egyptian exporters from accessing European markets, while others exited the sector due to a sharp reduction in export subsidies.

The Egyptian government reduced export subsidies from 8-10% to just 2.4-3%, effective from November 2024. Securing these subsidies also became conditional on exchanging foreign currency for Egyptian pounds, making them less attractive to exporters who previously used agricultural exports to access foreign exchange. This change led to a decline in export volumes to key markets, such as Saudi Arabia, which once absorbed large quantities of Egyptian oranges at low prices.

The ongoing Red Sea crisis further restricted Egyptian exports to Asian countries, which previously accounted for over 30% of export volumes before the crisis began in 2023. Logistical difficulties, including port congestion, extended transit times to Europe. For instance, the journey to the Netherlands now takes up to 50 days, resulting in alternating periods of shortage and oversupply when multiple shipments arrive simultaneously.

Valencia orange prices fluctuated significantly, ranging from 30% below to 35% above last season's levels. On average, prices were 20% higher than last season. The situation for Navel oranges became even more complicated later in the season.

A major shift in the Egyptian orange market was the launch of several new factories (four to five, according to industry sources) for producing orange juice concentrate. These facilities absorb large volumes of oranges, offering growers attractive payment terms regardless of fruit size. This change has relegated the fresh export market to secondary importance. The competition for supply began with Valencia oranges early in the season but intensified in late March and early April, as local prices for Navel oranges reached record highs. Following the Eid holiday (April 1), most packing houses ceased orange exports, with local prices exceeding €738 per ton, up from €437 last season.

Export volumes are estimated to have fallen by at least 15%, according to industry sources. Many Egyptian citrus exporters are now concerned about the changing market landscape, where local demand and processing dominate, overshadowing the fresh export sector. Several major fresh orange exporters have already launched their own concentrate plants or are planning to do so.

Morocco: Drought and competition limit export opportunities

In Morocco, orange exports have taken a back seat in the last two seasons, with growers and exporters focusing more on soft citrus and the local orange market. This shift is largely due to declining profitability for oranges, driven by increased competition from Egypt, where abundant production has saturated the market. At the same time, severe drought conditions in Morocco have raised production costs, further reducing profit margins for orange growers.

Moroccan exporters have struggled to take advantage of the unexpected gap left by Egypt in the international market this year. Securing supplies of Navel or Maroc Late oranges from April onwards has proven difficult, as these varieties are primarily grown for the domestic market, produced in smaller quantities, and often fail to meet the quality standards required for export.

The Moroccan citrus sector is now adopting a cautious approach, with growers closely monitoring the current export campaigns of other major producing countries, including South Africa and Turkey. It remains to be seen whether Moroccan orange exports will regain their appeal in the coming season.

Next Topic: Blueberries

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